Power BI Template Notes

1. Always make sure you’re using the latest Power BI Desktop Version. Click [here](https://www.microsoft.com/en-us/download/details.aspx?id=58494) to download.
2. Hide/Delete pages that you don’t find beneficial, before you publish your report
3. It is highly recommended that you publish your report and setup an automated refresh schedule. Step-by-step instructions can be found on this [webpage](https://helpcenter.qorusdocs.com/hc/en-us/articles/214042185-Using-OData-to-analyze-your-Qorus-activity)
4. You don’t have to download every new Template Qorus makes available. Discuss new versions with your CSAM to find out if anything new has been added that will add value to your company
5. Refer to the *OData Fields 20xx-xx.xlsx* file at the bottom of this [webpage](https://helpcenter.qorusdocs.com/hc/en-us/articles/214042185-Using-OData-to-analyze-your-Qorus-activity)
   1. This Excel file includes information on the different data tables used in the Customer Report
   2. The *CustomerActivities – Activities* page contains definitions of all activities
6. Assignments:
   1. Assignment pages include details of assignments created in the last 12 months
   2. The Customer Report includes data for all status assignments
7. Pursuits:
   1. Pursuit pages contain details of pursuits created in the last 12 months
   2. Pursuit pages do not include deleted pursuits
8. Pursuit Auto Answer:
   1. Pursuit AutoAnswer page keeps track of Documents used in Auto Answer that have been linked to a Pursuit (this applies to both Excel and Word)
   2. Pursuit AutoAnswer page includes Document Auto Answer data, even after the Document has been deleted
   3. Pursuit AutoAnswer page does not include data for deleted Pursuits
   4. Pursuit AutoAnswer page includes data for open and closed Pursuits created in the last 12 months
9. Share & Track
   1. The Share & Track page only contains data for document shares created in the last 12 months
   2. The Share & Track page includes all shares in all statuses (including Expired)
   3. The Share & Track page does not include Deleted Shares
10. When filtering by Groups, you will see that this does not hide users that do not belong to the selected Group. This is because multiple users can belong to multiple Groups, causing a many-tot-many relationship in our data model. You can simply filter your visuals accordingly. Ask your CSAM for assistance, if necessary.
11. Helpful links
    1. [Filter Pane](https://docs.microsoft.com/en-us/power-bi/consumer/end-user-report-filter)
    2. [Drill Mode](https://docs.microsoft.com/en-us/power-bi/consumer/end-user-drill)
    3. [Visual Interaction](https://docs.microsoft.com/en-us/power-bi/consumer/end-user-interactions)
12. Contact [Support](https://helpcenter.qorusdocs.com/hc/en-us/requests/new) if you have any questions!