

Designing and Deploying Dashboards



Agenda

- Designing Dashboards for Power BI
- Executing Queries with Natural Language Q&A
- Sharing Dashboards with Other Office 365 Users
- Staging & Deployment using Group Workspaces
- Working with Organizational Content Packs



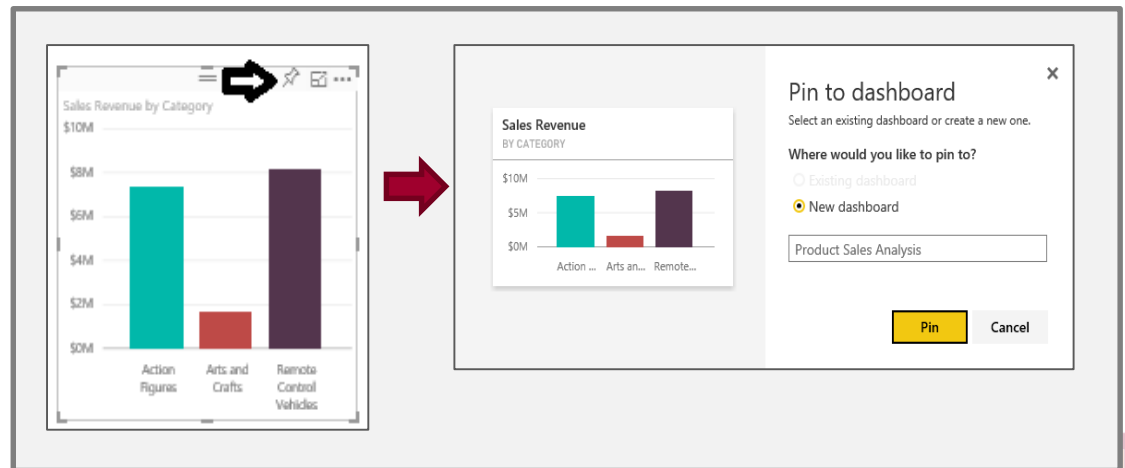
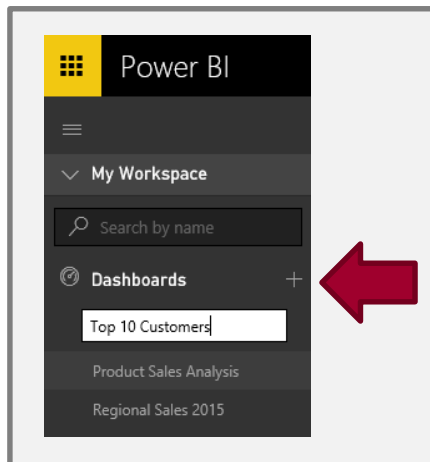
Dashboards in Power BI

- Dashboard is consolidated view of reports & datasets
 - Provides simpler, more intuitive entry point to reports and datasets
 - Simplicity and intuition key for users with mobile devices & tablets
- Dashboard represents unit of deployment and reuse
 - Dashboards can be deployed via dashboard sharing
 - Dashboards can be deployed using organizational content packs



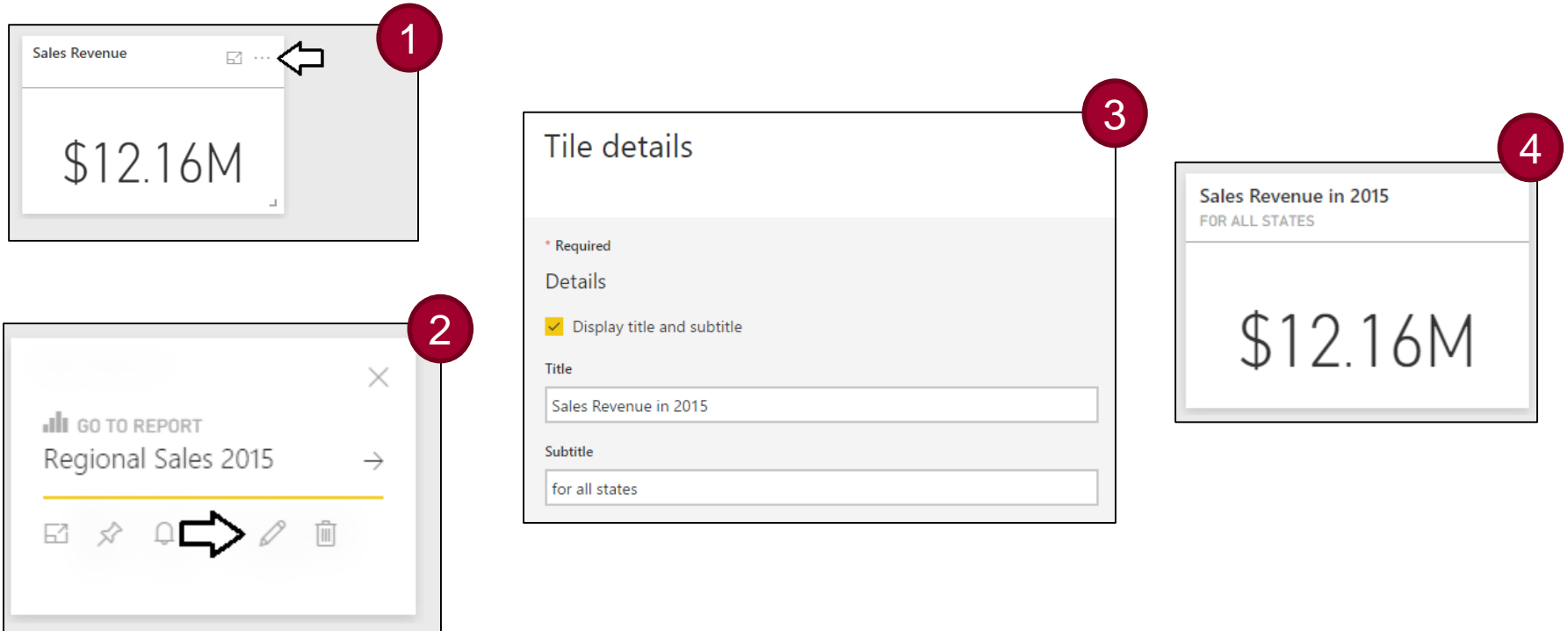
Creating Dashboards

- Dashboard is a collection of tiles
 - Dashboard tiles can be created by pinning a visual from a report
 - Dashboard tiles can be created from Q&A search result
 - Each tile is snapshot of information from an underlying dataset
- Dashboard can be created two different ways
 - Click on (+) button in Dashboards section of navigation pane
 - Create new dashboard when pinning visual from report



Modifying Tile Details

- You can customize a tile's title and subtitle
 - Default title and subtitle doesn't always provide enough clarity
 - Title and subtitle edited using **Tile details** dialog





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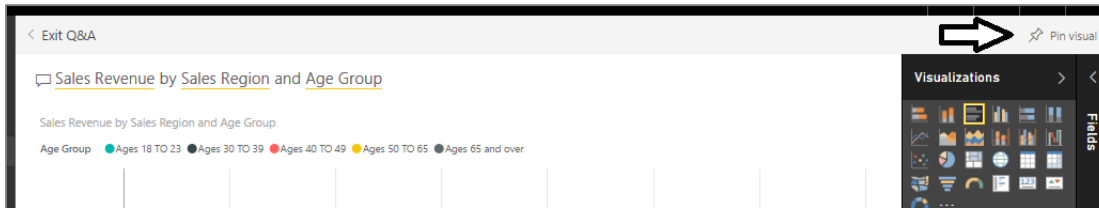
The Q&A Search Box

- Used to execute natural language queries
 - Queries are executed against underlying dataset(s) in workspace
 - Query results display using some type of Power BI visual
 - Power BI service selects Visualization type based on result type



Pinning Search Result to Dashboard

- Q&A search results can be pinned to dashboard
- Allows users to easily save visuals from query results



This tile was created from a visual on a report

This tile was created from a Q&A query result



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Working with the Q&A Search Box

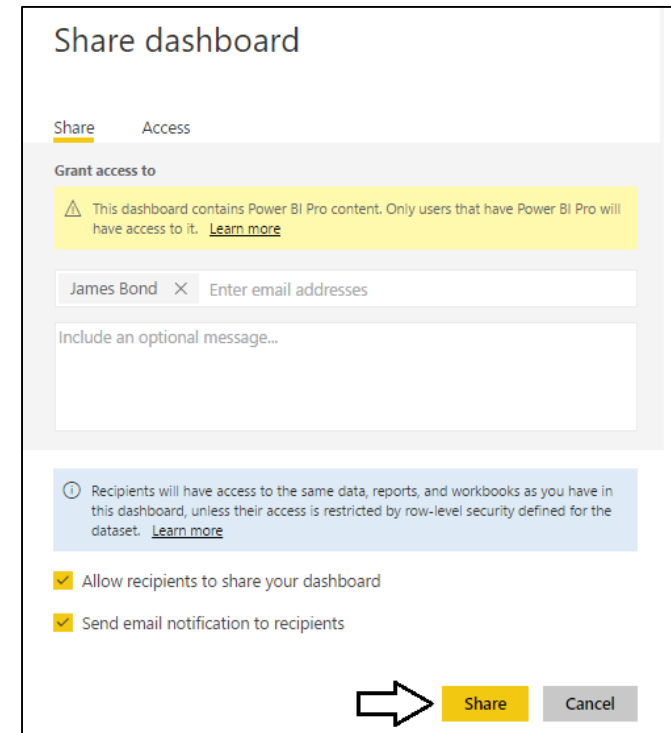
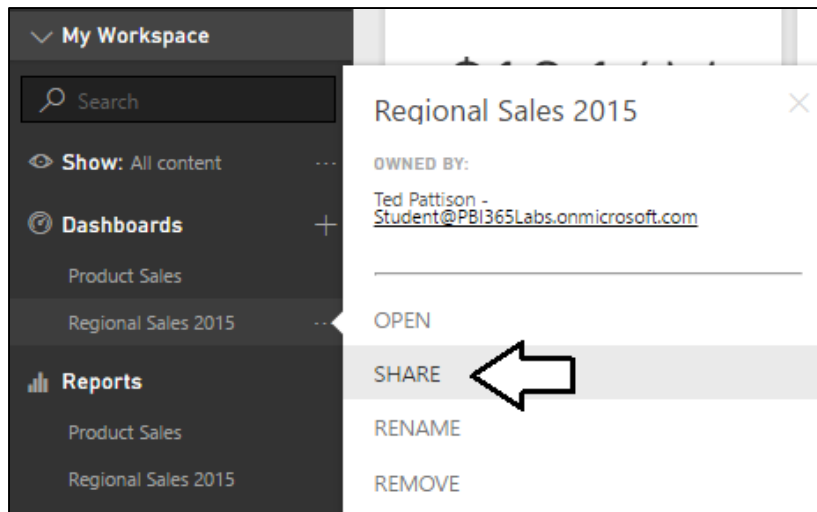
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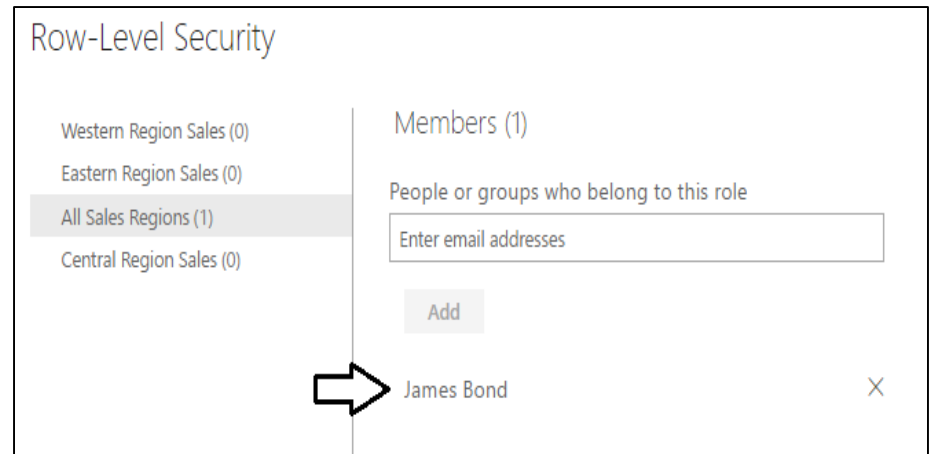
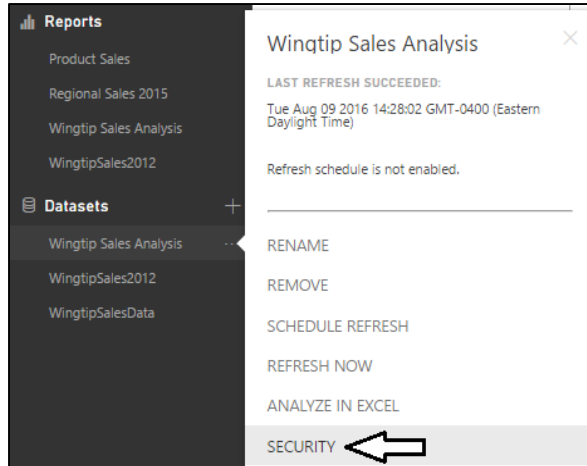
Sharing Dashboards

- Used to make dashboard accessible to other users
 - Other users must be within same Office 365 organization
 - Sharing dashboard provides indirect access to reports and datasets
 - Does not require Power BI Pro license



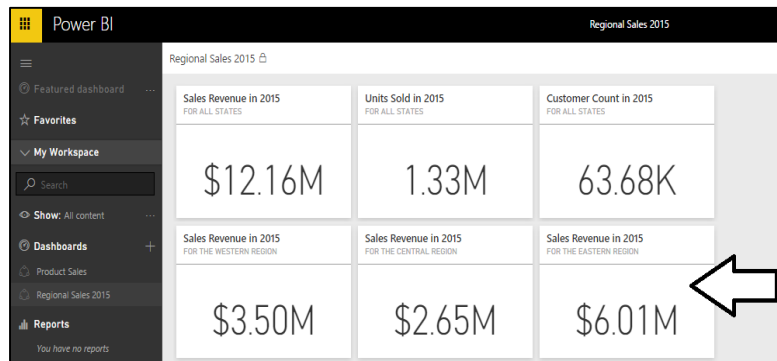
Configuring Row-level Security

- If required, configure RLS on dataset behind dashboard
 - If RLS is configured incorrectly, users may not see any data

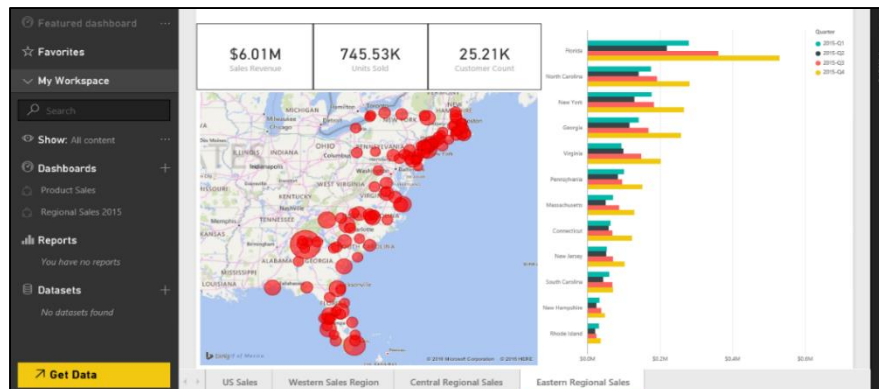


Testing Dashboard Sharing

- Login as secondary user
 - Make sure you can access the dashboard
 - Observe there is a link to dashboard but not to report or dataset



- Clicking on dashboard tile navigates user to report





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Sharing a Dashboard

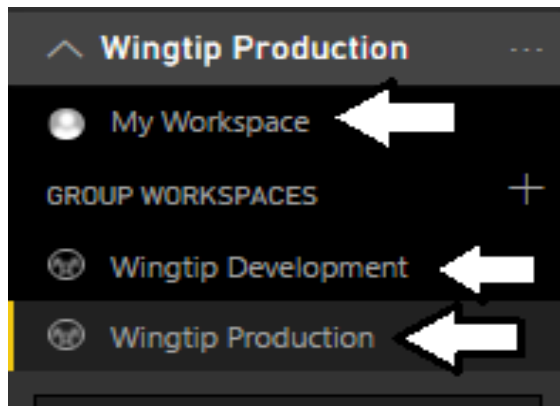
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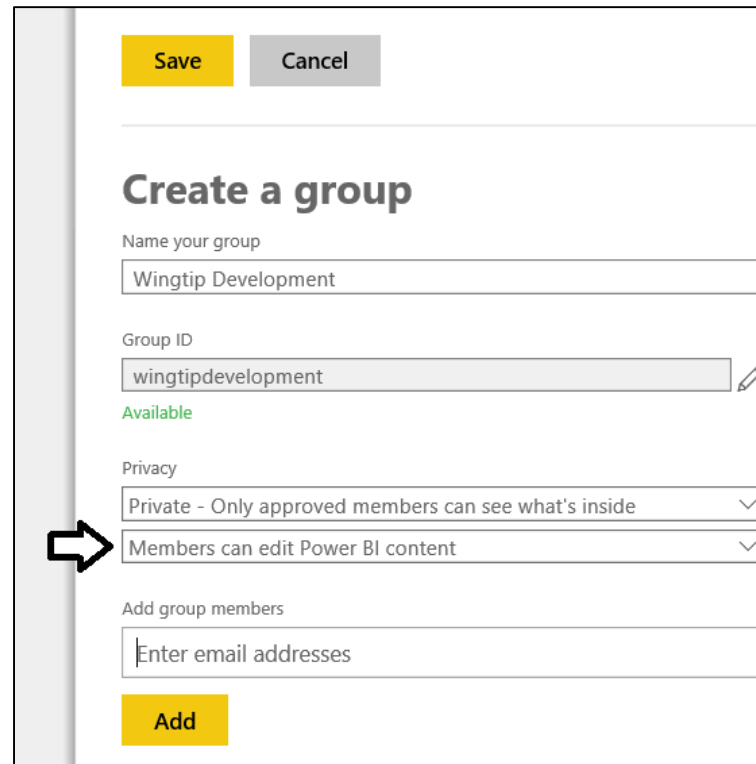
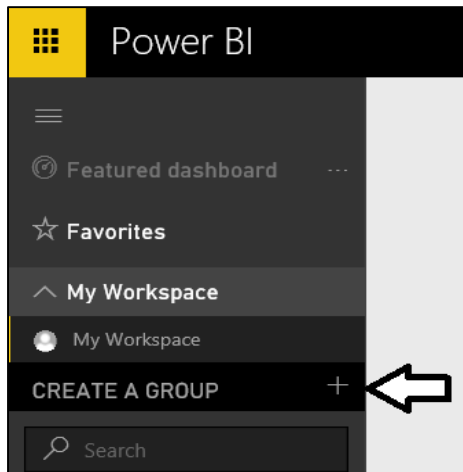
Understanding Group Workspaces

- Group workspaces required for team-based development
 - Assets in personal workspaces can only be edited by one person
 - Assets in group workspace can be edited by team members
- Group workspaces provide secure, updatable deployment
 - Group workspace can be secured using private membership
 - Group workspace usually created in read-only mode for production
 - Content pack used to deploy custom solution to group workspace
 - Content pack used to update custom solution in group workspace



Creating Group Workspaces for Development

- Create Editable Workspace for Development
 - Configure as **Members can edit Power BI content**



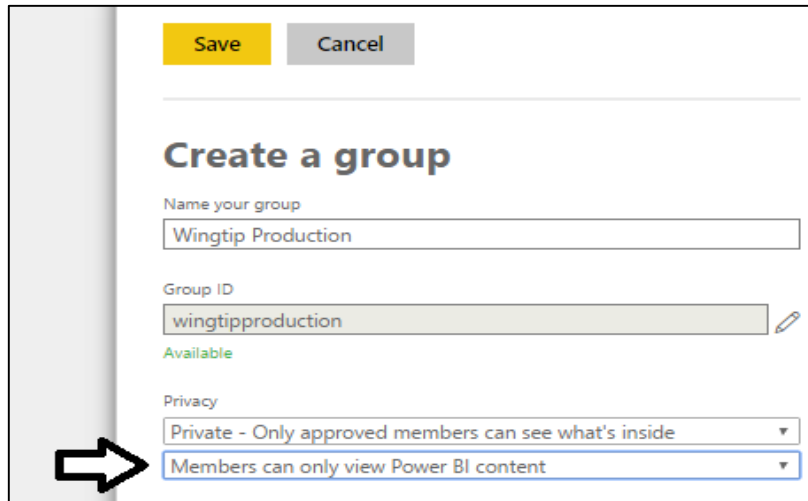
A screenshot of the 'Create a group' form in Power BI. The form includes the following fields and options:

- Save** (yellow button) and **Cancel** (gray button) at the top.
- Create a group** heading.
- Name your group**: Text input field containing 'Wingtip Development'.
- Group ID**: Text input field containing 'wingtipdevelopment', with a green 'Available' status and a pencil icon for editing.
- Privacy**: A dropdown menu showing 'Private - Only approved members can see what's inside'.
- Members can edit Power BI content**: A dropdown menu with a white arrow pointing to it from the left.
- Add group members**: Text input field containing 'Enter email addresses'.
- Add** (yellow button) at the bottom.



Creating Group Workspaces for Production

- Create Editable Workspace for Development
 - Configure as **Members can only view Power BI content**



Save Cancel

Create a group

Name your group

Wingtip Production

Group ID

wingtipproduction

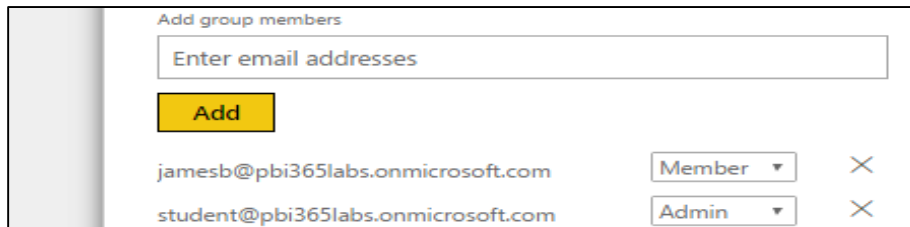
Available

Privacy

Private - Only approved members can see what's inside

Members can only view Power BI content

- Add users as standard members or as admin



Add group members

Enter email addresses

Add

jamesb@pbi365labs.onmicrosoft.com	Member	×
student@pbi365labs.onmicrosoft.com	Admin	×



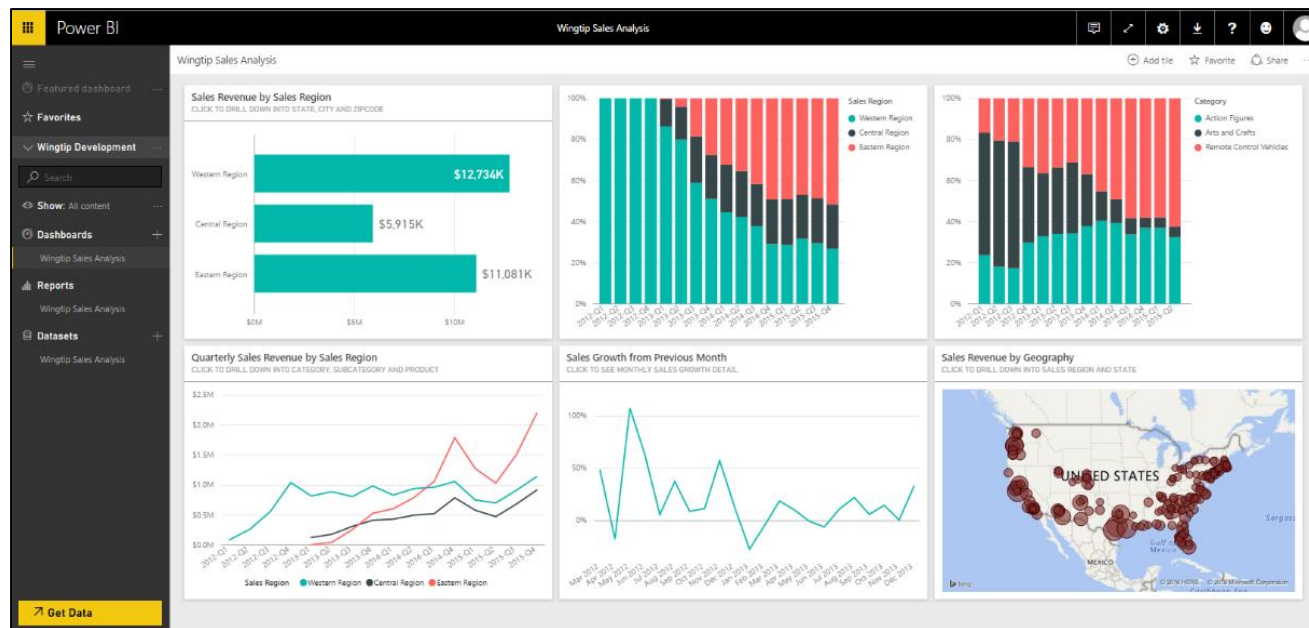
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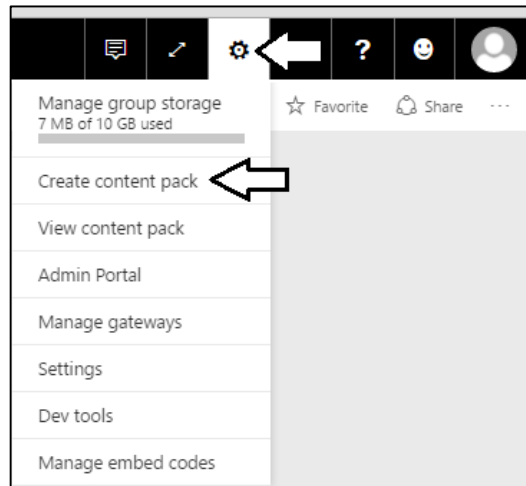
Building Solutions in a Development Workspace

- Steps to Building a Custom Solution
 - Import Power BI Desktop project into workspace
 - Design dashboard(s)
 - Deploy to production using Organizational Content Pack



Creating a Content Pack

- Best Practice Deployment uses Organization Content Packs
 - Used to copy custom solution from development to production
 - Content pack copies dashboards, reports and datasets
 - Content packs support updating assets after initial deployment



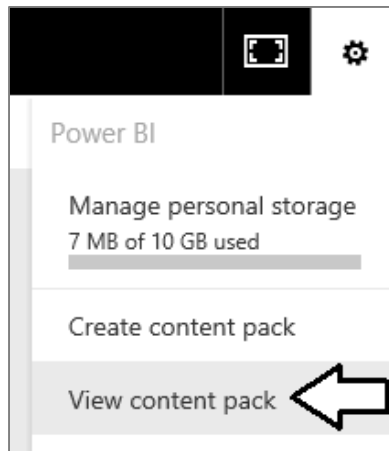
A screenshot of the 'Create content pack' form in the Wingtip Development application. The form is titled 'Wingtip Development' and 'Create content pack'. It includes a section for 'Choose who will have access to this content pack:' with two radio buttons: 'Specific groups' and 'My entire organization' (which is selected). Below this is a 'Title' field with the text 'Wingtip Sales Analysis'. There is also a 'Description' field with the text 'The content pack provides analysis of Wingtip sales revenue figures'. At the bottom of the form, there is a section for uploading an image or company logo, with a note: 'Upload an image or company logo. Image size: 45 KB or less, 4:3 aspect ratio, JPG or PNG format. Use default'.

A screenshot of the 'Select items to publish' section in the Wingtip Development application. This section is divided into three columns: 'Dashboards', 'Reports', and 'Datasets'. Each column contains a list of items to be published, with checkboxes next to them. In the 'Dashboards' column, 'Wingtip Sales Analysis' is checked. In the 'Reports' column, 'Wingtip Sales Analysis' is checked. In the 'Datasets' column, 'Wingtip Sales Analysis' is checked.



Viewing Content Packs

- You can view/edit content pack in workspace

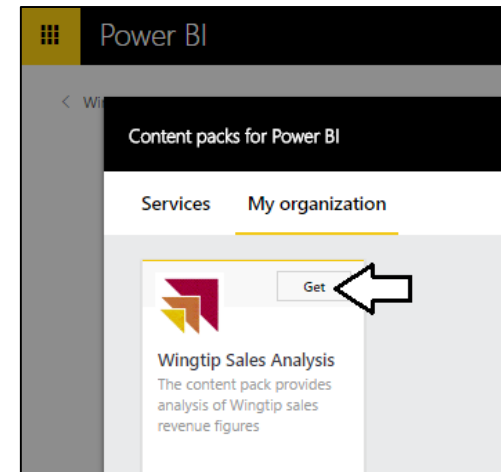
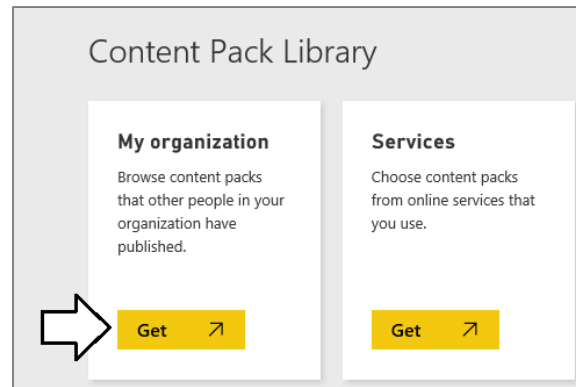
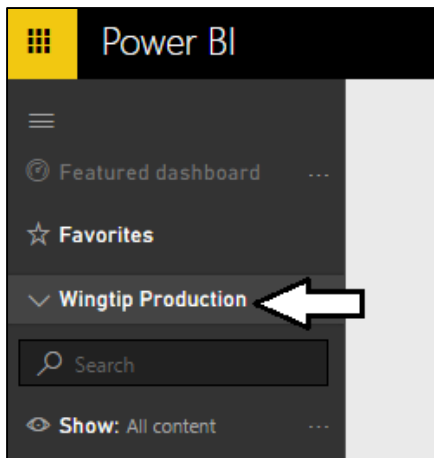


Wingtip Development			
Name	Published To	Date published	Actions
Wingtip Sales Analysis	My Organization	Aug 09, 2016	Edit Delete



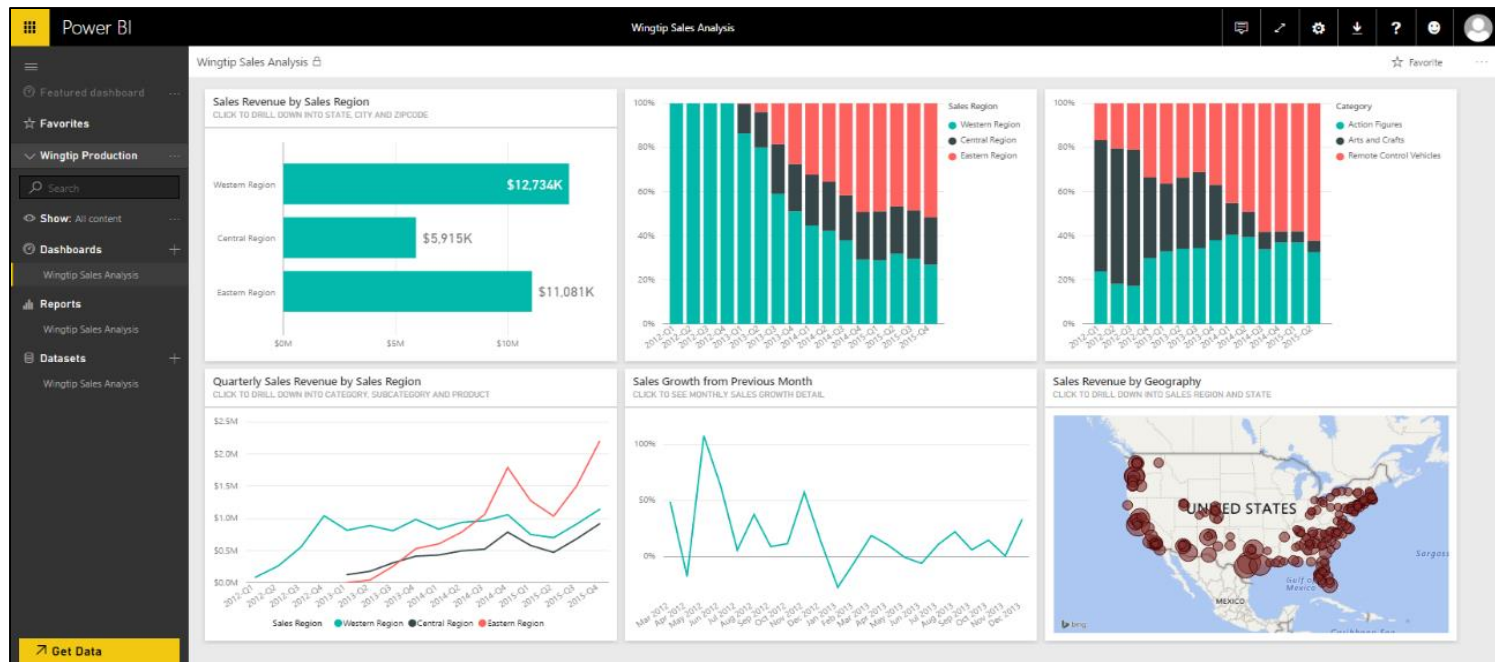
Deploying a Content Pack

- Content pack can be activated in other workspace



Read-only Workspaces

- Read-only workspace work well in production
 - Users cannot edit any dashboards or reports
 - Updates must be made to underlying content pack
 - Republishing content pack pushes changes to production





DEMO

Deploying a Dashboard using an Organizational Content Pack

Summary

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