

# 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



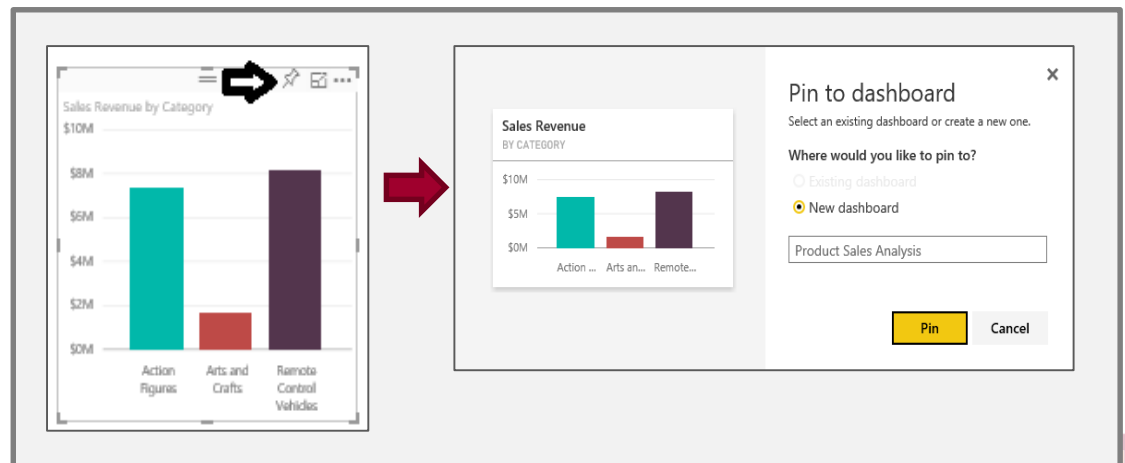
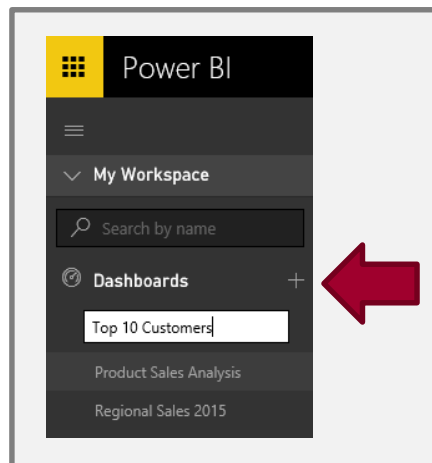
# Dashboards in Power BI

- 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



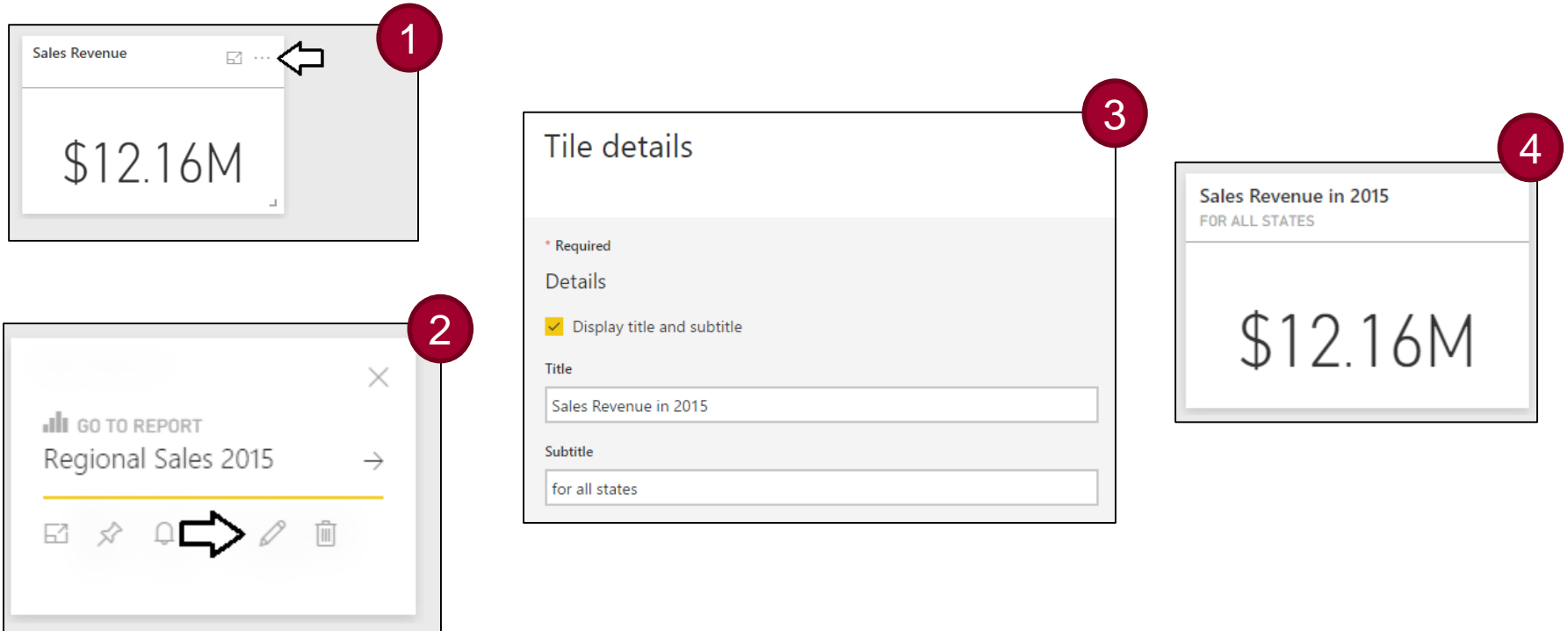
# Creating Dashboards

- 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

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# The Q&A Search Box

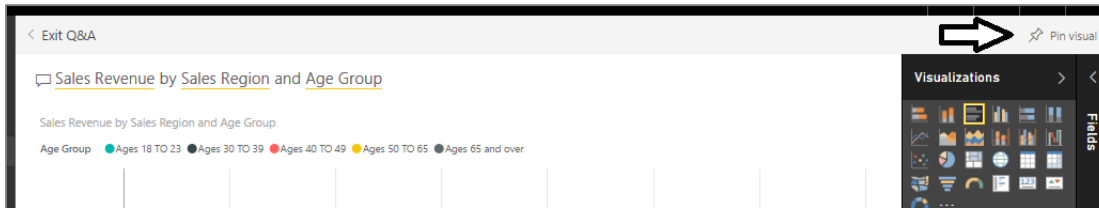
- Used to execute natural language queries
  - Queries are executed against underlying dataset(s) in workspace
  - Query results display using some type of Power BI visual
  - Power BI service selects Visualization type based on result type





# 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



**DEMO**

## **Working with the Q&A Search Box**

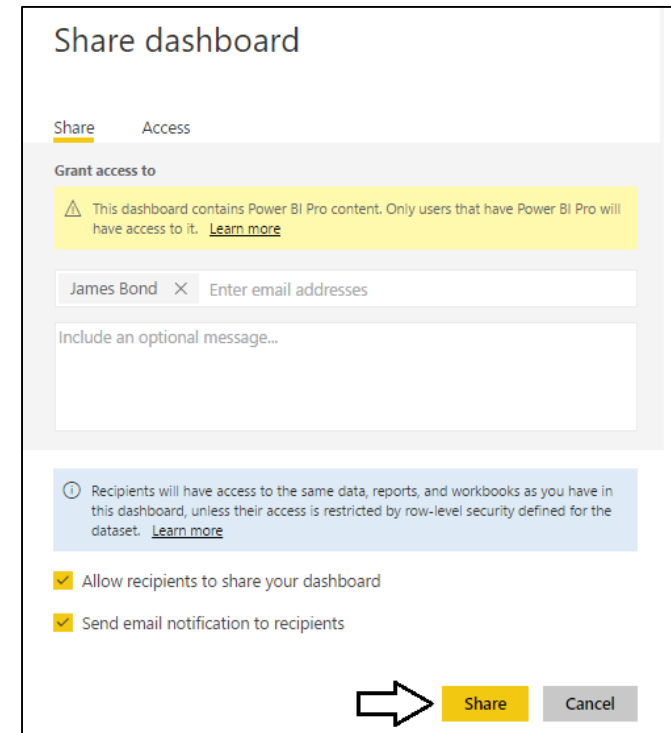
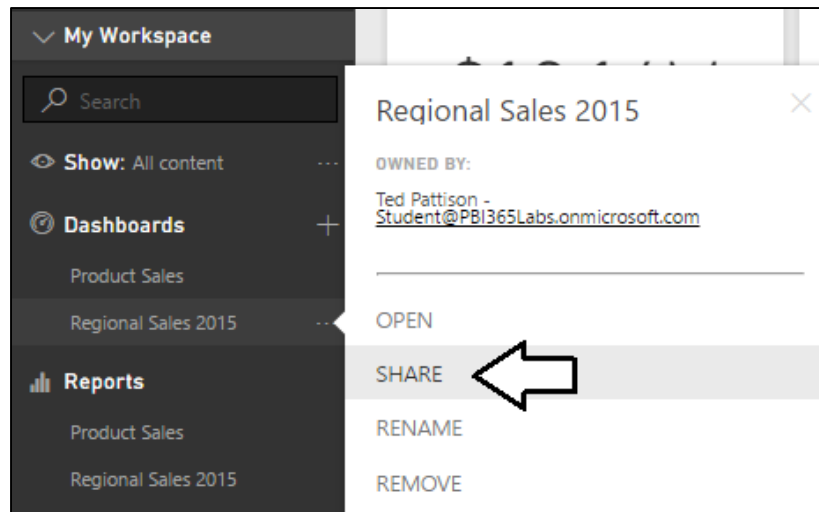
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# Sharing Dashboards

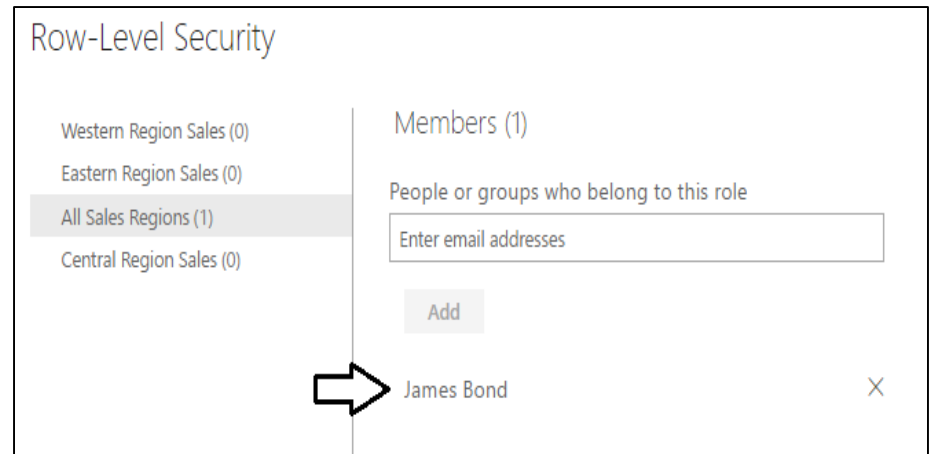
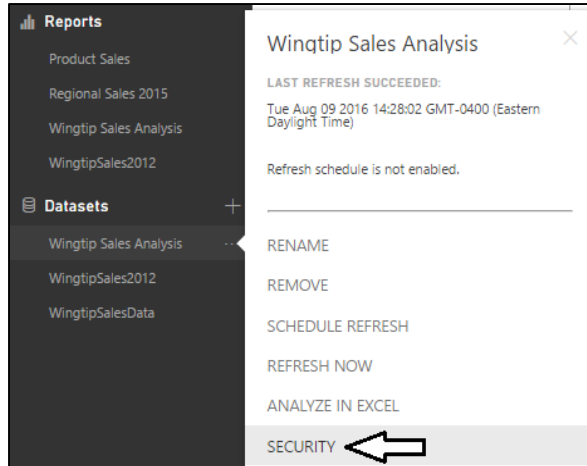
- Used to make dashboard accessible to other users
  - Other users must be within same Office 365 organization
  - Sharing dashboard provides indirect access to reports and datasets
  - Does not require Power BI Pro license





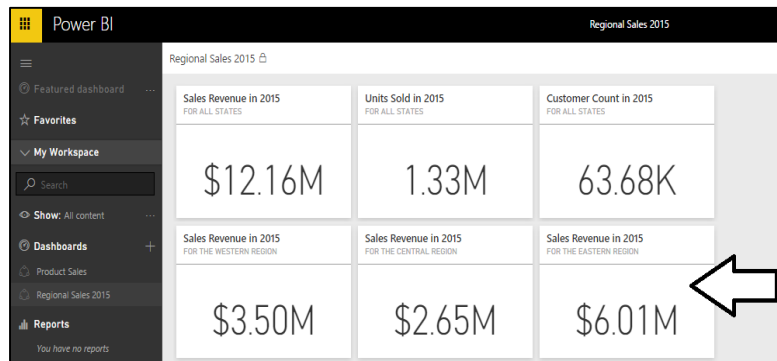
# Configuring Row-level Security

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

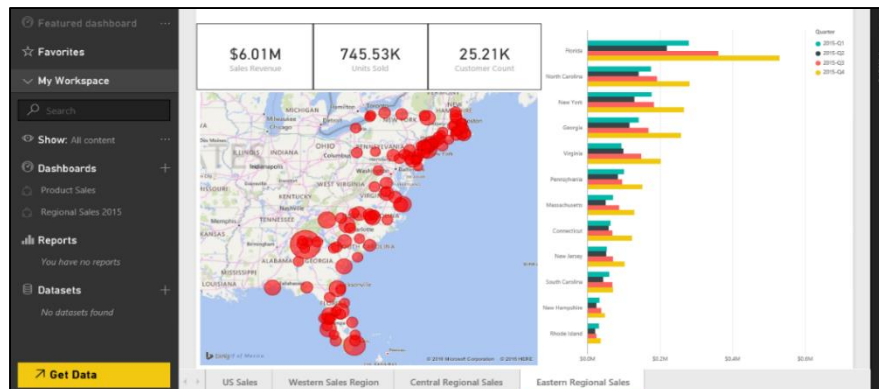


# Testing Dashboard Sharing

- 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





**DEMO**

## Sharing a Dashboard

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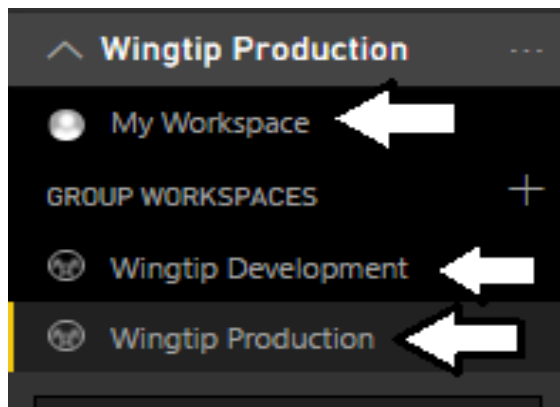
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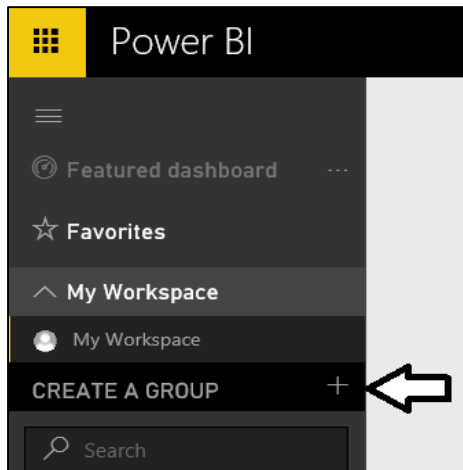
# Understanding Group Workspaces

- 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**

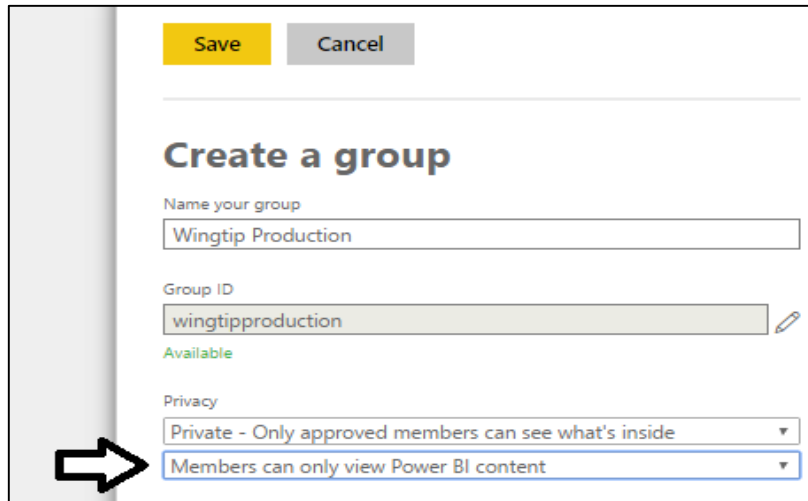


A screenshot of the 'Create a group' form in Power BI. The form has a yellow 'Save' button and a grey 'Cancel' button at the top. The title is 'Create a group'. Below the title, there are several fields: 'Name your group' with the value 'Wingtip Development', 'Group ID' with the value 'wingtipdevelopment' and a green 'Available' status, 'Privacy' set to 'Private - Only approved members can see what's inside', and a dropdown menu for 'Members can edit Power BI content'. A white arrow points to this dropdown menu. At the bottom, there is a field for 'Add group members' with the placeholder text 'Enter email addresses' and a yellow 'Add' button.



# Creating Group Workspaces for Production

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



Save Cancel

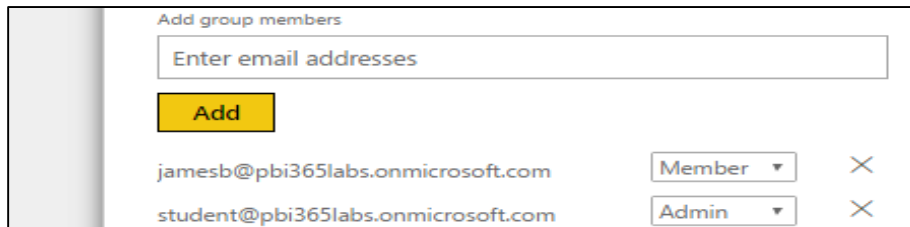
### Create a group

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	X
student@pbi365labs.onmicrosoft.com	Admin	X



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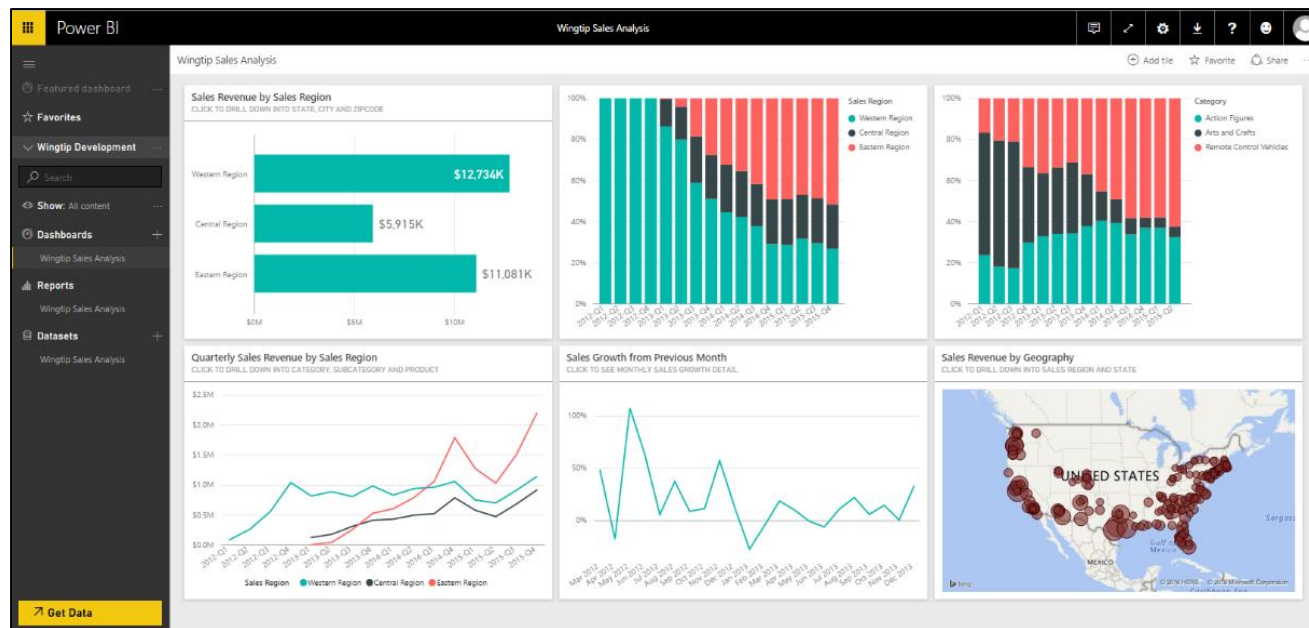
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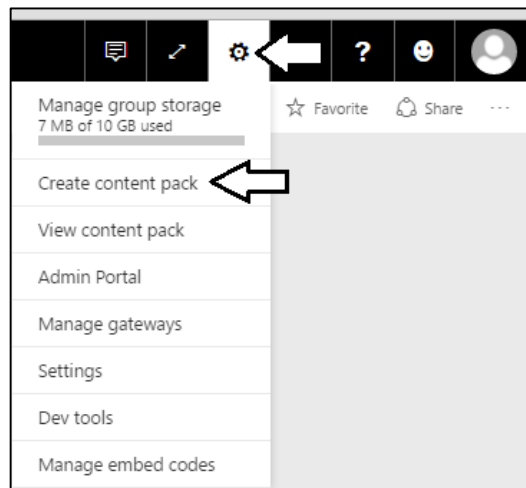
# Building Solutions in a Development Workspace

- 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'.

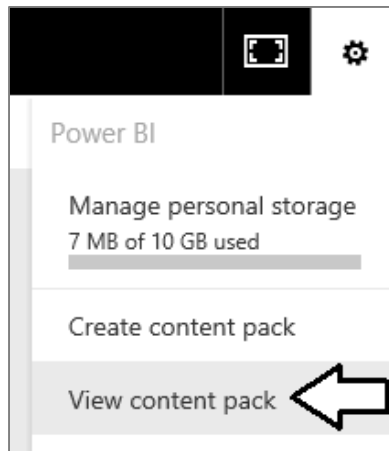
A screenshot of the 'Select items to publish' section in the Wingtip Development application. It is divided into three columns: 'Dashboards', 'Reports', and 'Datasets'. Each column has a checkbox next to the item 'Wingtip Sales Analysis', which is checked in all three columns.

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



# Viewing Content Packs

- You can view/edit content pack in workspace

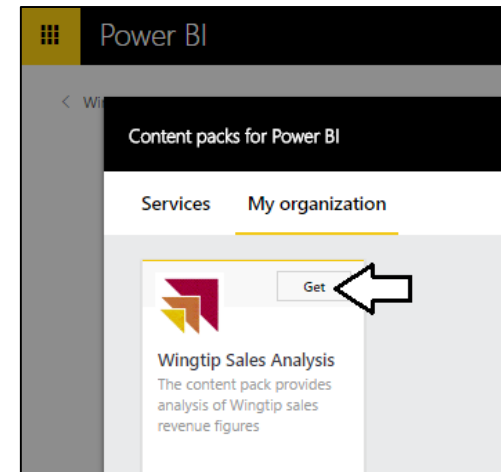
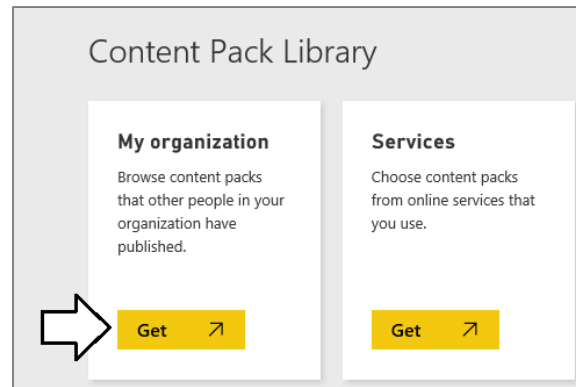
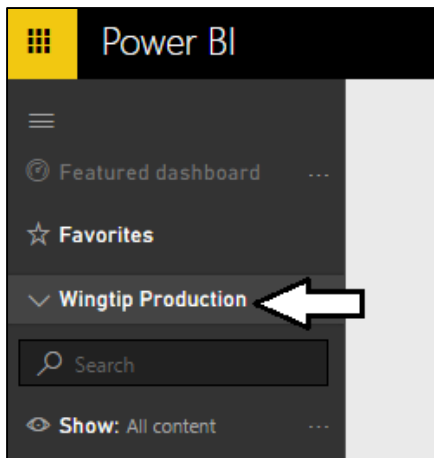


Wingtip Development			
Name	Published To	Date published	Actions
Wingtip Sales Analysis	My Organization	Aug 09, 2016	<a href="#">Edit</a>   <a href="#">Delete</a>



# Deploying a Content Pack

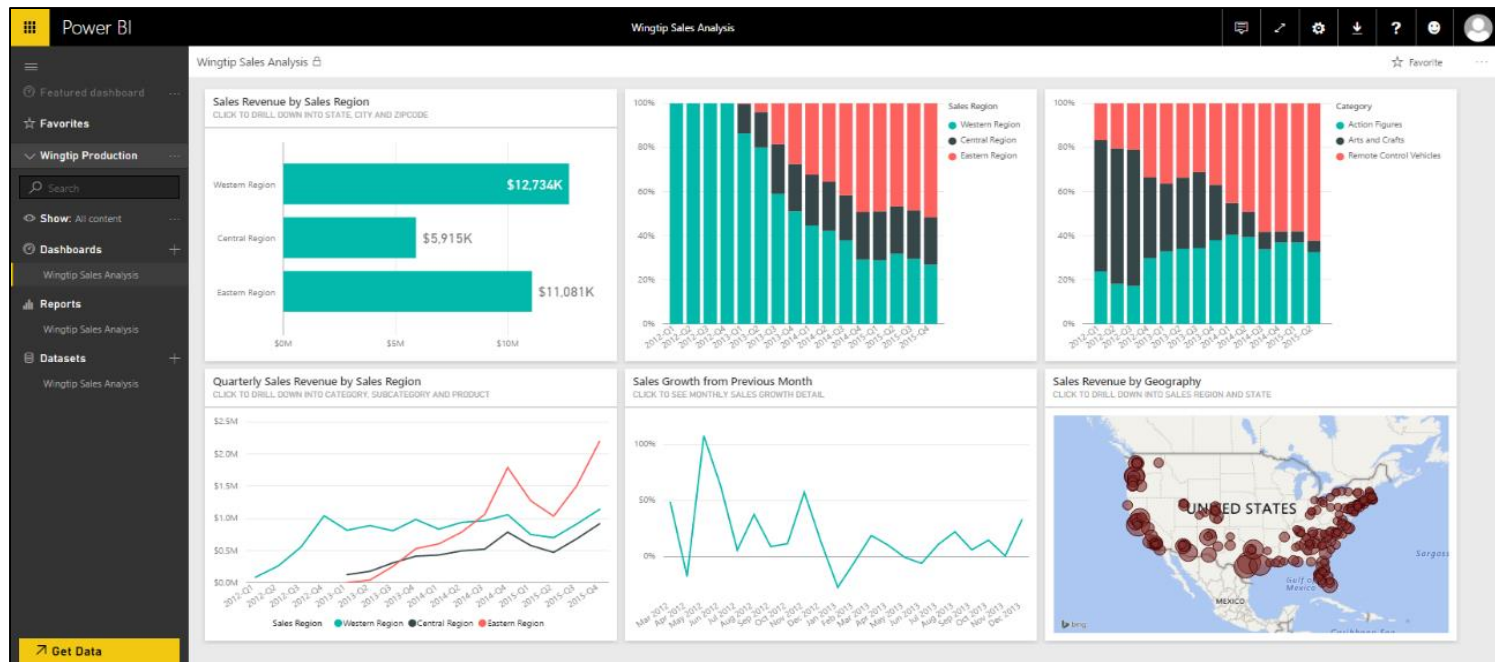
- Content pack can be activated in other workspace





# 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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