

Designing and Deploying Dashboards



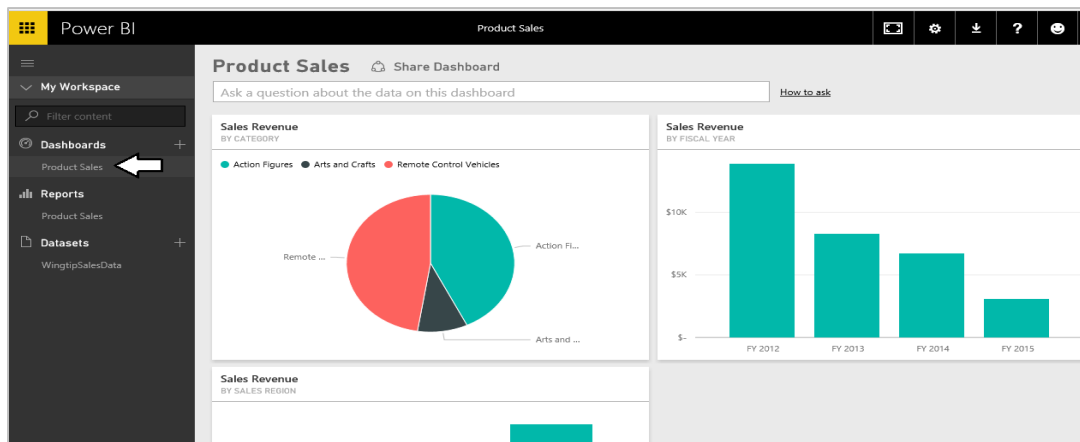
Agenda

- Creating Dashboards
- Sharing Dashboards
- Deploying Dashboards using Content Packs
- Accessing Dashboards using Mobile Devices



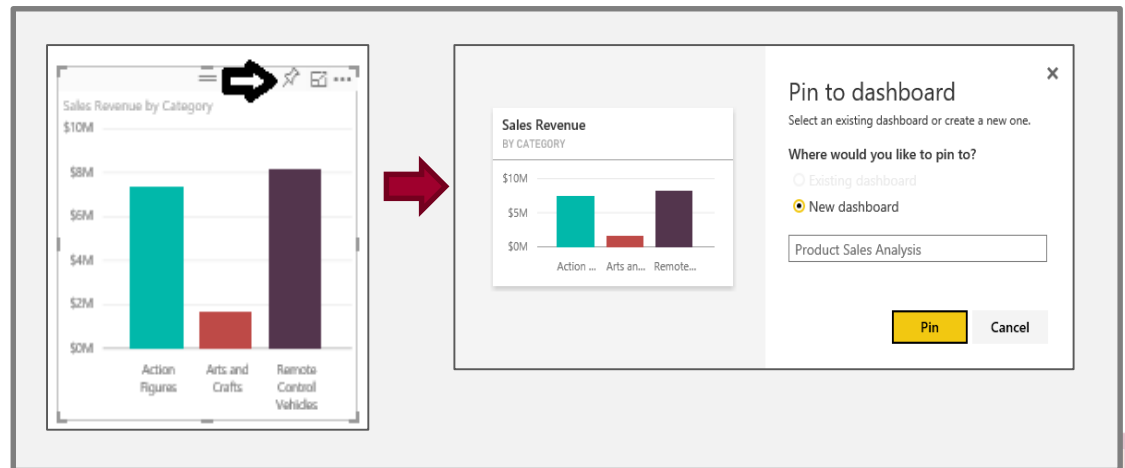
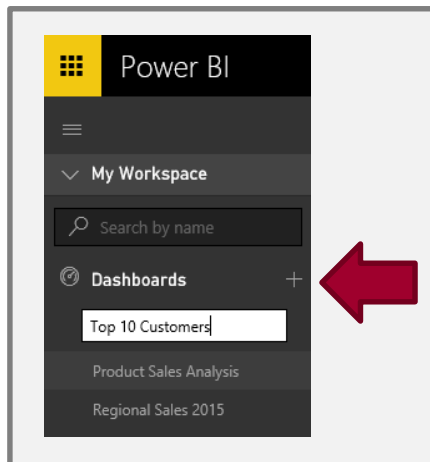
Dashboards in Power BI

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



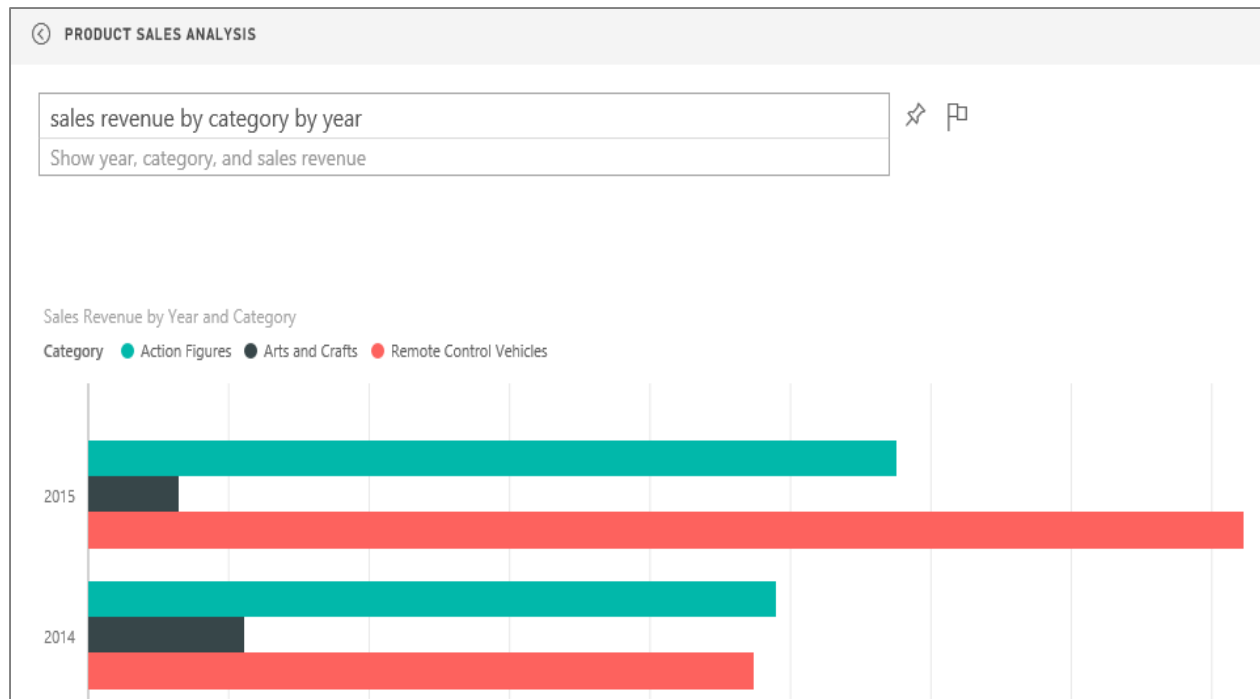
Creating Dashboards

- 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



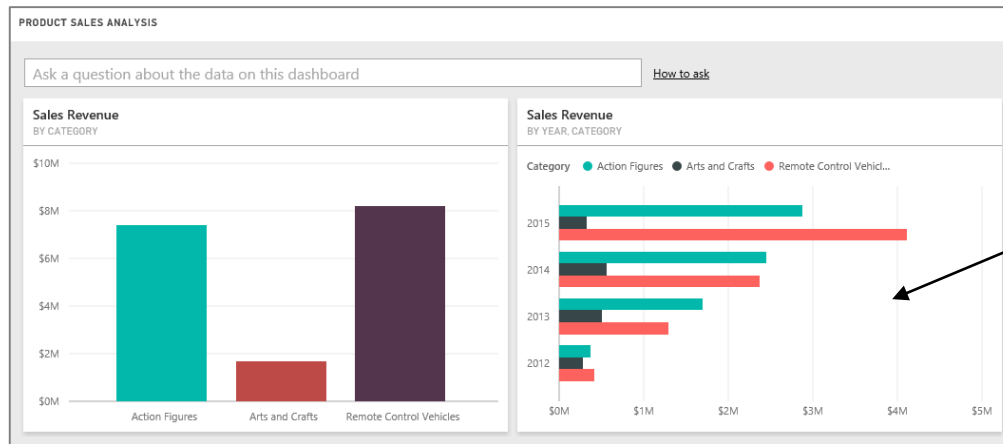
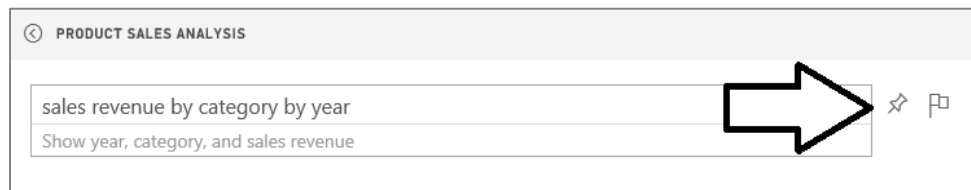
The Q&A Search Box

- Used to execute natural language queries
 - Queries are executed against underlying dataset 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

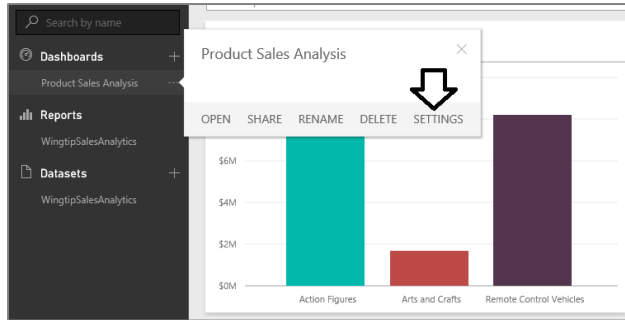
- Q&A search results can be pinned to dashboard
 - Allows users to easily save visuals from query results



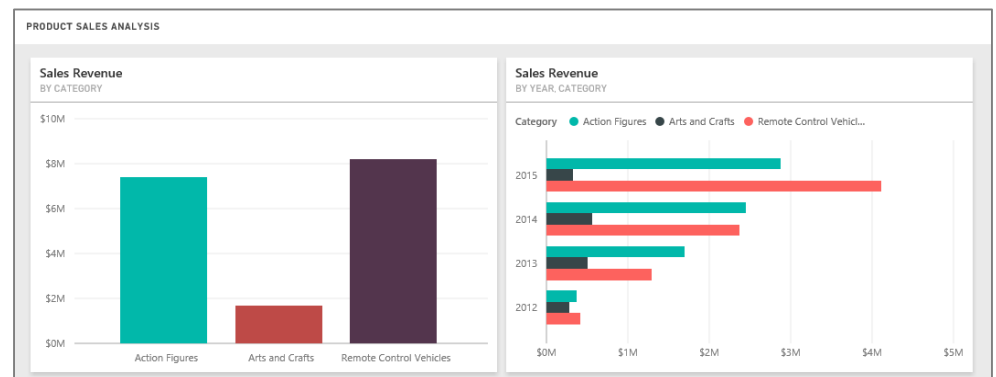
This tile was created from a visual on a report



Removing the Q&A Search Box

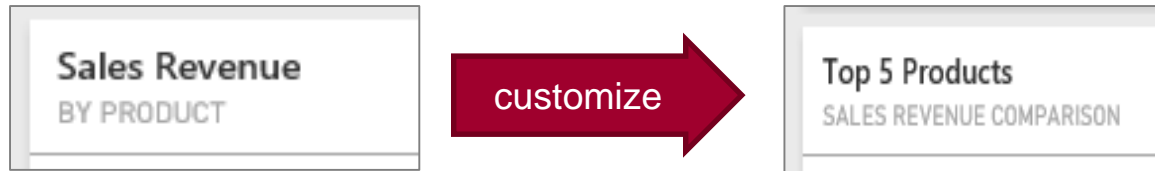


The screenshot shows the 'Settings' dialog box for 'Product Sales Analysis'. The 'Dashboards' tab is selected. The 'Q&A' section is expanded, showing a checkbox for 'Show the Q&A search box on this dashboard' which is currently unchecked. A black arrow points to this checkbox. Below the checkbox are 'Apply' and 'Discard' buttons.

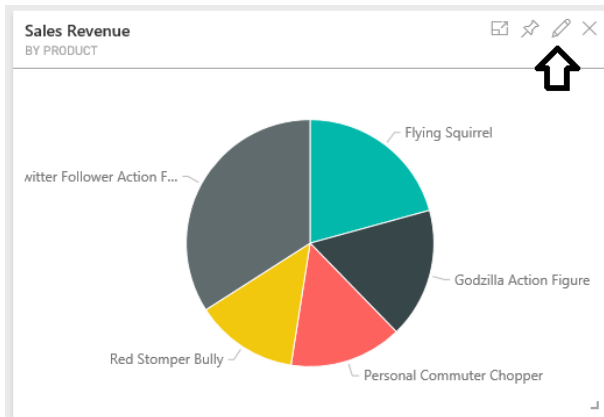


Modifying Tile Details

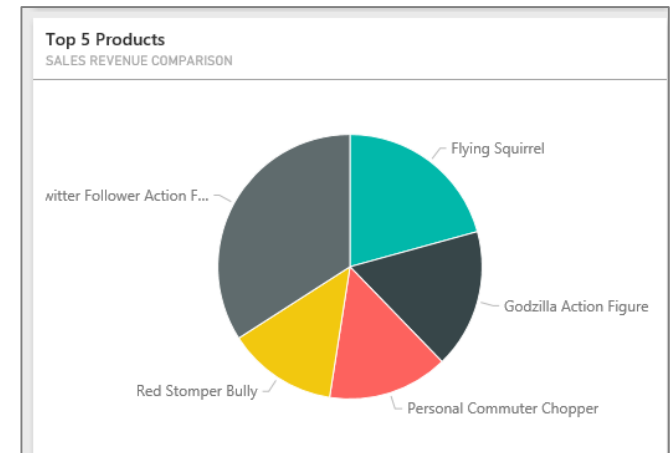
- You can customize Title and Subtitle of tile
 - Default title and subtitle doesn't always provide enough clarity



- Click on Edit title edit icon button



The "Tile details" dialog box is shown, allowing for the customization of the tile's title and subtitle. The "Title" field contains "Top 5 Products" and the "Subtitle" field contains "Sales Revenue Comparison". There is a "Restore default" link next to the subtitle field. Below these fields, there are two checkboxes: "Set custom link" and "Open in same tab", both of which are currently unchecked. At the bottom of the dialog are "Apply" and "Cancel" buttons.





DEMO

Creating a Dashboard

Agenda

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 - Deploying Dashboards using Content Packs
 - Accessing Dashboards using Mobile Devices

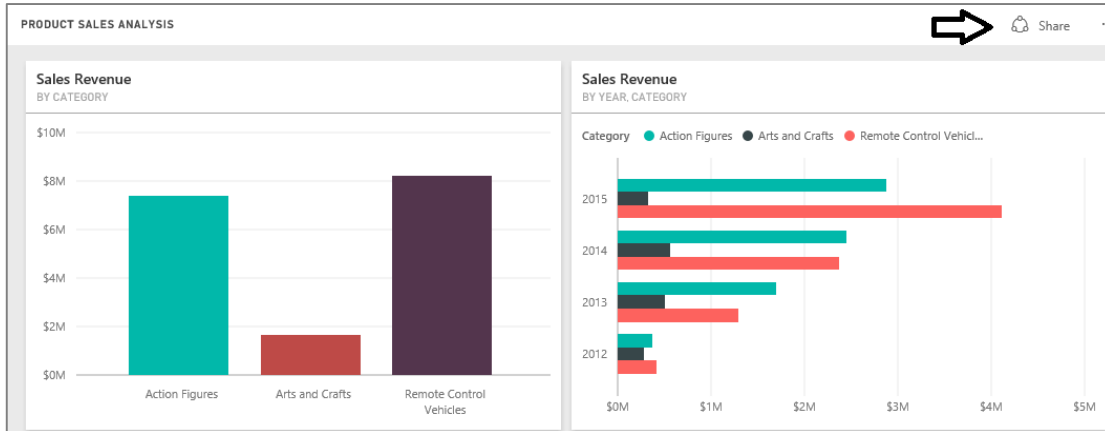


Sharing Dashboards

- There are two types of Power BI workspaces
 - Personal workspaces
 - Group Workspaces
- To deploy reports and dashboards from a personal workspace
 - Create one or more reports in your personal workspace
 - Create a dashboard and pin report tiles to it
 - Share dashboard with other users
 - Dashboard sharing involves accepting invitation
 - Dashboard owner can see who has accepted invitation
- Deploying reports and dashboards from group workspace
 - Group workspace created using Unified Group in Office 365 tenant
 - Allows team of authors to work on a single BI project
 - Users can be added with authoring permission or read-only permissions



Sharing a Dashboard



Share dashboard

Not shared with anyone

Invite

Shared with

Andy Enduser X |

Recipients will have access to the same data and reports as you have in this dashboard. [Learn more](#)

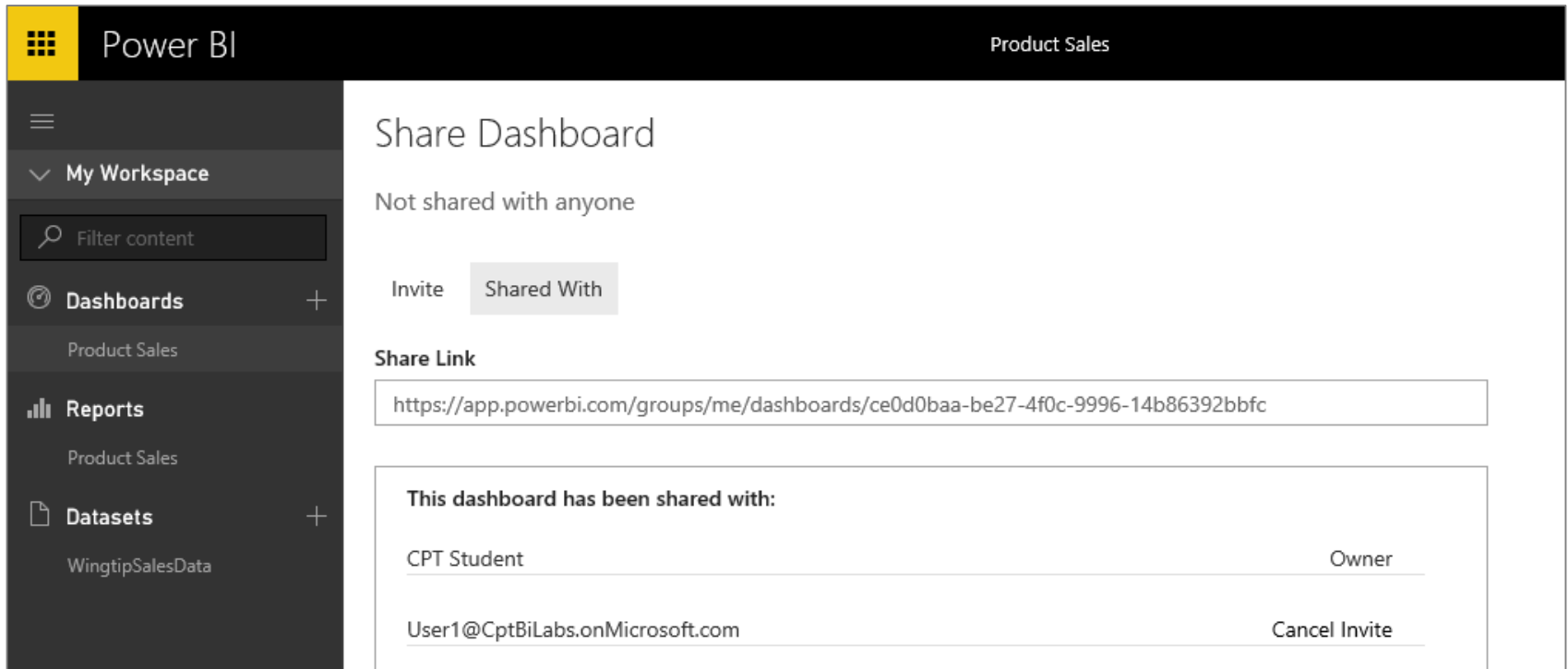
☒ Allow recipients to share your dashboard

☒ Send email notification to recipients

Share



Viewing the Shared With List

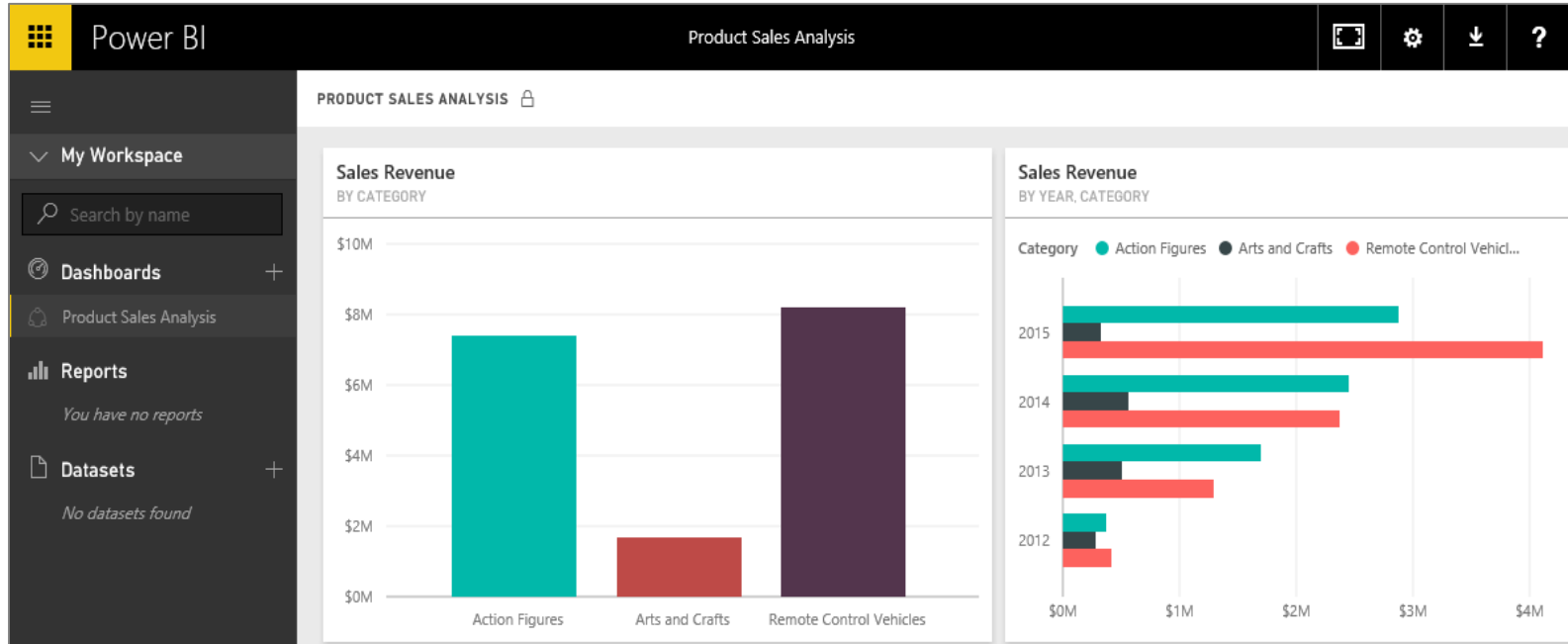
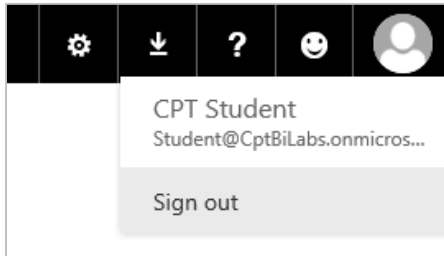


The screenshot shows the Power BI web interface. The top navigation bar includes the Power BI logo and the text 'Power BI' on the left, and 'Product Sales' on the right. The left sidebar contains a menu with 'My Workspace', 'Filter content', 'Dashboards' (with a '+' icon), 'Reports', and 'Datasets' (with a '+' icon). Under 'Dashboards', 'Product Sales' is selected. Under 'Reports', 'Product Sales' is listed. Under 'Datasets', 'WingtipSalesData' is listed. The main content area is titled 'Share Dashboard' and shows 'Not shared with anyone'. Below this, there are two tabs: 'Invite' and 'Shared With' (which is active). Under the 'Shared With' tab, there is a 'Share Link' section with a text box containing the URL: <https://app.powerbi.com/groups/me/dashboards/ce0d0baa-be27-4f0c-9996-14b86392bbfc>. Below the link, there is a section titled 'This dashboard has been shared with:' containing a table with two rows of shared users.

This dashboard has been shared with:	
CPT Student	Owner
User1@CptBiLabs.onMicrosoft.com	Cancel Invite



Testing the Dashboard as a Consumer



Drilling Down Into Reports

Year

☐ 2012

☐ 2013

☐ 2014

☒ 2015

Category

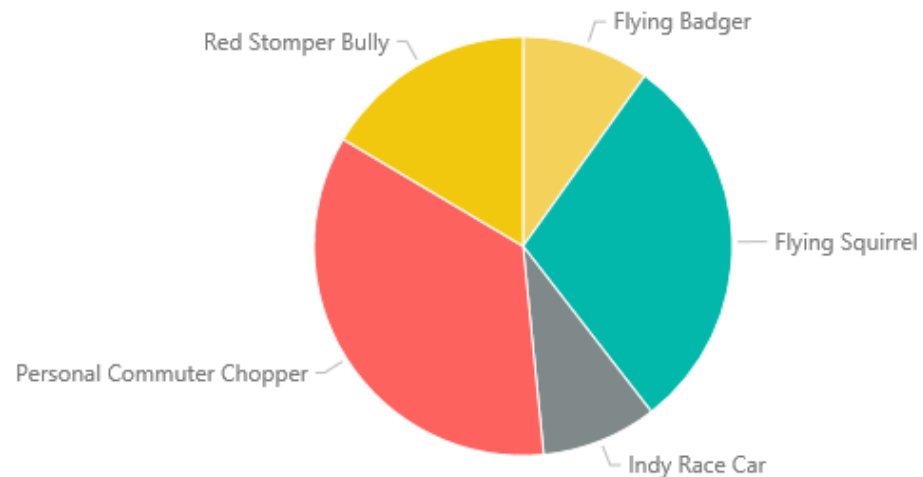
☐ Action Figures

☐ Arts and Crafts

☒ Remote Control Vehicles

Product Rank	Product	Sales Revenue
1	Personal Commuter Chopper	\$1,191,804
2	Flying Squirrel	\$1,005,531
3	Red Stomper Bully	\$559,646
4	Flying Badger	\$335,763
5	Indy Race Car	\$303,499

Sales Revenue by Product





DEMO

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Creating a Content Pack

Power BI

Regional Sales 2015

2015 Sales Revenue
FOR ALL STATES IN US
\$7.31M

2015 Units Sold
FOR ALL STATES IN US
1.60M

2015 Customer Count
FOR ALL STATES IN US
15.24K

Power BI

- Manage personal storage
7 MB of 10 GB used
- Create content pack
- View content pack
- Manage gateways

Create content pack

Choose who will have access to this content pack:

☐ Specific groups ☒ My entire organization

Title

Regional Sales 2015

Description

This is my first content pack. Isn't it awesome.

Upload an image or company logo

Image size: 45 KB or less, 4:3 aspect ratio, JPG or PNG format

[Use default](#)

Select items to publish

Dashboards	Reports	Datasets
<input type="checkbox"/> WingtipSalesAnalytics.p...	<input checked="" type="checkbox"/> Regional Sales 2015	<input checked="" type="checkbox"/> WingtipSalesAnalytics
<input checked="" type="checkbox"/> Regional Sales 2015	<input type="checkbox"/> WingtipSalesAnalytics	

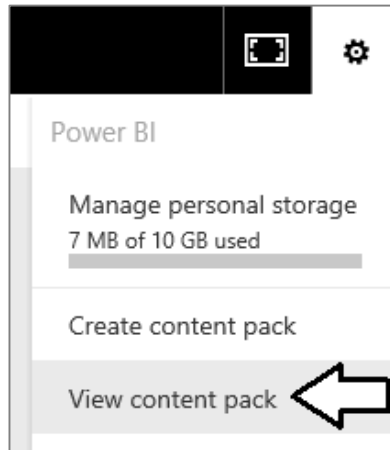
The content pack will be available in your organization's content gallery. [Learn more](#)

Publish Cancel



Viewing and Managing Content Packs

- You can view existing content packs



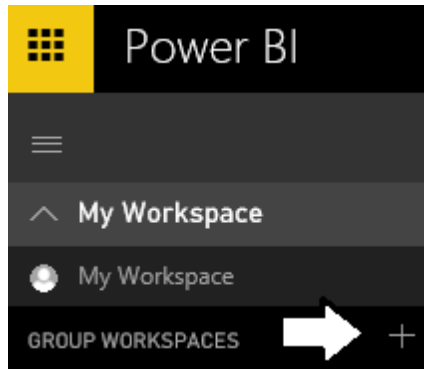
- You can delete a content pack or edit its properties

Name	Published To	Date published	Actions
Regional Sales 2015	My Organization	Dec 02, 2015	Edit Delete



Creating a Group Workspace

- Group Workspace can be created in Power BI service
 - This action created Office 365 unified group behind the scenes
 - Allow for shared authoring scenarios

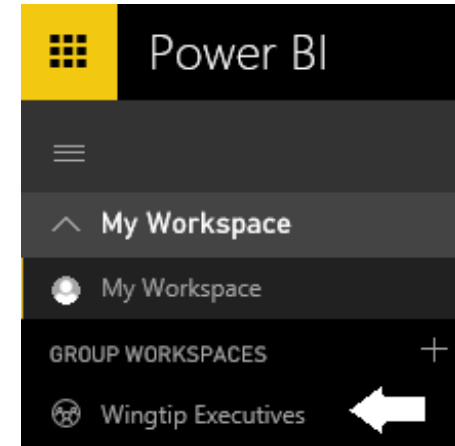


The 'Create a group' dialog box contains the following fields and options:

- Name your group:** A text input field containing 'Wingtip Executives'.
- Group ID:** A text input field containing 'wingtipexecutives', with a green 'Available' status indicator and an edit icon.
- Privacy:** A dropdown menu set to 'Private - Only approved members can see what's inside'.
- Members can only view Power BI content:** A dropdown menu.

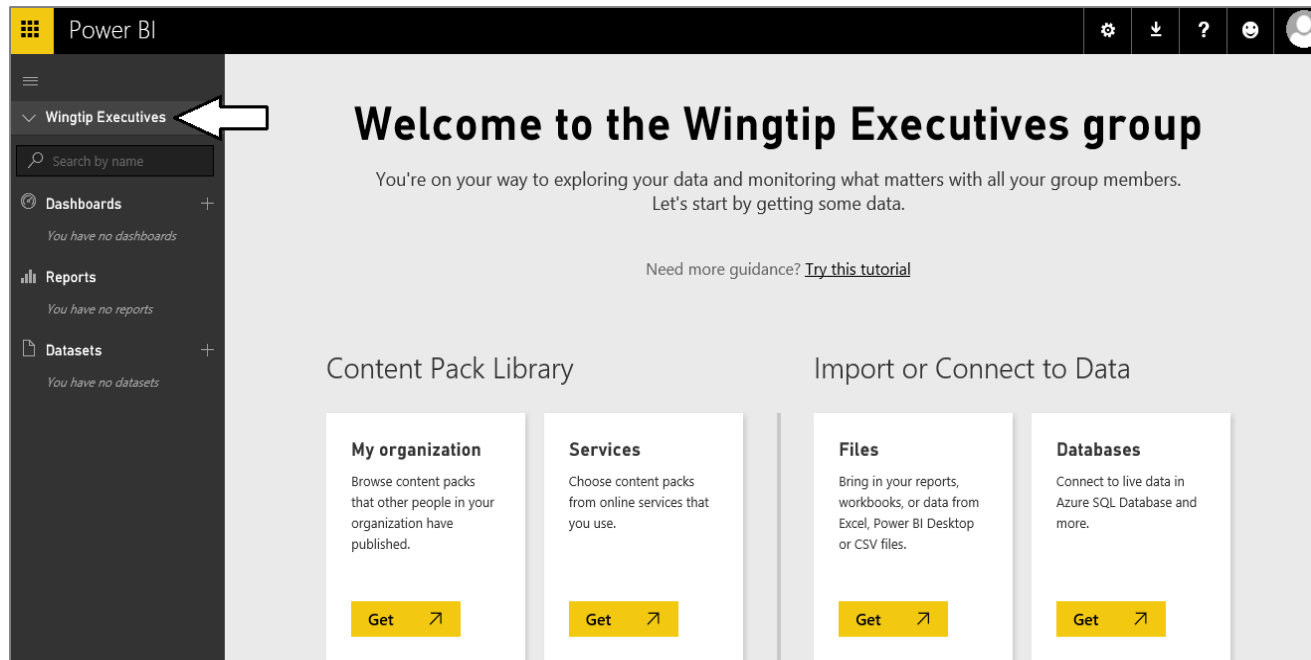
The 'Add group members' dialog box includes:

- Add group members:** The title of the dialog.
- Enter email addresses:** A text input field.
- Add:** A yellow button to add members.
- Members list:** A list showing 'user1@cptpowerbilabs.onmicrosoft.com' with a 'Member' role and a close (X) icon.

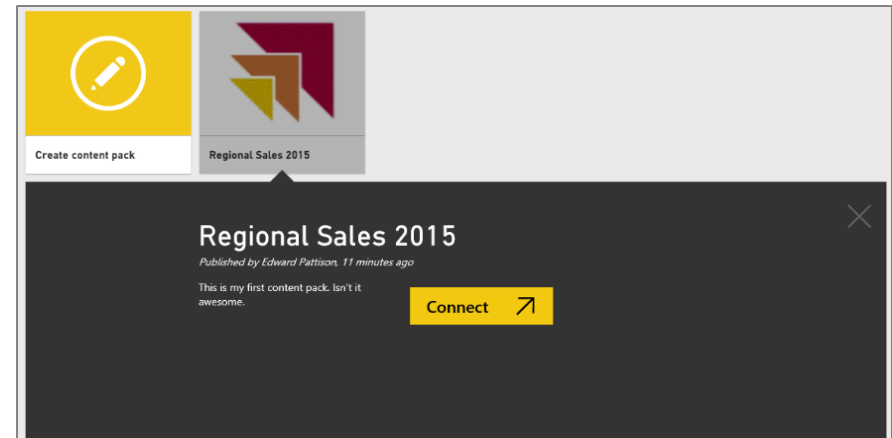
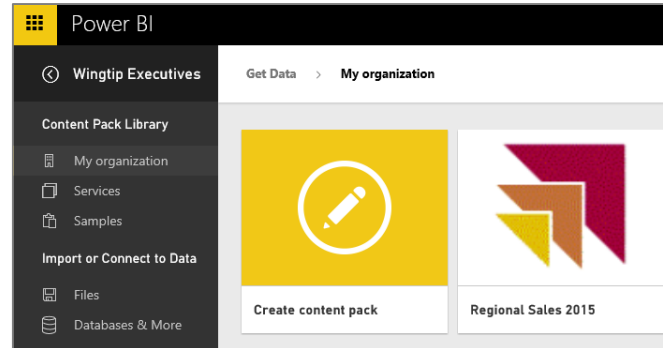
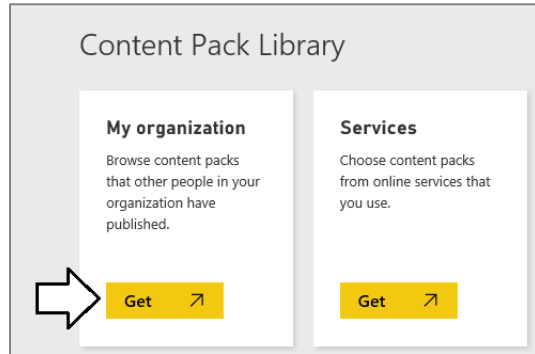


Switching Over to the Group Workspace

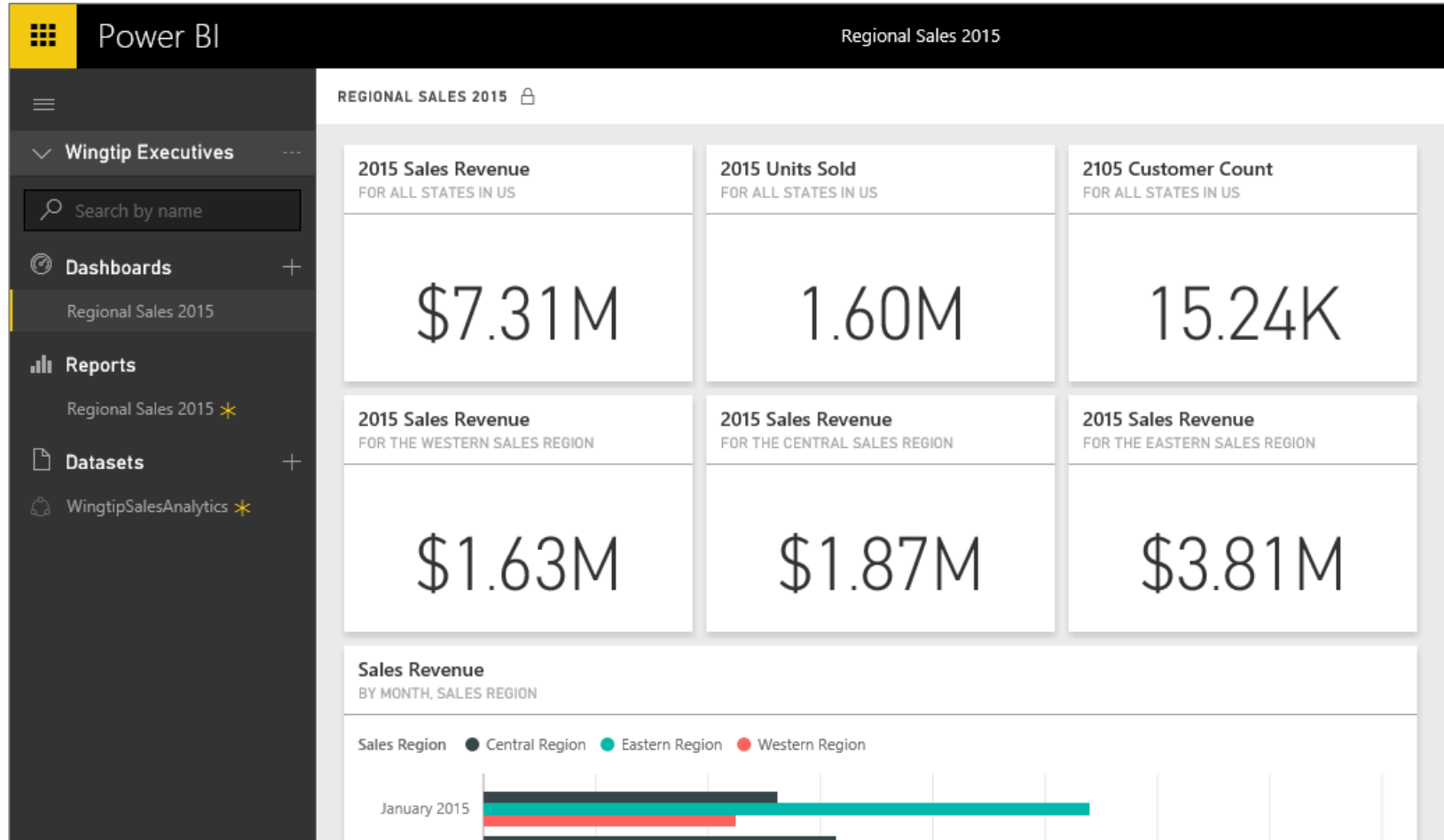
- Group workspace has its own collections
 - Dashboards
 - Reports
 - Datasets



Activating a Content Pack



Content Pack Activates Dashboard





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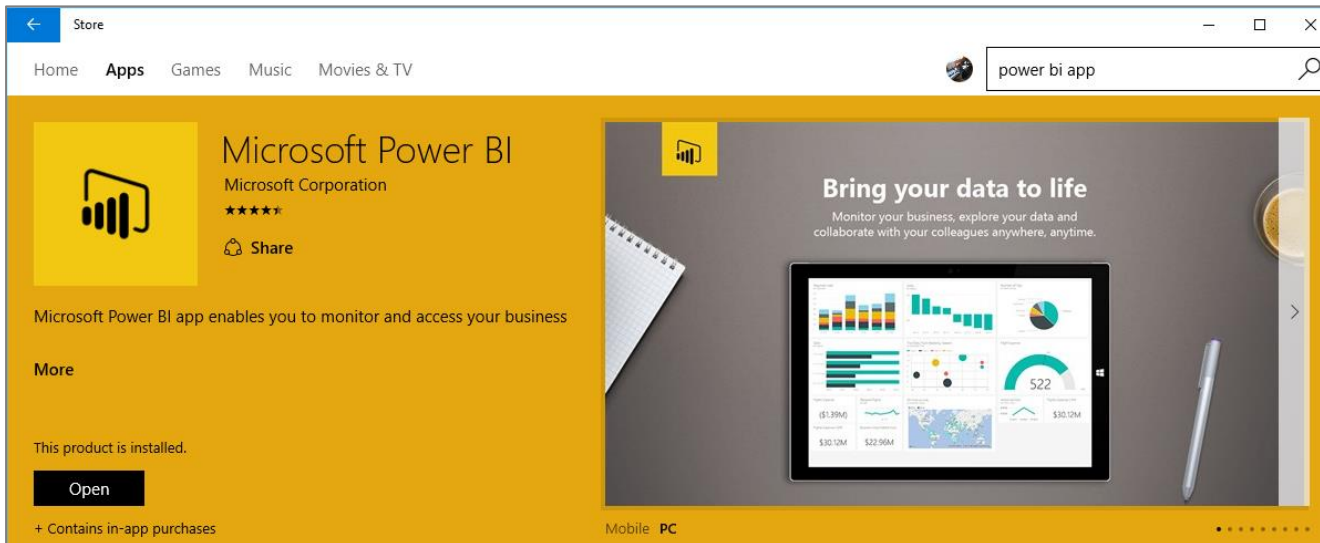
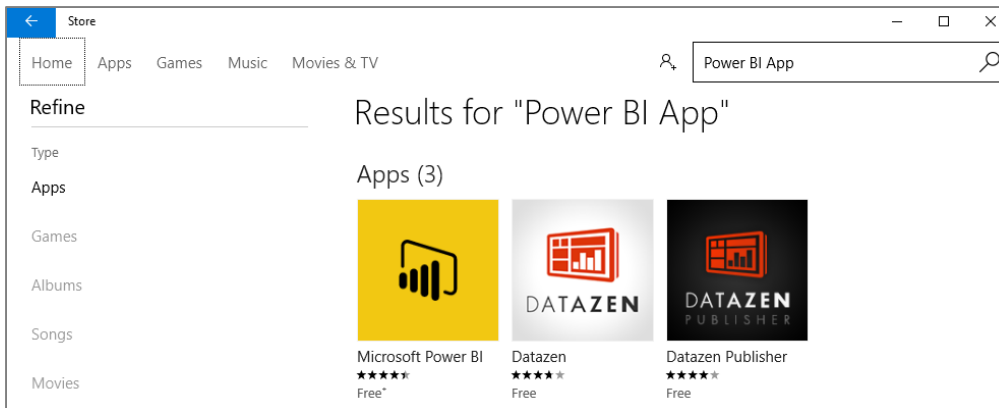
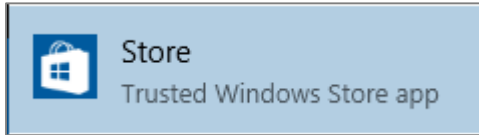
Deploying a Dashboard using an Organizational Content Pack

Agenda

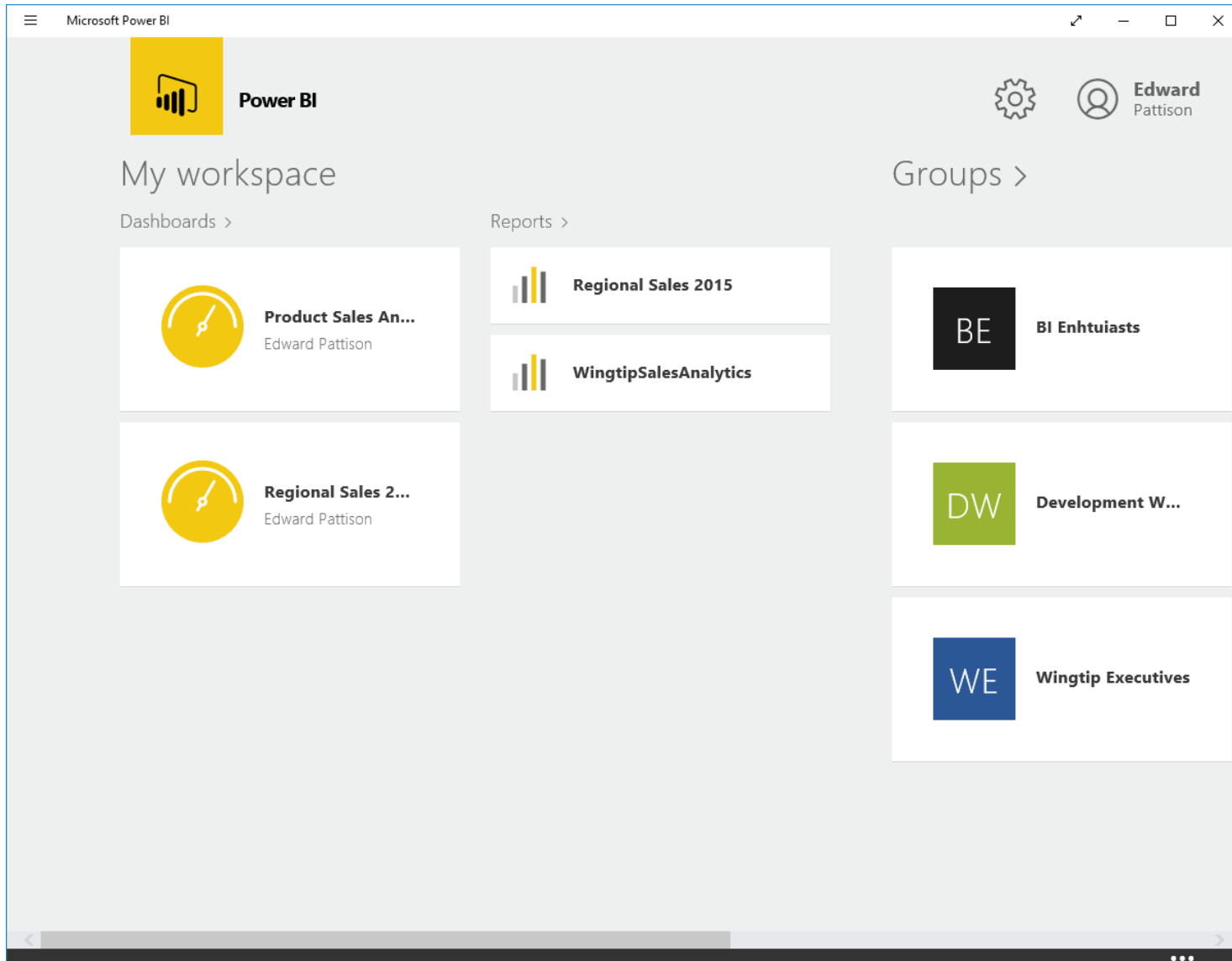
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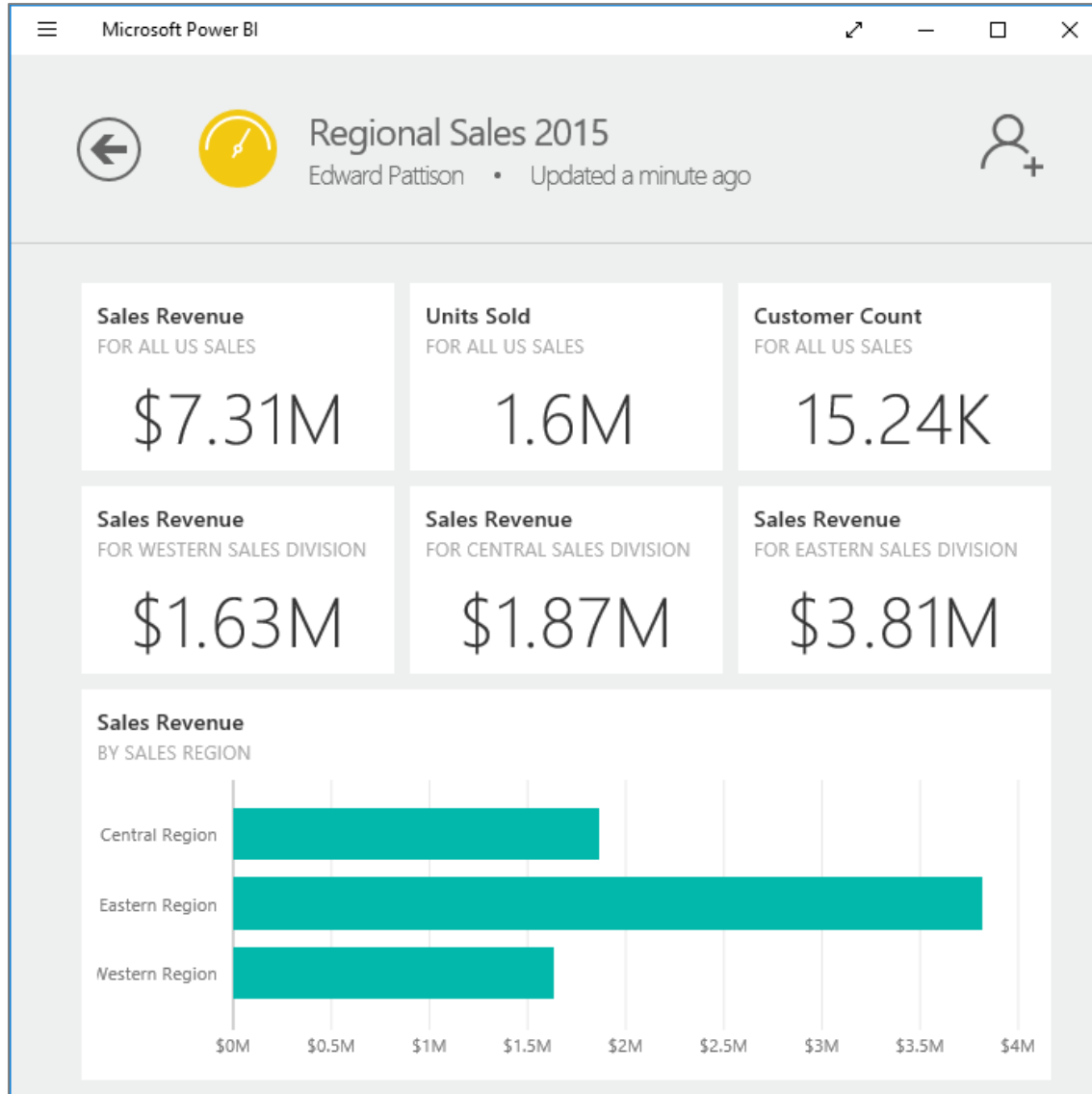
Discovering and Installing the Power BI App



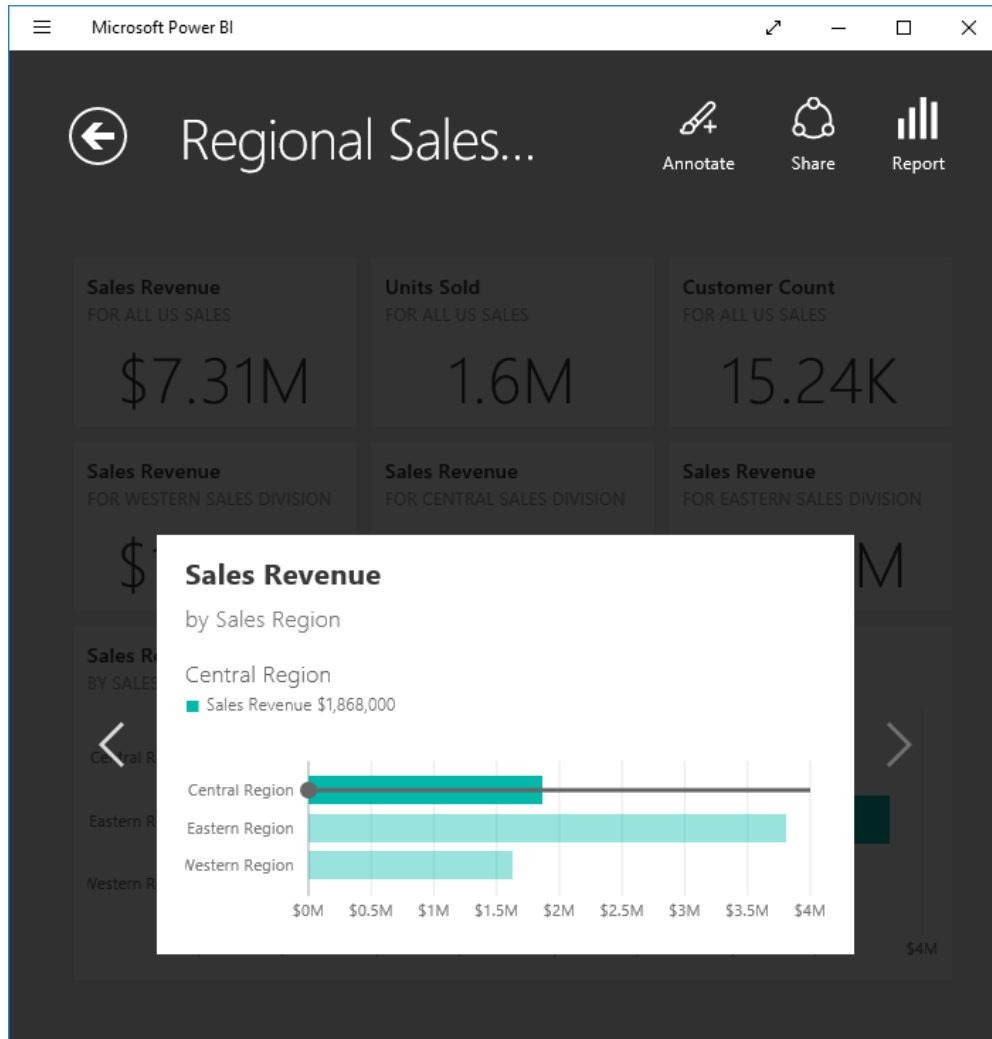
Launching the Power BI App



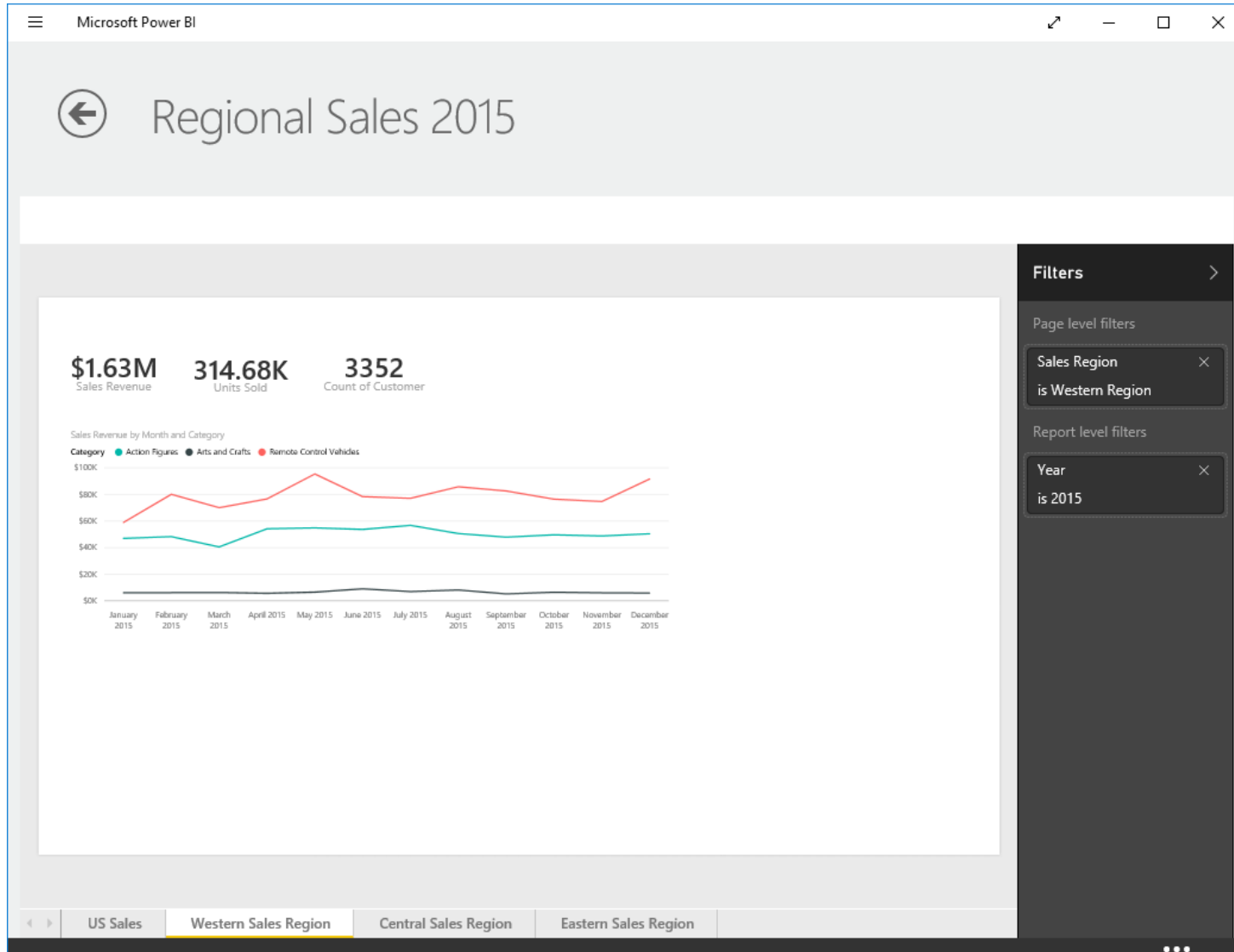
Viewing a Dashboard



Drilling Down on a Tile



Viewing a Report





DEMO

**Viewing Dashboards and Reports
using the Power BI App for Windows**

Summary

- ✓ Creating Dashboards
- ✓ Sharing Dashboards
- ✓ Deploying Dashboards using Content Packs
- ✓ Accessing Dashboards using Mobile Devices

