Building Dashboards in the Power BI Service

Lab Time: 60 minutes

Lab Folder: C:\Student\Modules\06_Dashboards\Lab

Lab Overview: In this lab you will continue to work with the report and dataset that you created in the Power BI Desktop project named **Wingtip Sales Analysis.pbix**. You will focus on the techniques required to create and deploy dashboards to an audience of business users in an Office 365 environment.

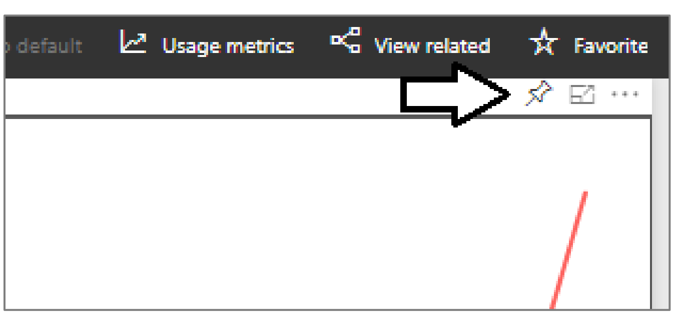
Lab Dependency: This lab assumes you have completed the lab titled **Designing Interactive Reports in Power BI Desktop** in which you created a multipage report in the **Wingtip Sales Analysis.pbix** project and then published this report and its underlying dataset to the Power BI Service. If you would like to begin work on this lab without completing the earlier lab, copy the lab solution file named **Wingtip Sales Analysis.pbix** which is located in the student folder at **C:\Student\Modules\05_Reports\Lab\Solution** into the folder at **C:\Student\Projects** using the Windows Explorer.

Exercise 1: Create a New Dashboard

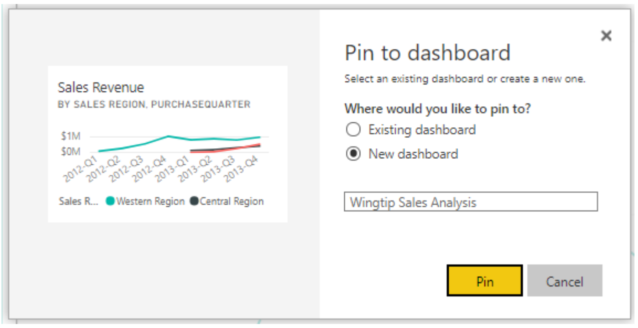
In this exercise create a new dashboard by pinning by pinning report visuals to create dashboard tiles.

1. Log in to the Power BI service and your personal workspace.
   a) Open a browser and navigate to the Power BI service at https://app.powerbi.com.
   b) Login with your primary Office 365 account.
   c) Expand the left navigation.
   d) You should be able to verify that you are running in the context of your personal workspace which is named **My Workspace**.
2. Open the report named **Wingtip Sales Analysis** that you created in the previous lab.
   a) In the **REPORTS** section of the left navigation menu, click the named **Wingtip Sales Analysis**.
   b) Navigate to the first page of the report named **Product Revenue Drilldown**.

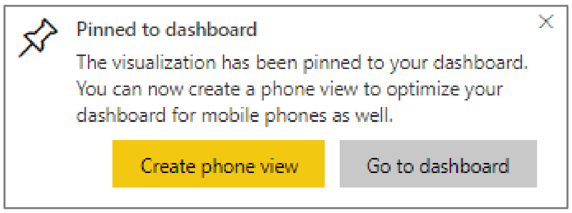
   c) Pin the line chart visual by clicking the thumbtack icon in the top left corner. When you click the thumbtack, you will then be prompted with the **Pin to dashboard** dialog.



d) In the **Pin to dashboard** dialog, select **New Dashboard**, type in a name of **Wingtip Sales Analysis** and click the **Pin** button.



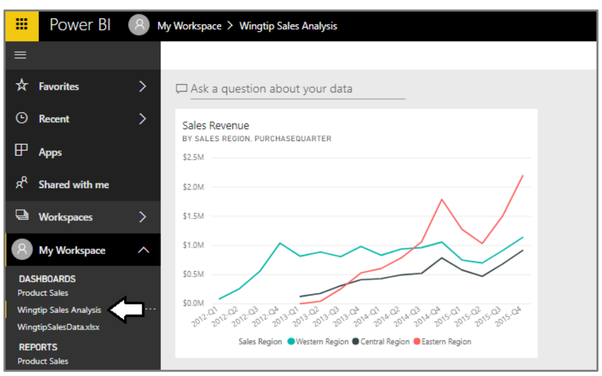
e) At this point, you will see a notification indicating a new dashboard has been created.



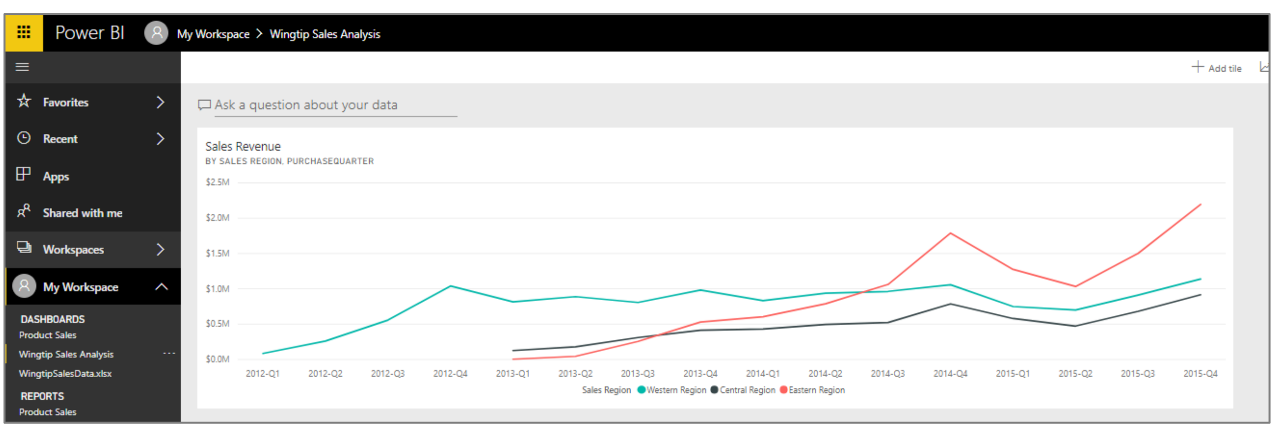
3. Inspect the new dashboard.

a) Navigate to the dashboard by clicking **Wingtip Sales Analysis** in the **DASHBOARDS** section of the left navigation menu.

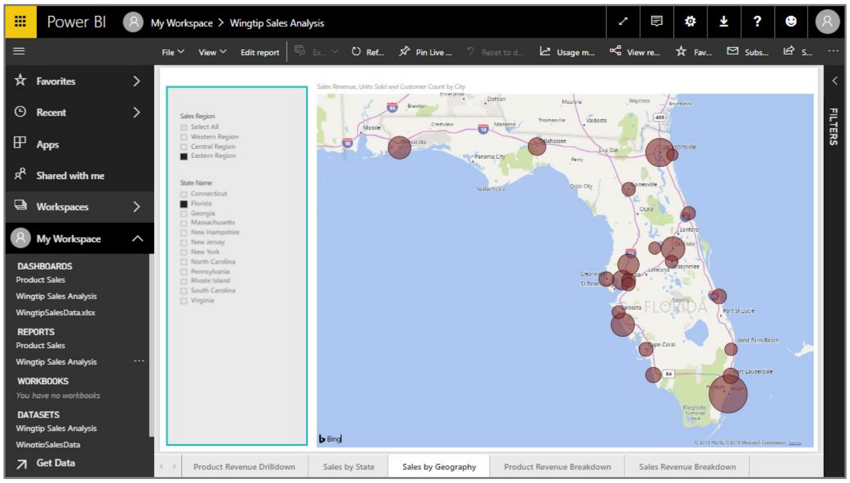
b) You should see the new dashboard tile created from the report visual you pinned in the previous step.



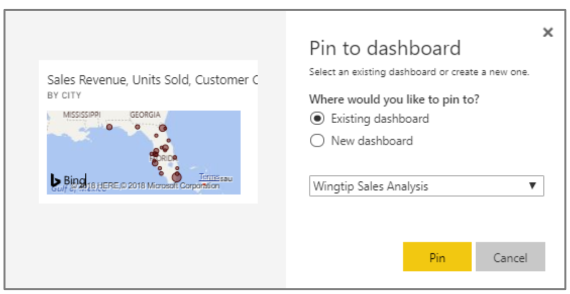
c) Use your mouse to resize the dashboard tile and make it much wider.



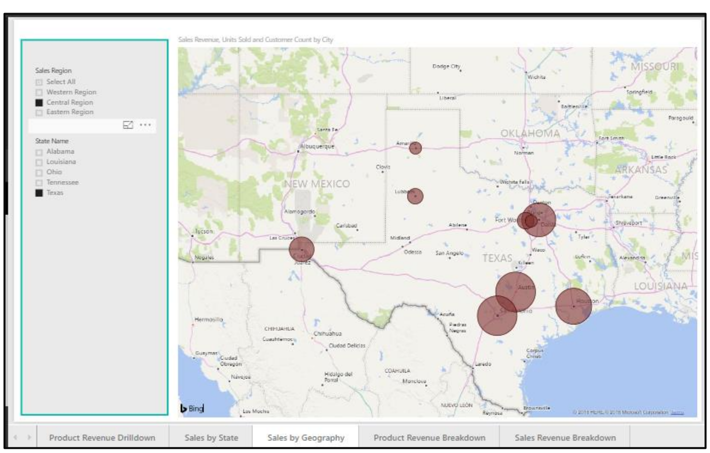
4. Pin another report visual to create a second dashboard tile.
   a) Navigate to the report named **Wingtip sales Analysis**.
   b) Navigate to the report page named **Sales by Geography**.
   c) Set the filter slicers on the page so that the underlying data is filtered by the state of **Florida**.



   d) Once you have set the filtering to **Florida**, click the thumbtack to pin the map visual to create another dashboard tile.
   e) In the **Pin to dashboard** dialog, select the **Existing Dashboard** named **Wingtip Sales Analysis** and click **Pin**.

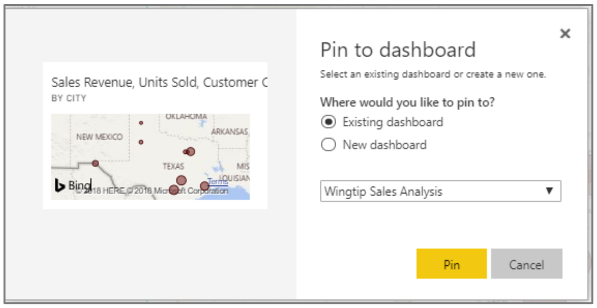


5. Pin another report visual to create a third dashboard tile.
   a) Navigate to the report named **Wingtip sales Analysis**.
   b) Navigate to the report page named **Sales by Geography**.
   c) Set the filter slicers on the page so that the underlying data is filtered by the state of **Texas**.



d) Once you have set the filtering to **Texas**, click the thumbtack to pin the map visual to create another dashboard tile.

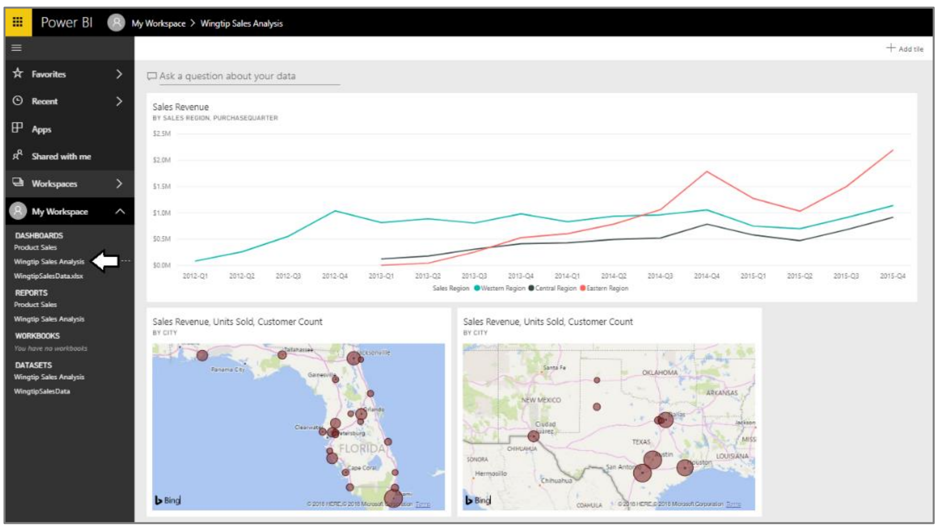
e) In the **Pin to dashboard** dialog, select the **Existing Dashboard** named **Wingtip Sales Analysis** and click **Pin**.



6. Inspect the **Wingtip Sales Analysis** dashboard.

a) Navigate to the dashboard by clicking **Wingtip Sales Analysis** in the **DASHBOARDS** section of the left navigation menu.

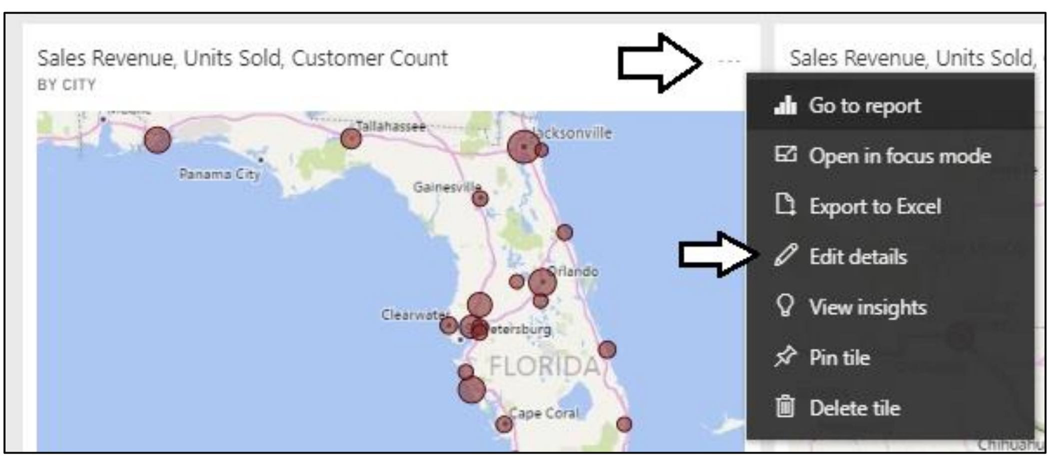
b) You should see the two new dashboard tiles with maps showing Florida and Texas.



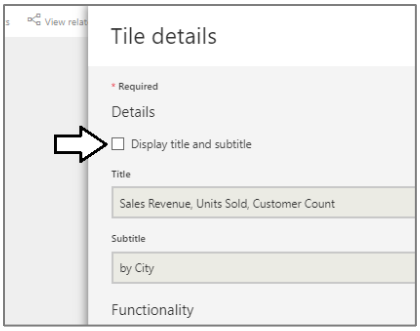
7. Remove the titles from the dashboard tiles which display maps.

a) Click the ellipse (**…**) menu at the top right of the tile which shows the map of Florida to display the tile's context menu.

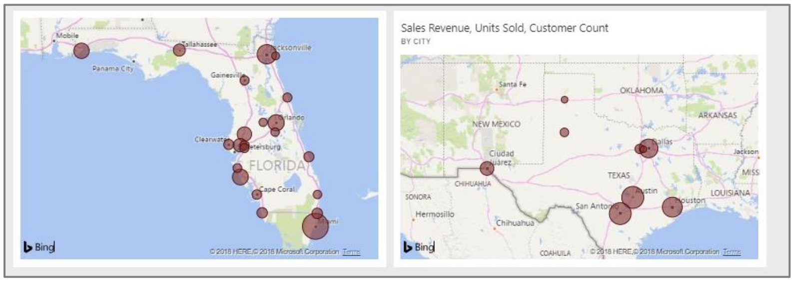
b) From the tile context menu, select the **Edit details** menu command to show the **Tile details** pane.



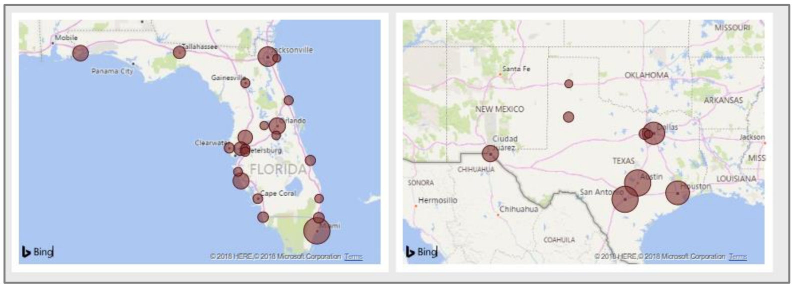
c) In the **Tile details** pane, uncheck the **Display title and subtitle** checkbox and then click the **Apply** button at the bottom.



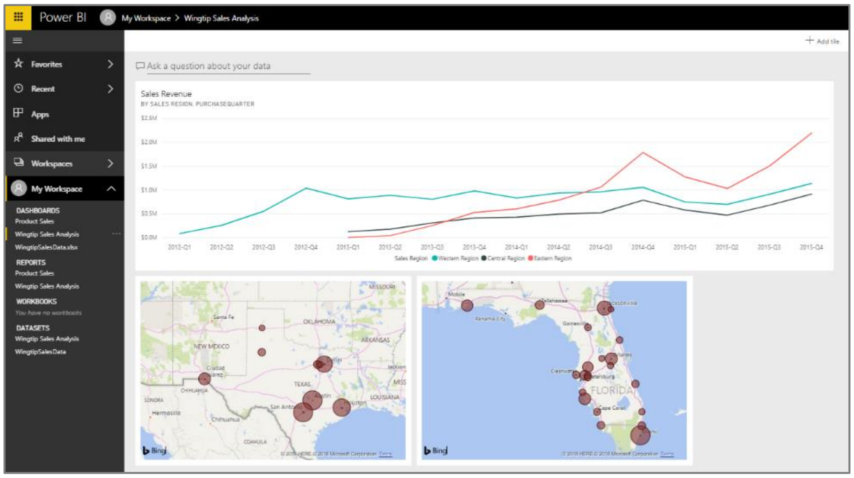
d) You should see that the dashboard tile with the Florida map no longer has a title or subtitle.



e) Repeat the same set of steps to remove the title and subtitle from the other dashboard tile with the map of Texas.



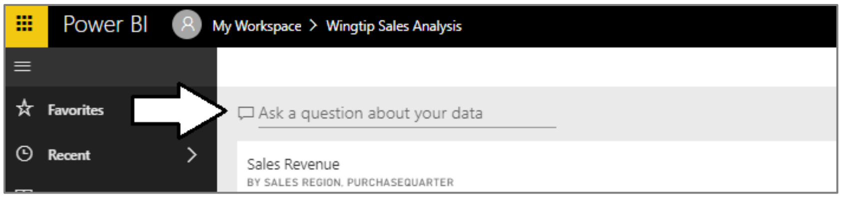
f) At this point, your dashboard should appear as below.



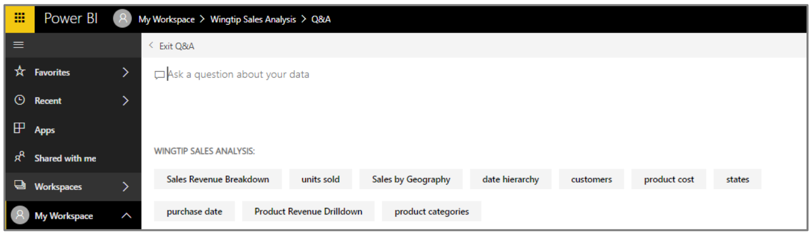
Exercise 2: Execute Queries with Natural Language Q&A

In this exercise you will use the natural language Q&A features in the Power BI Service to execute queries against the Wingtip Sales Analysis dataset in your personal workspace and you will create a new dashboard tile by pinning Q&A query results.

1. Inspect the **Wingtip Sales Analysis** dashboard.
   a) Navigate to the dashboard by clicking **Wingtip Sales Analysis** in the **DASHBOARDS** section of the left navigation menu.
   b) Locate the Q&A search box which has the caption **Ask a question about your data** at the top left corner of the dashboard.



   c) Click on the Q&A search box with the mouse to position the cursor so you can type a query.

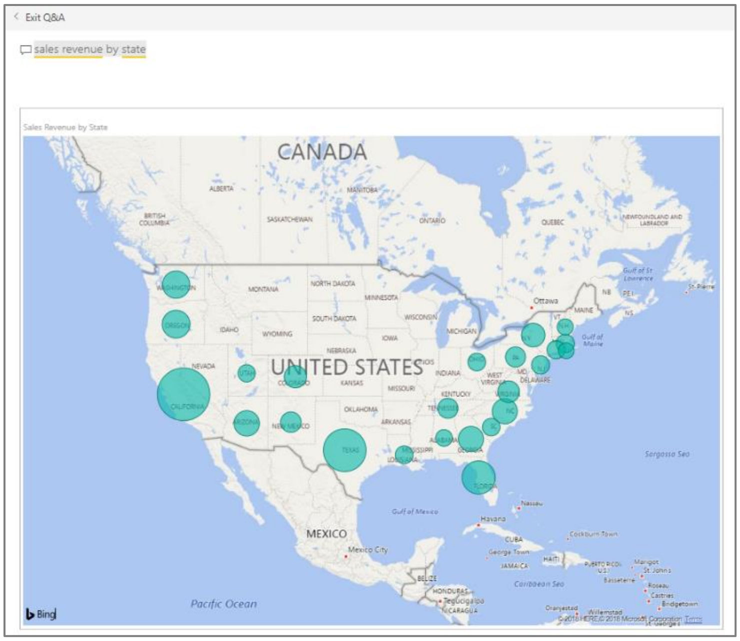


Once you have clicked on the search box and entered into query edit mode, You can see the name of the underlying dataset named **Wingtip Sales Analysis** and the name of fields and report pages below.

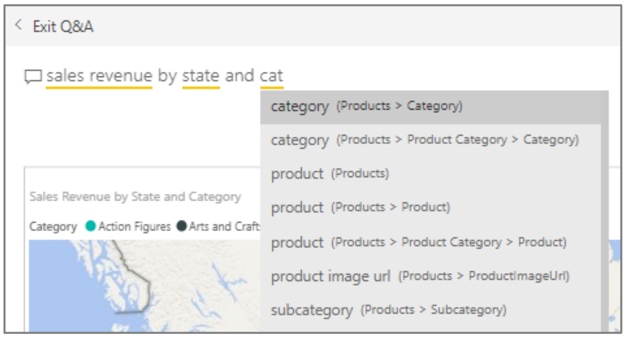
   d) Type the following text into the Q&A search box to run a Q&A query.

```
sales revenue by state
```

   e) The Q&A feature of Power BI should execute a query and then display a map visual with the data returned from the query.



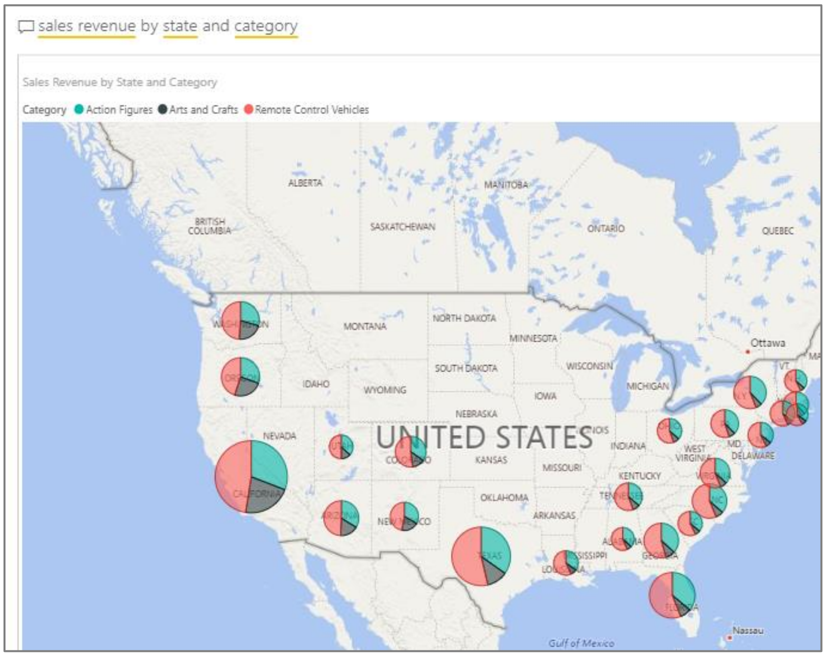
f) Note that as you are typing a Q&A query that you are assisted with IntelliSense.



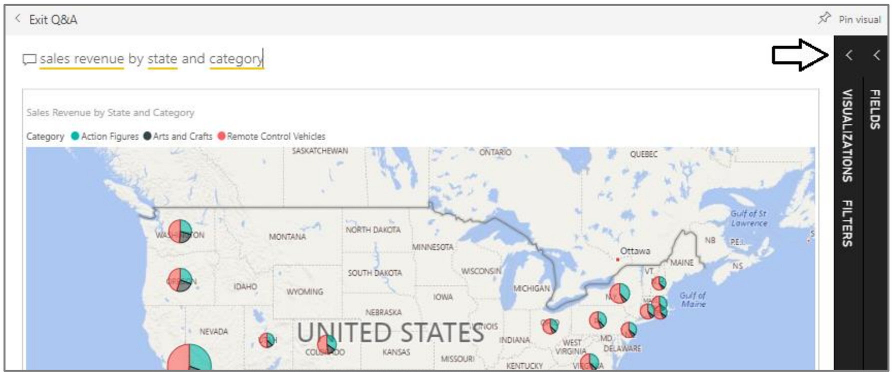
g) Refine your query by typing the following text into the Q&A search box.

```
sales revenue by state and category
```

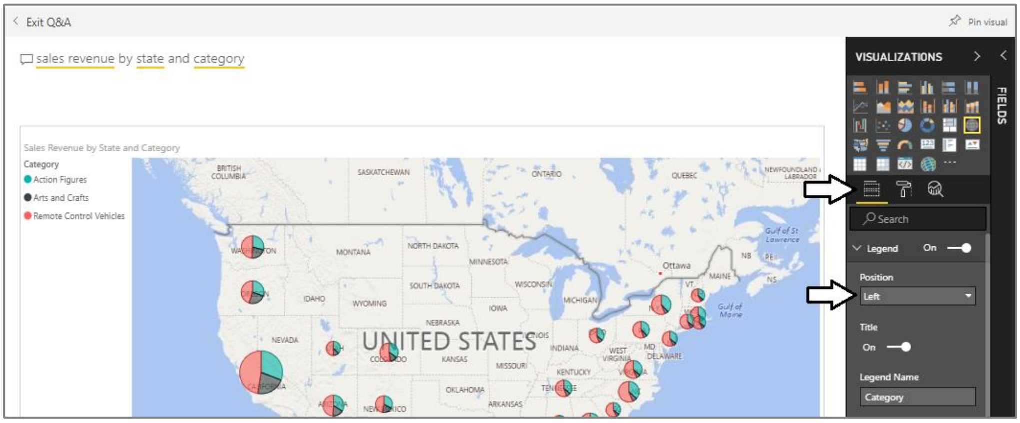
h) The Q&A results should now be updated to match the following screenshot.



i) Open the **Visualizations** panel by clicking the arrow on the left.

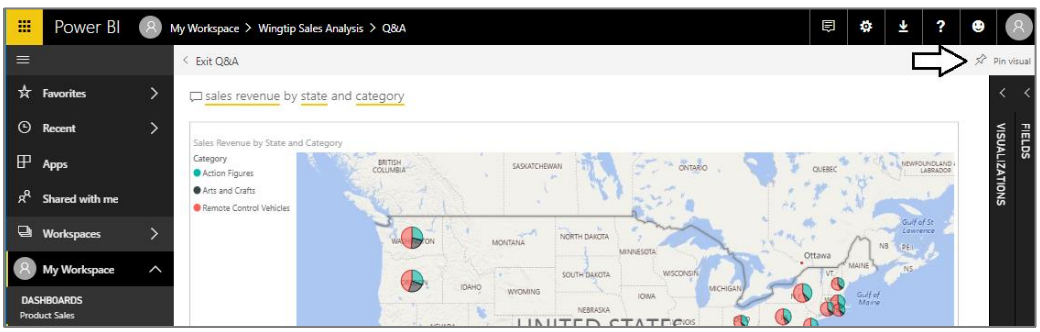


j) In the **Properties** pane inside the **Visualizations** panel, update **Position** property inside the **Legend** section so the map legend appears on the left.

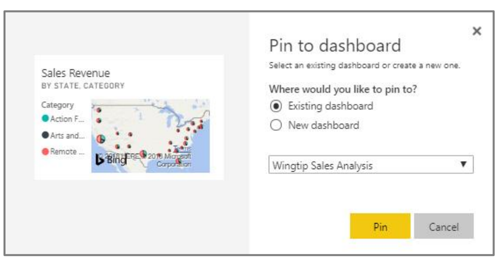


2. Pin the Q&A result to create a new dashboard tile.

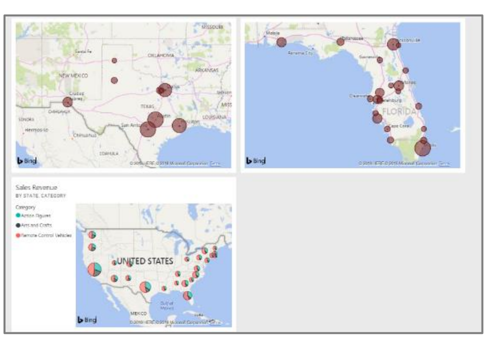
a) Pin the Q&A results you have created by clicking the Pin visual button at the top right of the page,



b) In the **Pin to dashboard** dialog, select the **Existing Dashboard** named **Wingtip Sales Analysis** and click **Pin**.

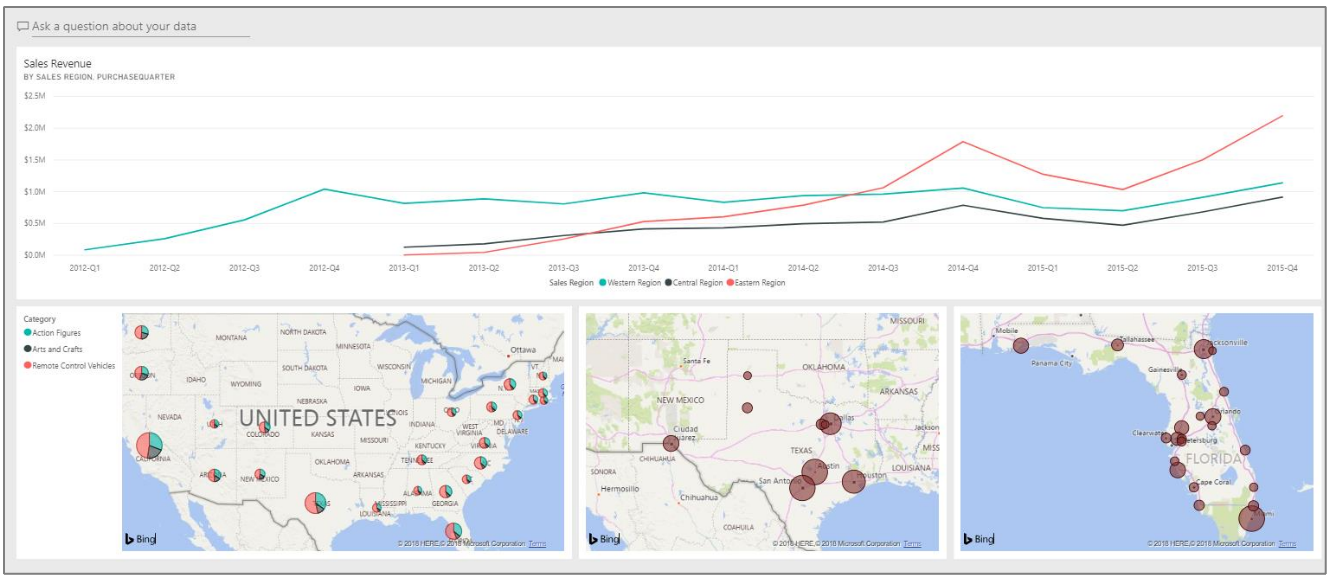


c) You should now see that a new dashboard tile has been created from your Q&A results.



d) Using the same set of steps you used before the other tiles, remove the title and text from the new dashboard tile.

e) Using the mouse, reposition the tiles on your dashboard to match the following screenshot.



You have now reach the end of this lab.