



Dashboard in a Day – Dashboard and Collaboration

by Power BI Team, Microsoft



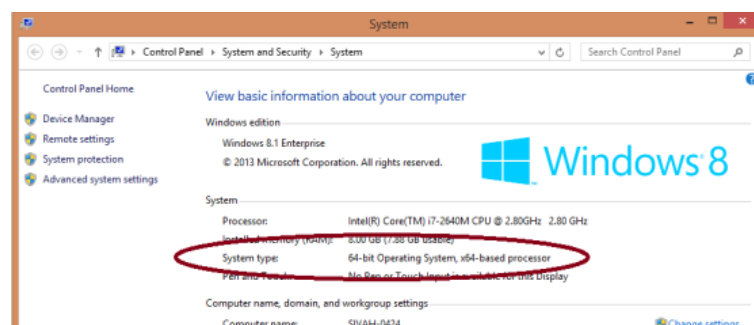
Contents

Power BI Service	5
Building Dashboard.....	5
References	15

Lab Prerequisites

Following prerequisites and setup must be complete for successful completion of the exercise:

- You must be connected to the internet.
- **Signup for Power BI:** Go to <http://aka.ms/pbidiadtraining> and sign up for Power BI with a business email address. If you cannot sign up for Power BI, let the instructor know.
- If you have an existing account, please go to <http://app.powerbi.com> and **Sign in** using your **Power BI Account**.
- At minimum, a computer with 2-cores and 4GB RAM running one of the following version of Windows: Windows 8 / Windows Server 2008 R2, or later.
- Microsoft Power BI Desktop requires Internet Explorer 10 or greater.
- Verify if you have 32-bit or 64-bit operating system to decide if you need to install the 32-bit or 64-bit applications.
 - Search for computer on your PC, right click properties for your computer.
 - You will be able to identify if your operating system is 64 or 32 bit based on “system type” as shown below.



- **Download the Power BI Content:** Create a folder called **DIAD** on the C drive of your local machine. Copy all contents from the folder called **Dashboard in a Day Assets** to the **DIAD** folder you just created (C:\DIAD).
- **Download and install Power BI Desktop** using any one of the options listed below:
 - If you have Windows 10, use Microsoft App Store to download and install Power BI Desktop app.
 - Download and install Microsoft Power BI Desktop from <http://www.microsoft.com/en-us/download/details.aspx?id=45331>.
- **Download and install Power BI Mobile App on your mobile device**
 - If you are using an Apple product download and install the Microsoft Power BI Mobile app from the Apple store or this link <https://apps.apple.com/us/app/microsoft-power-bi/id929738808>
 - If you are using an Android product download and install the Microsoft Power BI Mobile app from the Google Play store or this link <https://play.google.com/store/apps/details?id=com.microsoft.powerbim>

Document Structure

This document is lab 05 of 05 labs in total. The document structure and introduction section can be found in lab 01.

The document flow is in a table format. On the left panel are steps the user needs to follow and in the right panel are screenshots to provide a visual aid for the users. In the screenshots, sections are highlighted with red boxes to highlight the action/area user needs to focus on.

NOTE: This lab is using real anonymized data and is provided by ObviEnce LLC. Visit their site to learn about their services: www.obvience.com.

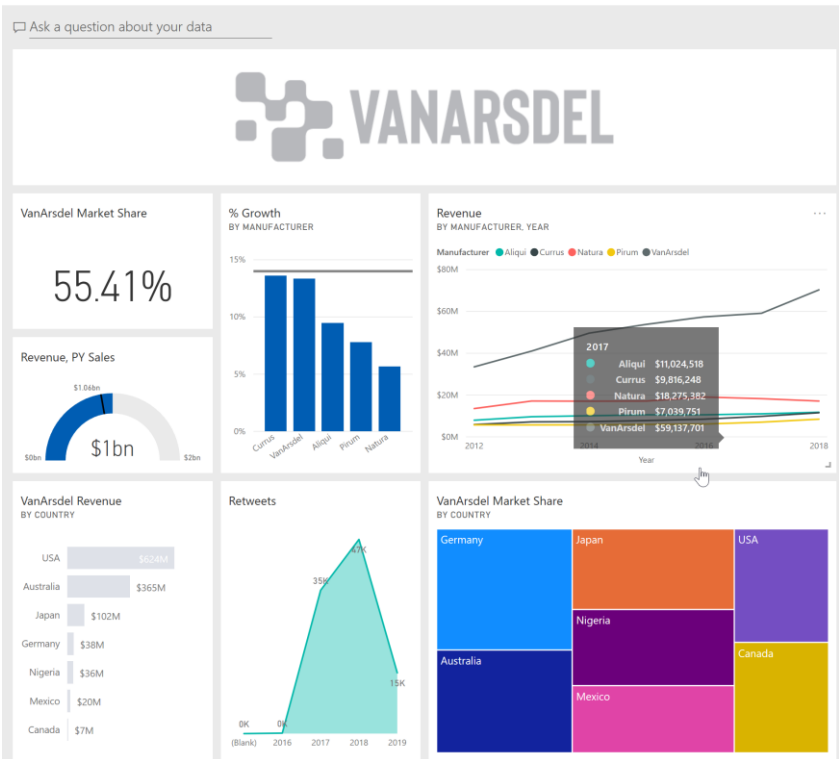
This data is property of ObviEnce LLC and has been shared for the purpose of demonstrating Power BI functionality with industry sample data. Any uses of this data must include this attribution to ObviEnce

Power BI Service

Building Dashboard

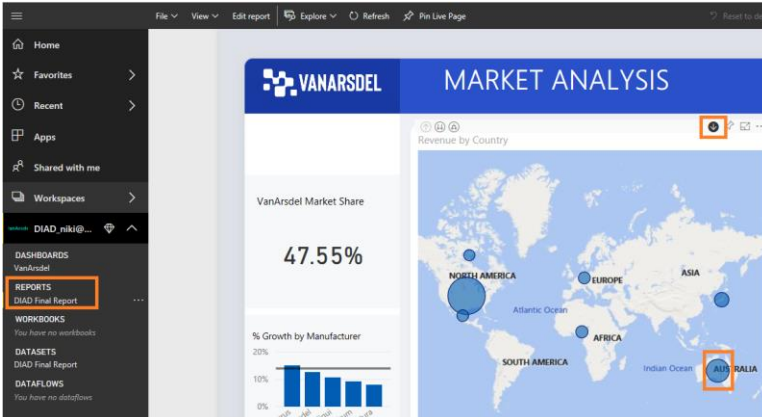
In this section, we will create a dashboard that will combine data from the Market Share report as well as Social report.

At the end of the section, we will create a dashboard that looks like the screenshot.



Let's start with exploring the report.

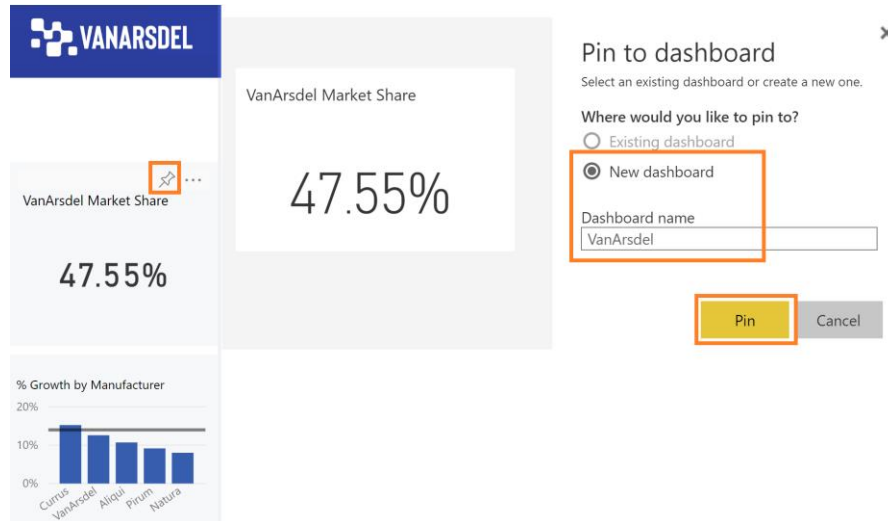
1. From the left menu, select **REPORTS** -> **DIAD Final Report**. You will be navigated to the report you just uploaded.
2. In the **map visual**, enable drill down by **hovering** over the visual.
3. Select the **down arrow** on the top right corner of the visual.
4. Select **Australia** to drill down to **State level**.



Let's pin visuals to the dashboard.

5. Hover over **VanArsdel Market Share** card visual.
6. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens.
7. We do not have a dashboard yet. Let's create one. With **New dashboard** selected, enter **VanArsdel** in the text box.
8. Select **Pin**.

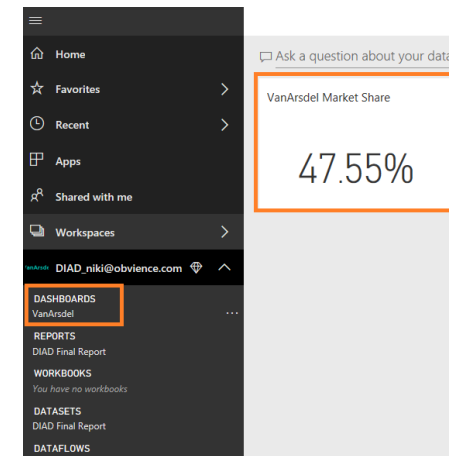
Notice alert messages are displayed stating the dashboard is ready to view.



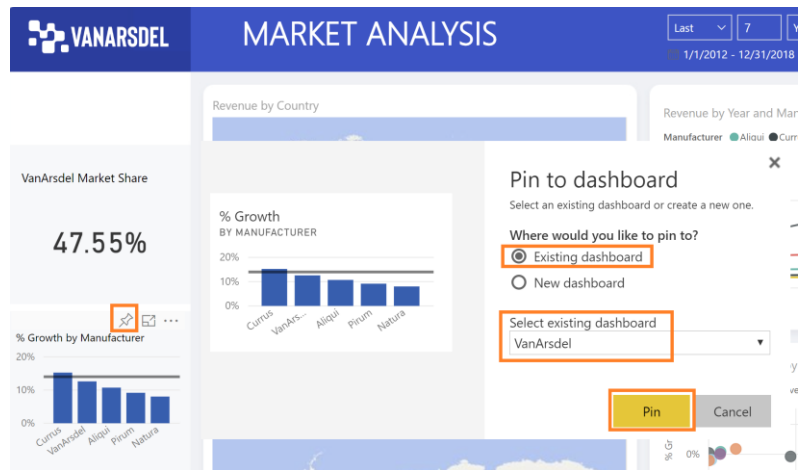
Notice in the left panel, VanArsdel Dashboard is created under DASHBOARDS.

9. From the left panel, select **DASHBOARDS -> VanArsdel**.
- Notice the VanArsdel Market Share tile is pinned to the dashboard.
10. Click on **VanArsdel Market Share**, notice you are navigated to the report.

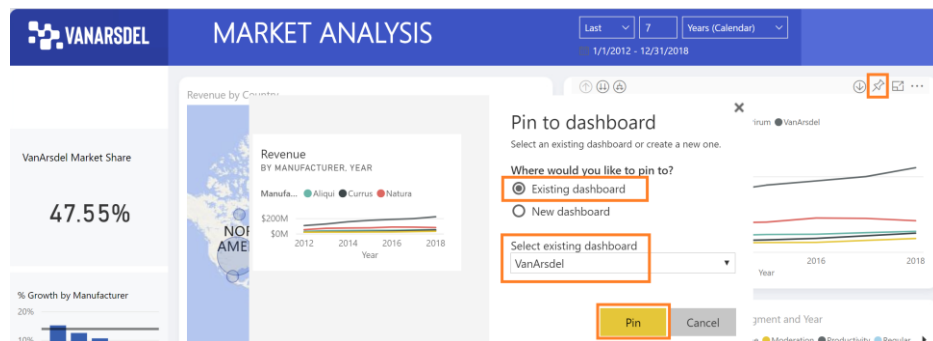
Tiles in dashboard are not interactive.



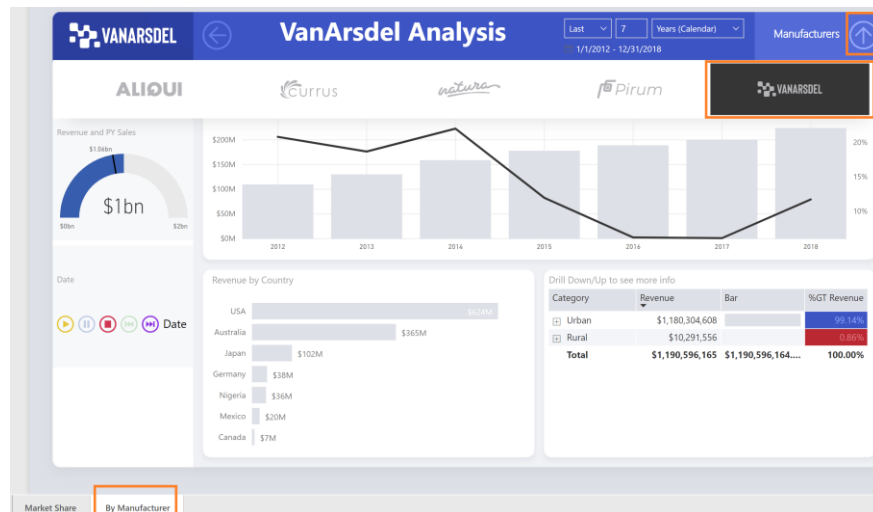
11. Hover over **% Growth by Manufacturer** visual.
12. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens.
13. Make sure **VanArsdel** is selected in the dropdown.
14. Select **Pin**.



15. Close out alert dialogs.
16. Hover over **Revenue by Year and Manufacturer** visual.
17. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens.
18. Make sure **VanArsdel** is selected in the dropdown.
19. Select **Pin**.

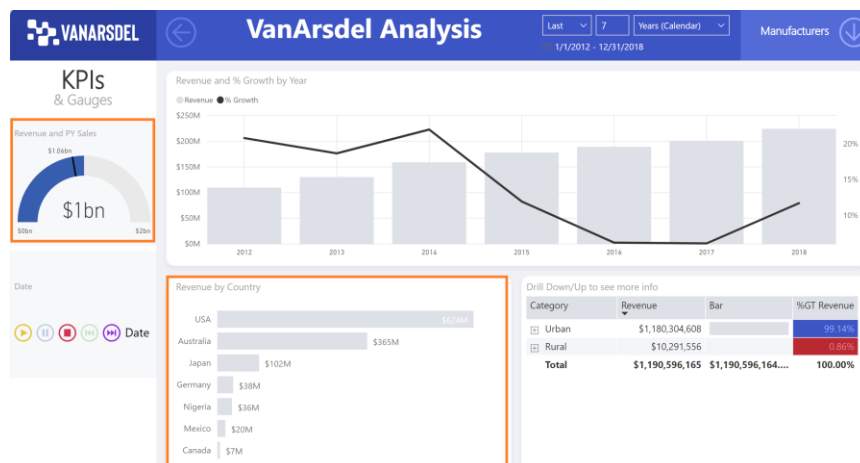


20. Close out alert dialogs.
21. Navigate to **By Manufacturer** page.
22. From the top right corner, select the **down arrow**. Notice manufacturer slicer displays.
23. Select **VanArsdel** from the slicer. This will filter the visuals.
24. From the top right corner, select the **up arrow**. Notice manufacturer slicer collapses.



25. **Pin the gauge visual** to the dashboard.
26. **Pin Revenue by Country** visual to the dashboard.
27. Close out alert dialogs.

Note: VanArsdel filter is applied to the tile that is pinned to the dashboard.

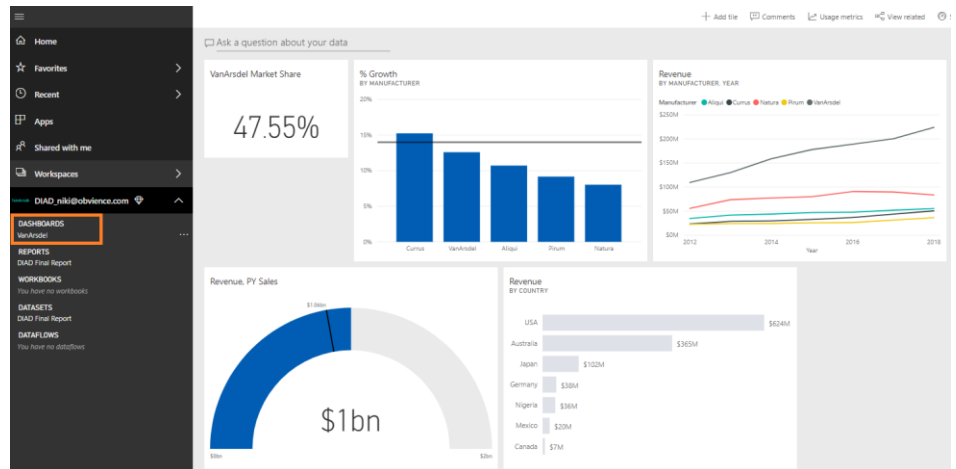


28. From the left panel, select **DASHBOARDS -> VanArsdel**.

Notice all the visuals are pinned as tiles to the dashboard.

You will see the visuals on the dashboard like the screenshot.

Each visual on the dashboard is called a tile. The tiles represent the data chosen and will be kept up to date as the data in the data model updates. Tiles are not interactive.

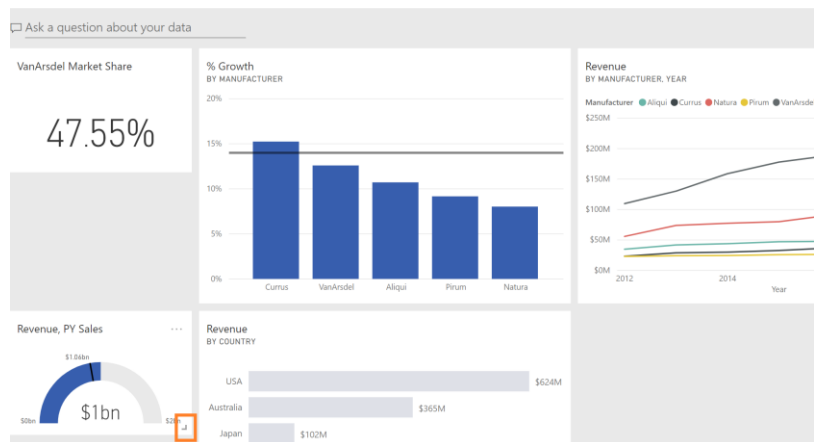


Let's organize the dashboard now.

29. Select and move the **gauge tile** as shown in the screenshot.

30. Select the **bottom right corner** of the tile and move it diagonally to change the image size.

Tiles can be of **various sizes (1x1 to 5x5)**. Drag the tile using the bottom right corner to resize. As you are dragging, note the gray shadow which indicates the size of the tile when you stop dragging.



31. From the top menu, select **Add tile**. Add tile dialog opens.

32. Select **Image** as the source.

33. Select **Next**.

34. In **URL** text box, enter

<https://raw.githubusercontent.com/CharlesSterling/DiadManu/master/Vanarsdel.png>

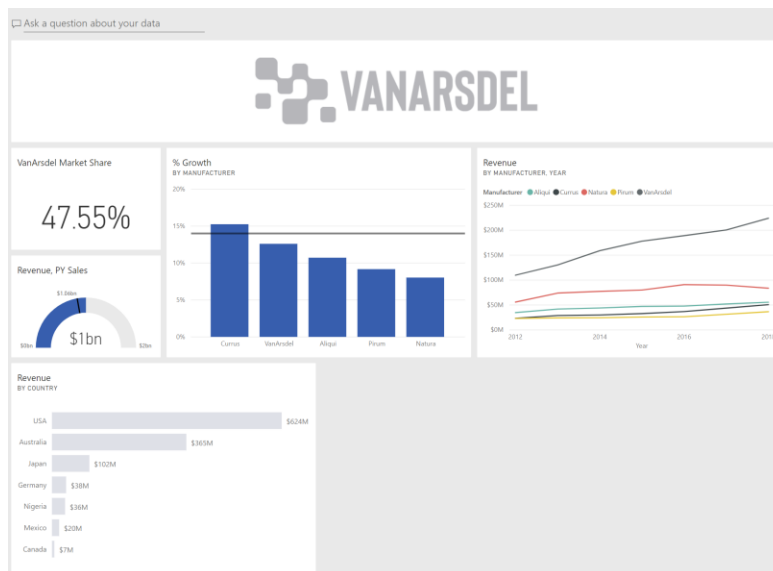
Note: URL is case sensitive.

35. Select **Apply**.

Notice a new tile with VanArsdel logo is added to the dashboard.

The screenshot shows the 'Add image tile' dialog box. The 'URL' field is highlighted with an orange box and contains the text: <https://raw.githubusercontent.com/CharlesSterling/DiadManu/master/Vanarsdel.png>. The 'Apply' button is also highlighted with an orange box.

36. **Resize** and **rearrange** the tiles as shown in the screenshot.



Revenue by Country tile shows Revenue by Country for VanArsdel, so let's rename it.

37. **Hover** over Revenue by Country tile.

38. Select the **ellipsis** on the top right corner of the tile.

39. Select **Edit Details**. Tile Details dialog opens.

40. Change **Title** to **VanArsdel Revenue**.

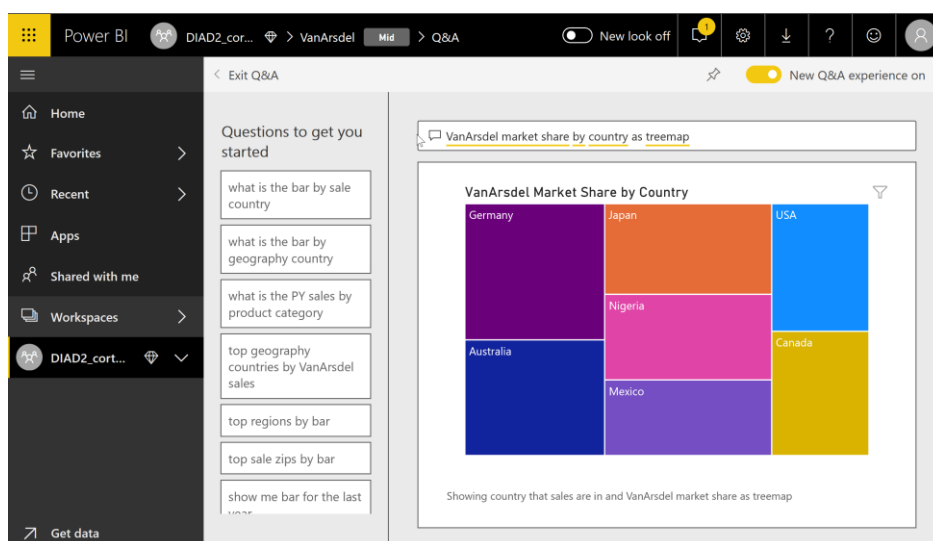
41. Select **Apply**.

It will be nice to have a visual that represents Market Share by country. Notice on the top of the visual, there is an option to **Ask a question about your data**. This is similar to Ask a question in the desktop.

42. In the text box start typing, **VanArsdel market share**. Notice a card visual is created.

43. Continue typing **VanArsdel market share by country**. Notice a bar chart is created.

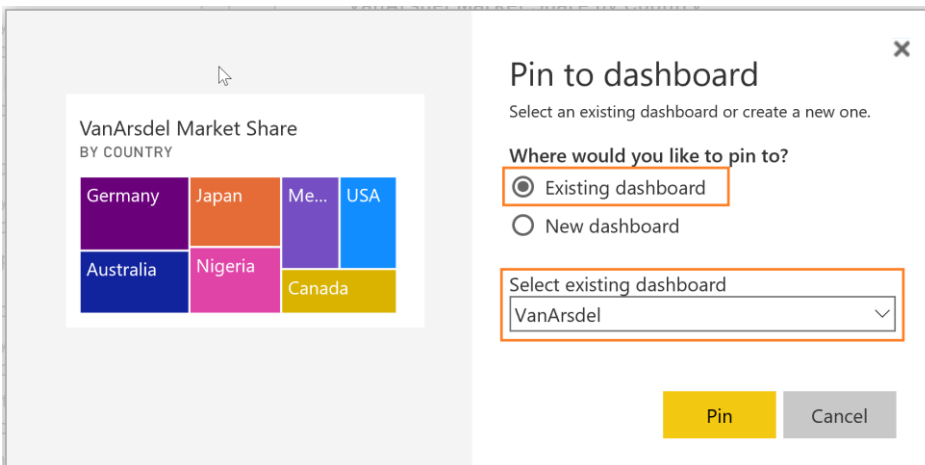
44. Continue typing **VanArsdel market share by country as treemap**. Notice a treemap visual is created.



Note: Remember we renamed tables.
One of the reasons we did it is to make it user friendly for Q&A.

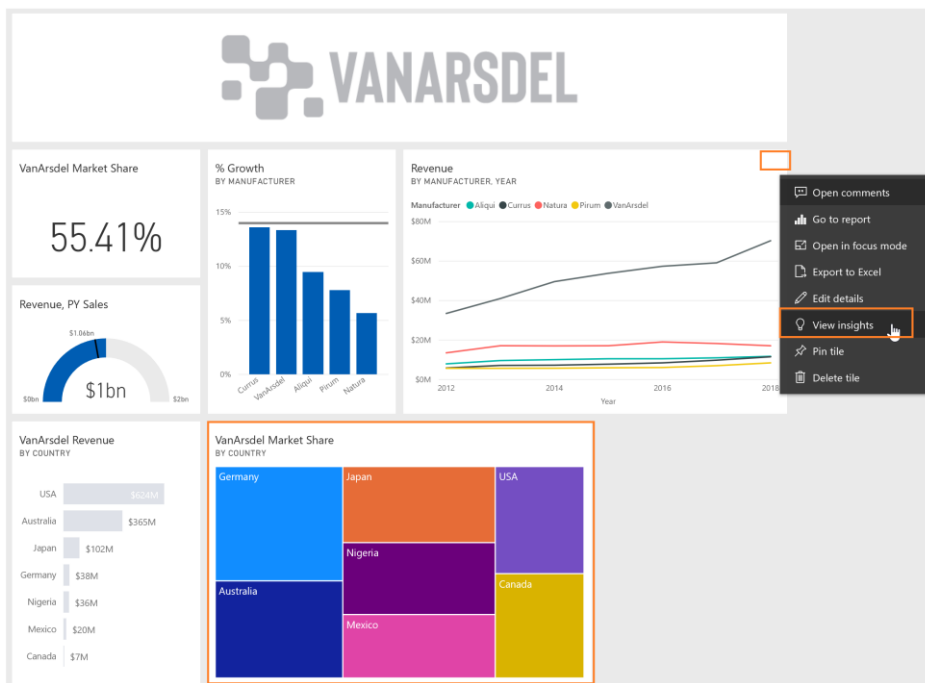
45. From the top right of the screen, select **Pin Visual**.
46. Pin to dashboard dialog opens. Select **Pin** to pin the visual to VanArsdel dashboard.
47. Close the alert dialogs.
48. Select **Exit Q&A** to navigate back to the dashboard.

Notice the visual is added as tile to the dashboard. Clicking on the tree map visual will navigate you back to the Q&A section.



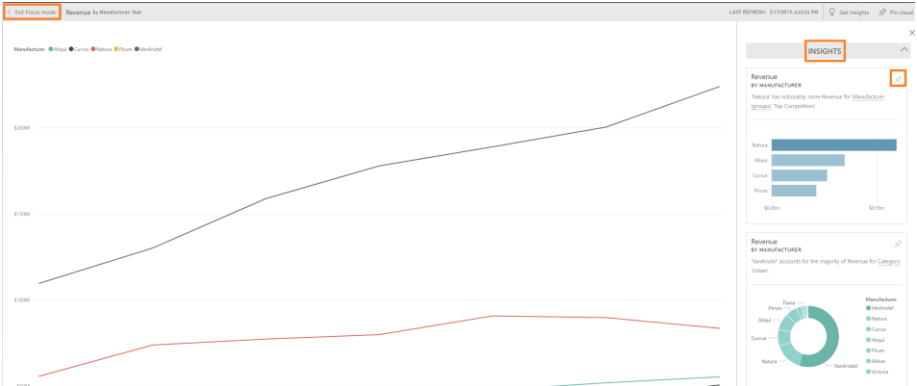
Power BI quickly searches different subsets of your dataset while applying a set of sophisticated algorithms to discover potentially-interesting insights. You can run insights against a dataset or dashboard tile. Let's generate insights on a dashboard tile. When we run insights on a dashboard tile, instead of searching for insights against an entire dataset, search is narrowed to the data used to create a single dashboard tile. This is often referred to as scoped insights.

49. Hover over the **line chart** on the dashboard.
50. Select the **ellipsis** on the top right corner.
- Select **View Insights**.



You will be navigated to **Focus mode** for the line chart.

51. **Scroll** on the Insights panel to review the various insights Power BI can generate. Notice that there is an option to pin insight visuals to the dashboard.
52. Click on **Exit Focus mode** on the top left to navigate back to the dashboard.



We want to be notified when VanArsdel's Market Share goes above or below a threshold. We can set up alerts to achieve this.

53. Hover over **VanArsdel Market Share** tile.

54. Click on the **ellipsis** on the top right corner of the tile.

55. Select **Manage alerts**. Manage alerts dialog opens.

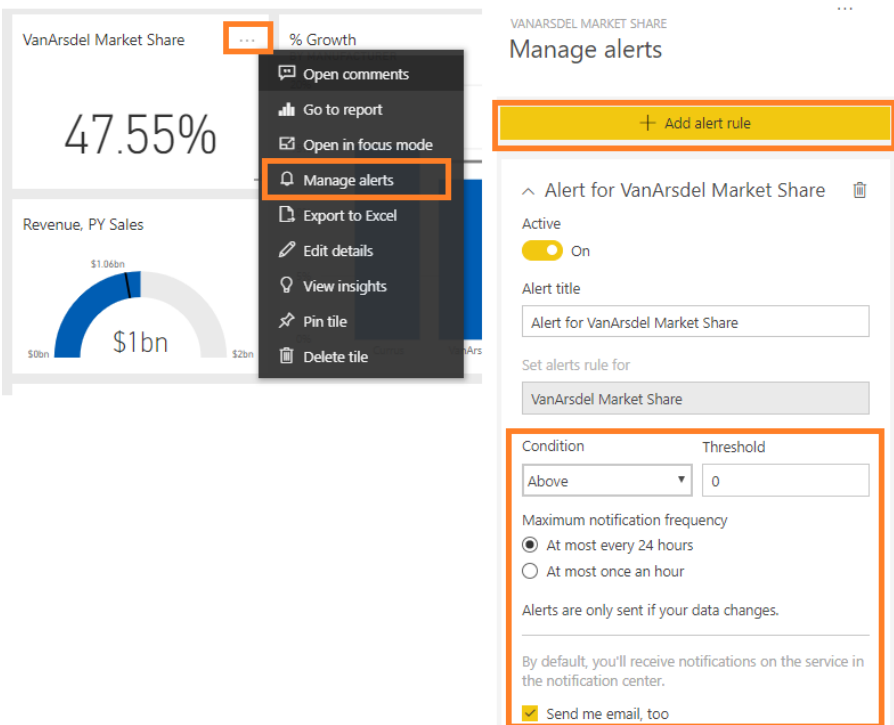
56. Select **Add alert rule dialog**.

Notice you can add Above and Below threshold and notification frequency can be set.

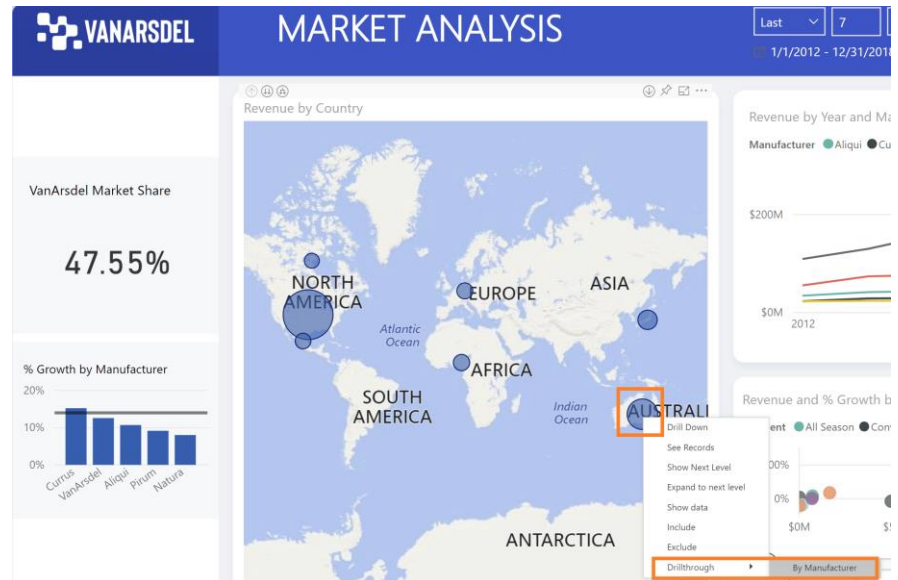
This is an introduction to managing alerts. Complete functionality is not covered in this lab.

57. Select **Cancel** to close the dialog.

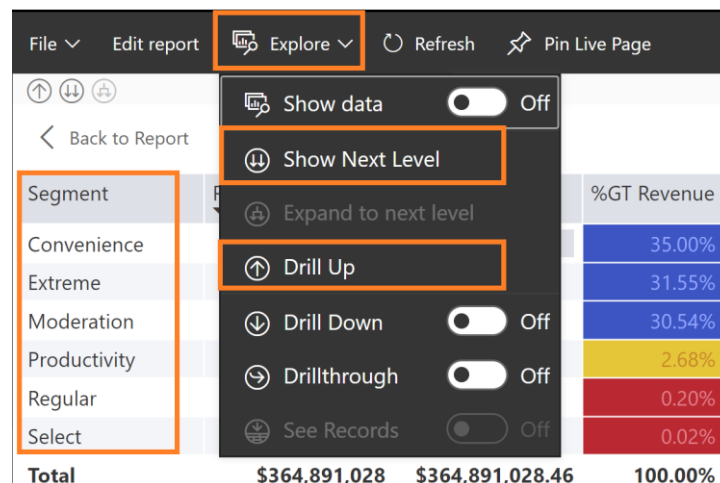
58. Select **Don't Save**.



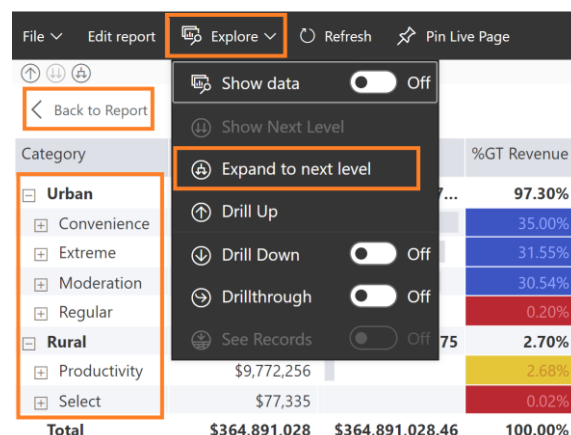
59. Click on **VanArsdel Market Share** tile to navigate to the report.
60. In map visual, right click on Australia bubble and select **Drillthrough -> By Manufacturer**.
61. You will be navigated to By Manufacturer page of the report with Australia filter applied to the report page.



62. Hover over **matrix** visual.
63. Select **focus mode icon** on the top right corner of the visual.
64. From the top menu, select **Explore -> Show Next Level**. Notice now data is at Product Segment level.
- From the top menu, select **Explore -> Drill up**.



65. This time from the top menu, select **Explore -> Expand to next level**. Notice now data is at Segment level but laid out as a hierarchy.
66. Select **Back to Report** to navigate back to the report view.
67. Notice all the functionality that is available in Power BI Desktop is available in the service. E.g. Show Data, See Records, etc.



68. From the top menu, select **View** and **enable Bookmark pane**. Bookmark pane opens on the right. There are 2 options, Personal bookmarks and Report bookmarks.

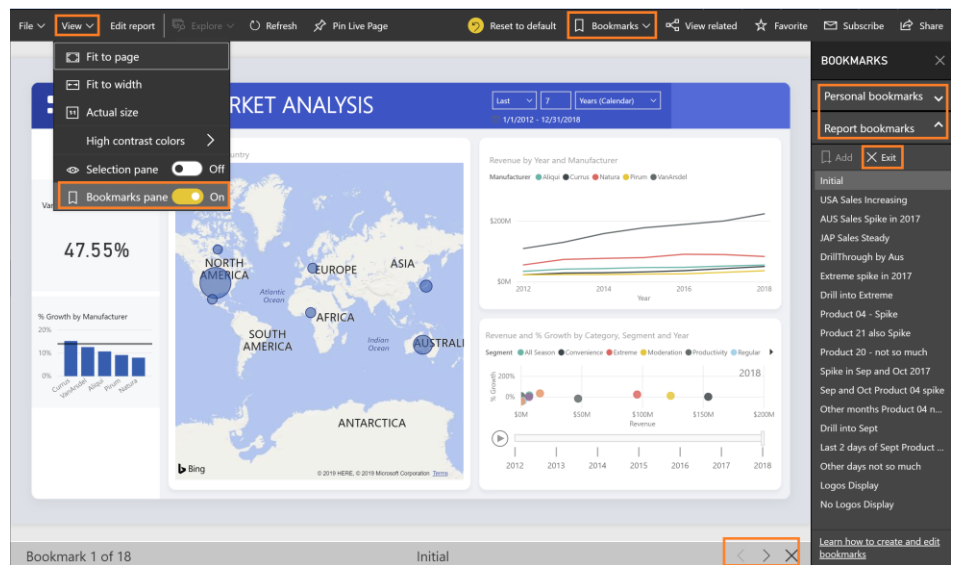
Report bookmarks: are the bookmarks report author created (we did this in Power BI Desktop).

Personal bookmarks: Report consumer can create their own bookmarks.

69. Select **View** in the Report bookmarks pane.

Notice you can view and navigate through the bookmarks using the arrow in the bottom of the screen. The behavior is like in Power BI Desktop.

Select **Exit** in Bookmark pane to close it.



Power BI provides an option to get quick insights into the complete dataset.

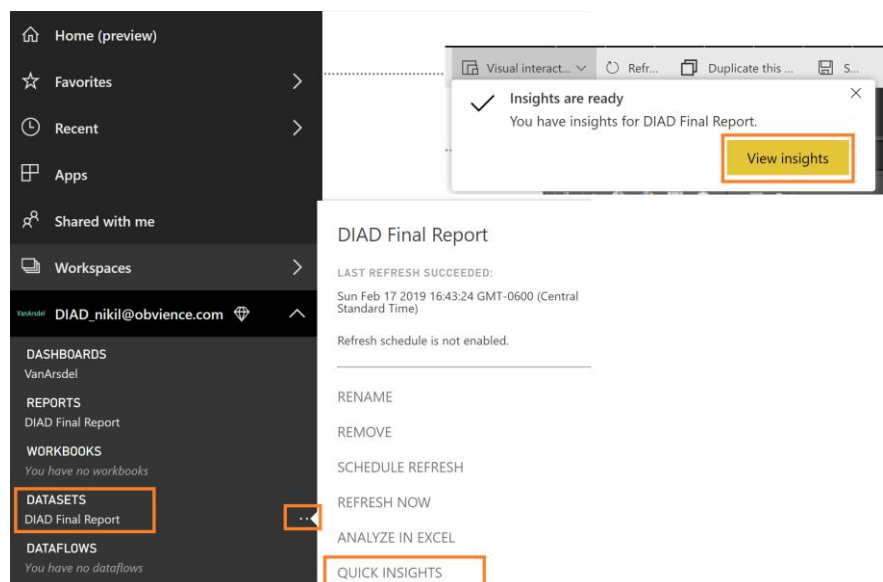
70. In the left panel, hover over **DATASETS -> DIAD Final Report**.

71. Select the **ellipsis**.

72. Select **Quick Insights**.

It might take a few minutes for the insights to be created. Once insights are ready a message appears of the top right corner.

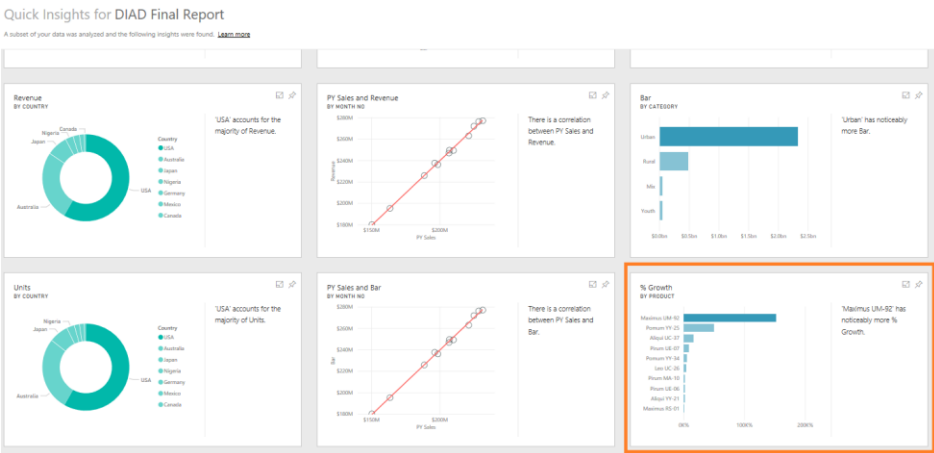
73. Select **View insights**.



A quick insights report is displayed based on the dataset. This provides insights into data you may have missed and helps to get a quick start with creating dashboards.

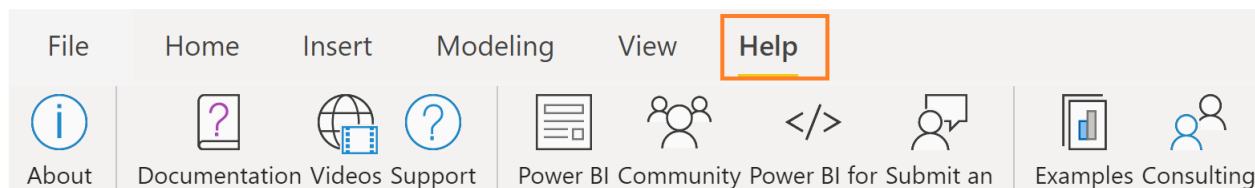
Hovering over each report provides an option to Pin it to a dashboard.

As you scroll down, notice there is a bar chart % Growth BY PRODUCT. Might be interesting to analyze this.



References

Dashboard in a Day introduces you to some of the key functionalities available in Power BI. In the ribbon of Power BI Desktop, the Help section has links to some great resources to help you as needed.



Here are a few more references that will help you with your next steps with Power BI.

Getting started: <http://powerbi.com>

Power BI Desktop: <https://powerbi.microsoft.com/desktop>

Power BI Mobile: <https://powerbi.microsoft.com/mobile>

Community site <https://community.powerbi.com/>

Power BI Getting started support page: <https://support.powerbi.com/knowledgebase/articles/430814-get-started-with-power-bi>

Support site <https://support.powerbi.com/>

Feature requests <https://ideas.powerbi.com/forums/265200-power-bi-ideas>

Power BI edX course <https://www.edx.org/course/analyzing-visualizing-data-power-bi-microsoft-dat207x-0>

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