

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



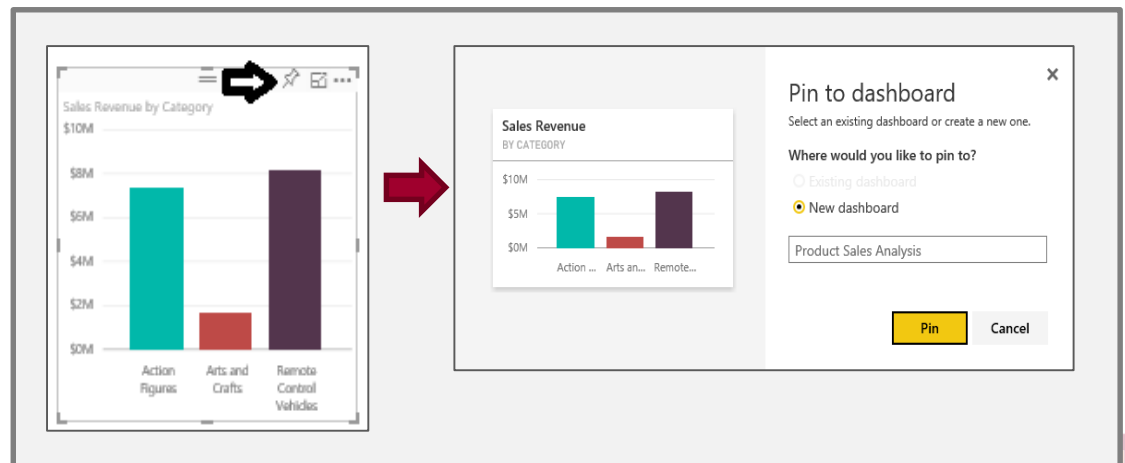
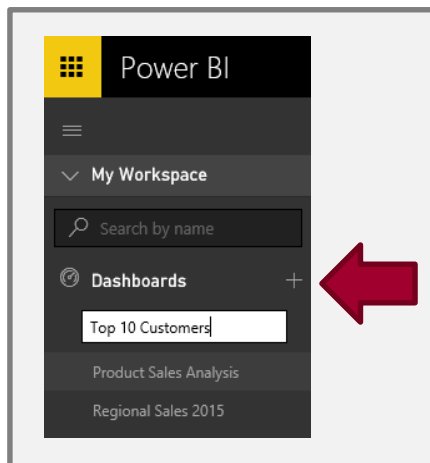
Dashboards in Power BI

- 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



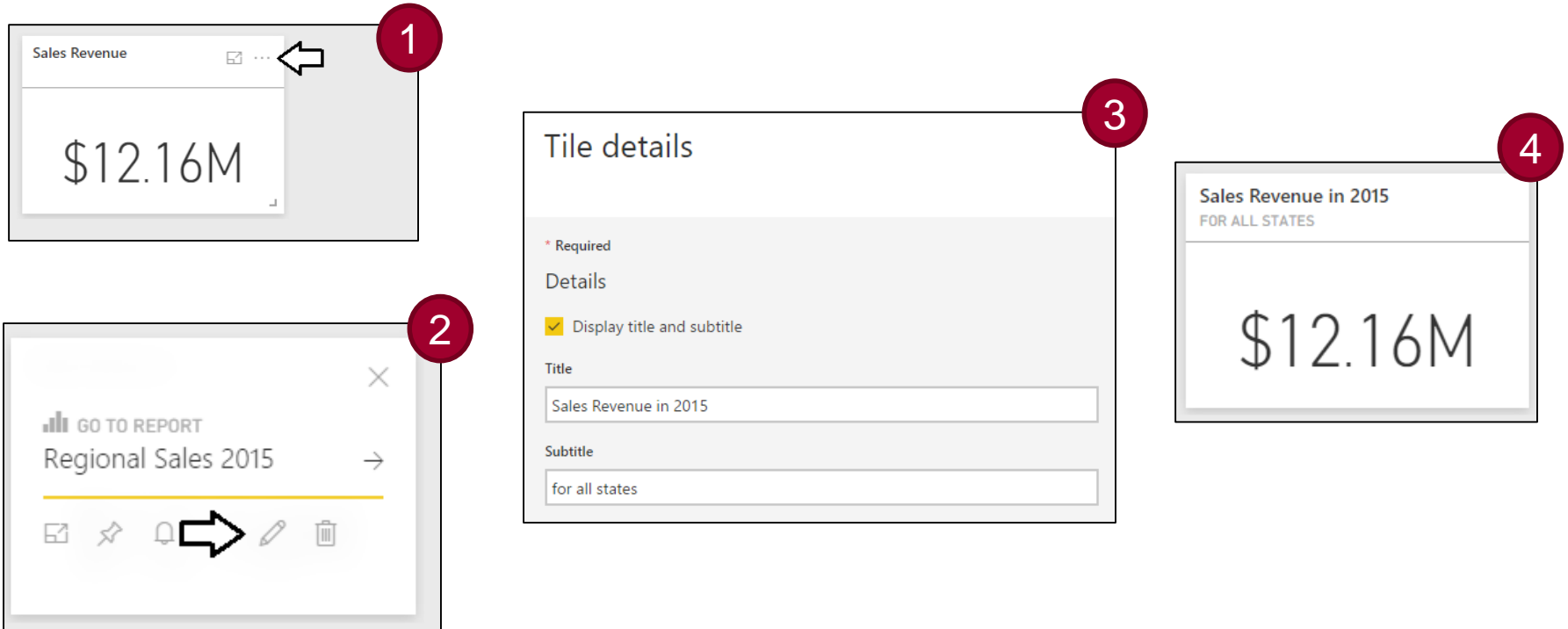
Creating Dashboards

- 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





DEMO

Creating a Dashboard

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



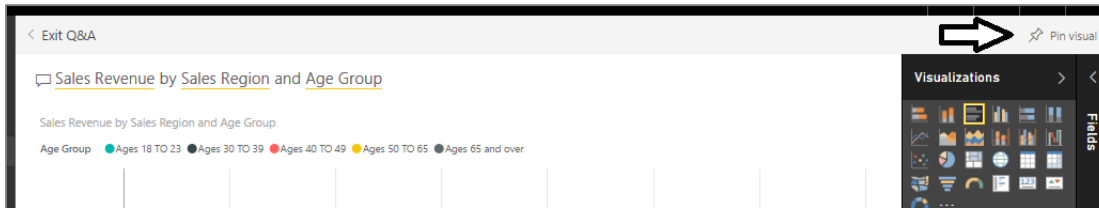
The Q&A Search Box

- 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



DEMO

Working with the Q&A Search Box

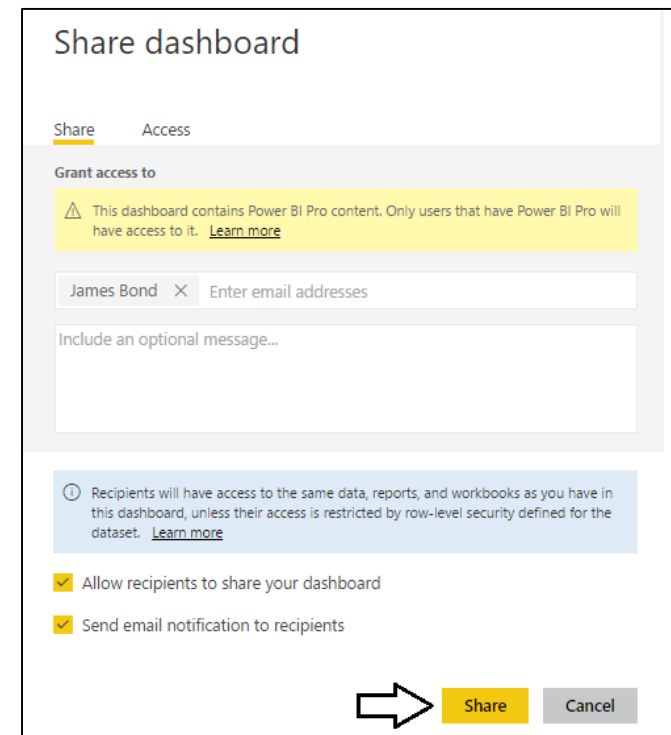
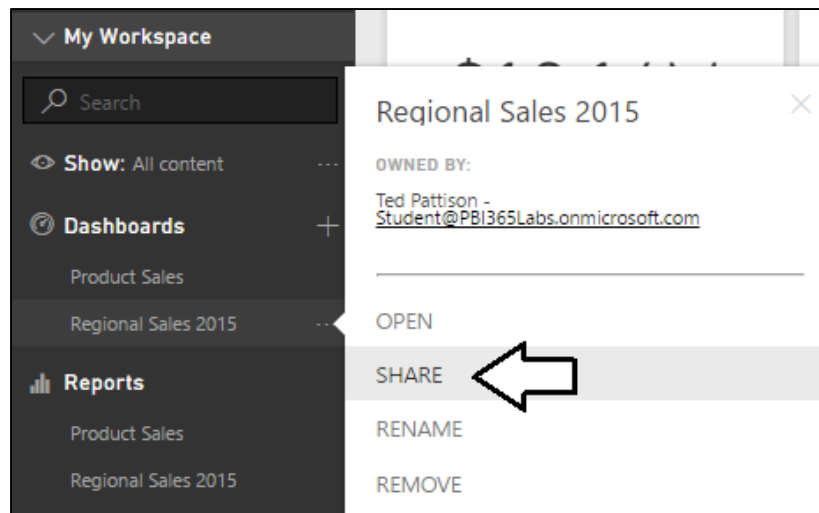
Agenda

- ✓ 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



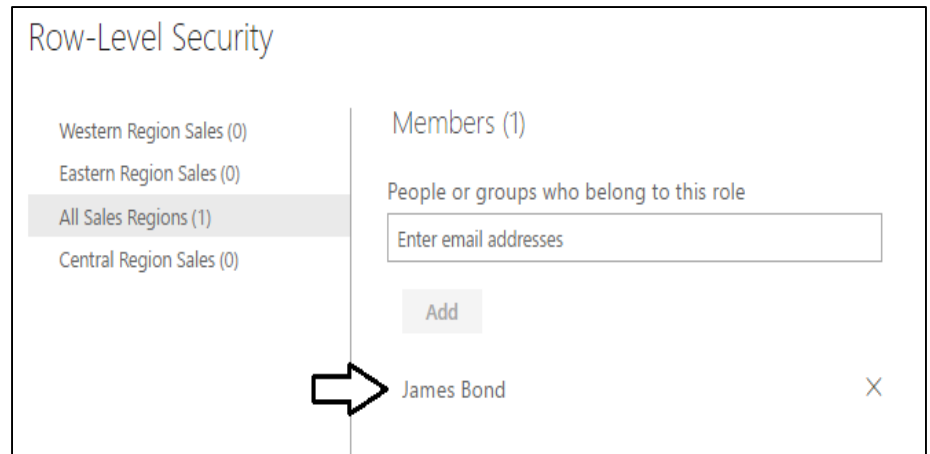
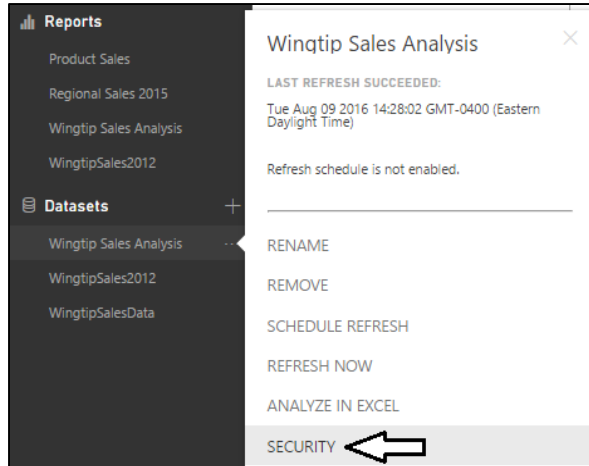
Sharing Dashboards

- 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



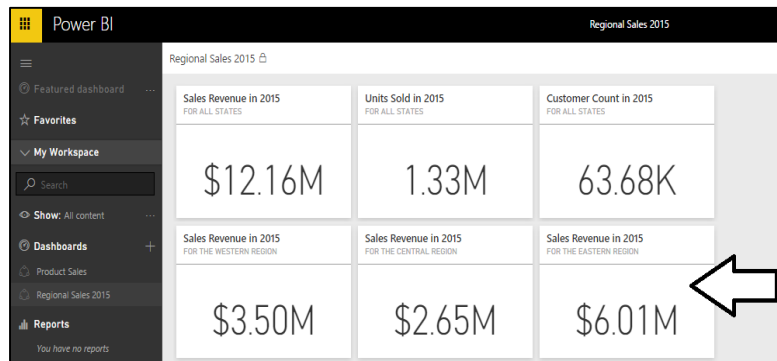
Configuring Row-level Security

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

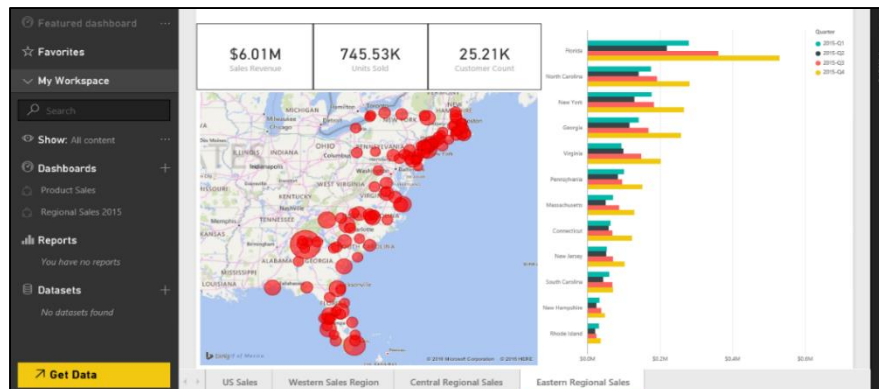


Testing Dashboard Sharing

- 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





DEMO

Sharing a Dashboard

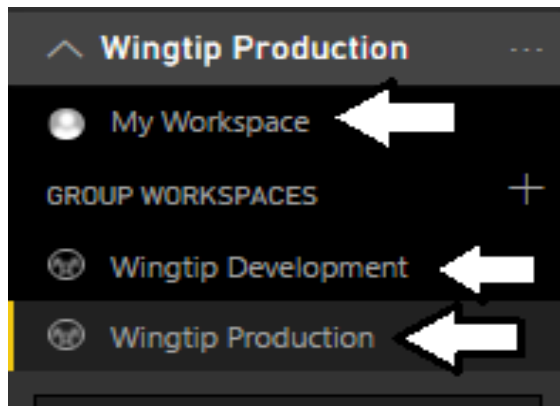
Agenda

- ✓ 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



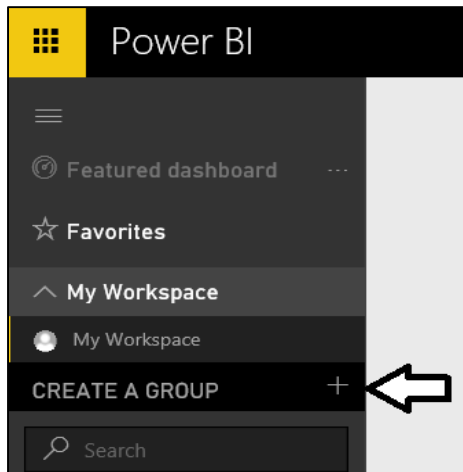
Understanding Group Workspaces

- 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**

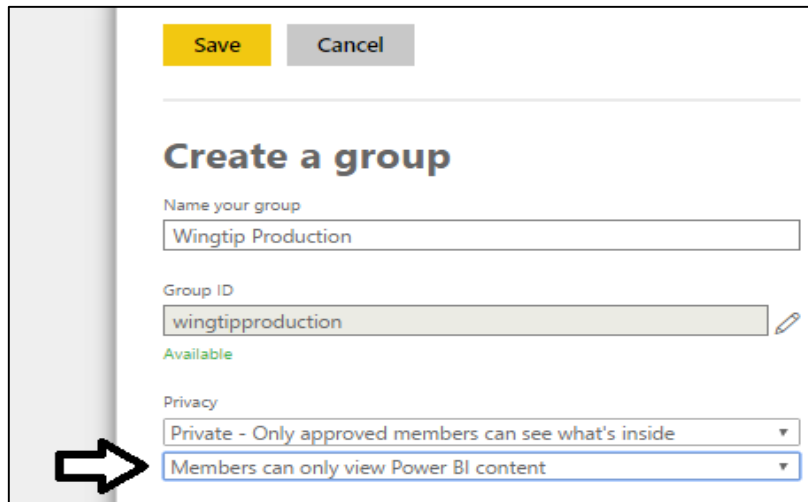


A screenshot of the 'Create a group' form in Power BI. The form has a white background with a grey sidebar on the left. At the top, there are 'Save' and 'Cancel' buttons. The main heading is 'Create a group'. Below this, there are several input fields and dropdown menus: 'Name your group' with the text 'Wingtip Development'; 'Group ID' with the text 'wingtipdevelopment' and a green 'Available' status; 'Privacy' with a dropdown menu showing 'Private - Only approved members can see what's inside'; and another dropdown menu showing 'Members can edit Power BI content'. Below these is a section for 'Add group members' with a text input field for 'Enter email addresses' and an 'Add' button. A white arrow points to the 'Members can edit Power BI content' dropdown menu.



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

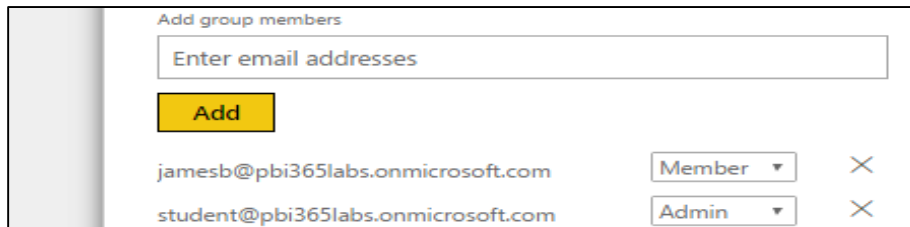
wingtipproduction Available

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	×



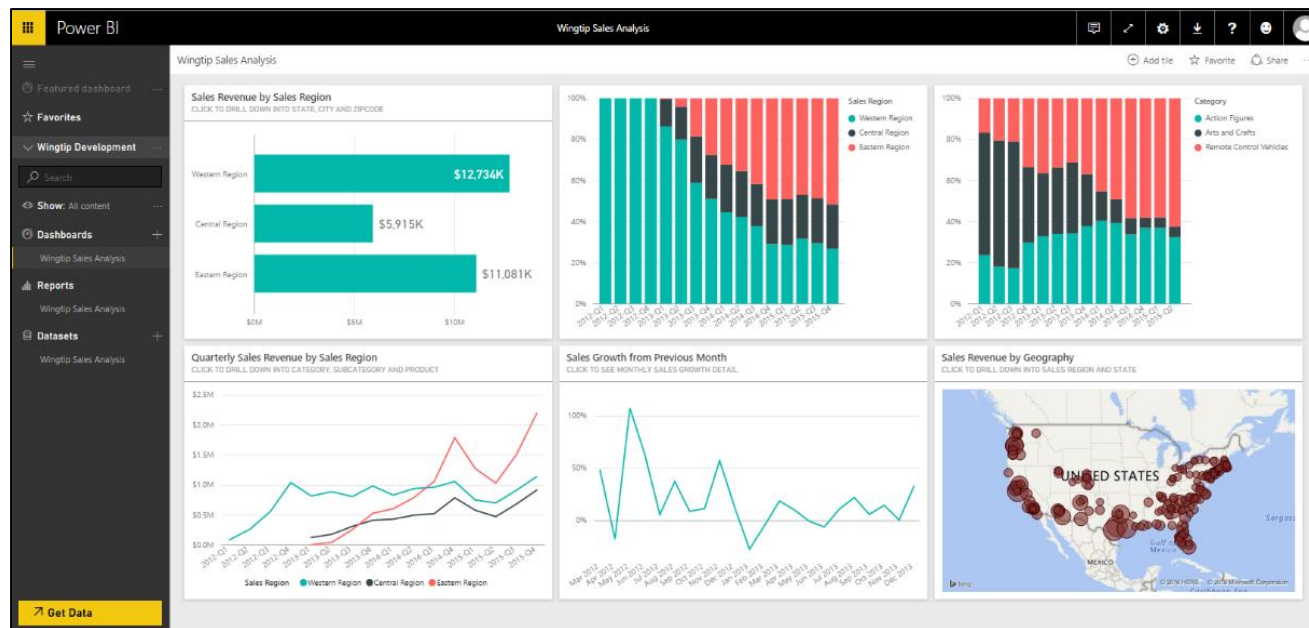
Agenda

- ✓ 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



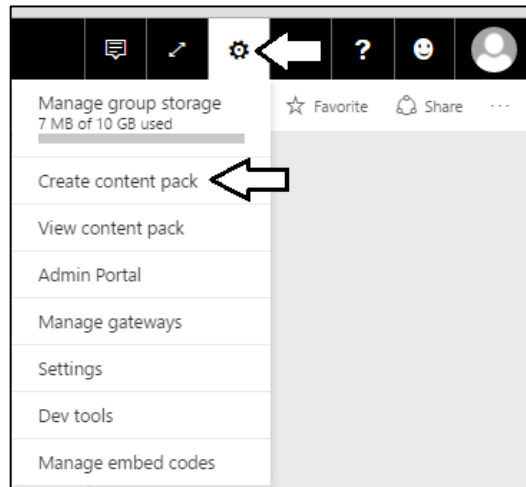
Building Solutions in a Development Workspace

- 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 interface. The form has a title field with 'Wingtip Sales Analysis' and a description field with 'The content pack provides analysis of Wingtip sales revenue figures'. Below the form 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'.

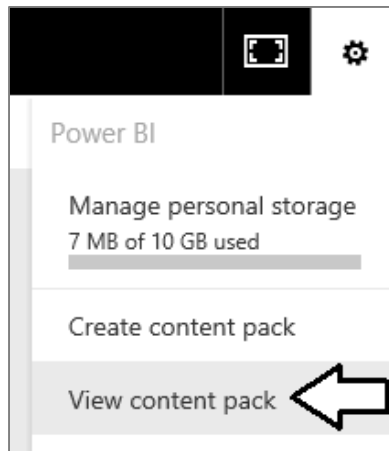
A screenshot of the 'Select items to publish' section. It is divided into three columns: 'Dashboards', 'Reports', and 'Datasets'. Each column has a checkbox and the text 'Wingtip Sales Analysis'. The 'Dashboards' checkbox is checked.

Dashboards	Reports	Datasets
<input checked="" type="checkbox"/> Wingtip Sales Analysis	<input type="checkbox"/> Wingtip Sales Analysis	<input type="checkbox"/> Wingtip Sales Analysis



Viewing Content Packs

- You can view/edit content pack in workspace

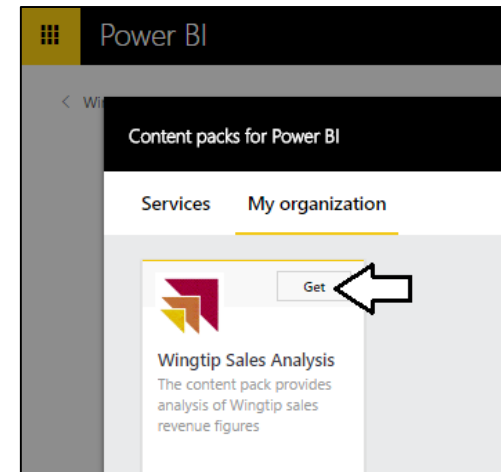
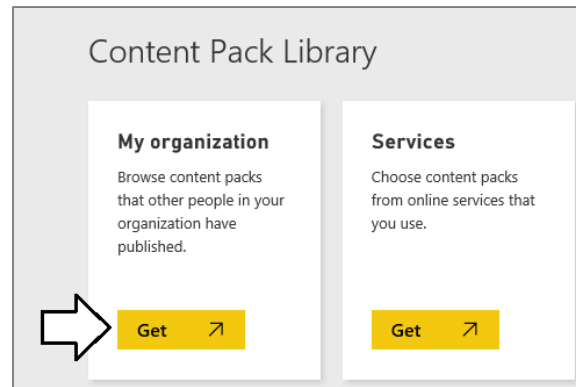
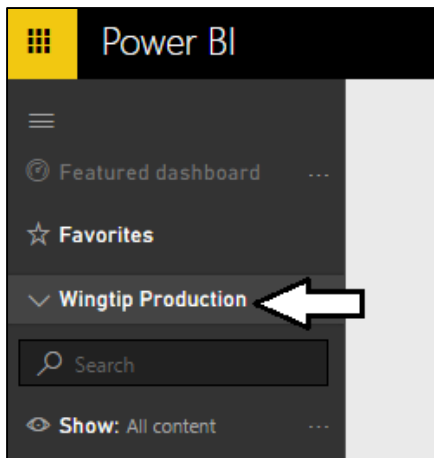


Wingtip Development			
Name	Published To	Date published	Actions
➡ Wingtip Sales Analysis	My Organization	Aug 09, 2016	Edit Delete



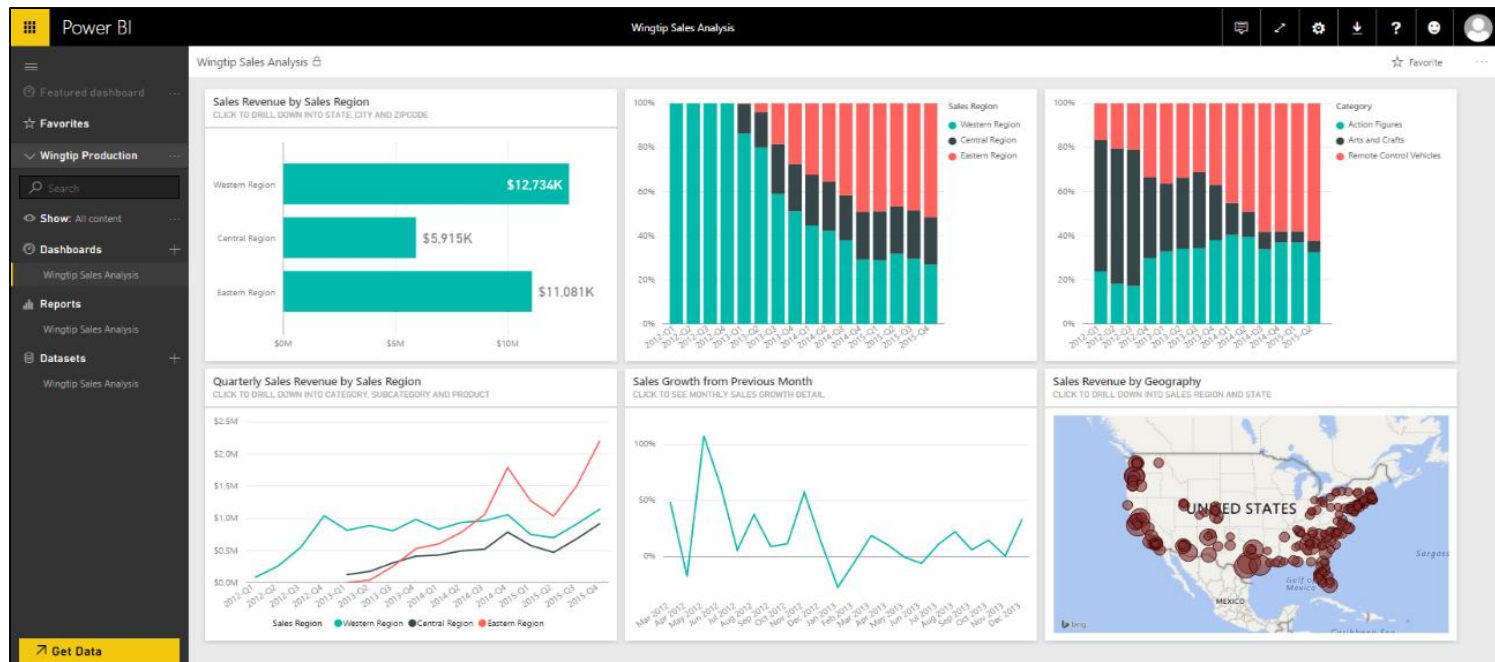
Deploying a Content Pack

- 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

- ✓ 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

