



## Microsoft Power BI

Power BI is the new and improved reporting tool that will take the place of FloodPro Analytics (FPA) effective 1/1/2023. Power BI offers robust reporting that helps analyze data and provide actionable insights. Power BI will be available 24/7/365 and gives you the ability to run reports on-demand. Please note, NFS will continue to automatically deliver batch reports as you receive them today. The upgrade to Power BI will not affect the current delivery of reports.

## Website Access

Go to <http://app.powerbi.com/> to access the new reporting tool.

Login ID: [POWERBI@NFSBI.onmicrosoft.com](mailto:POWERBI@NFSBI.onmicrosoft.com)

Password: Power\_BI@NFS

Once you are logged into the system, you will land on a dashboard with menu items on the left side of the screen. Please see the screenshot on the next page. The Power BI Workspace link below will take you directly to a list of reports:

<https://app.powerbi.com/groups/811f7f11-0207-4ce5-a13b-6fa97e1f293d/list>



app.powerbi.com/home

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## Getting started with Power

Power BI basics Sample repo

## List of Detail Reports

1. Agency Production – Agency Detail, with Commission %'s, Transaction and PIF Data
2. Agent Continuing Education - Report for WYO's who are tracking the continuing education of their agents.
3. Cancel Rewrite – Cancels for Reason code 22, 24 and 25.
4. Cancellation - Cancels by Cancel Transaction date
5. Claim-Claim detail by Loss date
6. Commission - Commission Payments for Base and Override
7. Eligible to Renew - Policies renewing in the next 90 days
8. Expiration - Policies that have Expired and not Renewed
9. General Agency Production - Agent/Agency rollup of Base and Override Commissions and Premium Amounts on one line
10. Mortgagee - Policy in Force report with Mortgagee data added
11. NFS Agent Production - Agent and Agency Production Detail report for all Active Agents with and without PIF
12. Policy In Force – 12 month looks at Current and Past Policies in Force detail
13. Quote Conversion - Quotes Written and Policy Numbers when applicable.
14. Retention Detail - Data looks at Current Expiring policies and if they have renewed and % retention rate
15. Transaction - Financial Transactions based on Tran. Written date. With Tran codes and Written Premiums.

## Report Filters

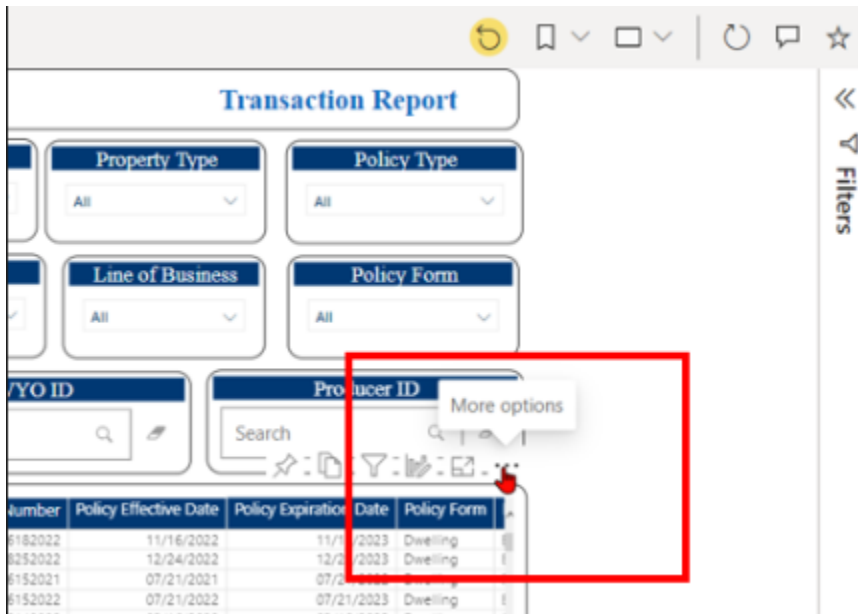
The screenshot below is an example of the filters you can use when creating a report. Please note that not all reports will have the same filters. Some menu items have a drop down menu which allows you to filter, while other menu options allow for searching and changing the date range.

The screenshot displays the filter interface for the 'Policy In Force' report. The interface is organized into a grid of filter controls. At the top left is the 'NATIONAL FLOOD SERVICES' logo. At the top right is the report title 'Policy In Force'. The filters are arranged in three rows and six columns:

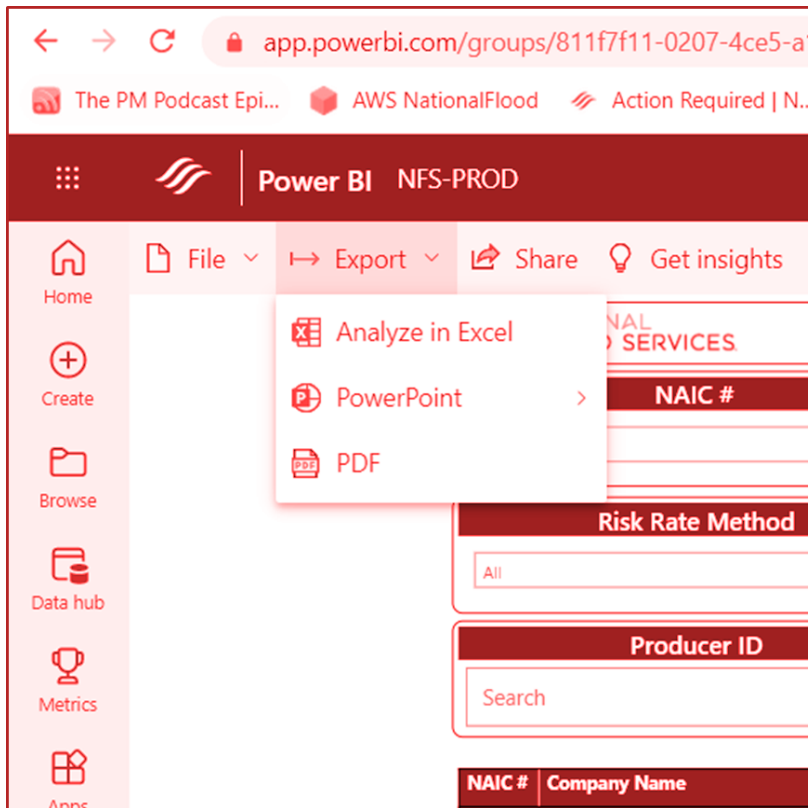
- Row 1:** NAIC # (dropdown), Effective Date (date range: 11/24/2021 to 11/23/2022), Policy Type (dropdown), Policy Form (dropdown), Flood Zone (dropdown).
- Row 2:** New/Renewal/Rollover (dropdown), Rate Table Code (dropdown), Property State (dropdown), Producer State (dropdown), Agency State (dropdown), Property Type (dropdown).
- Row 3:** Occupancy Type (dropdown), Producer ID (search), WYO ID (search), Agent NPN (search), Agency NPN (search), Policy Number (search).

## Exporting Data

On any of the Detailed Reports, click the grid showing the data. You will see the menu option on the far right with three dots. Click on the three dots to see the Export Data option.



**DO NOT USE THIS EXPORT OPTION** ↪



## Save Preferred Filter Settings

To avoid setting filters every time on a report, click on the bookmark and save your current filter setting for that report. The next time you use that report, just select your filter from the bookmark menu option.

The screenshot shows a web application interface with a dark blue header. The header contains the text "Cancellation | Data updated 12/19/22" and a search bar with the text "Search". Below the header, there is a grid of filter controls. The filters are arranged in a 3x3 grid:

- To - From:** A date range selector showing "/13/2023".
- Property Type:** A dropdown menu with "Non-Residential" selected.
- Property State:** A dropdown menu with "CA" selected.
- Cancel Reason:** A dropdown menu with "01-Building Sold or Removed" selected.
- Policy Type:** A dropdown menu with "All" selected.
- Agent NPN:** A search input field with "Search" text and a magnifying glass icon.
- WYO ID:** A search input field with "Search" text and a magnifying glass icon.
- Property City:** A search input field with "Search" text and a magnifying glass icon.

A "Personal bookmarks" dialog box is open on the right side of the screen. It has a title "Personal bookmarks" and a subtitle "Capture this report's current state". The dialog contains a text input field with the text "My Filter". Below the input field, there is a checkbox labeled "Make default view" and a green "Save" button. At the bottom of the dialog, there is a link that says "Show more bookmarks".

At the bottom of the screenshot, a table header is visible with the following columns: "Number", "NFIP Policy Number", "Alternate Policy N...", "PolicyType", "Policy Effective Date", "Policy Status", "Effective Month", "Effective Year", and "Expiration".