

Designing Dashboards for Mobile Devices



Agenda

- Understanding Power BI Mobile
- Installing the Power BI App on Mobile Devices
- Navigating Groups, Dashboards and Reports
- Creating Mobile Favorites, Alerts and Annotations
- Designing Mobile-First Dashboards



Understanding Power BI Mobile

- Power BI platform provides first class support for mobile
 - Native apps available for iOS, Android and Windows phone
 - Dashboard automatically resize to form factor of target device
 - Native apps cache offline data which is refreshed every 2 hours
- Power BI builds on Office 365 Mobile Device Management
 - Office 365 provides management of mobile devices
 - Organizations can require 2 factor authentication when needed
 - Microsoft Intune can be used to manage mobile devices



Power BI Native App Requirements

- Power BI Native App for iPads
 - Requires iOS 9.0 or later
- Power BI App for iPhones
 - Requires iPhone 5 and above, with iOS 9.0 or later
- Power BI App for Android
 - Requires Android 4.4 operating system or later
- Power BI App for Windows 10 Phone
 - Not supported on Windows 8.1 phone or earlier



Mobile Device Features

- Annotations
 - Write notes and draw on tiles using your mobile device
- Sharing Dashboard Tiles
 - Send annotated tiles to other users
- Data-driven Alerts
 - Power BI can send notification when data exceeds a threshold
- Favorites
 - Add favorites to mobile device to easily open a specific dashboard
- Scan QR Codes using Mobile Device
 - Allows users to quickly navigate to specific dashboard tile or report

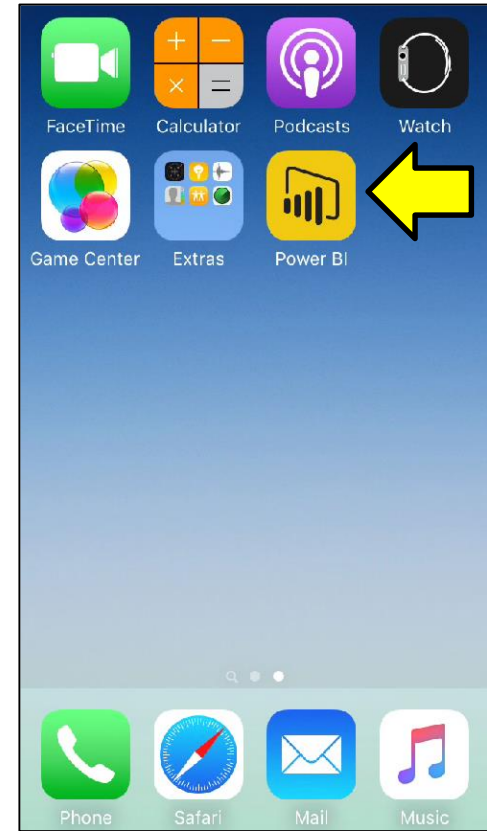
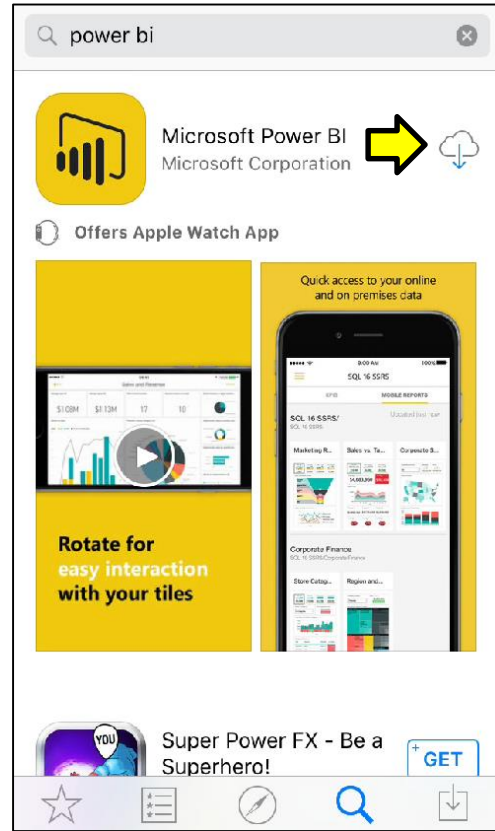
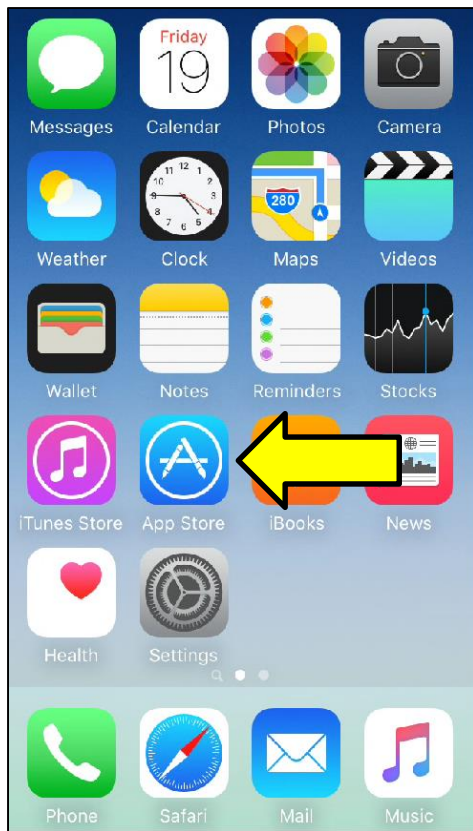


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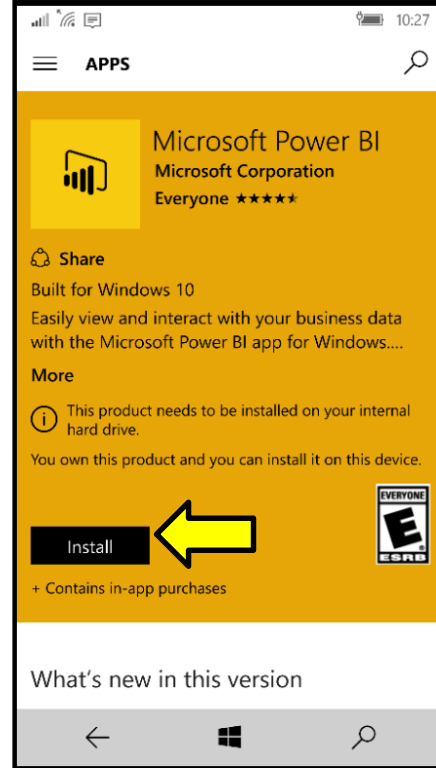
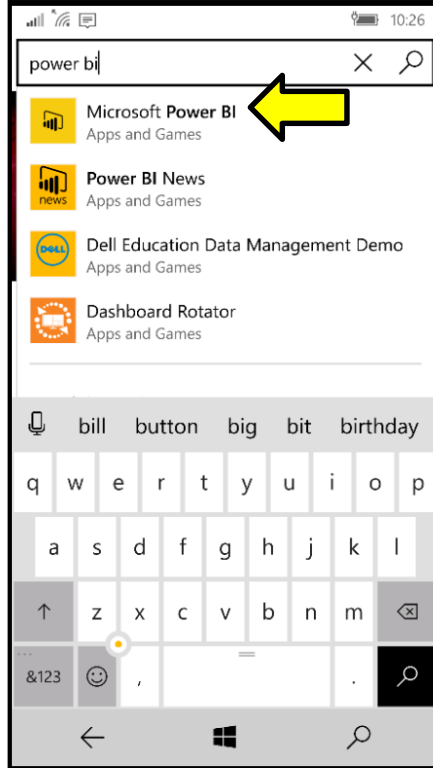
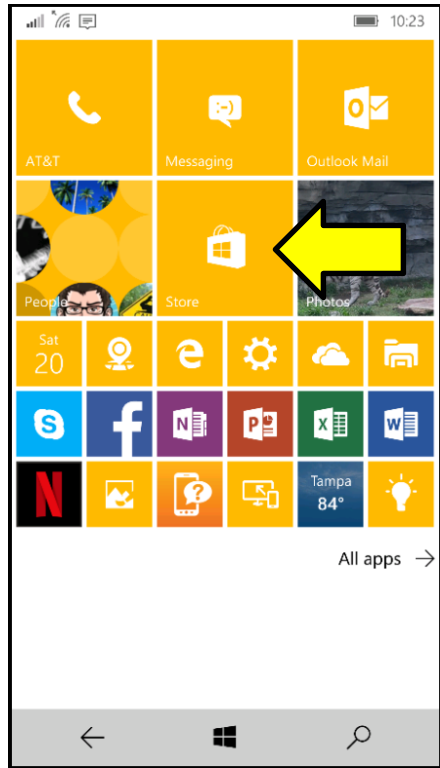
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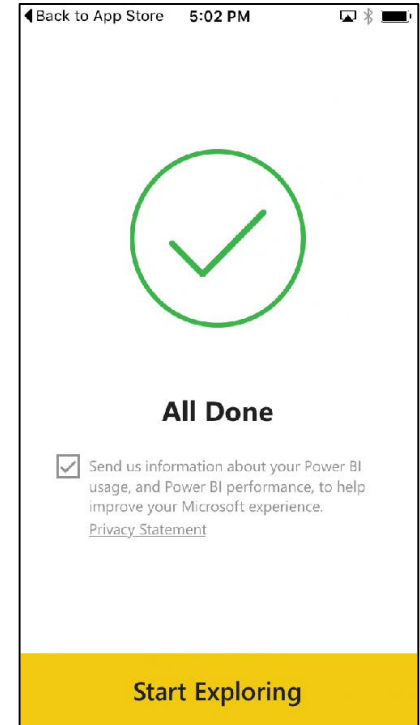
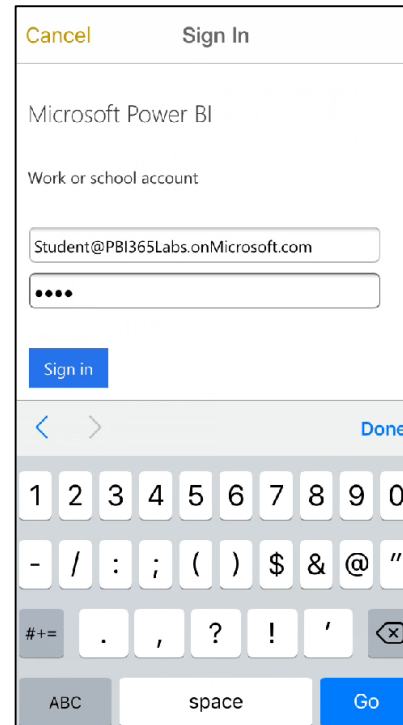
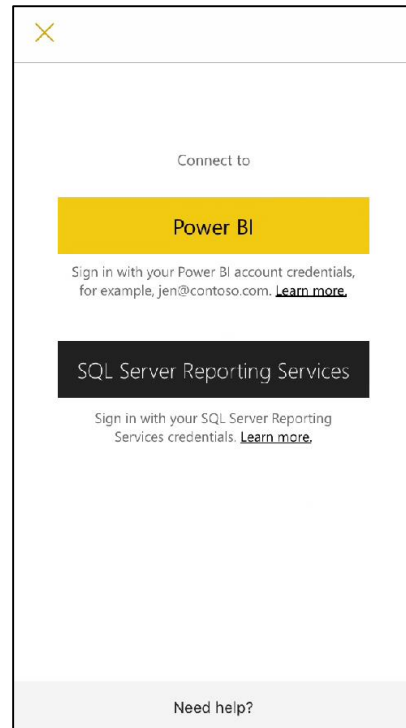
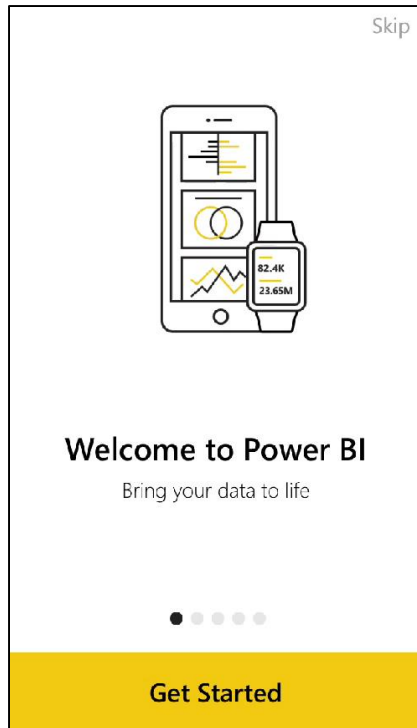
Installing the Power BI App on an iPhone



Installing the Power BI App on Windows Phone

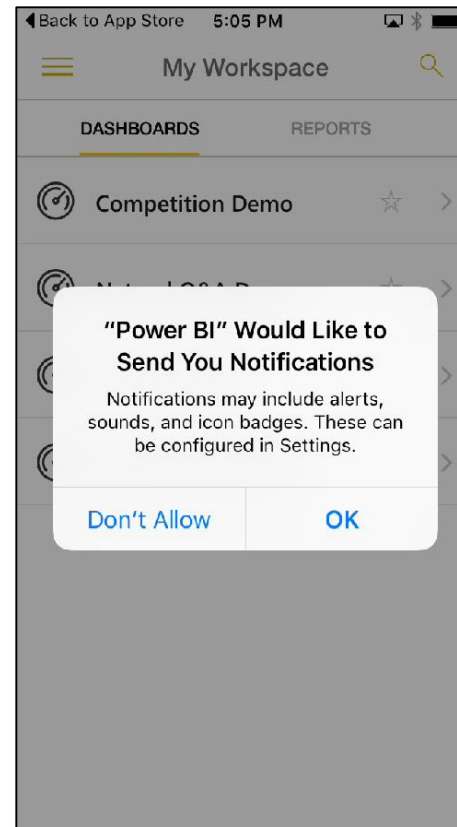
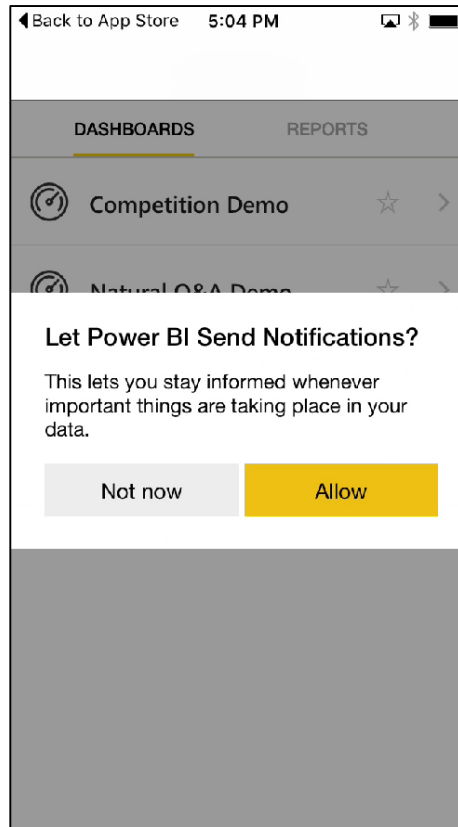


Logging into the Power BI Service



Allowing Power BI To Send Notifications

- Data driven alerts require Power BI to send notifications
 - Make sure to click Allow to grant these required permissions



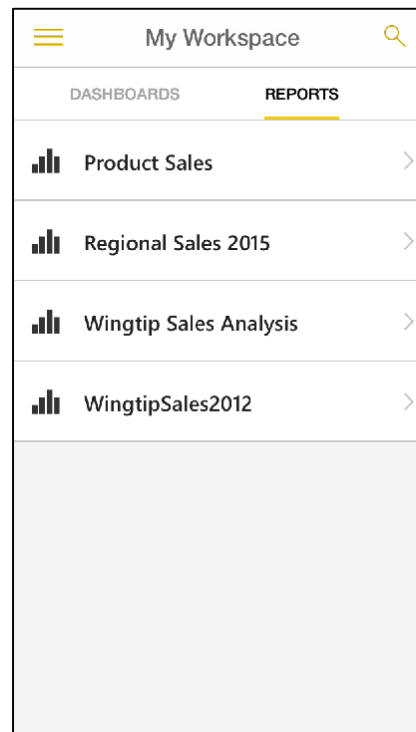
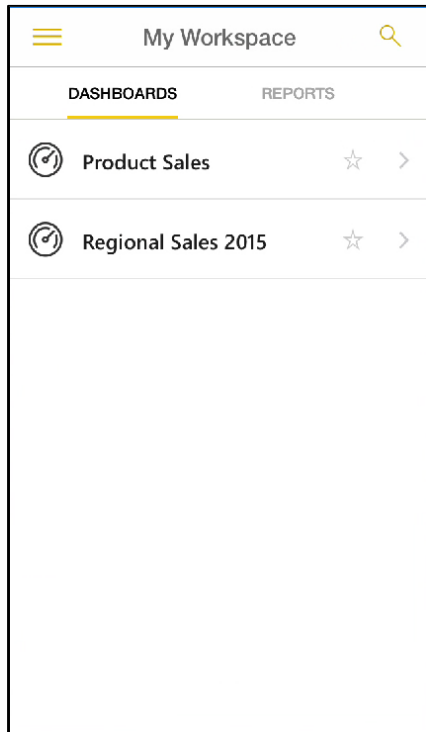
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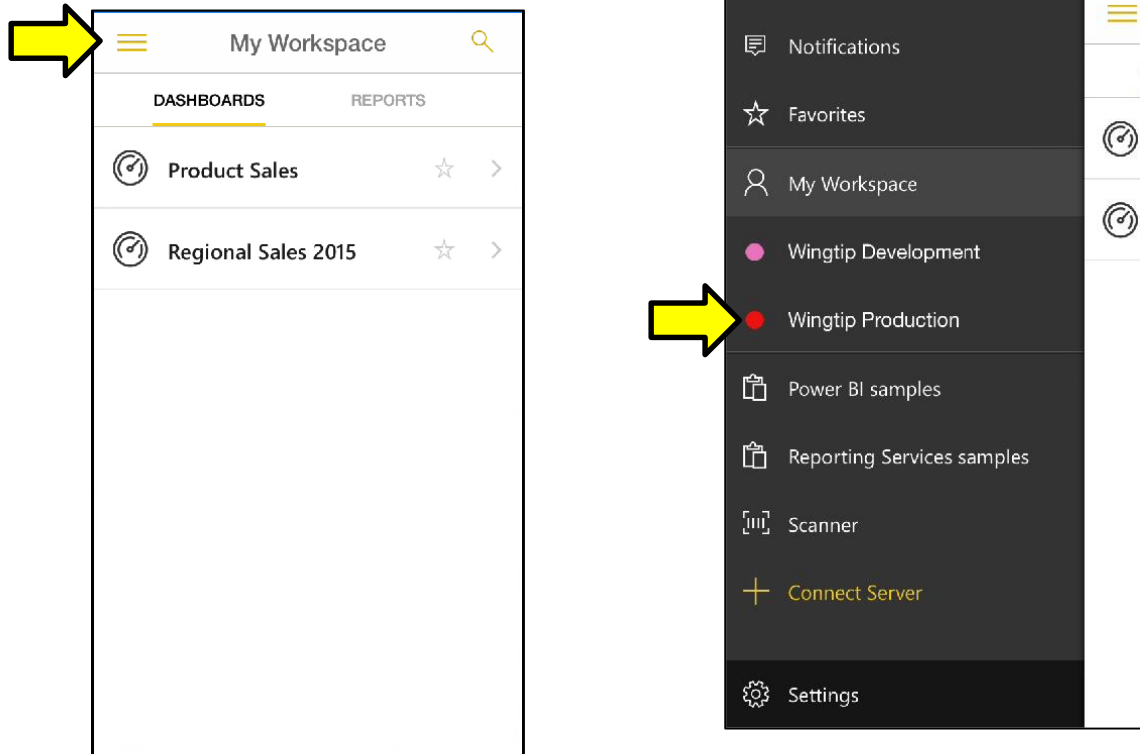
Navigating Dashboards and Reports

- Each workspace contains dashboards and reports
 - By default, you begin in your personal workspace
 - Each workspace has collection of DASHBOARDS and REPORTS
 - Tap on a dashboard or report to open it



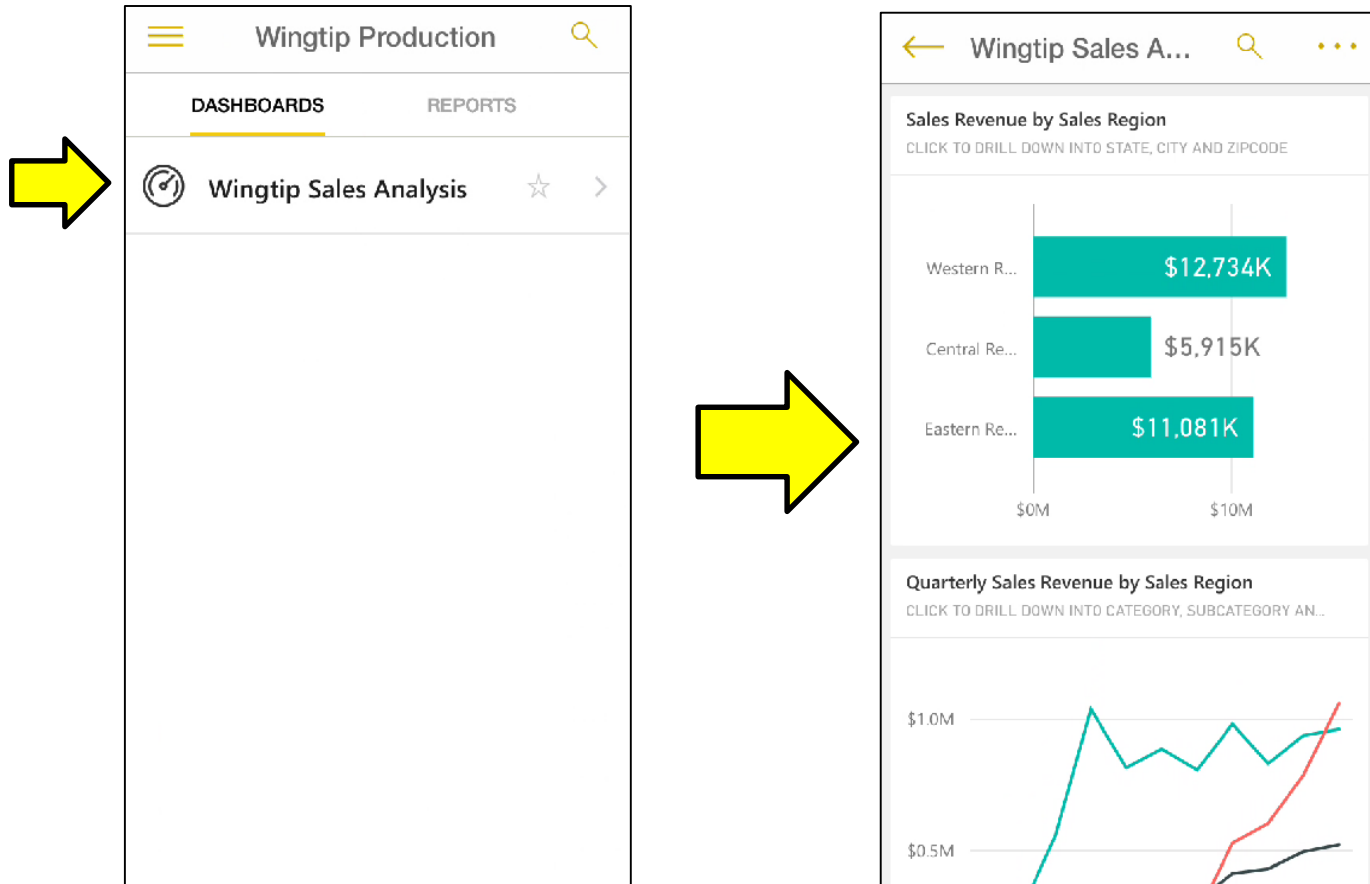
Navigating Between Workspaces

- Main flyout menu used to navigate across workspaces
 - You can also navigate to app setting or begin QR code scan



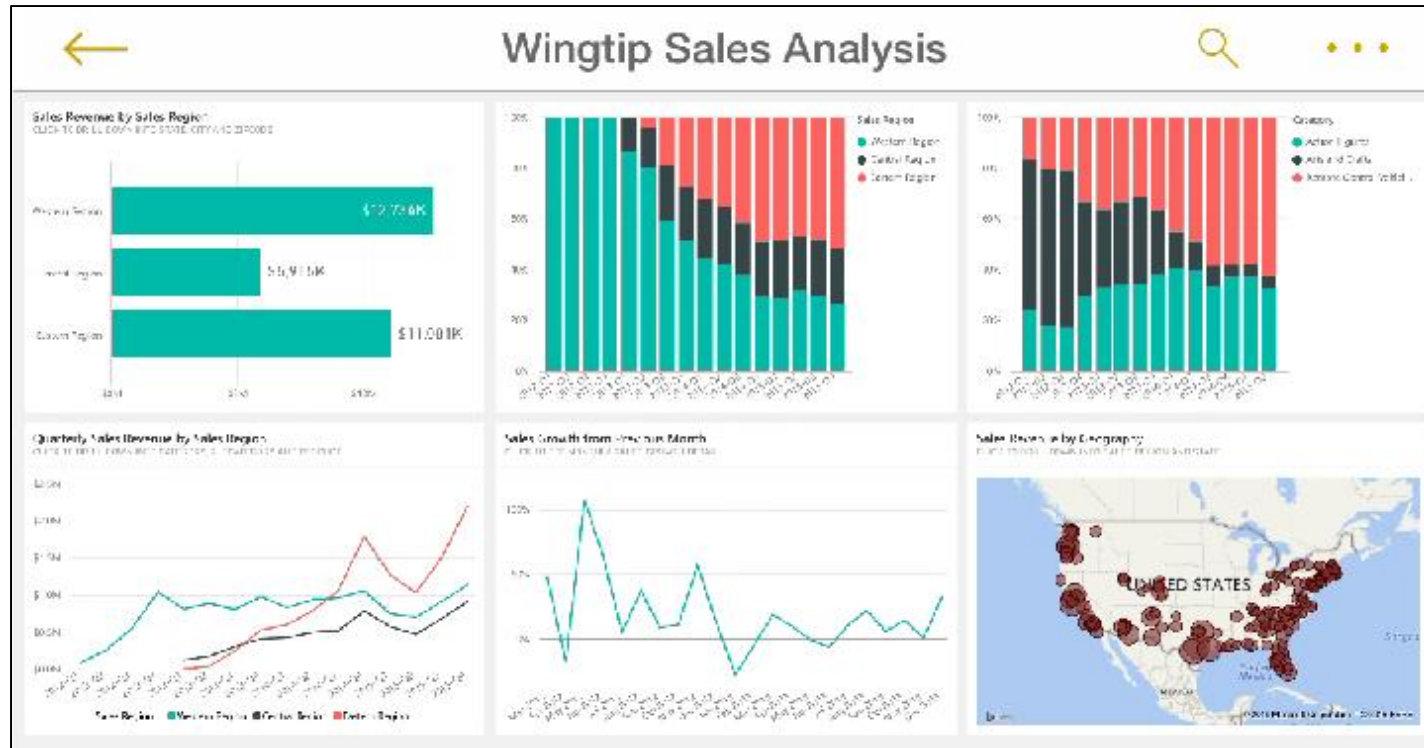
Opening a Dashboard

- Tap on a dashboard to open it
 - Tiles are displayed vertically when in Portrait Mode



Dashboards in Landscape Mode

- When you view a dashboard in Landscape Mode...
 - Mobile device will display the entire dashboard in single view



Opening a Report

- Reports always open in Landscape View
 - Reports can be hard to read on mobile device
 - Slicers are often too small to use effectively
 - You can create reports with page size designed for mobile form factor

The diagram illustrates the process of opening a report. It starts with a mobile app interface on the left, which transitions (indicated by a yellow arrow) to a landscape view on the right. The mobile app shows a 'Wingtip Production' header with a menu icon and a search icon. Below the header, there are two tabs: 'DASHBOARDS' and 'REPORTS'. The 'REPORTS' tab is selected, and a 'Wingtip Sales Analysis' report is visible. A yellow arrow points from the 'REPORTS' tab to the landscape view. The landscape view shows the 'Wingtip Sales Analysis' report in a wider format. It includes a left sidebar with filters for 'Year' (2012, 2013, 2014, 2015), 'Sales Region' (Western, Central, Eastern), 'Customer Type' (One-time, Repeat), and 'Gender' (Female, Male). The main content area displays a table of customer data and a bar chart titled 'Sales Revenue by Customer'. The table has columns for Customer ID, Customer Name, Age, City, State, Sales Amount, and Units Sold. The bar chart shows sales revenue for various customers, with 'Steven Eustice' having the highest revenue at \$2,750. At the bottom of the landscape view, there are three tabs: 'Top 10 Customers', 'Top 5 Products', and 'Product Revenue Drilldown'. The 'Top 10 Customers' tab is currently selected.

Wingtip Production

DASHBOARDS REPORTS

Wingtip Sales Analysis

Wingtip Sales Analysis

Year: ☐ 2012 ☐ 2013 ☐ 2014 ☐ 2015

Sales Region: ☐ Western Region ☐ Central Region ☐ Eastern Region

Customer Type: ☐ One-time Customer ☐ Repeat Customer

Gender: ☐ Female ☐ Male

Customer ID	Customer Name	Age	City	State	Sales Amount	Units Sold
1	Steven Eustice	37	Redlands, WA	WA	\$2,750	257
2	Tabbara Khan	30	Portland, OR	OR	\$6,786	263
3	Etzel Hickman	42	Scotts, WA	WA	\$6,513	255
4	Borge Norrback	31	Seattle, WA	WA	\$6,150	276
5	Samuel Carlson	38	San Jose, CA	CA	\$6,871	221
6	Kenia Duvalon	26	Spokane, WA	WA	\$5,910	237
7	Phoebe Morita	36	Soledad, CA	CA	\$5,316	362
8	Royce Scott	33	Southaven, MS	MS	\$5,544	158
9	Courtney Hardfield	34	Elgin, IL	IL	\$5,412	188
10	Alison Knight	34	San Jose, CA	CA	\$5,117	263

Sales Revenue by Customer

Steven Eustice: \$2,750

Tabbara Khan: \$6,786

Etzel Hickman: \$6,513

Borge Norrback: \$6,150

Samuel Carlson: \$6,871

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Top 10 Customers Top 5 Products Product Revenue Drilldown



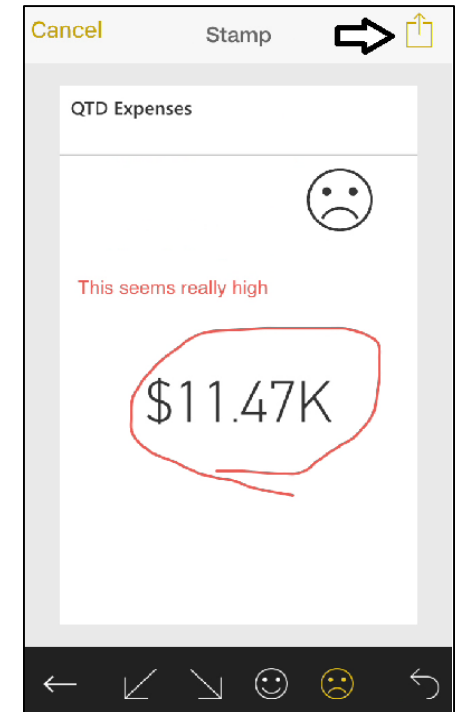
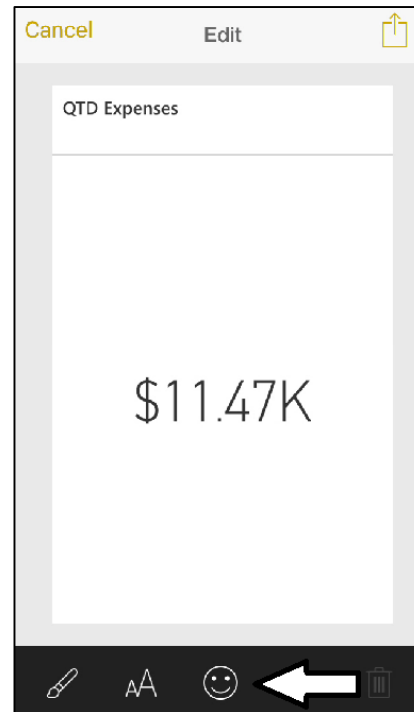
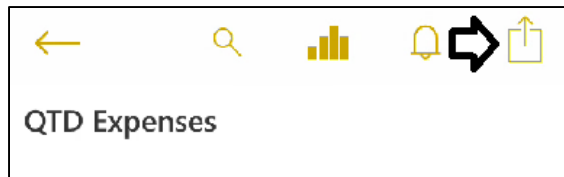
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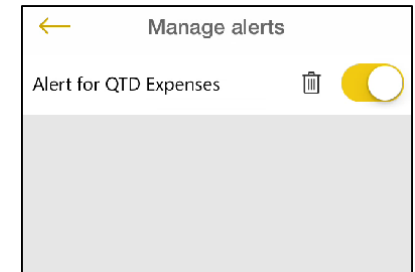
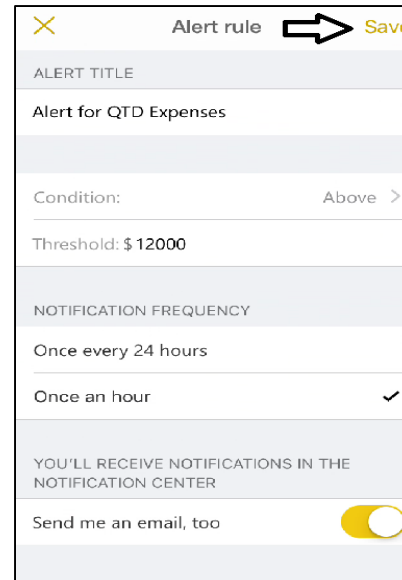
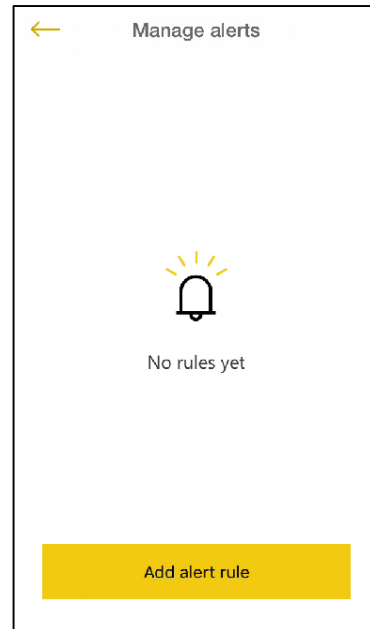
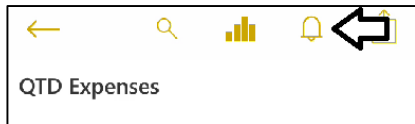
Creating Annotations

- Steps to create an annotation
 - Click **Share** menu in top right corner
 - Use drawing tools to create annotations
 - Click **Share** menu again to share annotation



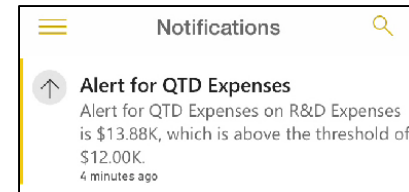
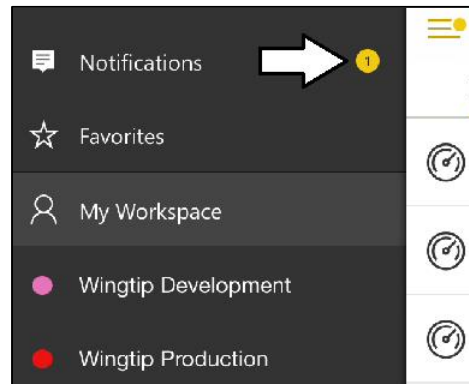
Creating Data-drive Alerts

- Steps to create an annotation
 - Click Bell icon button in top toolbar
 - Click **Add alert rule** on **Manage alerts** screen
 - Configure alert settings on **Alert rule** page and click Save.
 - Test out the alert to make sure it works



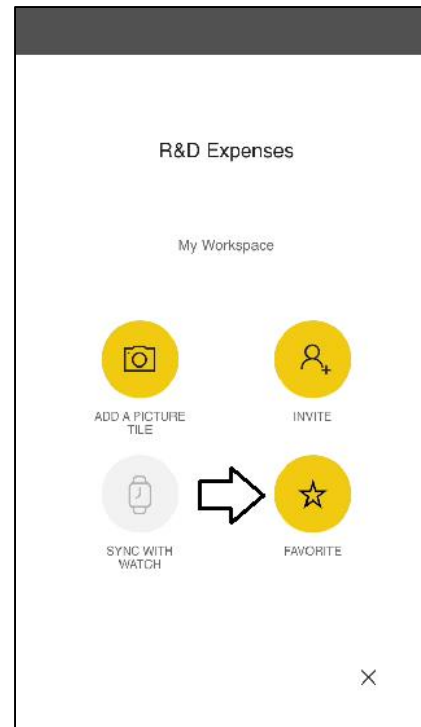
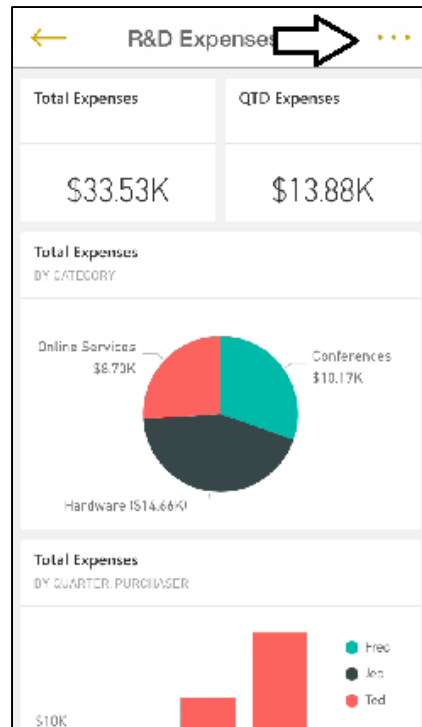
Receiving Notifications from an Alert

- Testing a data-driven alert
 - Update data to trigger alert to send notification
 - Examine alert notifications on your mobile device.



Adding Favorites

- Dashboard menu allows you to add dashboard into Favorites list.



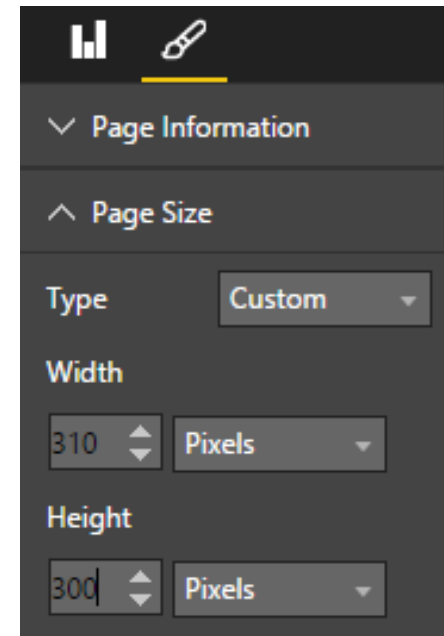
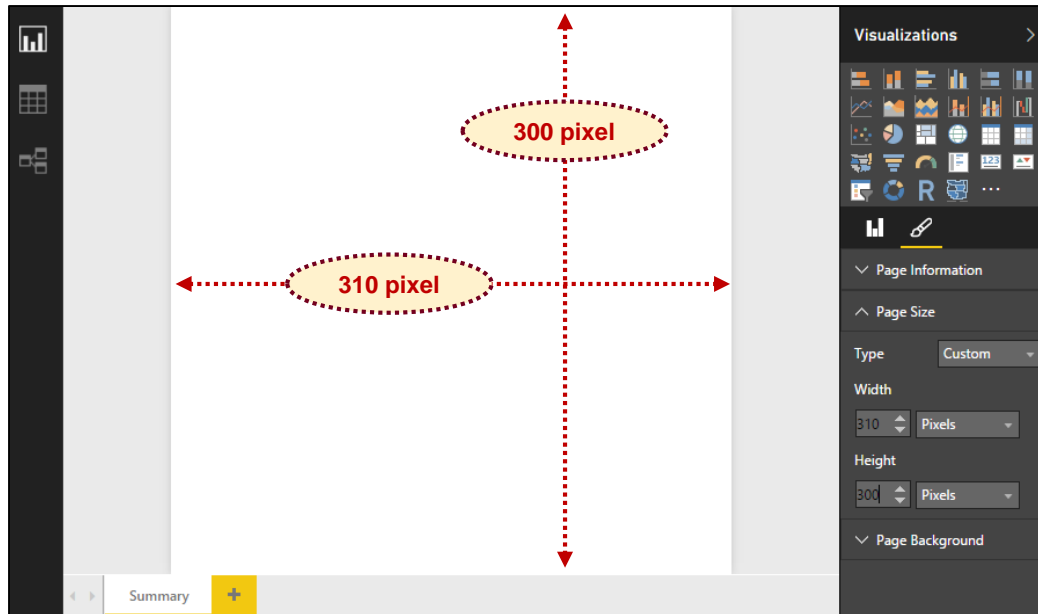
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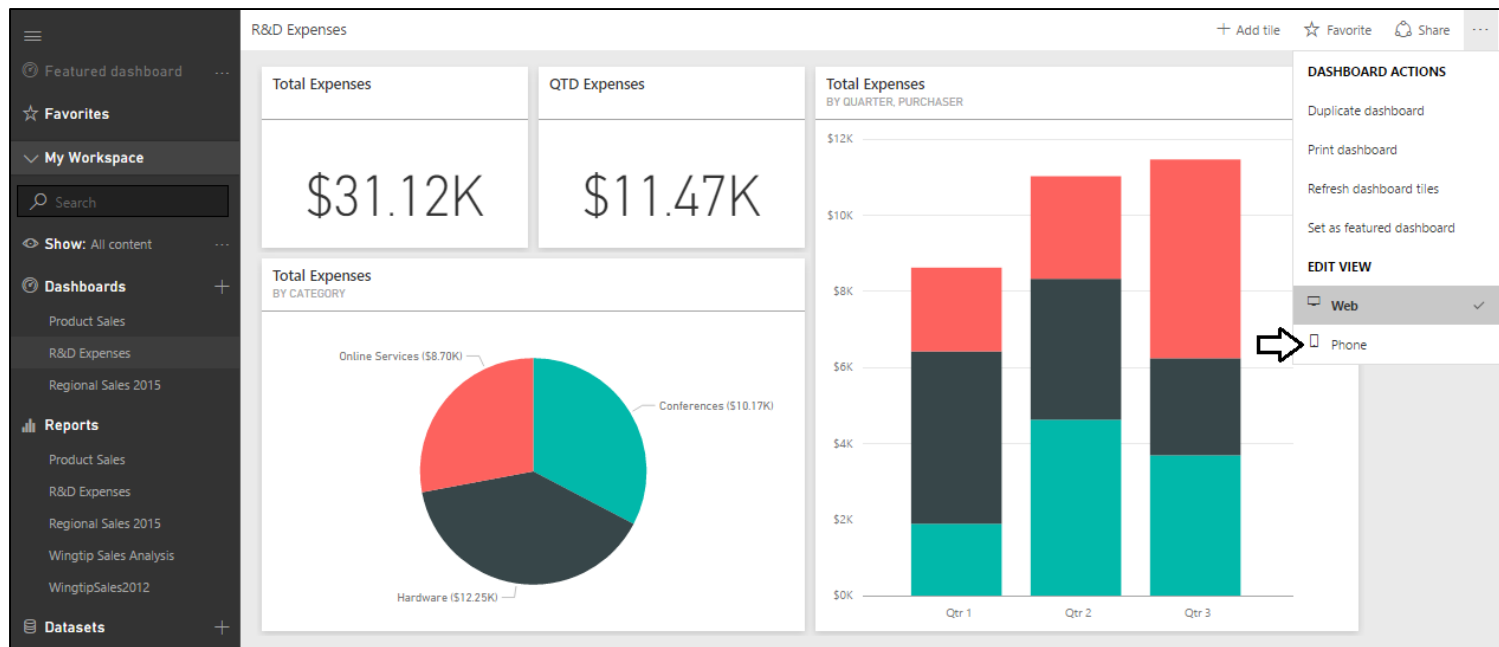
Modifying Page Size for Mobile Devices

- You can modify page size for pages in a report
 - Make it possible to optimize reports for mobile form factor

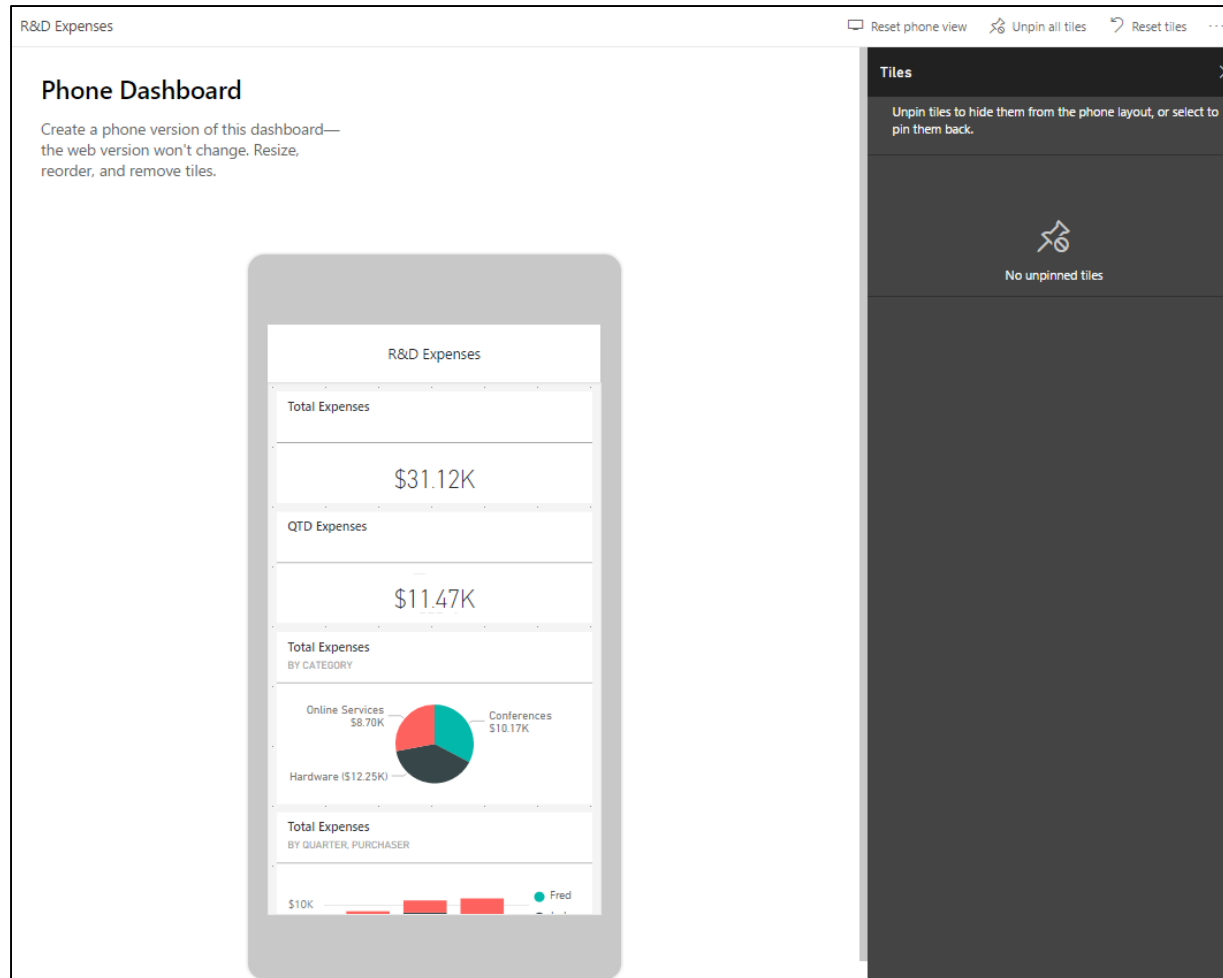


Modify the Dashboard's Phone Edit View

- Each Dashboard has Web Edit View and Phone Edit View
 - Both views are the same initially
 - Phone Edit View can be updated to target mobile devices



Working in Phone Edit View



Summary

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