

Designing Reports in Power BI Desktop using Bookmarks and Drillthrough



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- <https://github.com/CriticalPathTraining/Bookmarks>

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Slides and demo PBIX files by Ted Pattison of Critical Path Training teaching how to use Power BI Bookmarks

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| TedPattison Updates | | Latest commit 6e917f3 4 minutes ago |
|--|----------------|-------------------------------------|
| Bookmark Navigation and Filtering.pbix | Updates | 5 minutes ago |
| Bookmarks Demo.pbix | Updates | 5 minutes ago |
| Bookmarks Slideshow.pbix | Updates | 5 minutes ago |
| Bookmarks.pdf | Updates | 4 minutes ago |
| Bookmarks.pptx | Updates | 5 minutes ago |
| LICENSE | Initial commit | 5 minutes ago |
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Critical Path Training

<https://www.CriticalPathTrainig.com>

- **PBI365: Power BI Certification Bootcamp – 4 Days**
 - Audience is Business Users, Analysts and Data Professionals
- **PBD365: Power BI Developer Bootcamp – 4 Days**
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Agenda

- New Features for Report Design
- Creating Page Navigation Bookmarks
- Using Bookmarks to Capture Data Settings
- Using Bookmarks to Hide and Show Visuals
- Implementing Drillthrough




Thanks...

BLOG > ANNOUNCEMENTS > FEATURES

Power BI Desktop January Feature Summary



Amanda Cofsky
Program Manager

 January 8, 2018

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Happy new year to everyone! We are kicking off the new year with an update to Power BI Desktop focused on incremental improvements to popular features you are already using, including automatic date hierarchy, data label and axis formatting, and our relative date slicer. The ability to hide pages is another big update that gives you much more flexibility over how users consume your reports.

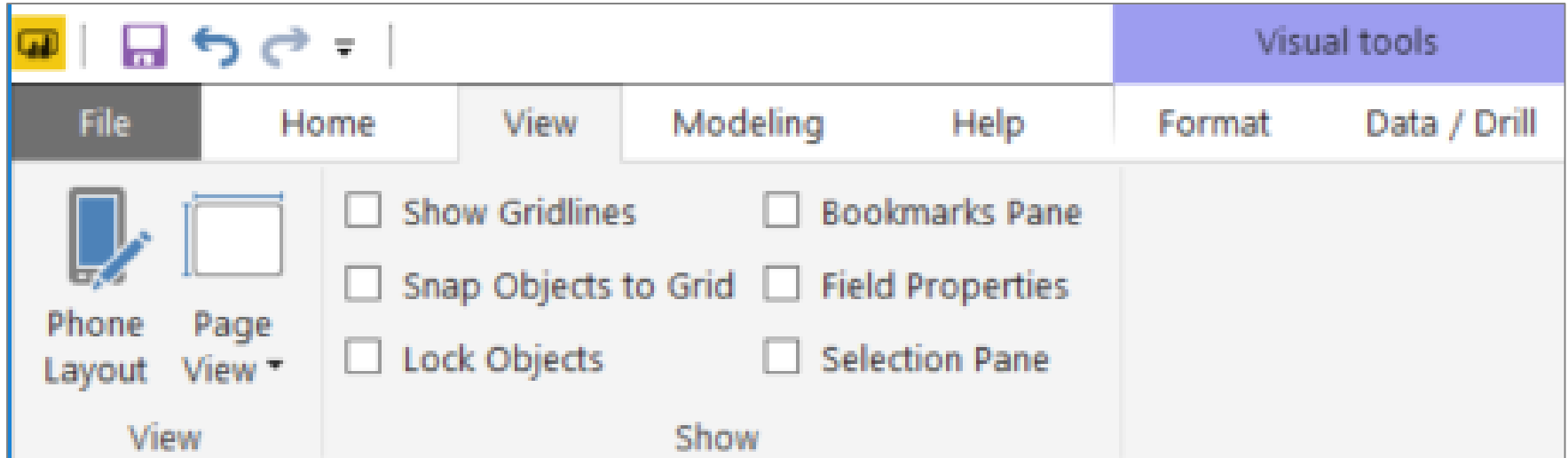
[Download Power BI Desktop](#)

The Stream of New Reporting Features

- Added in Sept 2017
 - Drillthrough features
- Added in October 2017
 - Bookmarks and Bookmark Linking
 - Selection Pane to Hide/Show Visuals
 - Visual Spotlighting
- Added in November 2017
 - Visual Ordering Control and Lock Objects
- Added in December 2017
 - Cross-highlighting support for bookmarks, Field Pane, Q&A
- Added in January 2018
 - Hide & Show report page tabs



It's Not Your Father's Power BI Desktop

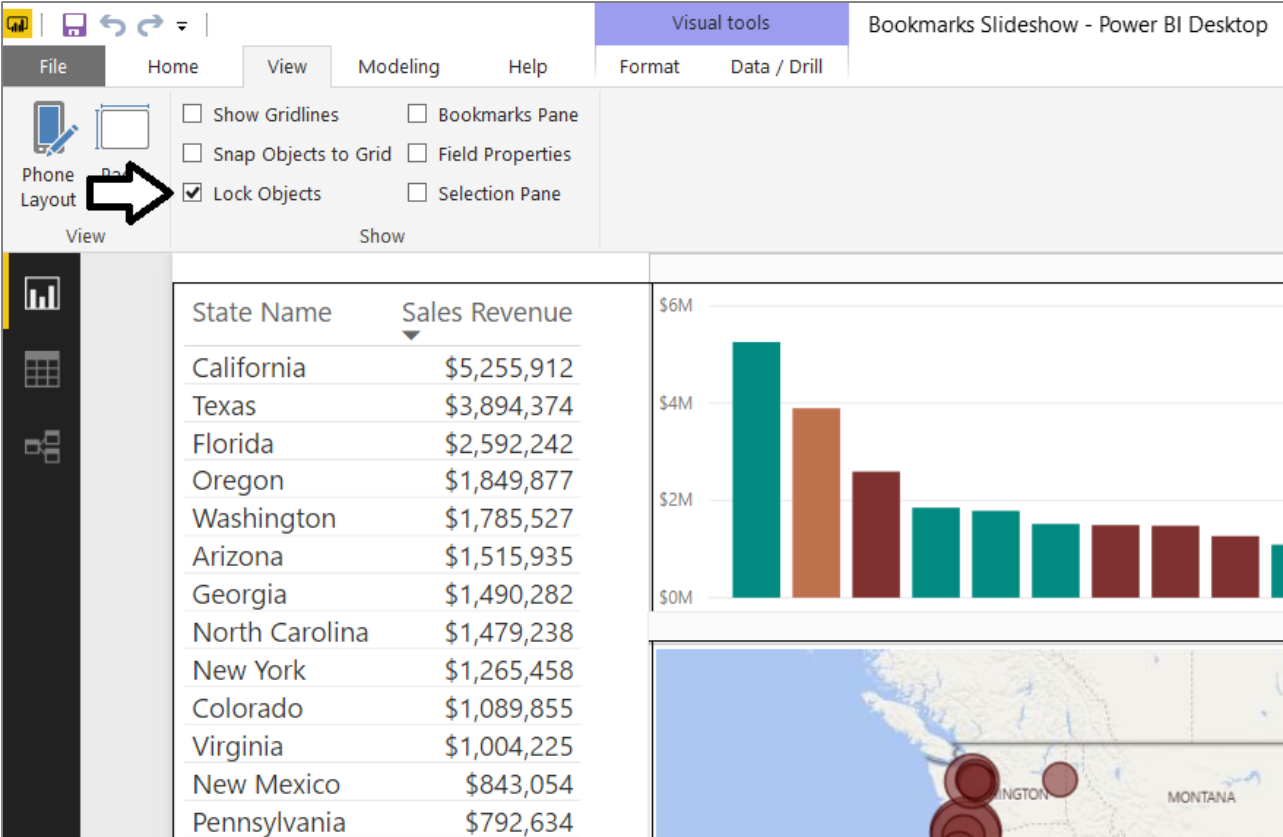


- **Lock Objects** mode used to prevent accidental moving
- **Bookmarks Pane** used to create and manage bookmarks
- **Field Properties** used to add field description
- **Selection Pane** used to select, order, hide & show visuals



Lock Objects Mode

- Prevents accident movement of report objects
 - Locks Objects setting is not saved at project level



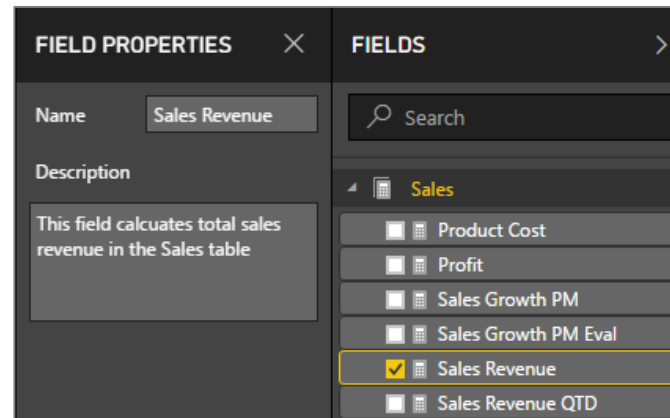
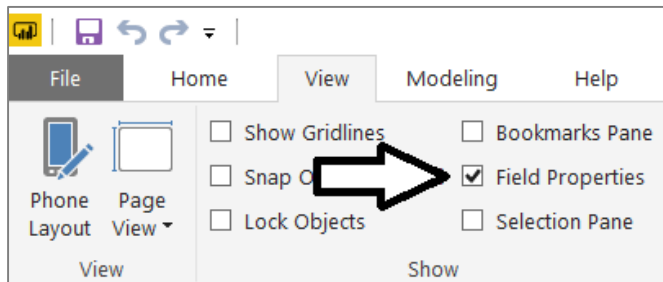
The screenshot shows the Power BI Desktop interface. The 'View' ribbon is active, and the 'Lock Objects' checkbox is checked. A white arrow points to this checkbox. The interface also displays a table of sales revenue by state, a bar chart, and a map of the United States.

| State Name | Sales Revenue |
|----------------|---------------|
| California | \$5,255,912 |
| Texas | \$3,894,374 |
| Florida | \$2,592,242 |
| Oregon | \$1,849,877 |
| Washington | \$1,785,527 |
| Arizona | \$1,515,935 |
| Georgia | \$1,490,282 |
| North Carolina | \$1,479,238 |
| New York | \$1,265,458 |
| Colorado | \$1,089,855 |
| Virginia | \$1,004,225 |
| New Mexico | \$843,054 |
| Pennsylvania | \$792,634 |

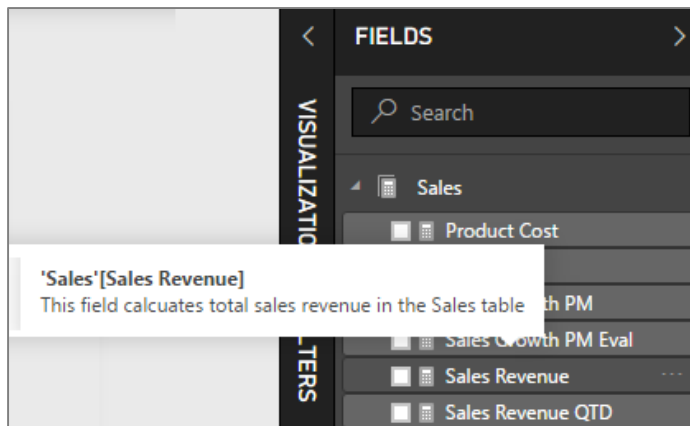


Field Properties Pane

- Allows data model author to add field description

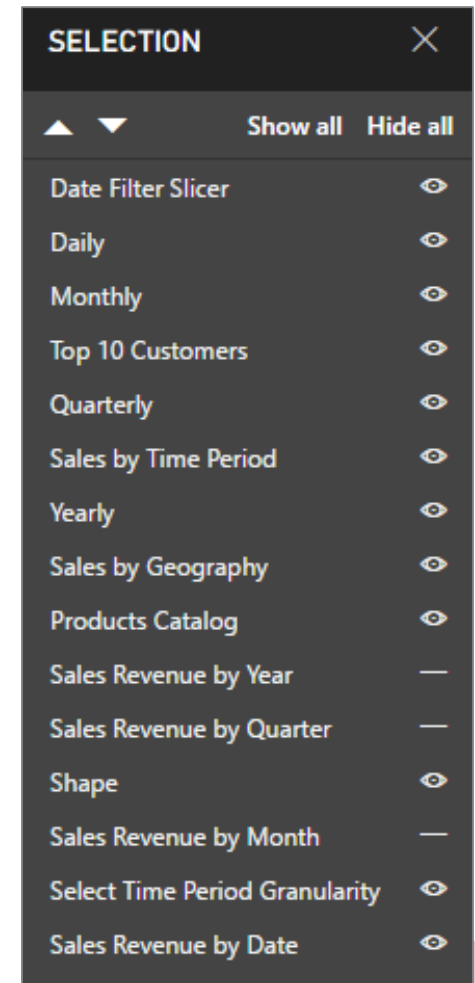
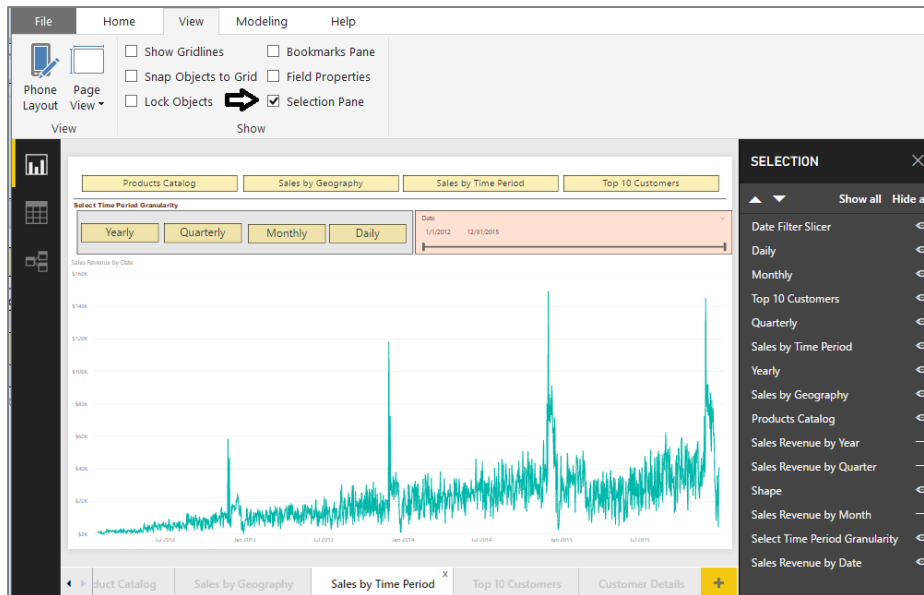


- Data model consumer can see description as tooltip in fields list



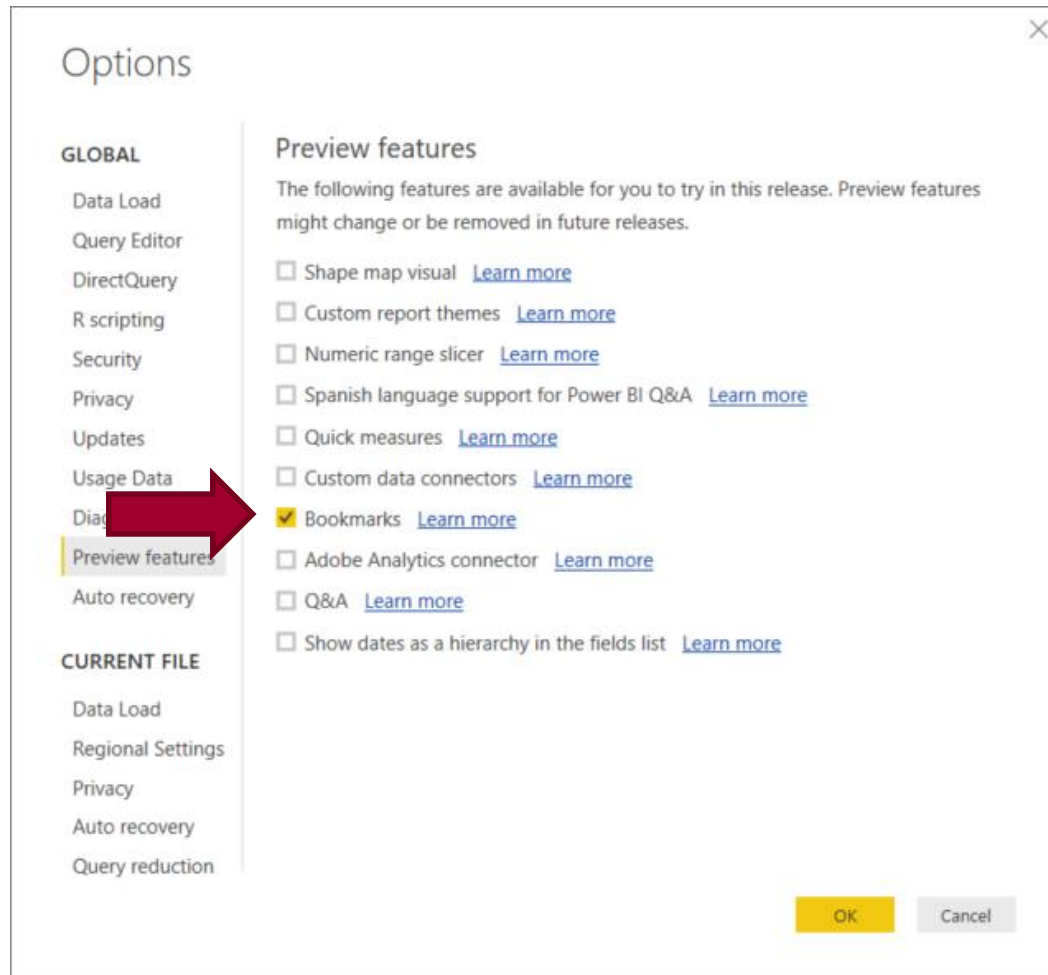
Selection Pane

- Provides control over object on a page
 - You can control whether visual is visible or hidden
 - You can change ordering to control what is on top



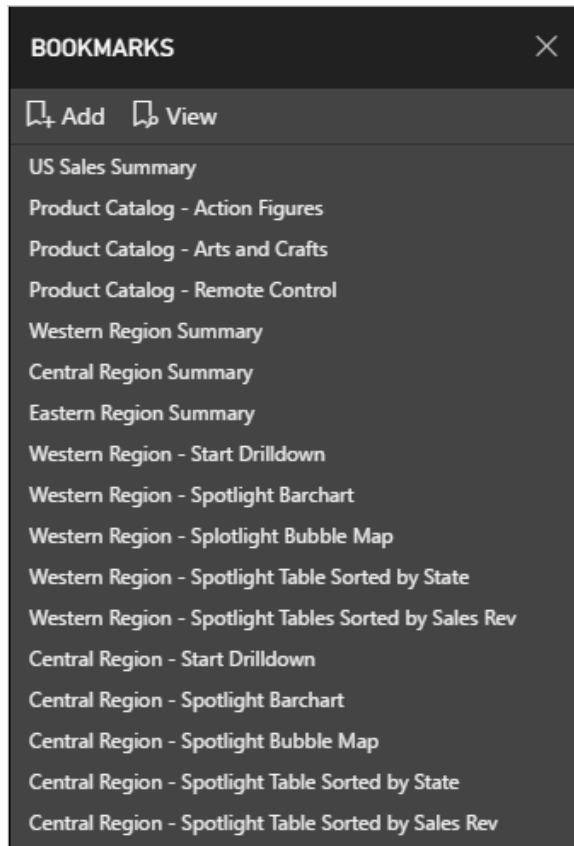
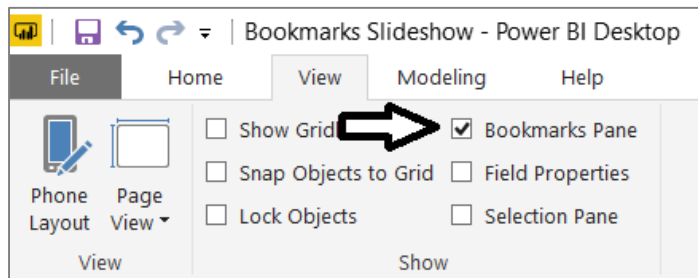
Bookmarks are still a Preview Feature

- Preview features must be enabled in Power BI Desktop



Bookmarks Pane

- Provide ability to create and manage bookmarks



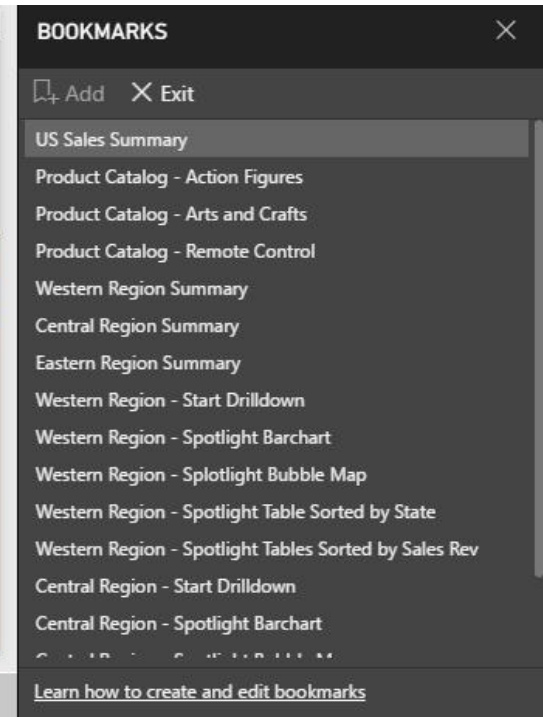
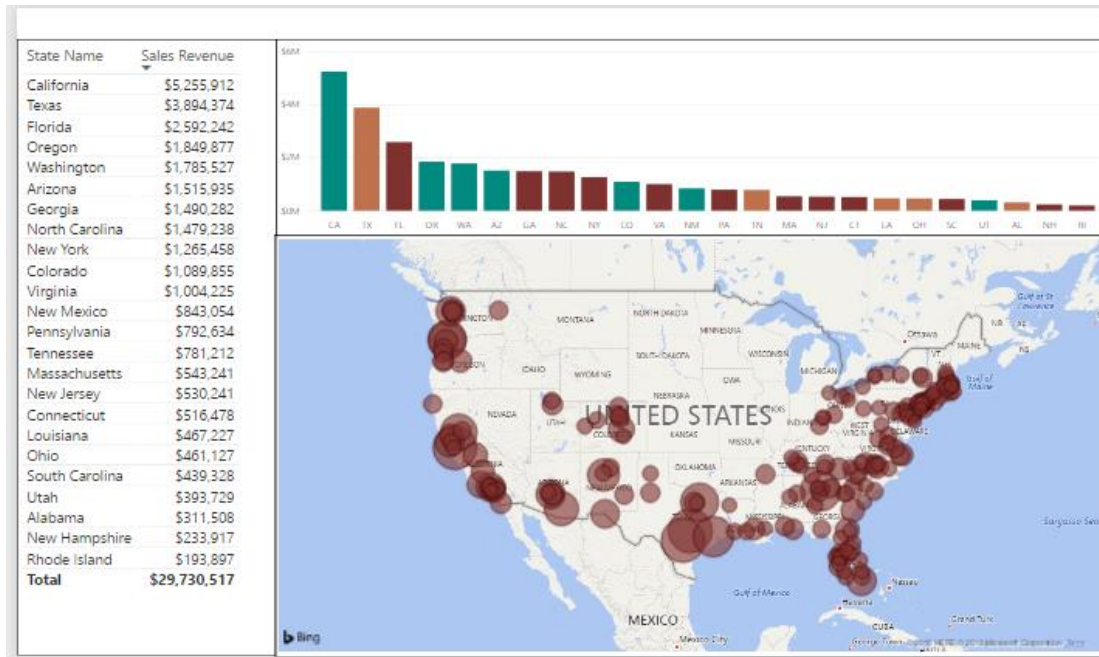
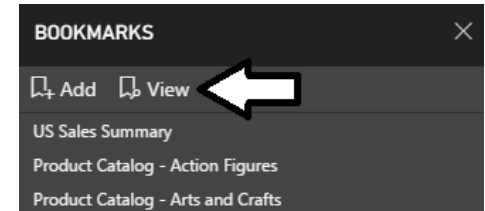
What are Bookmarks

- Snapshot of recorded settings which can include...
 - Current page
 - Filters
 - Slicers
 - Visual sort order
 - Drill location
 - Visibility
 - Spotlighting
- Foundation for Story telling
 - For reports only – *bookmarks not supported in dashboards*



Bookmarks as a Slide Show

- Bookmarks can be viewed as slide show
 - Start slide show by clicking View button
 - Consumer can step through one bookmark at a time



Bookmark 1 of 17

US Sales Summary





DEMO

Viewing Bookmarks as a Slide Show

New Custom Visuals for 2018


- Custom visuals shipped in Q4 of 2017
 - Text Filter
 - Image Grid
 - Table Heatmap
 - Card Browser
 - Image Timeline
 - Power KPI Matrix
 - PowerApps
 - **HTML viewer**





HTML Viewer Control


- Allows you to create a per-item HTML template
 - HTML template created with calculated column using DAX


The screenshot displays a Power BI report with five action figure cards arranged in a grid. Each card has a title, an image, a description, and a table of metrics. A large white arrow points from the cards to the Visualizations pane on the right.

| Green Angry Bird Action Figure | |
|---|--|
|  | A funny looking green bird that really hates pigs. |
| Category: | Action Figures > Cute and Huggable |
| List Price: | \$4.95 |
| Sales Revenue: | \$40,550 |

| Perry the Platypus Action Figure | |
|---|--|
|  | A platypus who plays an overly intelligent detective sleuth on TV. |
| Category: | Action Figures > Cute and Huggable |
| List Price: | \$21.95 |
| Sales Revenue: | \$654,110 |

| Phineas and Ferb Action Figure Set | |
|---|--|
|  | The dynamic duo of the younger generation. |
| Category: | Action Figures > Cute and Huggable |
| List Price: | \$19.95 |
| Sales Revenue: | \$502,640 |

| Twitter Follower Action Figure | |
|---|--|
|  | An inexpensive action figure you can never have too many of. |
| Category: | Action Figures > Cute and Huggable |
| List Price: | \$1.00 |
| Sales Revenue: | \$3,508,806 |

| Woody Action Figure | |
|---|---|
|  | The lovable, soft-spoken cowboy from Toy Story. |
| Category: | Action Figures > Cute and Huggable |
| List Price: | \$9.95 |
| Sales Revenue: | \$125,738 |

VISUALIZATIONS

Field

Subcategory

FILTERS

Visual level filters

Drag data fields here



Oh my....

- Nothing like parsing together HTML using DAX

```
Product HTML Inline Layout =
VAR MainDivFormatting = "display:inline-block;float:left;width:248px;height:160px;margin-left:4px;margin-right: 8px;margin-bottom:4px;"
VAR TableFormatting = "font-size:8px;border: 1px black solid;border-radius:4px;margin-bottom: 16px; "
VAR ImageCellFormatting = "padding: 4px;background-color:white;width:64px;max-width:64px;text-align:center;"
VAR TitleCellFormatting = "padding: 4px;background-color:white;font-size:14px;line-height:14px;background-color:black;color:white;border-top-left-radius:4px;border-
VAR ImageFormatting = "width:38px;"
VAR DescriptionCellFormatting = "padding: 8px;font-size:12px;line-height:16px;background-color:lightyellow;color:darkblue;vertical-align:middle;height:48px;border-1
VAR LeftCellFormatting = "padding: 4px;background-color:white;width:48px;max-width:48px;text-align:right;border-top: 1px solid #DDD;"
VAR RightCellFormatting = "padding: 4px;font-weight:bold;background-color:#EEE;width:200px;border: 1px solid #CCC;"
RETURN
"<div style='" & MainDivFormatting & "'>" &
  "<table style='" & TableFormatting & "'>" &
    "<tr><td colspan='2' style='" & TitleCellFormatting & "'> [Product] </td></tr>" &
    "<tr><td style='" & ImageCellFormatting & "'><img src='" & [Product Image] & "' style='" & ImageFormatting & "' /></td>" &
    "<td style='" & DescriptionCellFormatting & "'> [Description] </td></tr>" &
    "<tr><td style='" & LeftCellFormatting & "'>Category:</td><td style='" & RightCellFormatting & "'> [Category] & " & [Subcategory] & "</td></tr>" &
    "<tr><td style='" & LeftCellFormatting & "'>List Price:</td><td style='" & RightCellFormatting & "'> & FORMAT([ListPrice], "$#,###.00") & "</td><tr>" &
    "<tr><td style='" & LeftCellFormatting & "'>Sales Revenue:</td><td style='" & RightCellFormatting & "'> & FORMAT([Sales Revenue], "$#,###") & "</td><tr>" &
  "</table>" &
"</div>"
```

- It might be a good time to check out DAX Studio
 - <http://daxstudio.org/>



Into the weeds....

- CSS Styles maintained in DAX variables

```
VAR MainDivFormatting = "display:inline-block;float:left;width:248px;height:160px;margin-left:4px;margin-right:4px;"
VAR TableFormatting = "font-size:8px;border: 1px black solid;border-radius:4px;margin-bottom: 16px; "
VAR ImageCellFormatting = "padding: 4px;background-color:white;width:64px;max-width:64px;text-align:center;"
```

- Measure returns a complete HTML element

```
RETURN
"<div style='" & MainDivFormatting & "' >" &
  "<table style='" & TableFormatting & "' >" &
    "<tr><td colspan='2' style='" & TitleCellFormatting & "'>" & [Product] & "</td></tr>" &
    "<tr><td style='" & ImageCellFormatting & "'><img src='" & [Product Image] & "' style=" &
    "<td style='" & DescriptionCellFormatting & "' >" & [Description] & "</td></tr>" &
    "<tr><td style='" & LeftCellFormatting & "' >Category:</td><td style='" & RightCellFormatting & "' >" &
    "<tr><td style='" & LeftCellFormatting & "' >List Price:</td><td style='" & RightCellFormatting & "' >" &
    "<tr><td style='" & LeftCellFormatting & "' >Sales Revenue:</td><td style='" & RightCellFormatting & "' >" &
  "</table>" &
"</div>"
```

- Number, Currency & Date formatting accomplished using DAX

```
">" & FORMAT([ListPrice], "$#,###.00") & "</td>" &
">" & FORMAT([Sales Revenue], "$#,###") & "</td>"
```



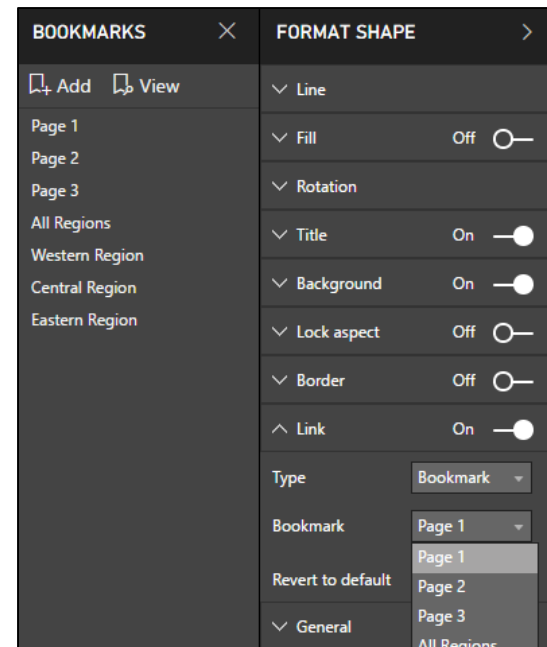
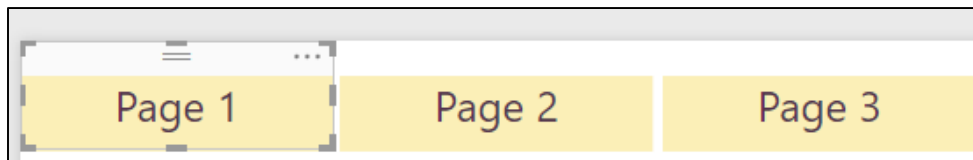
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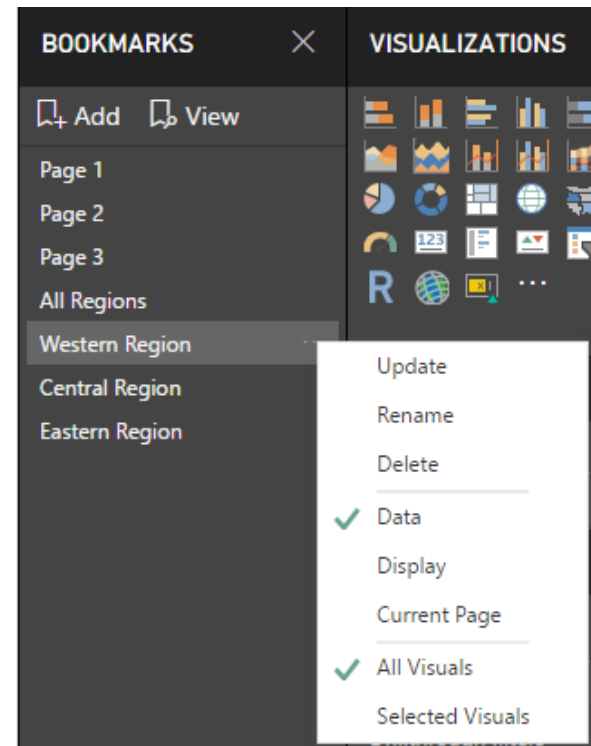
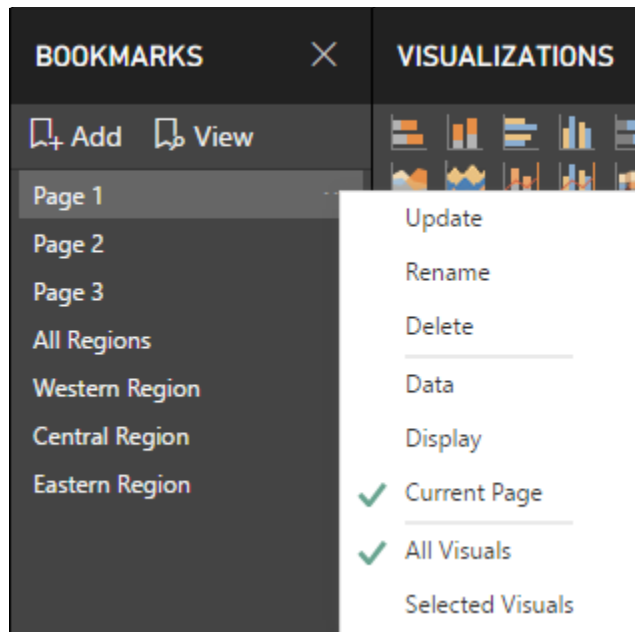
Creating Buttons to Link to Bookmarks

- Shares and images can link to bookmarks
 - Acts as a button to navigate to bookmark
 - Button responds to click when in read view
 - Button requires CONTROL + click when in edit view



Bookmarks Types

- Bookmarks can capture or ignore certain types of data
 - Data (filtering and slicers)
 - Display (visible or hidden)
 - Current Page (page navigation)





DEMO

Using Bookmarks to Capture Data Settings



DEMO

Using Bookmarks to Hide and Show Visuals



DEMO

Implementing Drillthrough

Summary

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- **PBI365: Power BI Certification Bootcamp – 4 Days**
 - Audience is Business Users, Analysts and Data Professionals
 - Provides hands-on introduction to the Power BI platform
 - Focuses on build solutions using Power BI Desktop
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 - Apps and App Workspaces
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 - Teaches developing custom visuals with TypeScript and D3
 - Teaches R programming and integrating R with Power BI
 - Teaches programming with the Power BI APIs
 - Teaches developing with Power BI Embedded

