

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



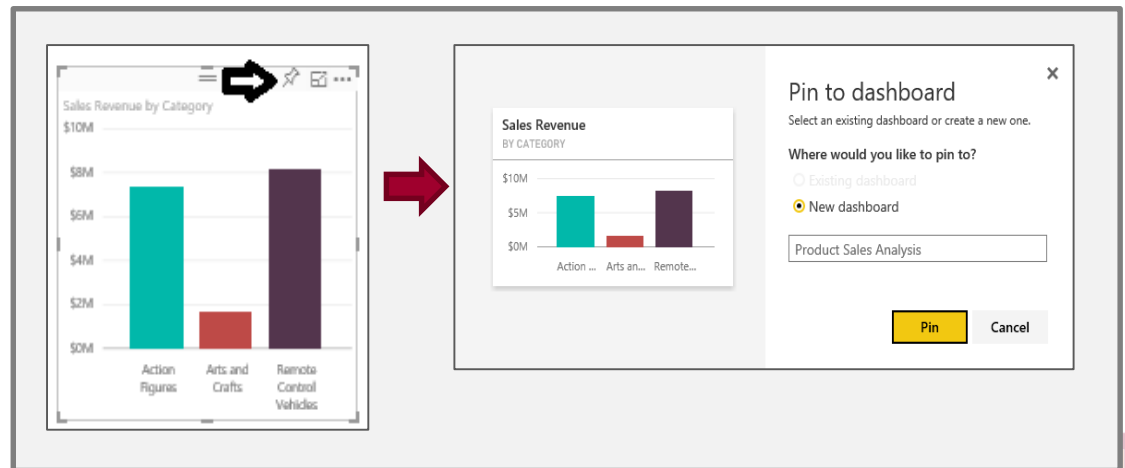
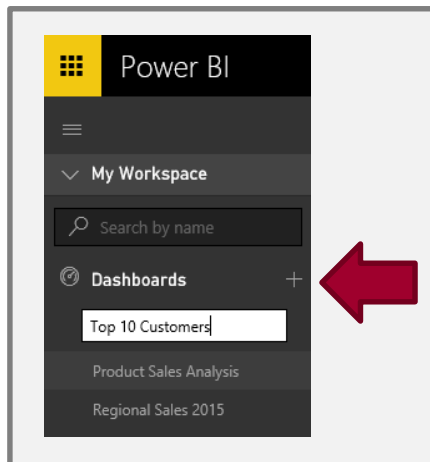
Dashboards in Power BI

- 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



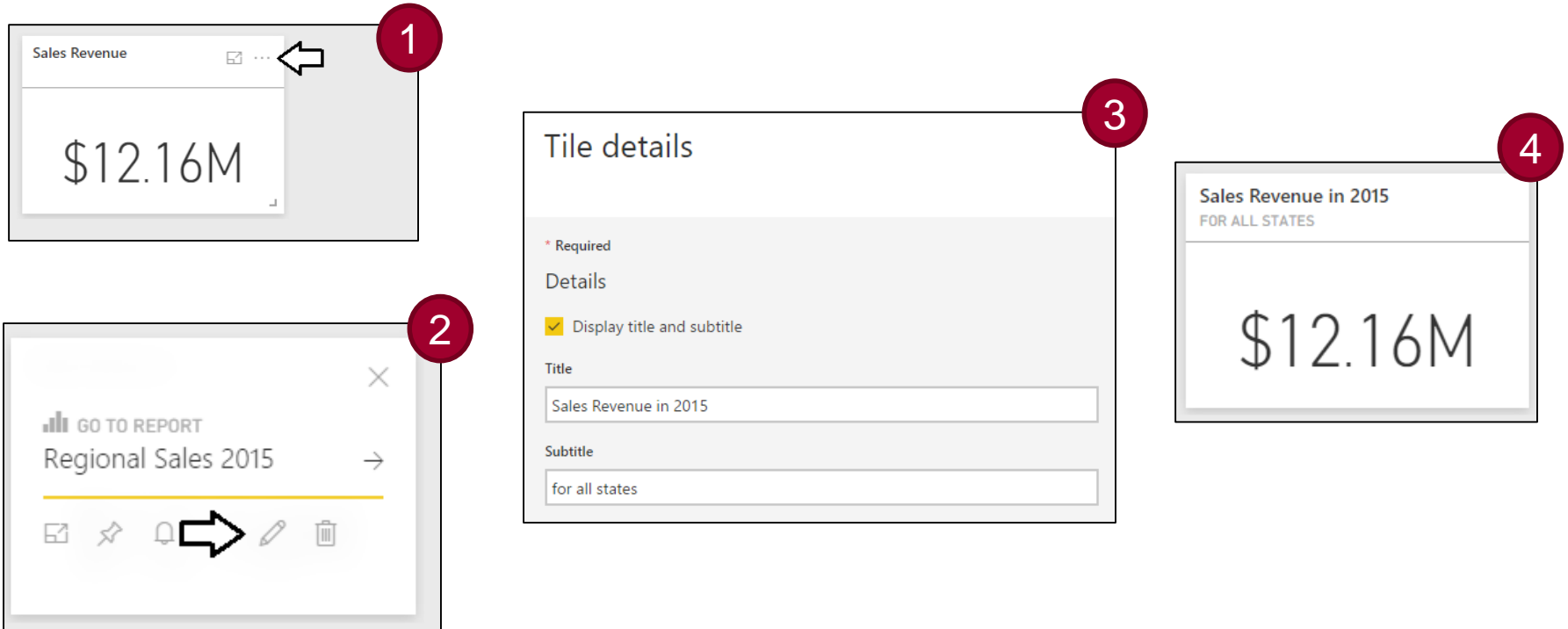
Creating Dashboards

- 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





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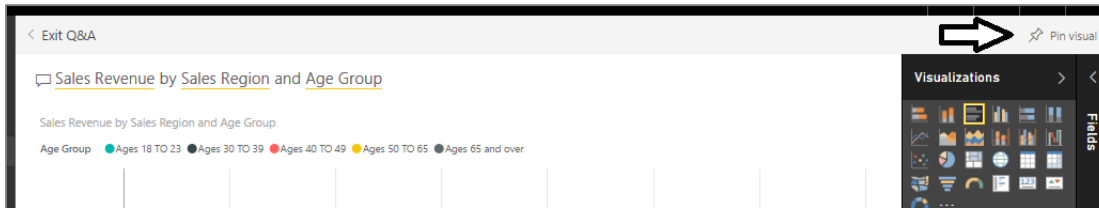
The Q&A Search Box

- 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



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Working with the Q&A Search Box

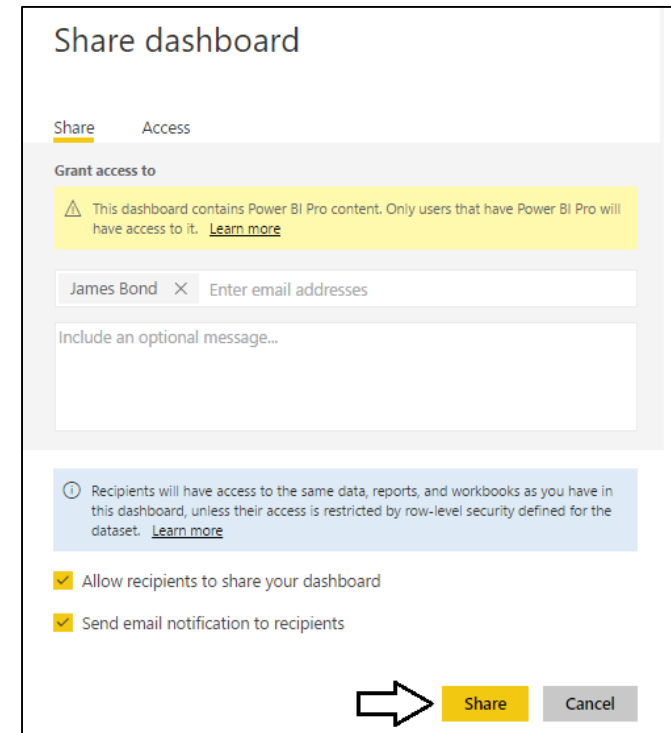
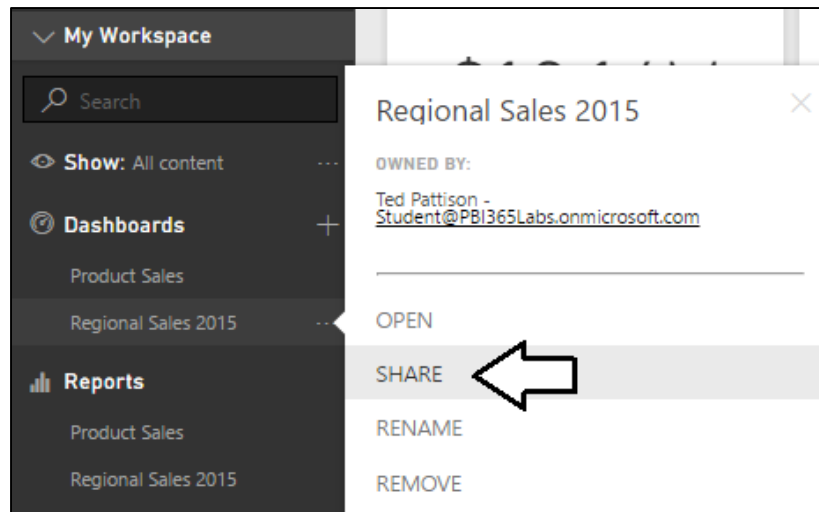
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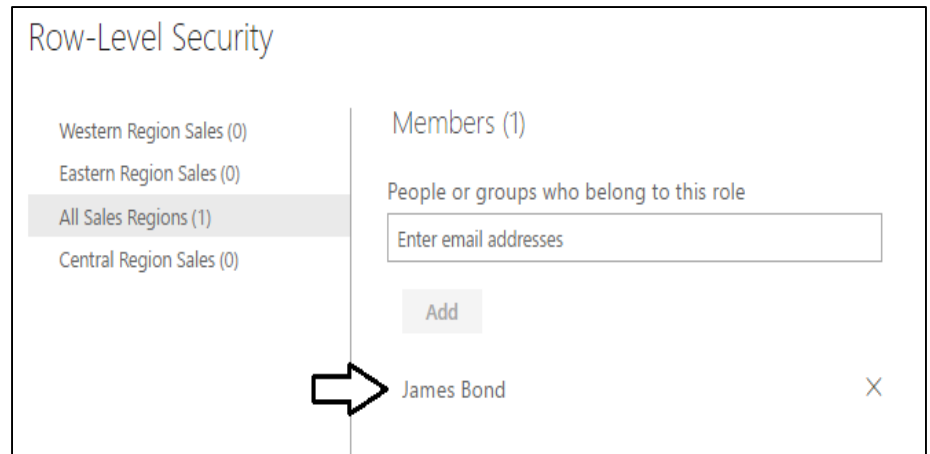
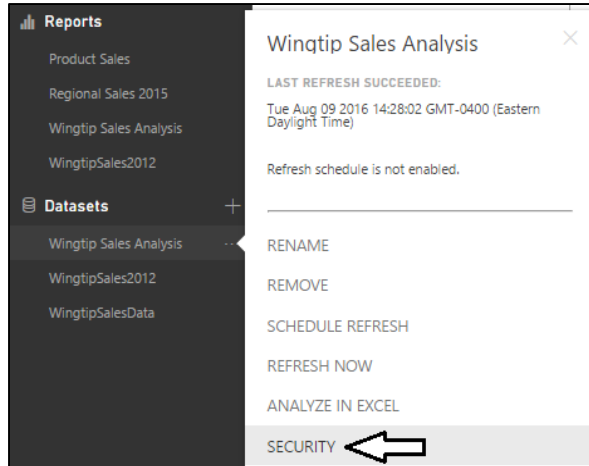
Sharing Dashboards

- 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



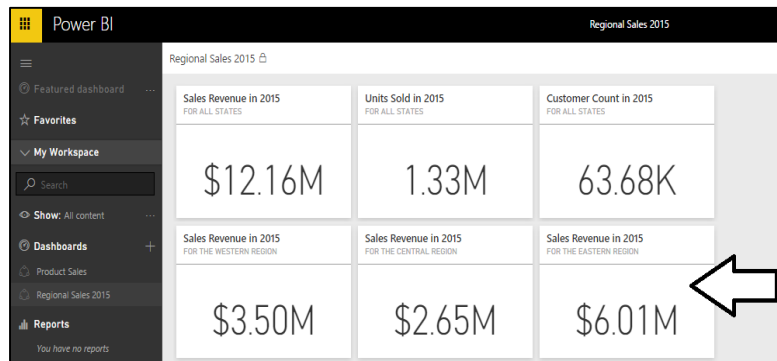
Configuring Row-level Security

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

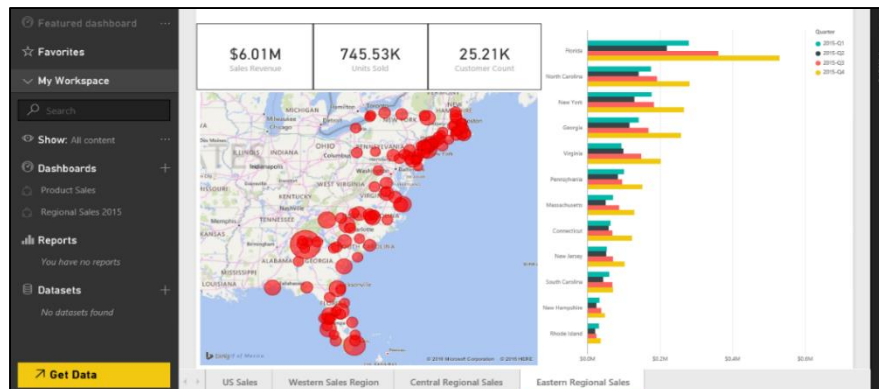


Testing Dashboard Sharing

- 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





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Sharing a Dashboard

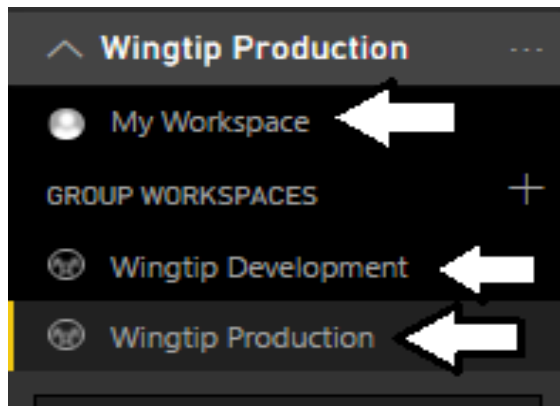
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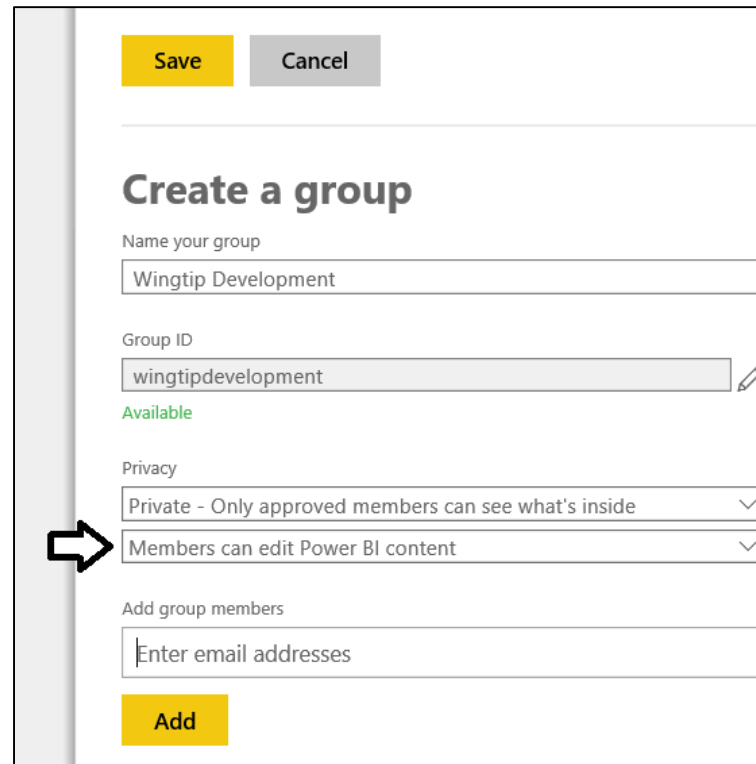
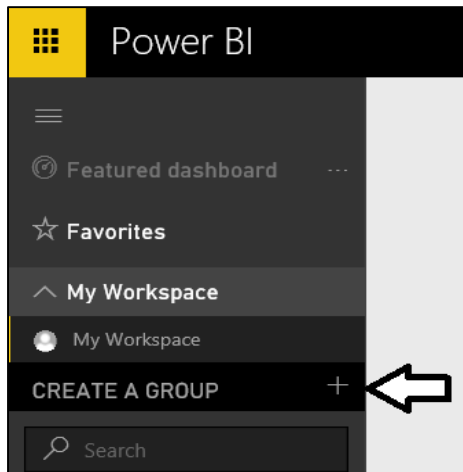
Understanding Group Workspaces

- 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 is light-themed and contains the following fields and options:

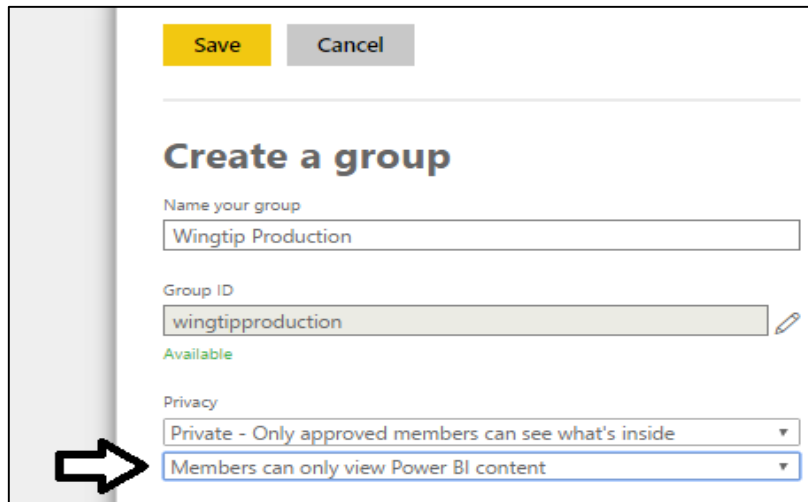
- Save** and **Cancel** buttons at the top.
- Create a group** heading.
- Name your group**: A text input field containing 'Wingtip Development'.
- Group ID**: A text input field containing 'wingtipdevelopment', with a green 'Available' status indicator and a pencil icon for editing.
- Privacy**: A dropdown menu with the selected option 'Private - Only approved members can see what's inside'.
- Members can edit Power BI content**: A dropdown menu with the selected option 'Members can edit Power BI content'.
- Add group members**: A text input field containing 'Enter email addresses'.
- Add** button at the bottom.

A white arrow points to the 'Members can edit Power BI content' dropdown menu.

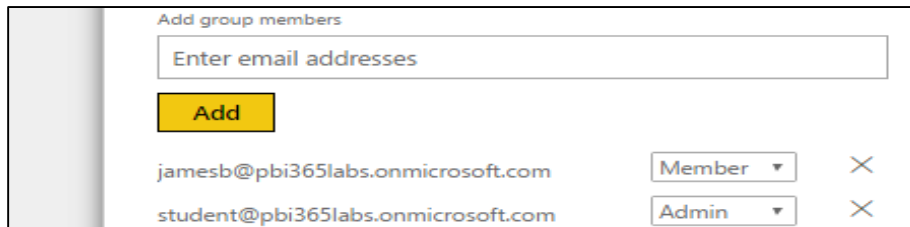


Creating Group Workspaces for Production

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



- Add users as standard members or as admin



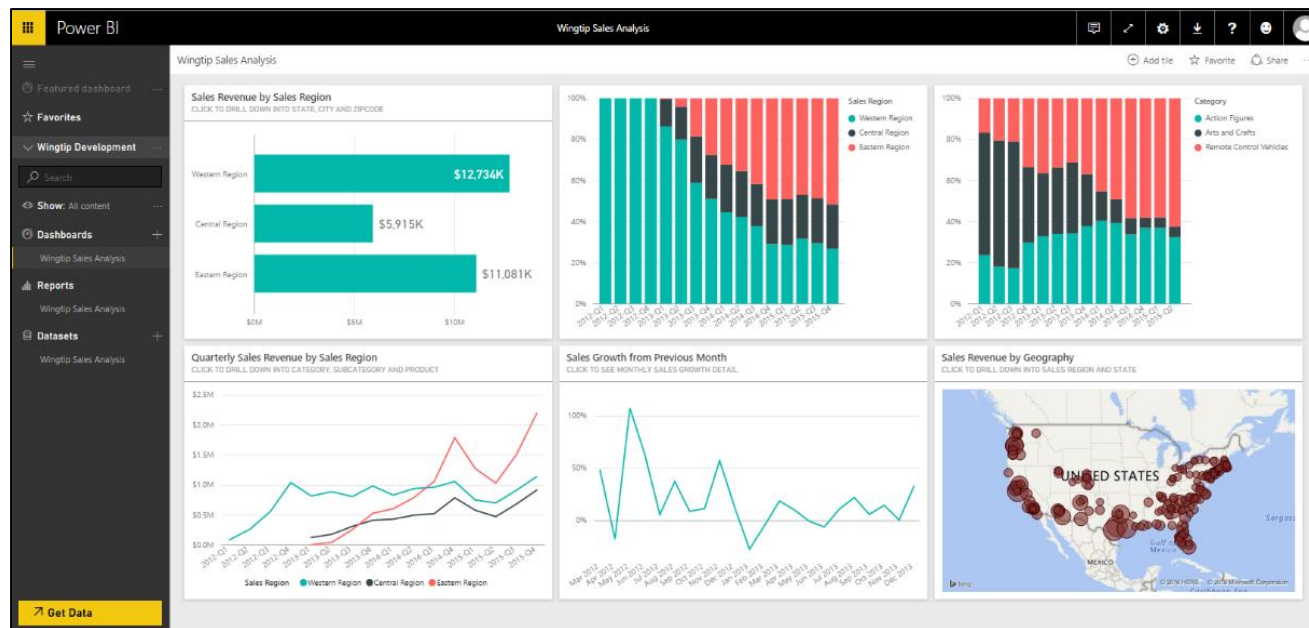
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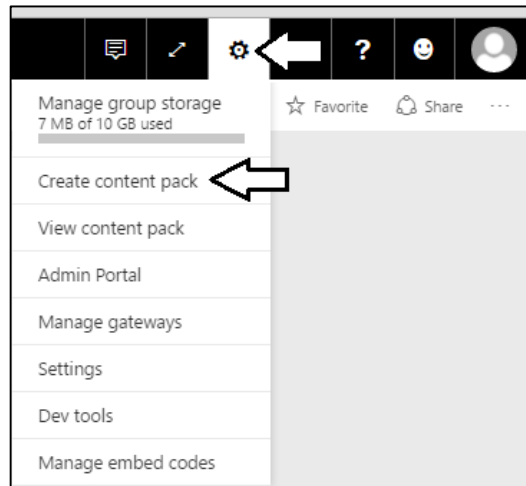
Building Solutions in a Development Workspace

- 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 environment. 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 a 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'. The Wingtip logo is shown next to the upload instructions.

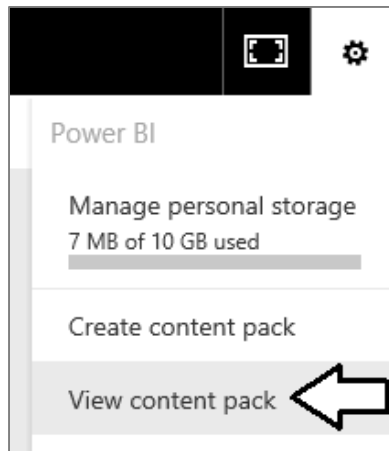
A screenshot of the 'Select items to publish' section. It is divided into three columns: 'Dashboards', 'Reports', and 'Datasets'. Each column has a checkbox next to 'Wingtip Sales Analysis', all of which are checked.

| 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

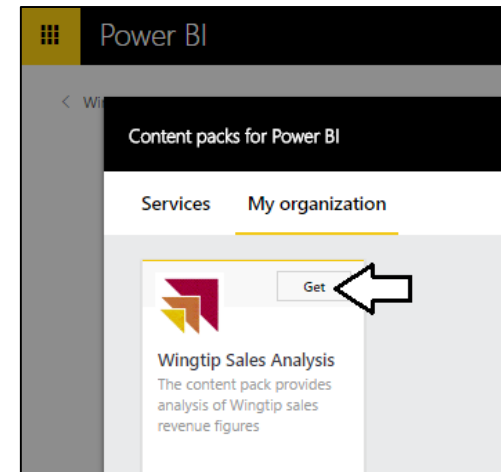
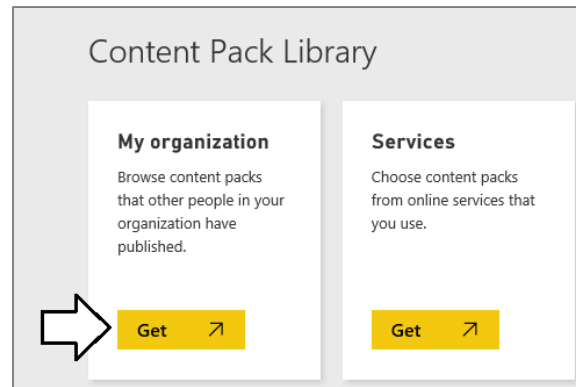
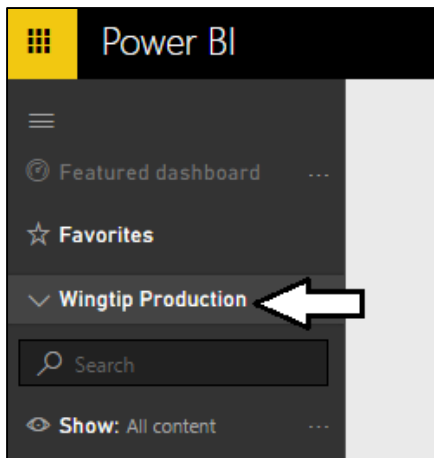


| Wingtip Development | | | |
|------------------------|-----------------|----------------|---|
| Name | Published To | Date published | Actions |
| Wingtip Sales Analysis | My Organization | Aug 09, 2016 | Edit Delete |



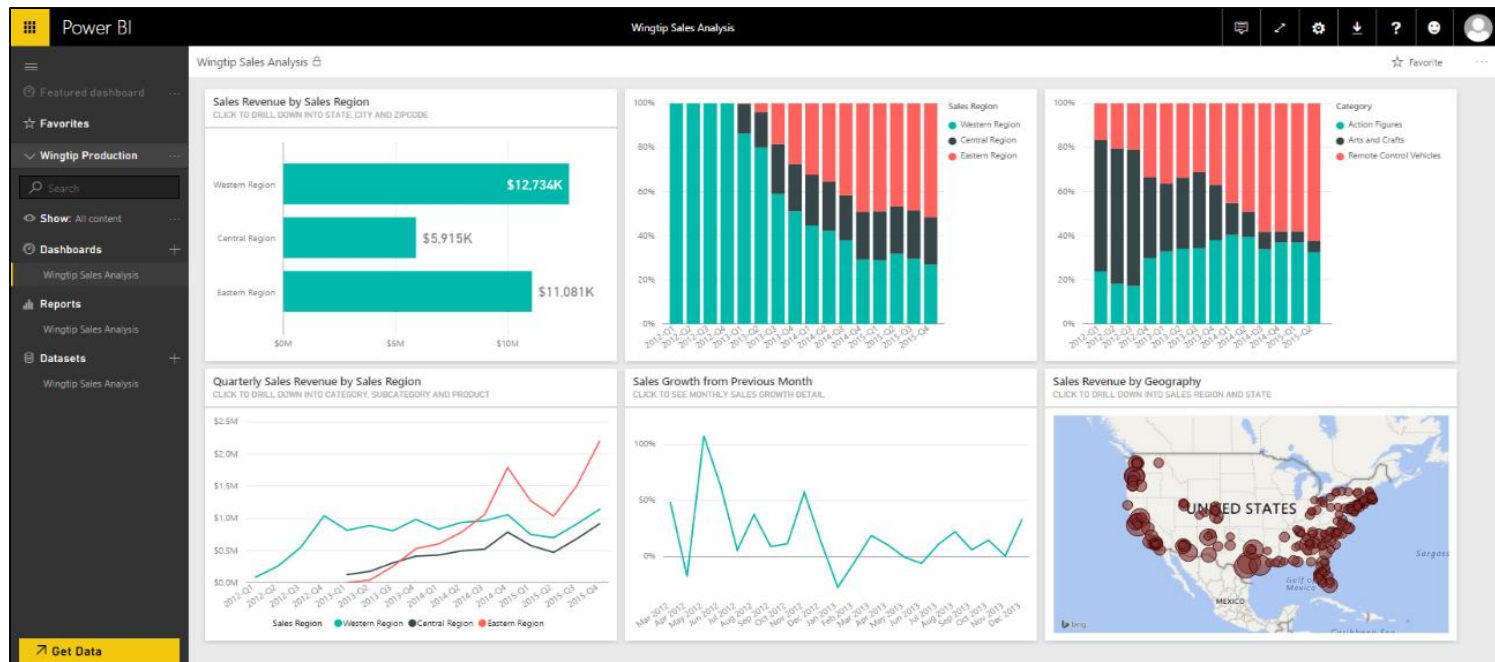
Deploying a Content Pack

- 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





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Deploying a Dashboard using an Organizational Content Pack

Summary

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