Aspecto destacado Nota

Module 9: Power BI Mobile

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Module overview

Power BI™ mobile apps enable you to access and use Power BI information on a mobile device, including iOS (iPad, iPhone, iPod Touch, Apple Watch), Android phone or tablet, and Windows® 10 devices. This means that, potentially, Power BI reports and Power BI dashboards created in Power BI Desktop and the Power BI service can be used anywhere and at any time.

Power BI reports and dashboards are designed to work on a mobile device without modification. However, you can also create specific optimized reports and report layouts for display on mobile devices. The Power BI mobile apps support the sharing

and annotation of dashboards, and you can use Power BI data on mobile devices even when you are not connected to a network. Power BI alerts and notifications also work across the Power BI service, including on mobile devices.

Objectives

After completing this module, you will be able to:

- Create dashboards and reports for mobile devices.
- Use the Power BI mobile app.

Lesson 1: Power BI mobile apps

In this lesson, you will learn how to view Power BI reports and dashboards on a mobile device, and understand the features included in the mobile apps. You will also learn how to optimize report layouts for display on mobile devices.

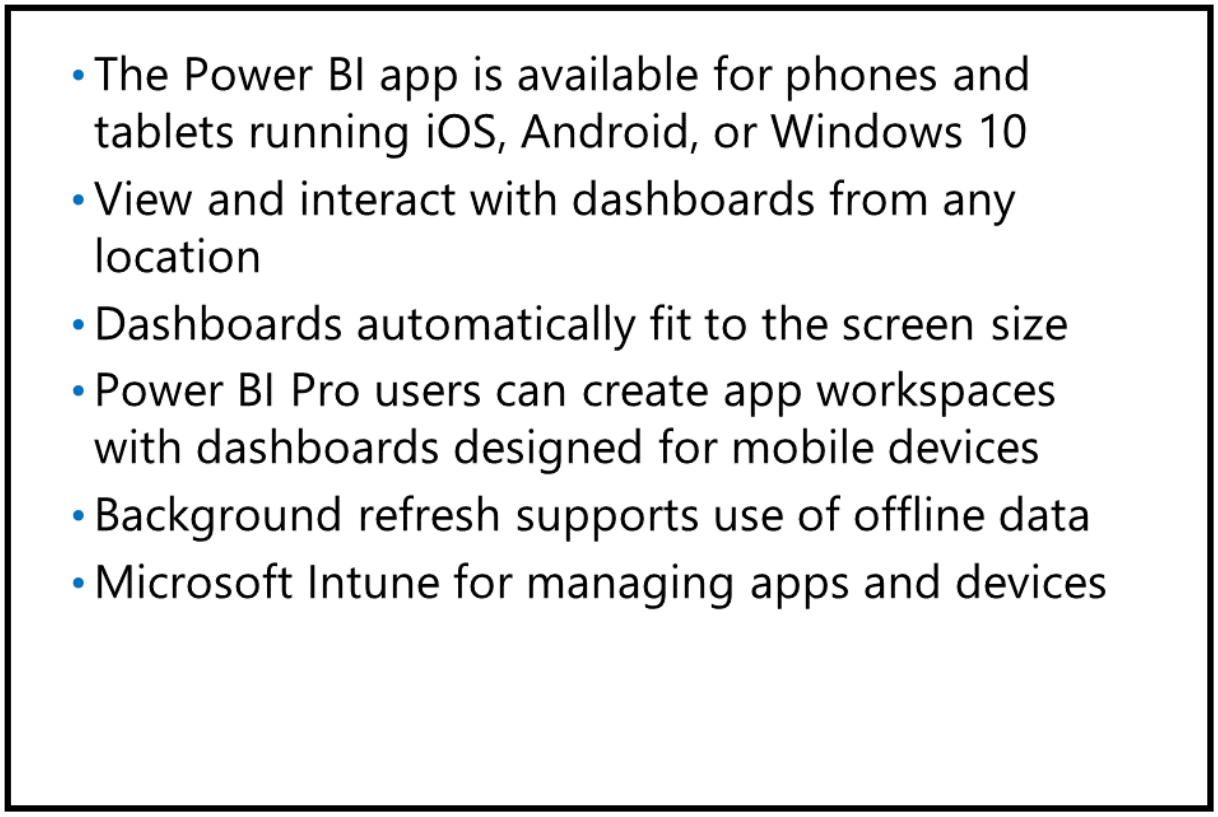
Lesson objectives

After completing this lesson, you will be able to:

- Create dashboards for mobile devices.
- Understand the features of the Power BI app for iOS devices, including iPhone and iPad.

- Describe the available features included in the Power BI app for Android devices.
- Optimize reports for display on mobile devices.

Creating dashboards for mobile devices



The Power BI mobile app is available for iOS, Android, and Windows 10 mobile devices, enabling Power BI users to view reports and dashboards, and interact with data, from any location. You use the Power BI service to create dashboards, which you then view on a device running the app. Dashboards automatically adjust and

resize to fit the target screen size, and the data refreshes in real time, giving up-to-the minute results. This means there is no need for any additional formatting, and no need to create resized visuals for mobile reports.

> **Note:** At the time of writing, Windows 10 Mobile is deprecated and support will end in December 2019.

Design considerations

Although dashboard items scale to size, you might wish to pay attention to the visuals you include on a dashboard and the level of detail. If you know the target device is a tablet or phone, you make allowance for the screen size. A bar chart with 30 columns might display perfectly on a tablet, but may be more difficult to view on a mobile, even in landscape mode.

> **Note:** If your organization uses Power BI Pro, and users connect using mobile phones, you can create app workspaces with reports and dashboards designed for the smaller screen. You can scale down the size of visuals, and ensure that the most important data is placed at the top of the dashboard. These items are then shown first when you vertically scroll dashboard items.

Offline data

By default, Power BI runs a background data refresh, so if you go offline, data remains reasonably up to date. While offline, you continue to have access to the

dashboards and reports you have recently accessed from the app.

Manage apps and devices

Organizations can manage and control apps and devices with Microsoft Intune®. The Power BI apps for iOS and Android integrate with Intune, so you can manage the apps on the devices, in addition to controlling security. Intune works alongside Mobile Device Manager (MDM) within Office 365®.

For more information on managing your devices with Intune, see *Configure mobile apps with Microsoft Intune* in the Power BI documentation:

Configure mobile apps with Microsoft Intune

http://aka.ms/E4v70j

Power BI for iOS

- Power BI for iOS works with iPhone, iPad, and Apple Watch
- View and interact with Power BI reports and dashboards, and SQL Server mobile reports and KPIs
- Download from Apple App Store
- View dashboards in landscape mode for the same experience as viewing on the Power BI service portal
- Annotate and share tiles with colleagues
- Scan QR codes to open tiles directly
- Set up data alerts on single figure tiles: set above and below values to be alerted when value goes outside the boundaries

The Microsoft Power BI for iOS app is compatible with the iPhone, iPad, and Apple Watch, and is part of the family of mobile BI experiences for Power BI. You use the app to view and interact with your organization's dashboards and reports from anywhere in the world. In addition to accessing live on-premises and cloud data, you can share dashboards with colleagues using email or text messages. You can also view SQL Server mobile reports and KPIs for your on-premises data by using the Power BI app.

You can download the app by searching for Microsoft Power BI on the Apple App Store or from the *View dashboards on your iPhone* section of *View dashboards and reports in the Power BI mobile apps* in the Power BI documentation:

View dashboards on your iPhone

http://aka.ms/AA55urd

You don’t need to sign in to Power BI to start using it on your iOS mobile device. The app includes sample dashboards, so you can see how the app works before you sign in and view your organization’s content.

Viewing modes

When viewing dashboards on your iPhone in portrait mode, the tiles stack vertically, in the left to right order of the tile placement, on the web version of the dashboard in Power BI service. If you turn your phone sideways to view the dashboard in landscape mode, the dashboard tiles display exactly as they are on the portal, which is useful for tiles that are grouped together contextually.

Interacting with tiles

You interact with dashboard tiles on your iPhone and iPad in the same way as you do on the portal. You tap a tile to open it in **Focus mode**. You then tap to view items in more detail in pie, bar, and line charts. Tap a pie chart to put it in **Focus mode**, and the slicer automatically appears. Spin the chart to show each of the pie slices in detail.

Annotate and share tiles

You can add notes and emoticons directly to tiles. You tap a tile to bring it into **Focus mode**, and then use the tools to annotate the tile.

You can share dashboards with colleagues who then receive an email inviting them to access the dashboard. To view the dashboard, recipients must have a Power BI Pro license or you need to host the content in a Premium capacity. You can also send a snapshot of a tile from the iPhone app to anyone in or outside of your domain—they will receive an image of the tile, report, or visual alongside a link to the original content.

Power BI QR codes

The Power BI mobile app for the iPhone includes a QR scanner, which means users can scan a QR code that links directly to a dashboard tile, and opens in Power BI Mobile. Consider the following scenario: you create a dashboard in the Power BI service for presenting to the senior managers in your organization; you display the dashboard on a large TV in Full Screen Mode during the presentation—but you want the managers to view the data in more detail during the meeting. By creating a QR code for those tiles that need viewing in more detail, you can give the code to the managers, either on paper, in an email message, or from your iPhone. The code opens the tiles directly in the Power BI app.

To generate a QR code, open the relevant dashboard in Power BI service. Click the ellipsis (**…**) on the tile you want to create a code for, and then click **Open in focus mode** to open the tile. Click the ellipsis (**…**), and then click **Generate QR code**. After

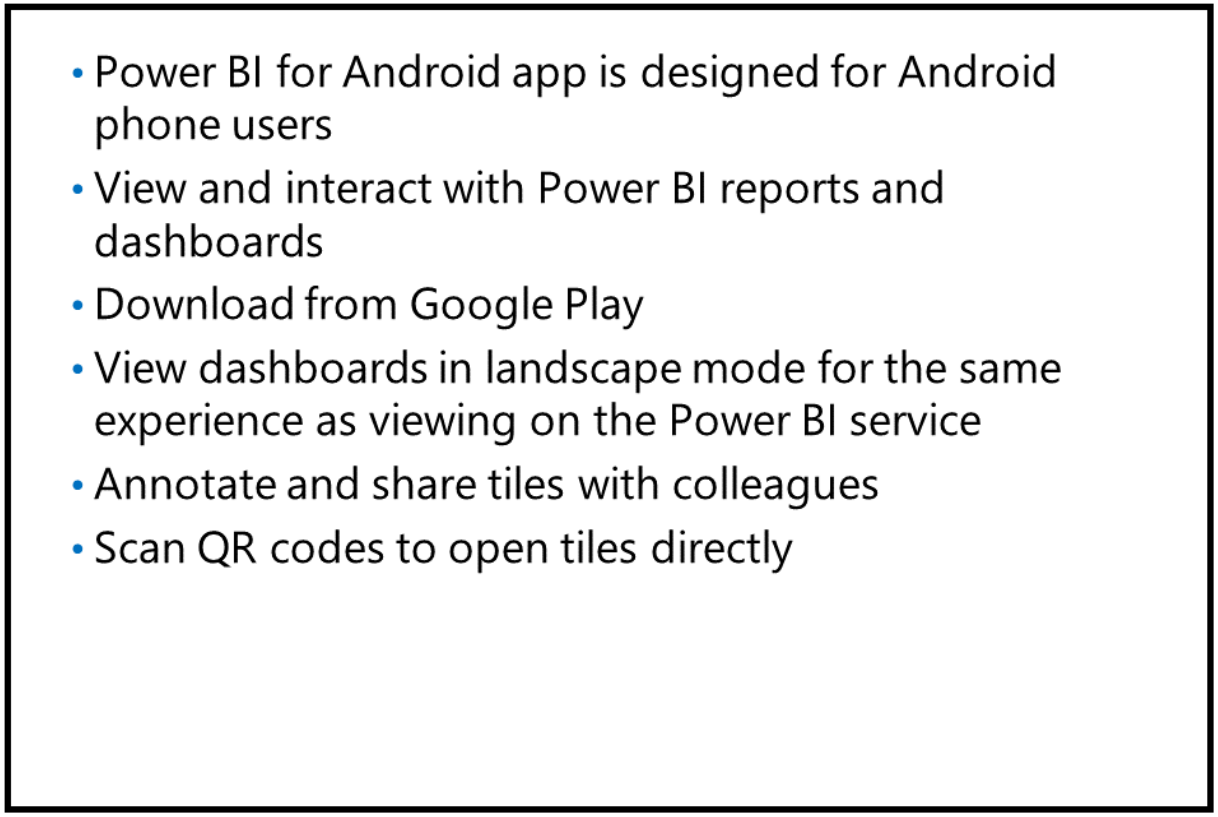
it has been generated, you download the code as a .jpg file. You use this file in email messages and PowerPoint slides, save it to your phone, or print it.

To scan a QR code, in the Power BI Mobile main menu, tap **Scanner**, or use a QR scanner app that is already installed on your mobile. Both methods require access to the camera on your phone, which you must allow.

Data alerts

Data alerts can be added to tiles that display a single number. You set thresholds to alert you when the number goes above or below the value you set, or you can set both. For example, your organization's sales for the year currently show $27.31 million. You can add an alert so you are notified when this figure reaches $30 million. For example, if you wanted to monitor your organization's share price, you could set an alert for when the value drops below $15, and goes above $25.

Power BI for Android



The Power BI app for Android devices has been created with much the same abilities as the app for iOS, with the emphasis on enabling data insights on the move. You can download and install the app, either by searching for Microsoft Power BI on Google Play or from *View dashboards and reports in the Power BI mobile apps* in the Power BI documentation:

View dashboards and reports on your Android phone

http://aka.ms/AA55urg

After installing the app and signing in to Power BI, swipe right on the **Home** screen to see your dashboards, then tap any dashboard to view it.

Viewing modes

On an Android phone, you can view dashboards in portrait mode, which arranges the tiles one on top of another. For a uniform view, they all resize to the same width, filling the available screen space. Landscape mode is also supported, meaning you can view a dashboard in the same layout as it was designed on the Power BI service portal.

Interacting with tiles

While viewing a dashboard, you can tap the ellipsis (**…**) to invite a colleague to share the dashboard, **Refresh** the data, or find out **More about this dashboard**. Swipe up and down to see all the tiles in the dashboard. Tap a tile to put it in **Focus mode**, then tap the points in a chart to see specific details and values.

Annotate and share tiles

You can annotate and add stickers (emoticons) to your dashboard tiles. Tap a tile to open it in **Focus mode**, and then use the tools to annotate the tile.

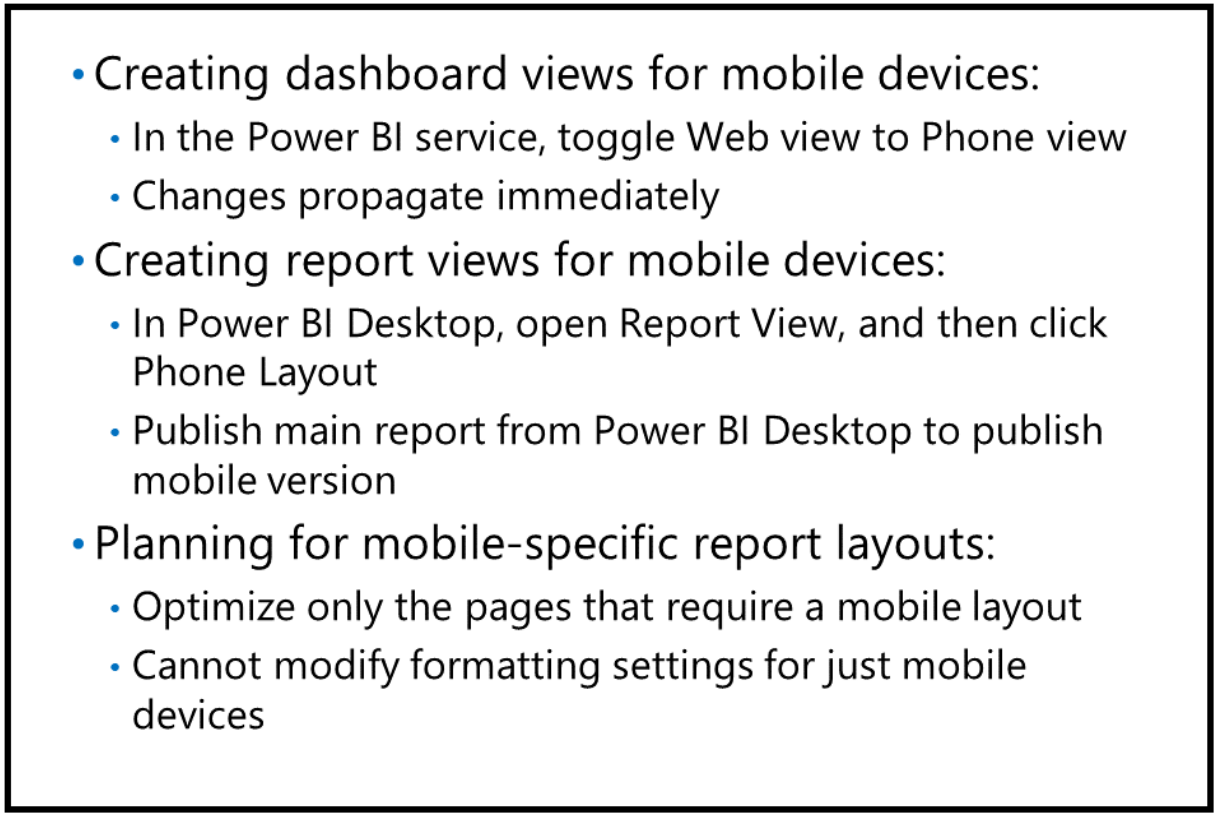
You can share dashboards with colleagues and, if you are the dashboard owner, you can view the colleagues you have invited and see whether they have accepted your

invitation. You can also allow colleagues to share the dashboard with others and dashboard owners can unshare a dashboard.

Power BI QR codes

The Power BI for Android app includes a QR scanner, or you can use any of your other QR code scanner apps. The scanner included with Power BI needs access to your phone's camera, so you must allow this before scanning. When you scan a QR code for a tile, it opens immediately after successfully interpreting the code, either when you use the Power BI scanner, or an alternative scanner app.

Optimizing reports for mobile apps



If you view a regular dashboard on a mobile device—especially a dashboard that has a lot of data and descriptive fields—by default, you will get a long list of tiles in a top to bottom, left to right, order. If you turn your mobile device to landscape mode, it will render in the same layout as on the web. However, if you want a dashboard to be optimized for viewing on a mobile device, you might need to change the layout of the tiles just for those devices; for example, you might have a lot of descriptive tiles that do not need to be displayed on the smaller screen.

Creating dashboard views for mobile devices

You can optimize a dashboard in the Power BI service for mobile device use: open the dashboard in the Power BI service, click **Web view** in the top right corner, and then click **Phone view**.

You now get a view where the tiles are shown in the same layout as you would see on a mobile screen; you can remove tiles, reorder tiles, and resize tiles. If you want to remove everything and start from scratch, there is an option to unpin all the tiles; you can also reset the phone view to match the default layout.

> **Note:** Any changes you make to the phone view of a dashboard in Power BI service are automatically propagated to anyone who views that dashboard in a Power BI mobile app.

Creating report views for mobile devices

You can also optimize Power BI Desktop reports for mobile device consumption:

1. In Power BI Desktop, click **Report View** in the left navigation bar.
2. On the **View** tab, click **Phone Layout**. You now get a blank phone canvas. All of the visuals on the original report page are listed in the **VISUALIZATIONS** pane on the right.
3. To add a visual to the phone layout, drag it from the **VISUALIZATIONS** pane to the phone canvas.
4.

To remove a visual, click the **X** in the top-right of the visual on the phone canvas, or select the tile and press **Delete**. Removing a visual in this view only removes it from the Phone canvas; the visual and the original report will not be affected.

Phone reports use a grid layout. As you drag visuals to the mobile canvas, they snap to that grid. You can add some or all of the master report page visuals to the phone report page. You can add each visual only once. You can resize your visuals on the grid, as you would for tiles on dashboards and mobile dashboards.

Note: The phone report grid scales across phones of different sizes, so your report will look equally good on small- and large-screen phones.

When planning for mobile-specific report layouts, note the following:

- For reports with multiple pages, you can optimize all the pages or only a few.
- On a phone, you move between pages by swiping from the side or tapping the page menu.
- You cannot modify formatting settings for just the phone. Formatting is consistent between master and mobile layouts. For example, font sizes will be the same. So to change a visual, such as changing its formatting, dataset, filters, or any other attribute, you must return to the regular report authoring mode.

Publishing a phone report

To publish the phone version of a report, you publish the main report from Power BI Desktop to the Power BI service, and the phone version publishes at the same time.

Viewing optimized and non-optimized reports on a phone

In the mobile apps on phones, Power BI automatically detects optimized and non-optimized phone reports. If a phone-optimized report exists, the Power BI phone app automatically opens the report in phone report mode. If a phone-optimized report does not exist, the report will open in the non-optimized, landscape view.

When viewing a phone report, changing the phone's orientation to landscape will open the report in the non-optimized view with the original report layout, whether you optimize the report or not. If you only optimize some pages, when users access a non-optimized page in portrait view, they will be prompted to rotate their device to view the page in landscape mode. For more information about creating reports for phone apps, see *Optimize reports for the Power BI mobile apps* in the Power BI documentation:

Optimize reports for the Power BI mobile apps

https://aka.ms/b1tebj

Demonstration: Creating reports and dashboards for mobile apps

In this demonstration, you will see how to:

- Create a phone layout for a report in Power BI Desktop.
- Create a phone view for a dashboard in Power BI service.

Check your knowledge

Discovery

If you have an iOS or Android phone or tablet, download the Power BI app if you don't already have it. You do not need to sign in with a Power BI account, because you can use the sample data. Explore the features of the Power BI app, looking at the Power BI samples. Which useful features could be added to improve the app? In addition to features you like and don't like, discuss how they could be useful in your organization.

Show solution Reset

Lesson 2: Using the Power BI mobile app

In this lesson, you will learn how to create and publish reports specifically for mobile devices. You'll also learn about the features in the mobile apps that enable dashboards to be shared and annotated—and how the apps enable Power BI data to be displayed offline. Finally, you will learn about Power BI alerts and notifications, and how alerts work for mobile devices.

Lesson objectives

After completing this lesson, you will be able to:

- Create and view mobile device-specific on-premises reports.
- Share and annotate a snapshot of a tile, report, or visualization from the Power BI mobile app.
- Use the Power BI mobile app for offline content consumption.
- Use the Power BI Notification Center, and set alerts for the mobile apps and the online Power BI service.

Creating and viewing on-premises reports

- Use Power BI mobile apps to view on-premises reports and KPIs
- Create as SQL Server Reporting Services mobile reports using SQL Server Mobile Report Publisher, optional phone layout
- Publish reports to a SQL Server Reporting Services web portal
- View reports in Power BI mobile app:
  - Select **Connect to server** using format: http://<servername>/reports or https://<servername>/reports

In addition to using the Power BI mobile apps to view Power BI dashboards and reports, you can also use them to view Reporting Services mobile reports and KPIs. You create mobile device-specific reports using SQL Server Mobile Report Publisher, and then publish these reports to a SQL Server Reporting Services web portal, where you can also create KPIs. You then view these mobile reports and KPIs in the Power BI mobile app, organized in folders or collected as favorites.

Note: If you do not have access to a Reporting Services web portal, you can still explore the features of Reporting Services mobile reports in the Power BI mobile app. Tap the options icon, and then tap **Report Server samples**. Browse the samples to interact with KPIs and mobile reports.

You can connect mobile reports to a range of data sources, including on-premises SQL Server and Analysis Services data. You design the layout of your mobile reports on a design surface with adjusting grid rows and columns, and flexible mobile report elements that scale well to any screen size. You then save these mobile reports to a Reporting Service portal, and view and interact with them in a browser or in the Power BI mobile app on iPads, iPhones, and Android phones.

> **Note:** To use the Power BI mobile app to view your reports and KPIs, you need to enable Basic Authentication on your reporting server.

Prepare SQL Server Reporting Services

The key steps for preparing SQL Server Reporting Services ready for creating mobile reports are as follows:

1. Configure SQL Server Reporting Services (SSRS) if it is not already running.
2. In SSRS, create a shared data source.
3. In Report Builder, create a new dataset using your shared data source and save it to the SSRS server.

You use this dataset for KPIs and mobile reports; multiple datasets can use the same data source.

Create a new KPI

To create a KPI:

1. On the Reporting Services web portal, on the **New** menu, click **KPI**.
2. Select your dataset then select the field and aggregation you want to use.
3. Choose the trend set to show the past KPI values in the chart.
4. Choose the visualization type for the chart.

Create a new mobile report

To create a mobile report:

1. Download and install the SQL Server Mobile Report Publisher.
2. Start Mobile Report Publisher—you can begin with visuals or with data. If you start with visuals, sample data is automatically generated.
3. To add your own data, click **Add Data**, and select where your data is located. You can add local Excel data or a shared dataset from your SSRS instance.
4. To create a phone layout, select **Phone** in the layout dropdown menu in the top-right of the window, and design the report.
5.

Save the report, typically to an instance of Reporting Services.

View KPIs and mobile reports in the mobile app

Use the Power BI app to connect to a Reporting Services server to view mobile reports and KPIs. To get started:

1. Ensure you have the latest version of the Power BI app downloaded to your device.
2. Open the app, tap **Sign In**, and sign in to the app using your credentials.
3. Tap the options icon, and then tap **Connect to server**.
4. Enter the server address and your user name and password. Use this format for the server address:
5. **http://< *servername* >/reports** or **https://<*servername*>/reports** (https is recommended for all production scenarios).
6. Optionally specify a display name for the server.
7. Tap **Connect**.
8. Tap the options icon anytime to go between your Reporting Services mobile reports and your dashboards in the Power BI service.
9. When you enter the app in future, you will see the server in the menu that you

have set up. You can only have a connection to one instance of Reporting Services at a time in the app. If you want to connect to a different server, you need to disconnect from the current one.

In future, the Power BI mobile app will default to the KPI page as the first page you see, unless you are also connected to a Power BI instance. It will default to Power BI when both services are connected.

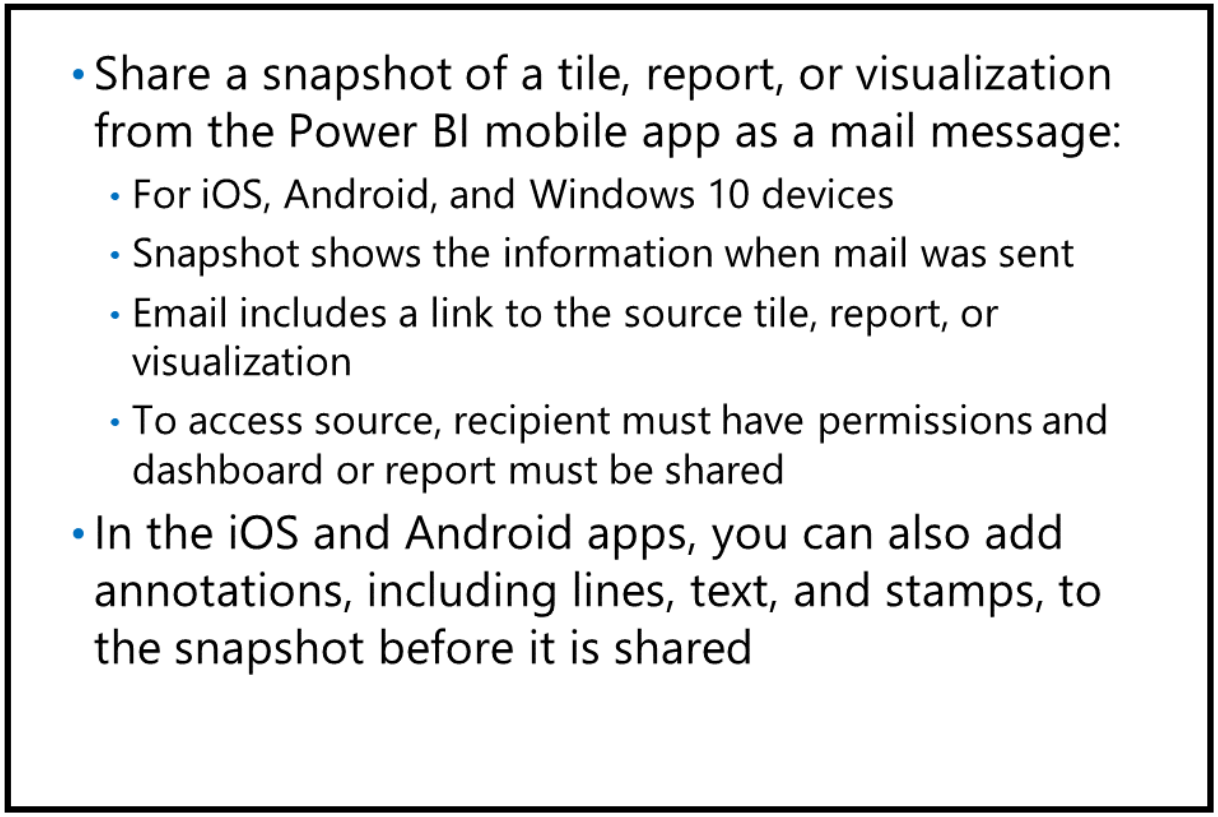
KPIs and mobile reports can be marked as favorites in the Reporting Services web portal; you then view them in a single folder on your device, together with Power BI favorite dashboards and reports. You can also mark KPIs and mobile reports as favorites within the Power BI mobile app.

For more information about this, see *Create mobile reports with SQL Server Mobile Report Publisher* in Microsoft Docs:

Create mobile reports with SQL Server Mobile Report Publisher

https://aka.ms/ac9os9

Annotating and sharing content



You can share a snapshot of a tile, report, or visualization from the Power BI mobile app for iOS, Android, and Windows 10 devices as a mail message. The snapshot shows the information as it was at the time when the mail was sent, and includes a link to the source tile, report, or visualization. Snapshots can be sent to anyone but, to access the current information through the link, the recipient must have the appropriate permissions—and you must have already shared the dashboard or report with them.

In the iOS and Android apps, you can also add annotations, including lines, text, and stamps, to the snapshot before it is shared.

To annotate a tile, report, or visual:

1. Open a report, or tap a tile or visualization to open it in focus mode.
2. Tap the annotate icon.
    - To draw lines, tap the squiggly line or pen icon, choose a width and color, and draw.
    - To type comments, tap the text icon, choose the text size and color, and type.
    - To paste stamps (such as emoticons), tap the smiley face, choose a color, and tap where you want them.

To share a tile, report, or visual:

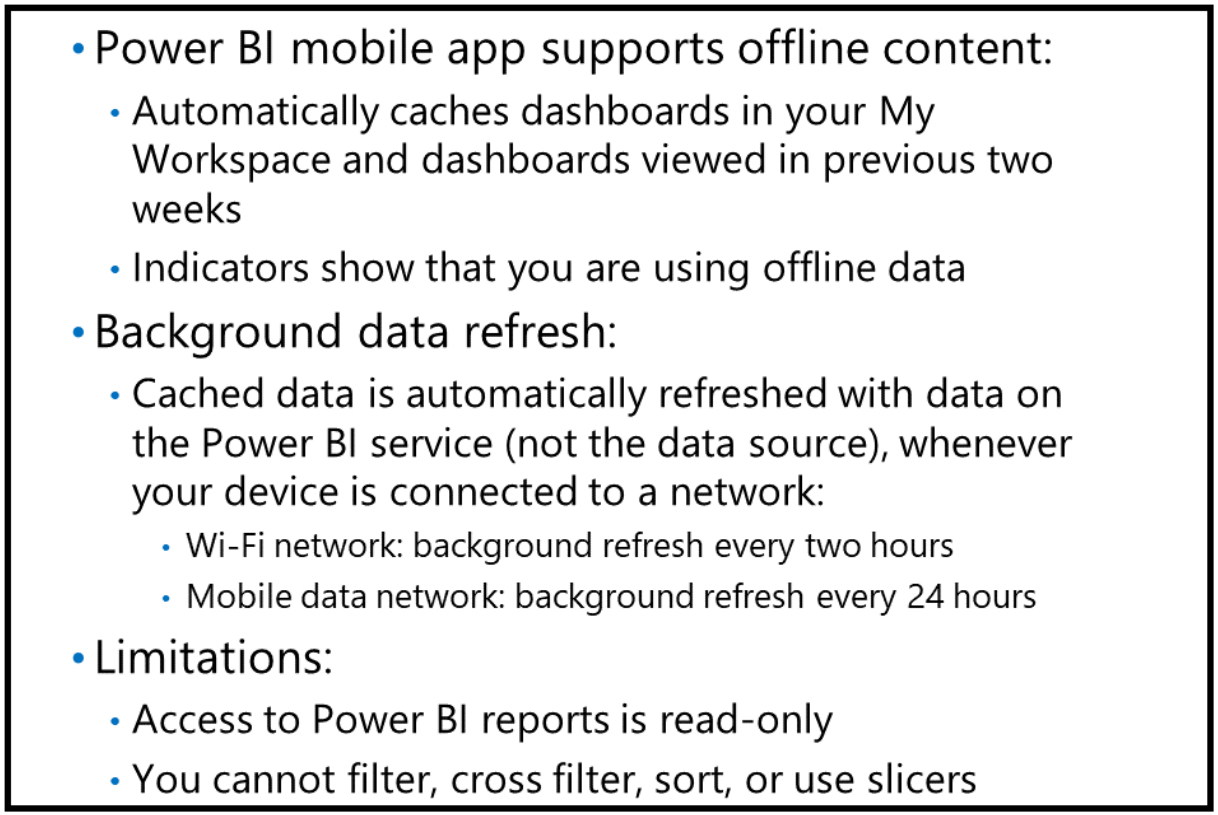
1. In focus mode, tap **Share** in the upper-right corner.
2. Tap the Mail icon.
3. Type the recipients' names, and (optionally) edit the standard message text.
4. Tap **Send**.

The mail message includes a link to the live version of the tile, report, or visualization. The message recipients can click this link and go straight to that tile, report, or

visualization, provided that:

- The recipients have been assigned the appropriate permissions to the dashboard or report.
- The dashboard or report has been shared with the recipients.

Taking mobile content offline



The Power BI mobile app supports offline content consumption so, unlike when you're using a mobile browser, data is still available when you are not connected to a network. The mobile app automatically caches the dashboards in your My Workspace, together with any other dashboards you have viewed in the previous two weeks. The Power BI app provides indicators to show that you are using offline data, so it's clear whether the dashboards, reports, and tiles are showing current live or cached information.

Background data refresh

Cached data is automatically refreshed with data on the Power BI service (not the data source), whenever your device is connected to a network:

- **Wi-Fi network**. Background refresh updates the content every two hours.
- **Mobile data network**. Background refresh updates every 24 hours.

If you do not want your device to use background refresh, you can turn it off, to prevent excessive network usage.

> **Note:** For iOS devices that are managed by Microsoft Intune Mobile Application Management (MAM) policies, background data refresh for the Power BI mobile app is turned off. To refresh the data from the Power BI service, you must go into the app.

Offline limitations

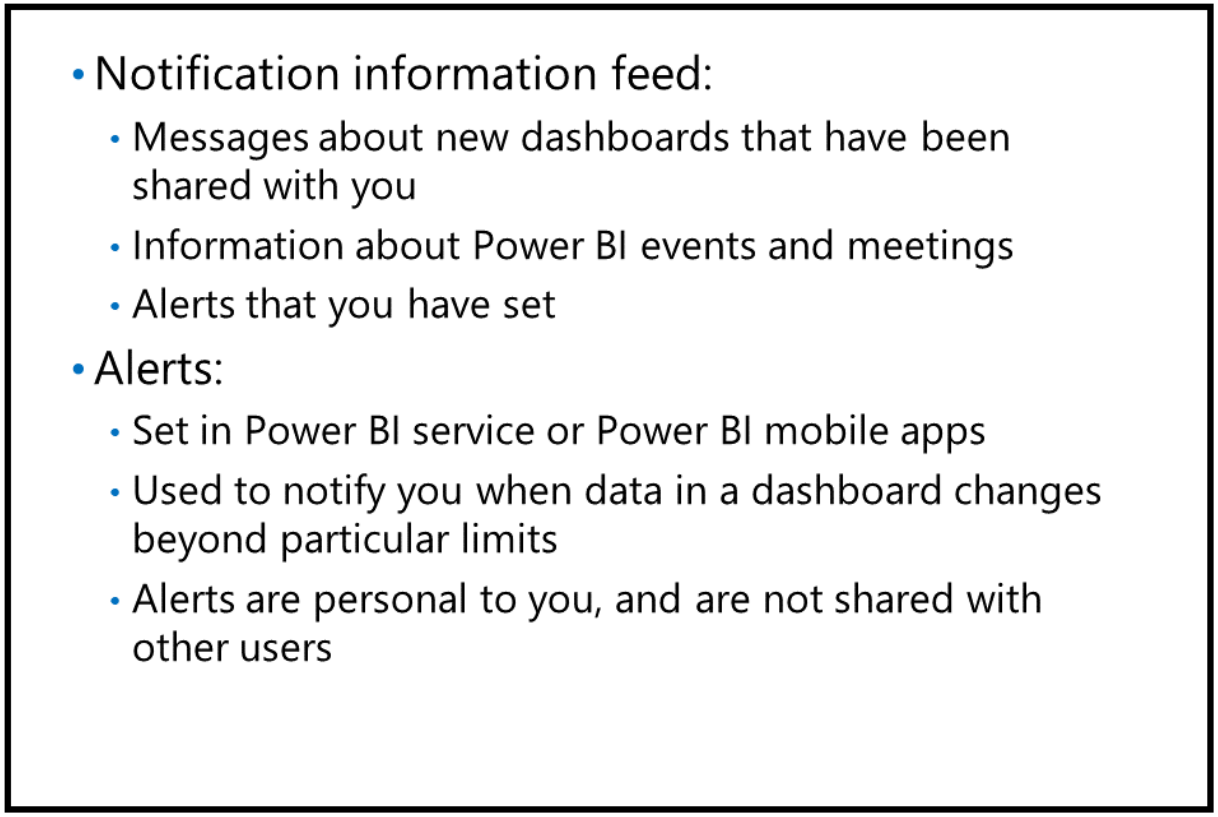
While offline, you can interact with cached dashboards and reports, with the following limitations:

- Your access to Power BI reports is read-only.
- You can see full reports, but you cannot filter, cross-filter, sort, or use slicers.

When working offline with the Power BI mobile app, you might also encounter the following additional limitations:

- The Power BI app can only cache a maximum of 250 MB of data.
- Some tile types are not available offline, because they require an always-on server connection, such as Bing map tiles.
- Reporting Services mobile reports and KPIs can be viewed offline, providing you have viewed them while connected. However, these reports and KPIs do not refresh in the background; instead, they refresh when you open them.

Using data alerts



If you work in an organization where many coworkers are using and sharing information, your Power BI experience could potentially become overwhelming; for example, as others share dashboards with you, alerts are generated, and new reports generated. The Power BI Notification Center addresses this challenge.

The Notification Center is a constantly updated information feed, including messages about new dashboards that have been shared with you, information about Power BI events and meetings, and alerts that you have set. You set alerts in either the Power BI service or the Power BI mobile apps; because the alerts are shared across your login, the same alerts display wherever you are connected, and whether the alert was set in the service or in an app.

Alerts are used to notify you when data in a dashboard changes beyond particular limits, and are used for tiles that feature a single number, such as cards and gauges. Alerts are personal to you, and are not shared with other users, even when you share a dashboard that includes a tile for which you have set an alert.

> **Note:** If your device gets lost or stolen, you should connect to the Power BI service to turn off all data-driven alert rules, to prevent any alert notifications on that device from providing information about your data to an unauthorized person.

Setting an alert

The following steps describe how to set an alert in the Power BI app for iOS (the steps for Android devices are similar):

1. Tap a number or gauge tile in a dashboard to open it in focus mode.
2. Tap the bell icon to add an alert.
3. Tap **Add alert rule**.
4. Select to receive alerts above or below a value, then set the value.
5. Select whether to receive hourly or daily alerts, and whether to also receive an email when you get the alert.
6. (Optionally) change the alert title.

7. Tap **Save**.

Receiving alerts

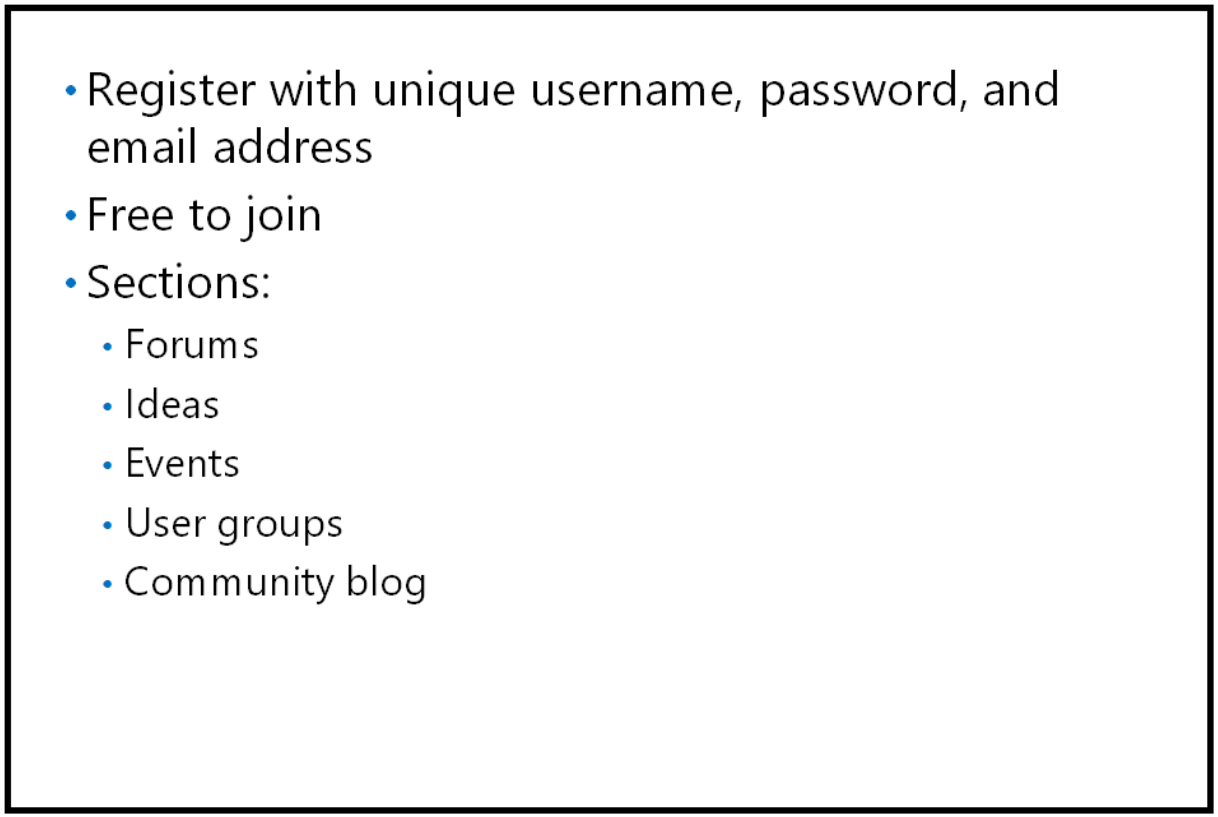
Alerts are received into the Power BI Notification Center on your mobile device or in the Power BI service; this is also where you get any notifications about new dashboards that have been shared with you. Alerts are only generated when data is refreshed; after a refresh, if data reaches an alert threshold, the following occurs:

1. The Power BI service checks when the last alert was sent.
2. Depending on the alert interval option you configured for the alert (every hour or every 24 hours, for example) a new alert will be generated.
3. If the alert is configured to send an email message, the email will be sent.
4. Power BI adds a message in the Notification center, and adds a new alert icon to the applicable tile.
5. On a mobile device, tap the global navigation button to open the mobile notification center and see the alert details.

Module review and takeaways

In this module, you have learned how to create dashboards and reports for use on mobile devices, including specific features supported by iOS and Android operating systems. You learned how to create and publish reports for mobile devices, and how reports and dashboards can be optimized for consumption on mobile devices. You also learned how to share and annotate dashboards, how Power BI data can be used when mobile devices are offline, and how to set and use alerts.

Power BI Community



The Power BI Community is a free website where you can learn more about Power BI and connect to other BI professionals. To get started, you register and create a

profile. This is a separate registration to the login you use for the Power BI service, requiring a unique username, password, and email address. You can use the same email address that you use for the Power BI service. Your profile is visible to other users, who can view your posts and activity, and add you as a friend. You use the messaging feature to send and receive private messages to and from other community members. You can personalize your profile to include a photo or avatar, and add links to your social media profiles such as Twitter and Facebook.

The community includes the following sections:

Forums

The forums are an incredibly useful source of knowledge for finding solutions to problems you have encountered, or for discovering how to master a task. You can search existing posts, or browse through the main topic areas. Each post includes an options menu, offering numerous useful features, including bookmarking the post, subscribing to the post to be informed of new comments, and sending the post to a friend. Experienced users and moderators all contribute to helping the community resolve their issues and answer questions.

Ideas

Microsoft encourages users to submit feedback and suggestions for continuous product improvements to Power BI. In addition to being able to submit a suggestion for a new feature, or a better way for an existing feature to operate, community

members can vote on suggestions, so that Microsoft develops the most popular features first.

Events

For free training and learning, visit the Events page to find meetings local to you, or online meetings. These events include official Microsoft meetings, in addition to user group meetings. You use the options menu to subscribe to the events page, receive events via RSS, and invite a friend to join the community.

User groups

You can find established user groups, and get information on how to start one if you don't have one near to where you live. Use the **Notify me** link to add your location and receive alerts if a new group starts up, or you can suggest an existing group partners with you. The program managers at Microsoft post comments to inform the community when work begins on a feature.

Community blog

The community blog comprises articles, guides, and information specific to Power BI, written by community members. You can also use the options menu to subscribe to the blog to receive updates when new blogs are published, obtain updates as an RSS feed, and invite a friend to join. Furthermore, you can bookmark articles you like and reread them as required.

When you give a “thumbs-up” to like an article, this gives it kudos. Authors earn kudos badges by collecting likes from other members. If you have written an article that you would like to publish to the community blog, you contact the Admin team and submit your work.

For more information and to interact with the Power BI community, see *Welcome to Microsoft Power BI Community*:

Welcome to Microsoft Power BI Community

https://aka.ms/qfx3ay

Review question(s)

Check your knowledge

Discovery

Which types of information are likely to work best on a mobile device? Ask students how they think Power BI mobile apps could be used in their own organizations, and which types of visualizations and data formats they would choose for mobile reports and dashboards.

Show solution Reset