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 uses

- Data-driven Alerts
  - Power BI can sends notification when data exceeds a threshold

- Favorites
  - Add favorites to mobile device to easily open a specific dashboard

- Scan QR Codes using Mobile Device
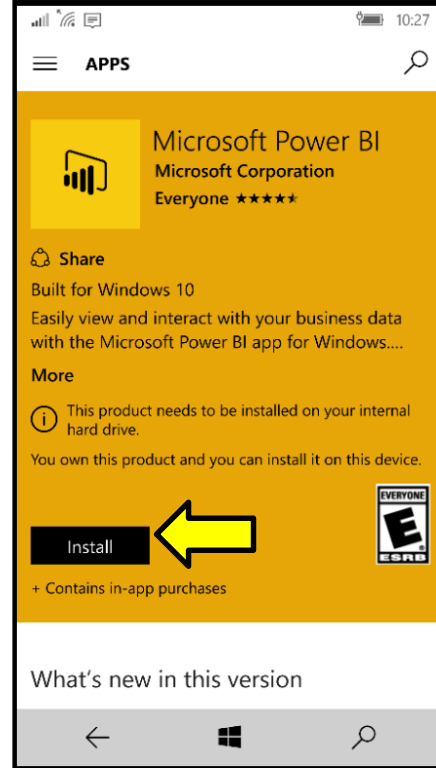 - Allows users to quickly navigate to specific dashboard tile or report

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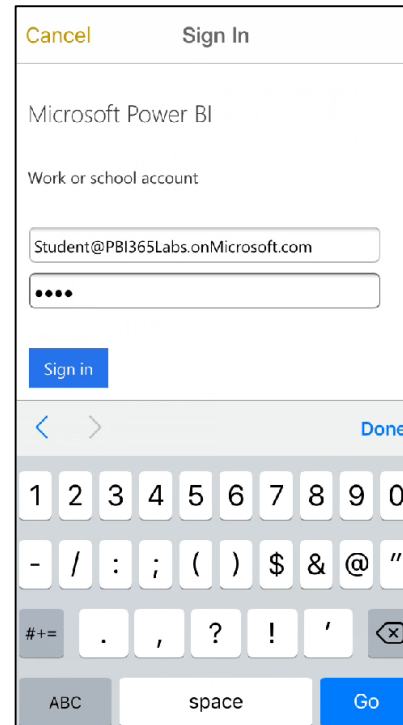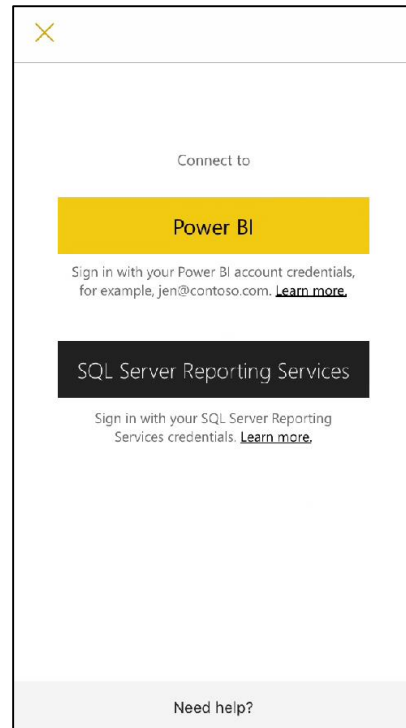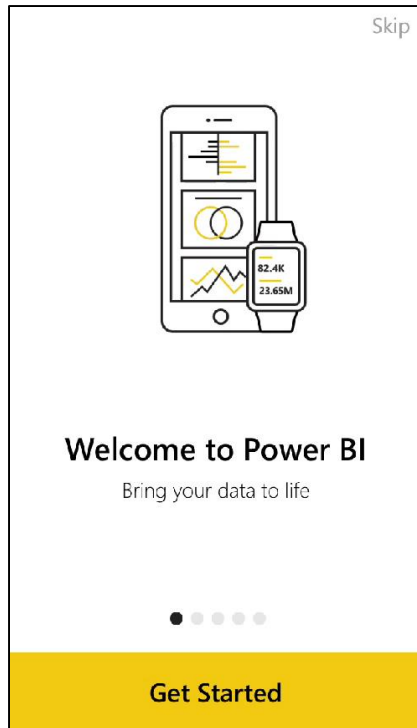- • Designing Mobile-First Dashboards

Installing the Power BI App on an iPhone
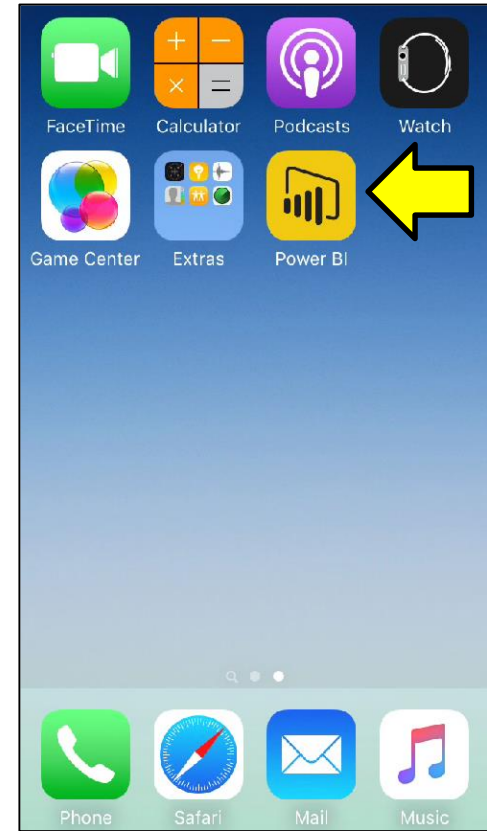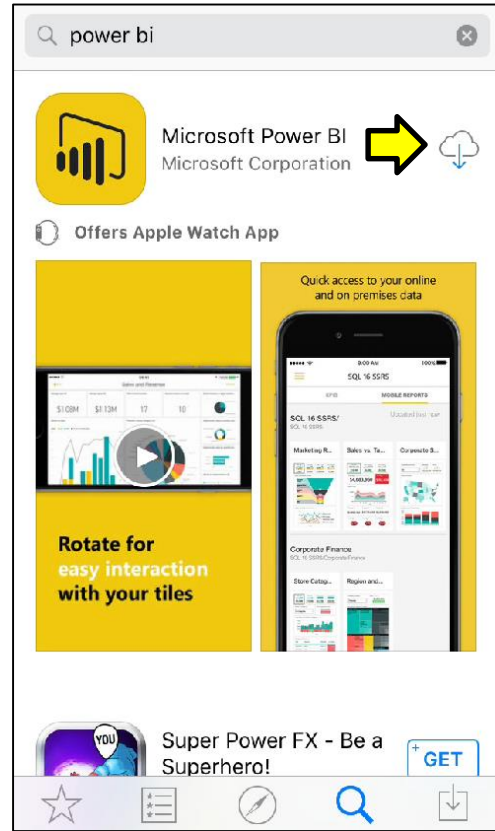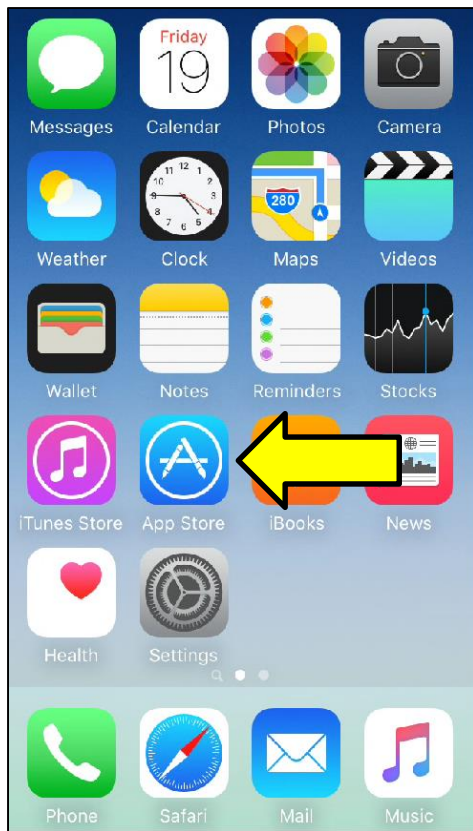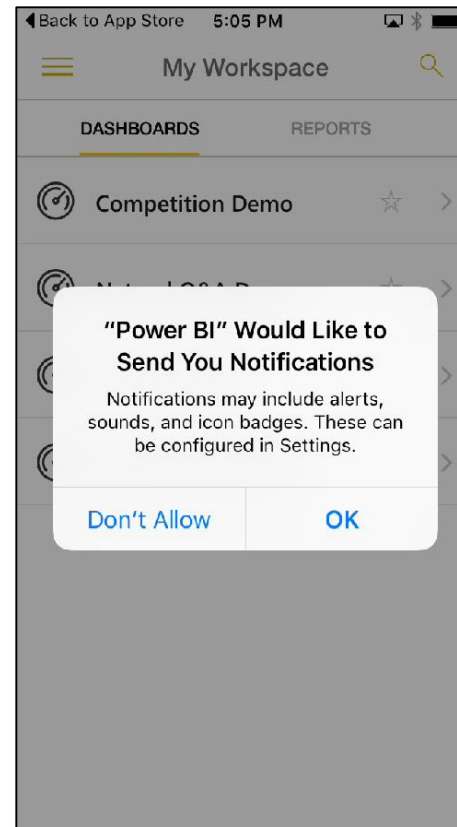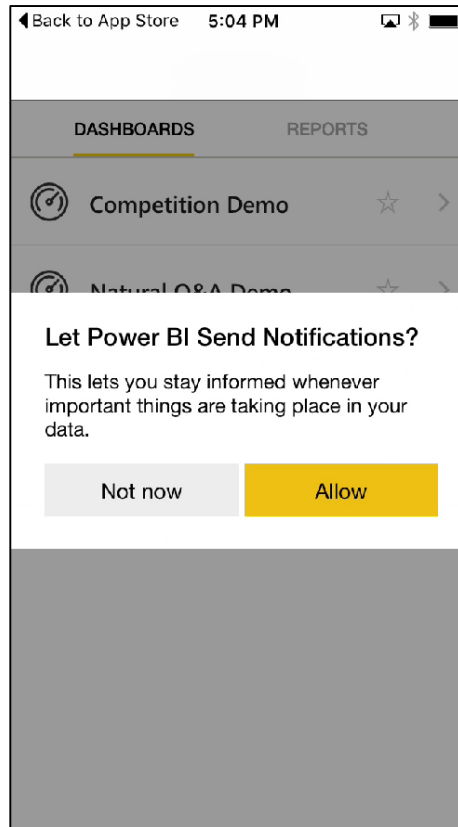
Installing the Power BI App on Windows Phone
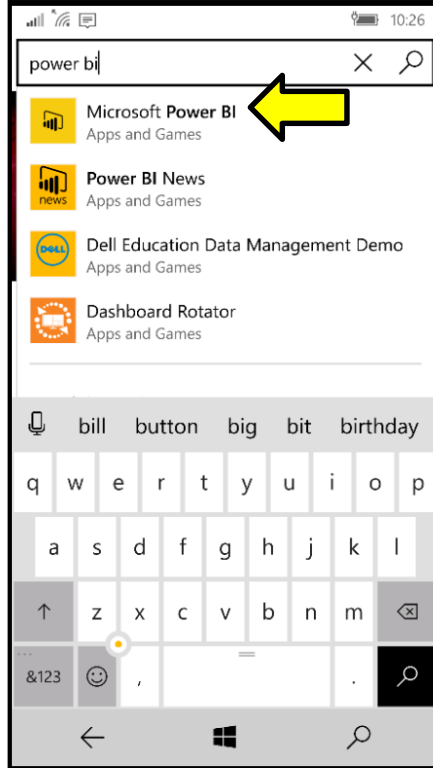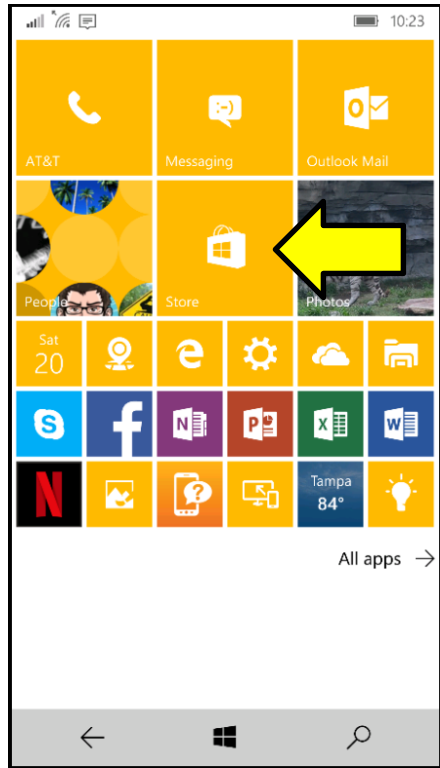
Logging into the Power BI Service
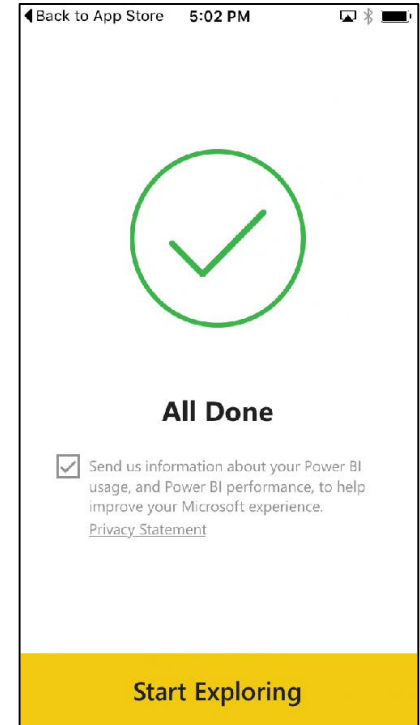
Allowing Power BI To Send Notifcations

- 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
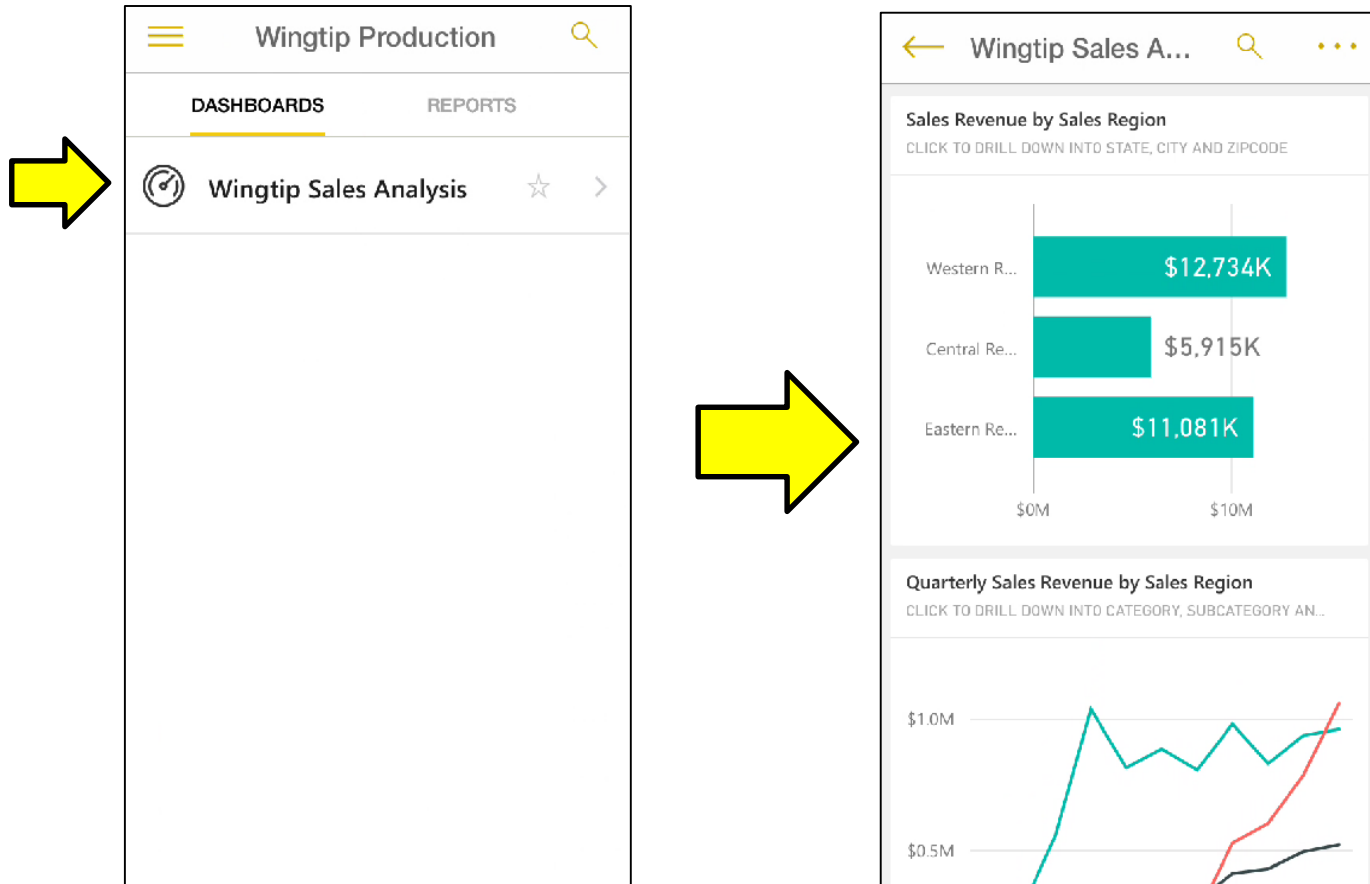 - Tap on a dashboard or report to open it
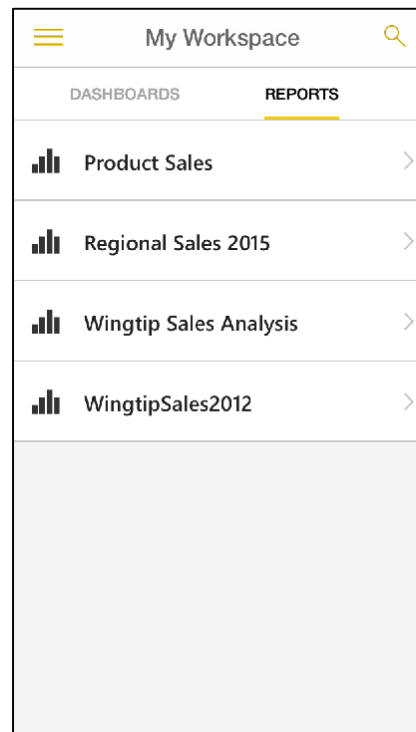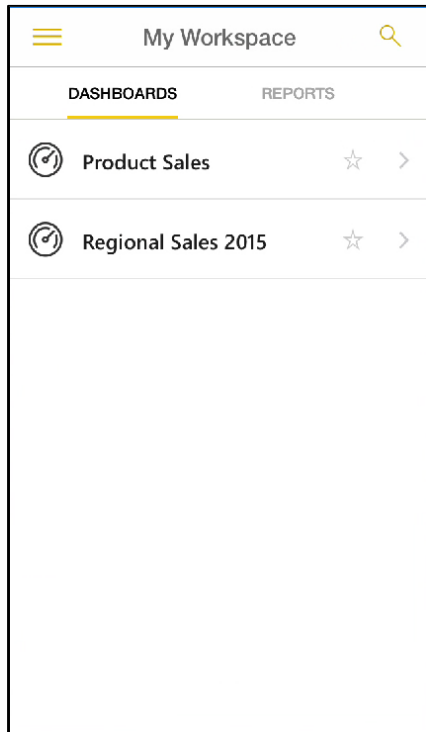
Navigating Between Workspaces

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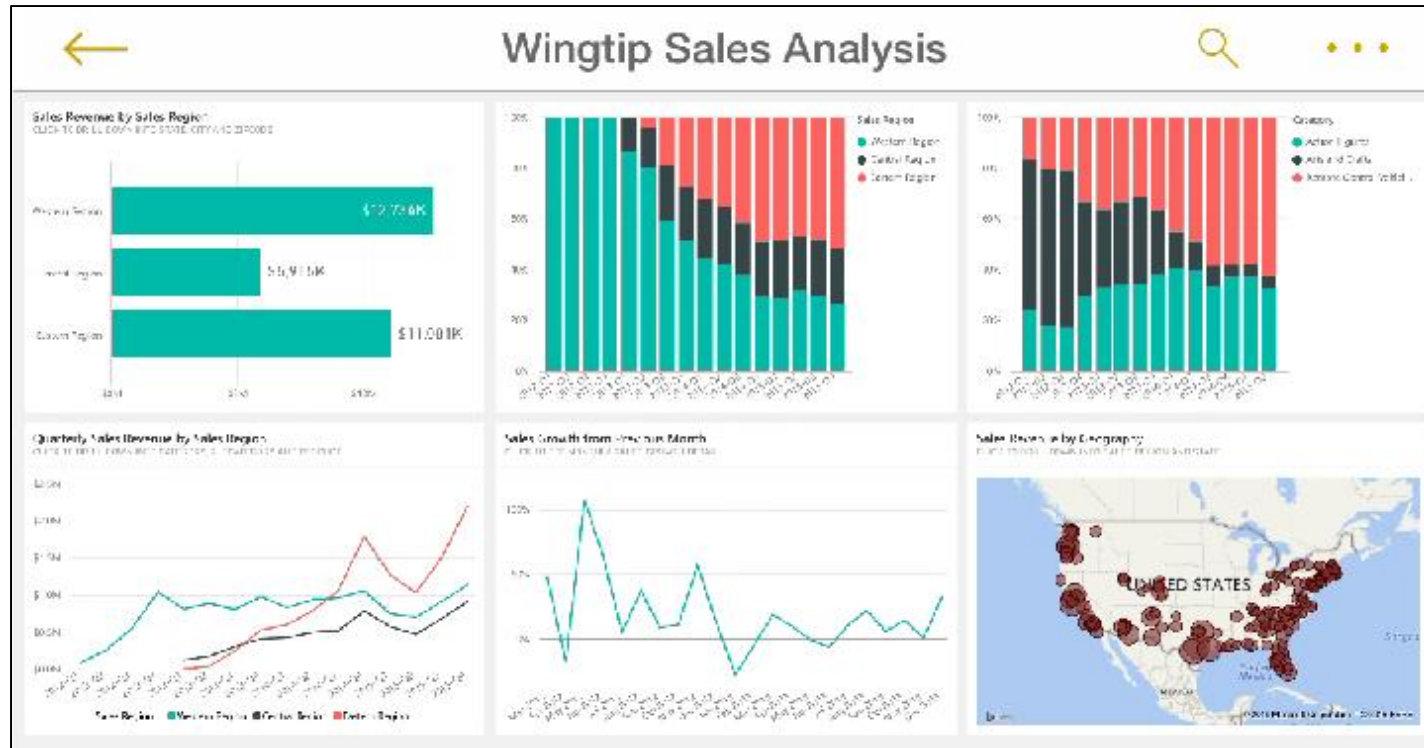 - You can also navigate to app setting or begin QR code scan
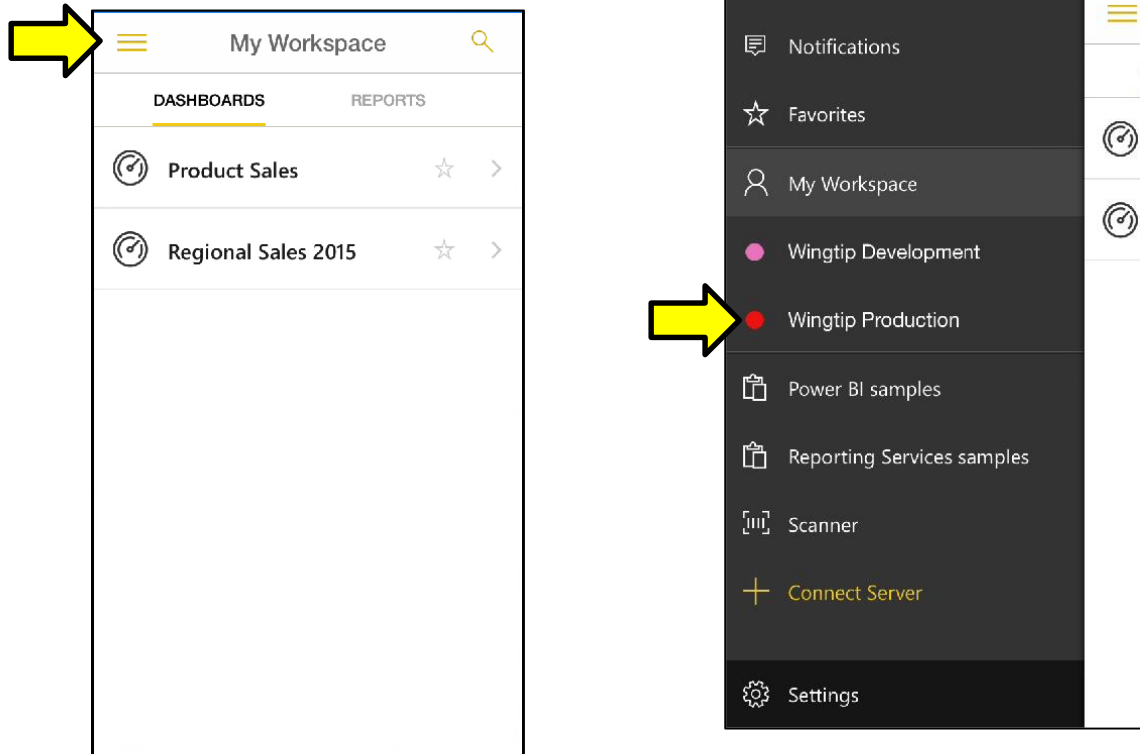
Opening a Dashboard

- 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 to small to use effectively
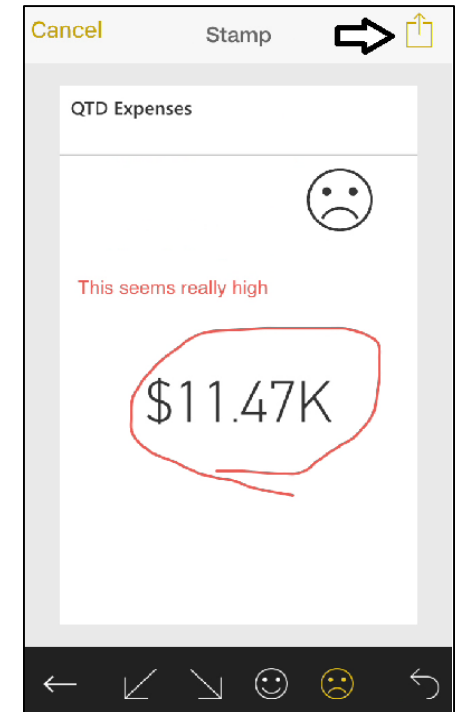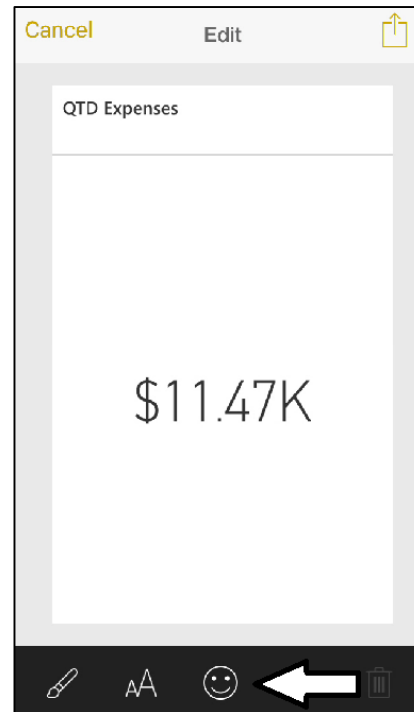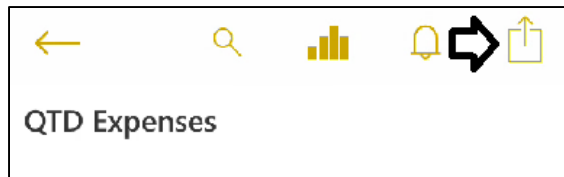 - You can create reports with page size designed for mobile form factor

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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.
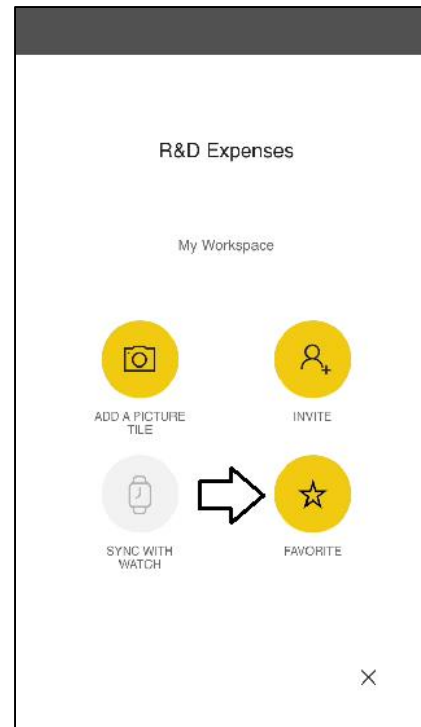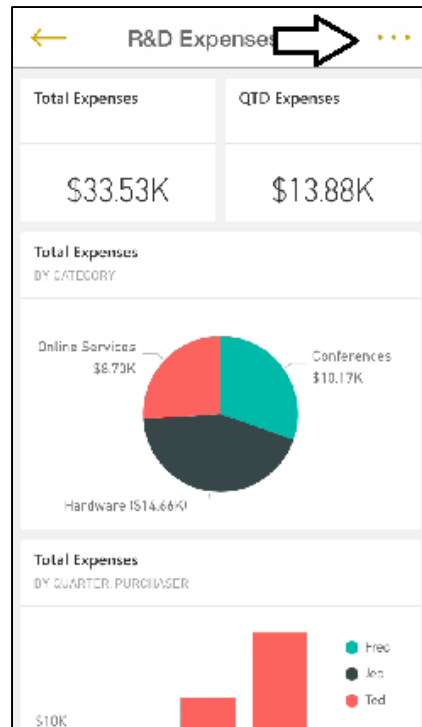 - Test out the alert to make sure it works
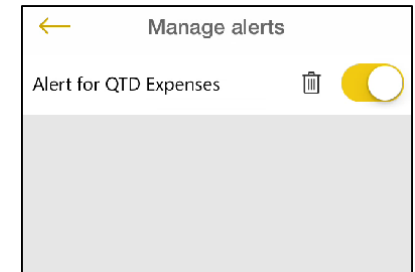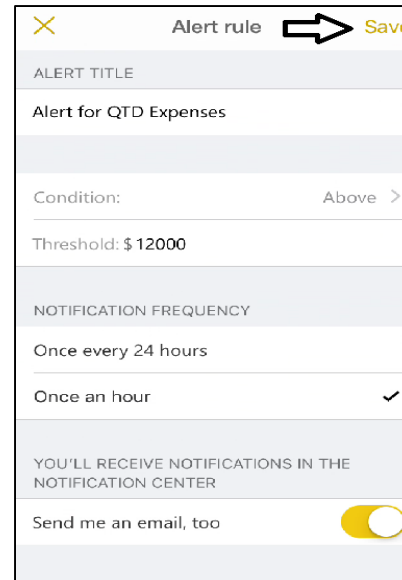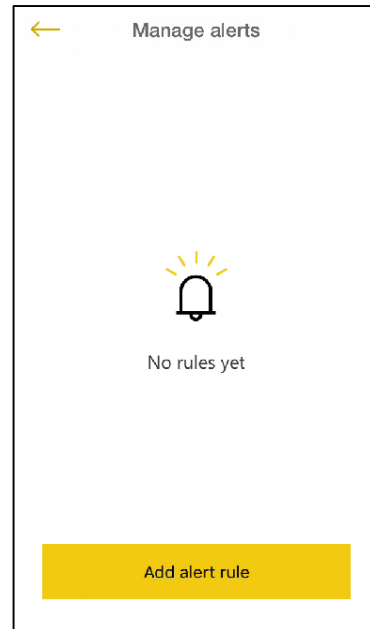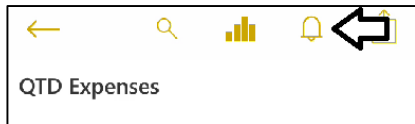
Receiving Notifications from an Alert

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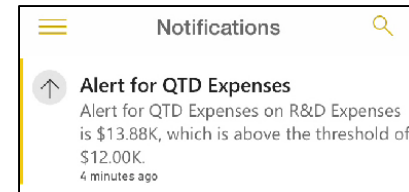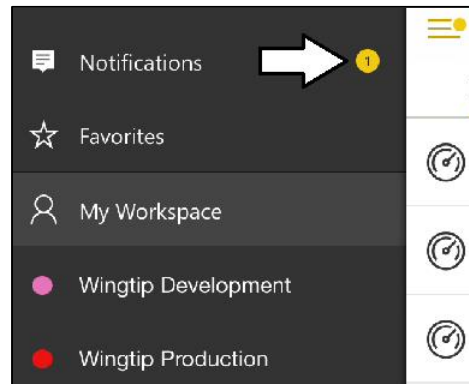
Adding Favorites

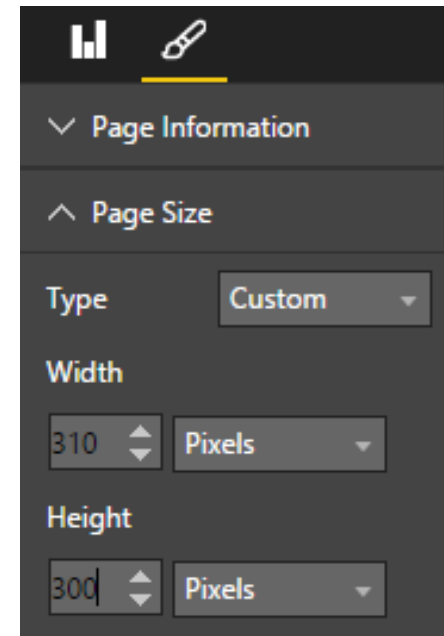- Dashboard menu allows you to add dashboard into Favorites list.
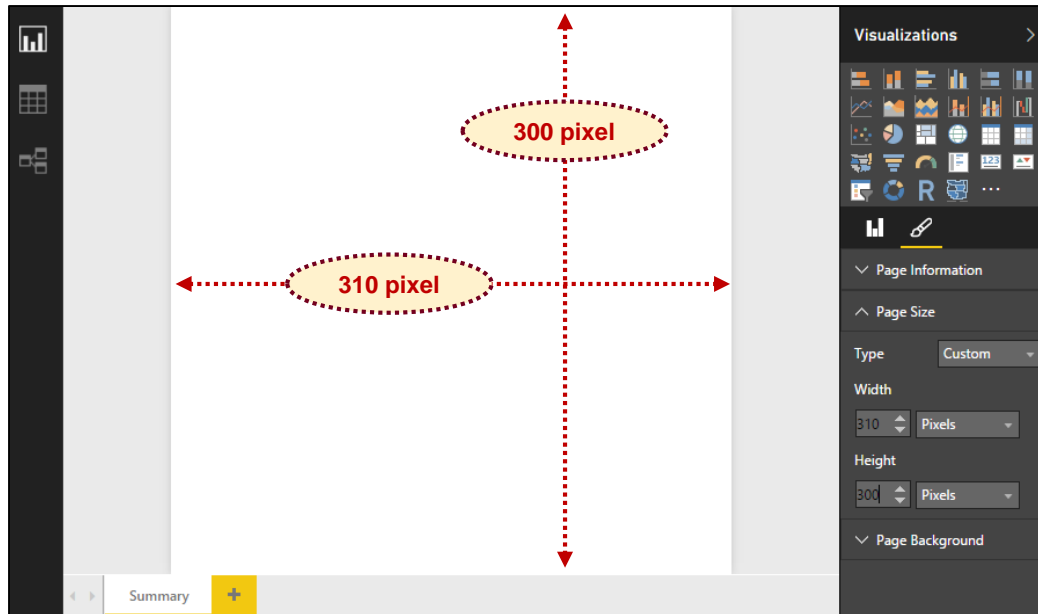
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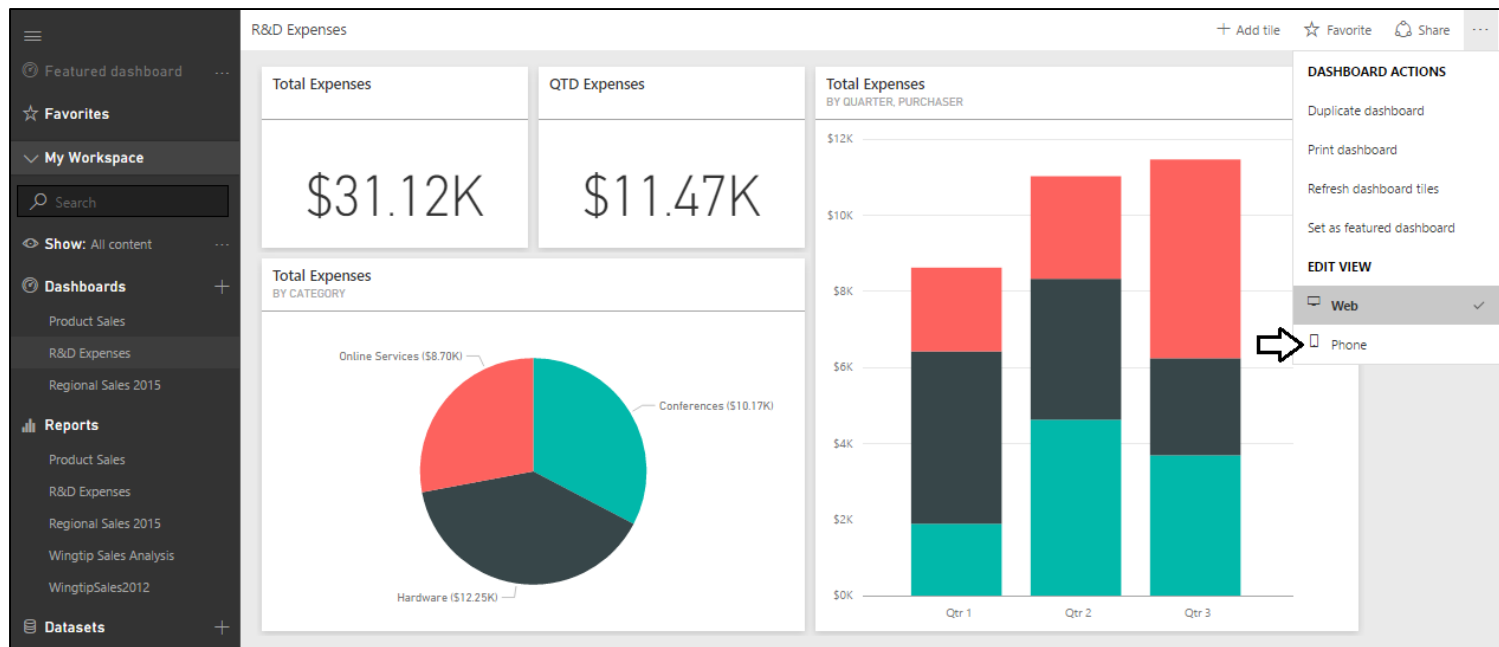- ➤ Designing Mobile-First Dashboards

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
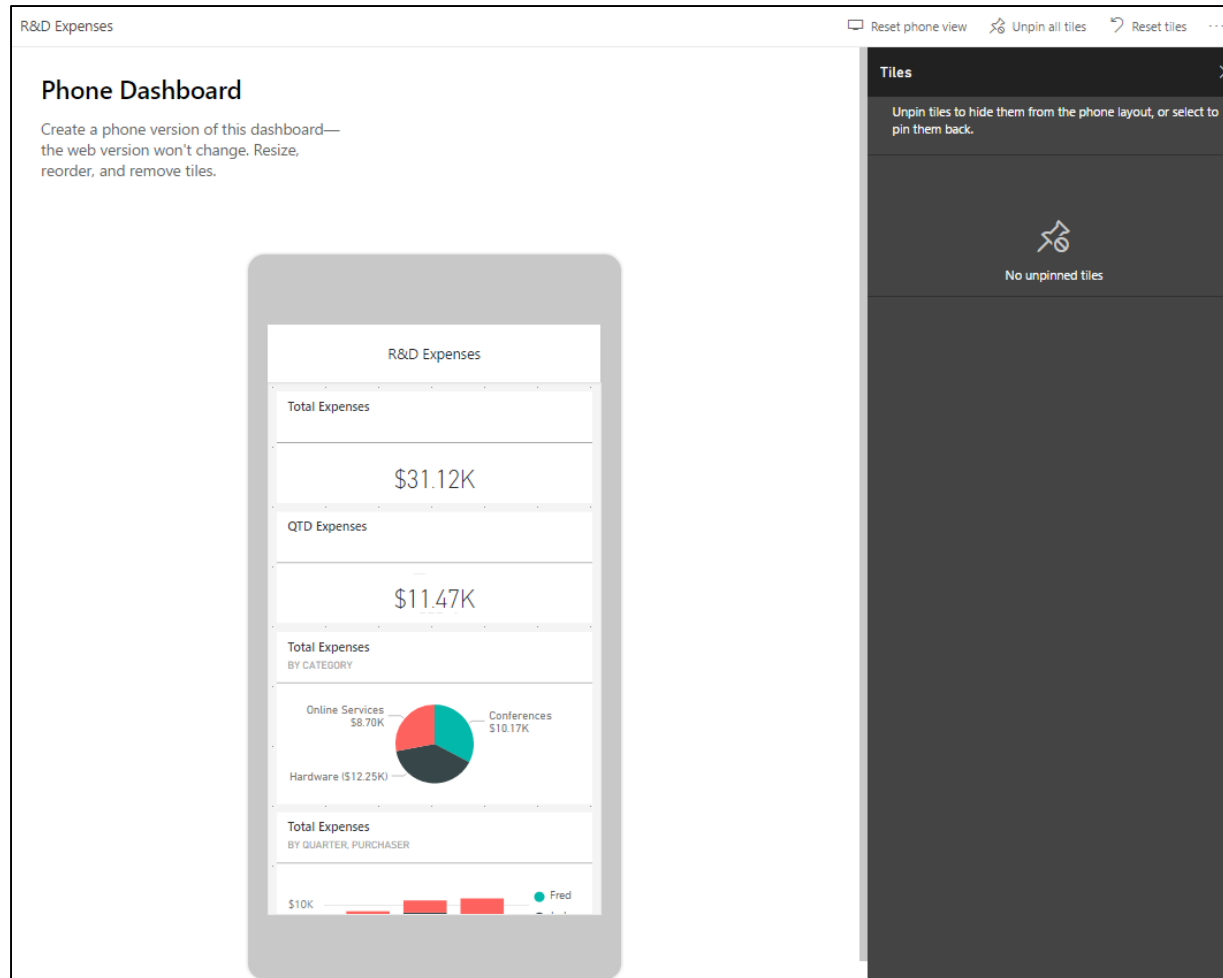
Modify the Dashboard's Phone Edit View

- 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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