

Wakely Broker Consulting Services

WakelyBCS Market Insights Benchmarking Dashboard

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How to export the dashboard for printing

Exporting & Printing - Overview

- Dashboard is built in Microsoft Power BI
- Like all business intelligence applications, Power BI is optimized for online use
- To support your business needs, Wakely intentionally designed the report with a focus on a printed version as the end product
 - Report dimensions
 - Page headers/footers
 - Dashboard pages vs. add-on analysis pages

Exporting & Printing - Considerations

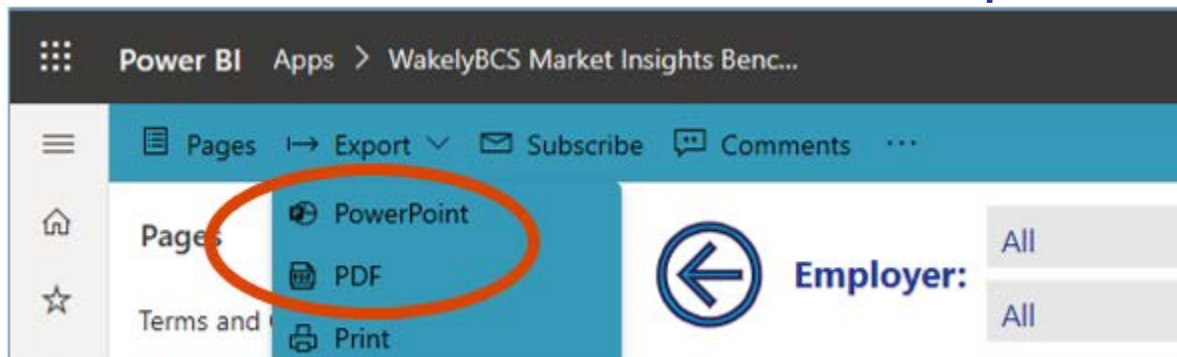
- Power BI exporting and printing functionality
 - Takes screenshots of what is currently visible on the screen
 - Exporting → formats the dashboard as a Microsoft PowerPoint presentation or as a pdf
 - Wakely recommends PowerPoint because it gives you the flexibility to reorder, delete and add additional slides
 - Printing → current screen only
 - Wakely recommends using a screen capturing tool instead
 - Watch the [Screen Capturing](#) tutorial for more information

Exporting the Dashboard

1. Keeping in mind that Power BI takes screenshots, review each page of the report to set it up as desired.
2. Click on the Export menu in the upper, left hand corner of the screen.

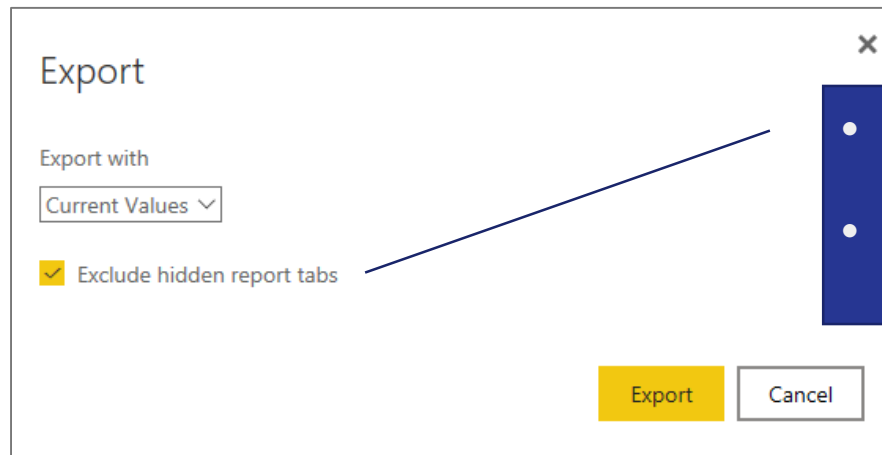


3. Select PowerPoint or PDF from the dropdown menu.



Exporting the Dashboard, Continued

4. In the Export popup window:
 - a. Make sure “Export with” is set to “Current Values”
 - b. Check/uncheck the “Exclude hidden report tabs” checkbox

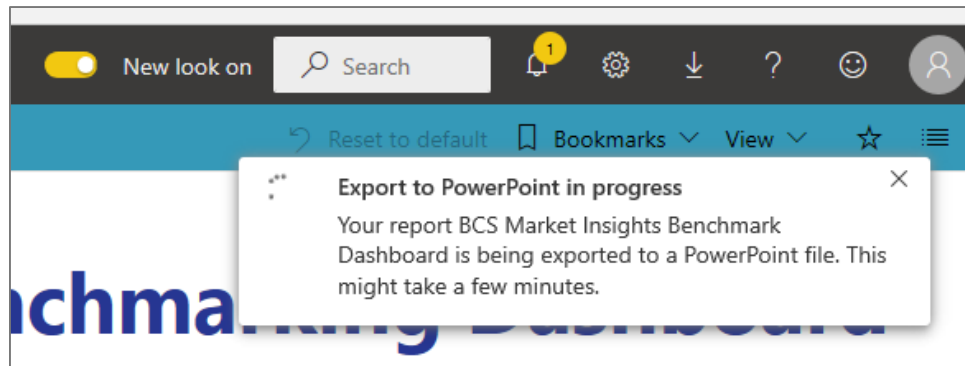


- Uncheck to include all report pages
- Check to only include main dashboard pages

- c. Click the “Export” button.

Exporting the Dashboard, Continued

5. Wait for Power BI to generate PowerPoint or pdf file:
 - a. This can take several minutes if you export the full report.
 - b. A message located in the upper, right hand corner of the screen will notify you the export is in progress.



6. When prompted, open or save the exported file in preparation to print.



Exporting & Printing - Demo

Demo exporting

For questions or a live training, please contact:

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