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 by deployed via dashboard sharing
   - Dashboards can by 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
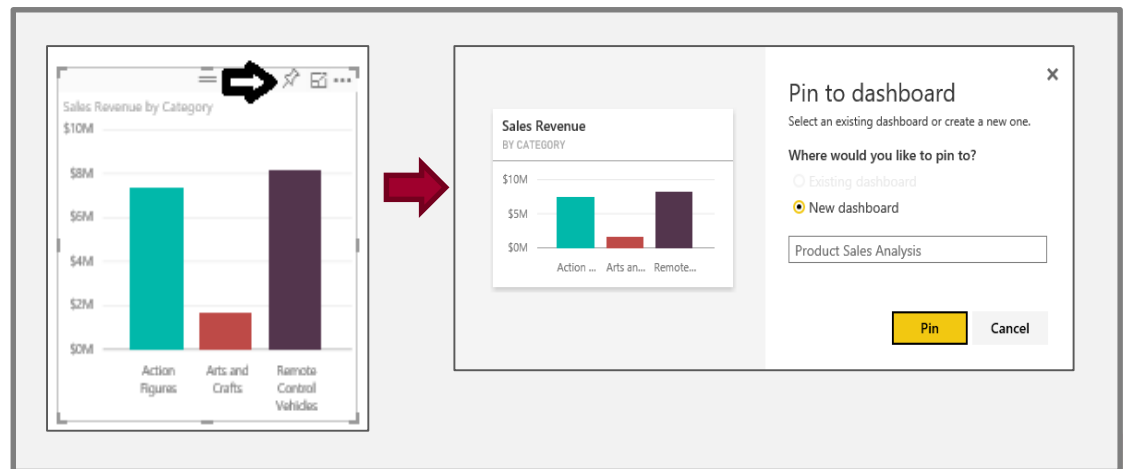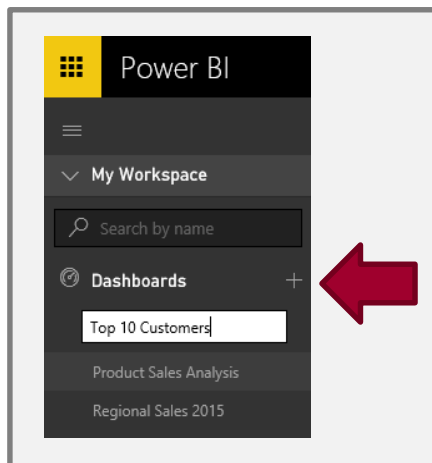
Modifying Tile Details

- 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
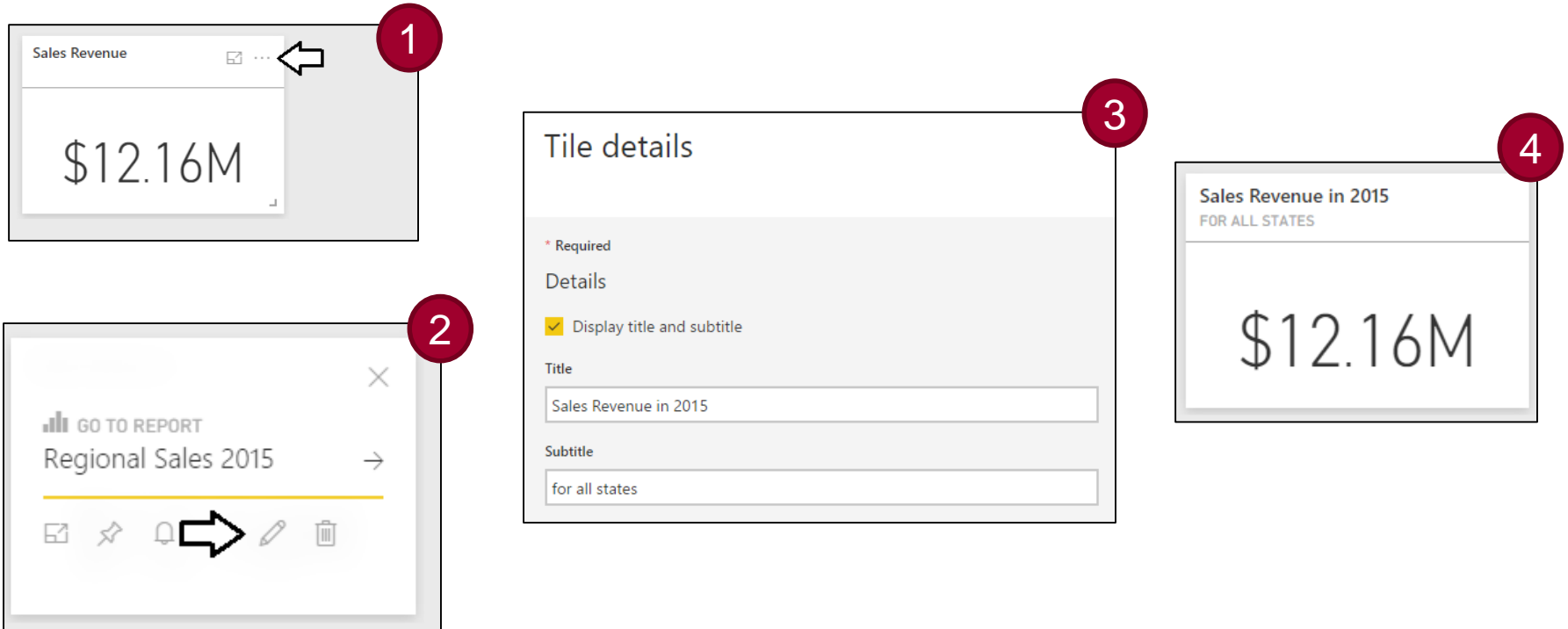
DEMO

Creating a Dashboard

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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
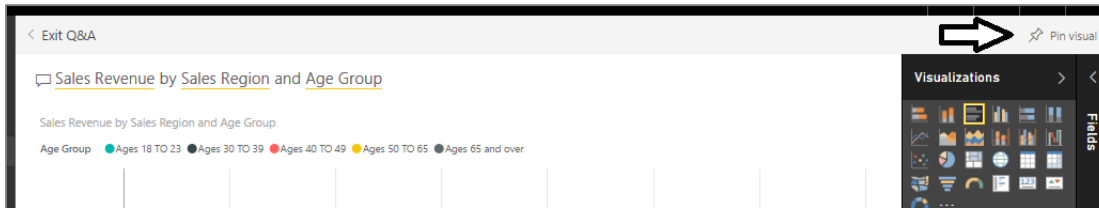
This tile was created from a visual on a report

This tile was created from a Q&A query result

DEMO

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
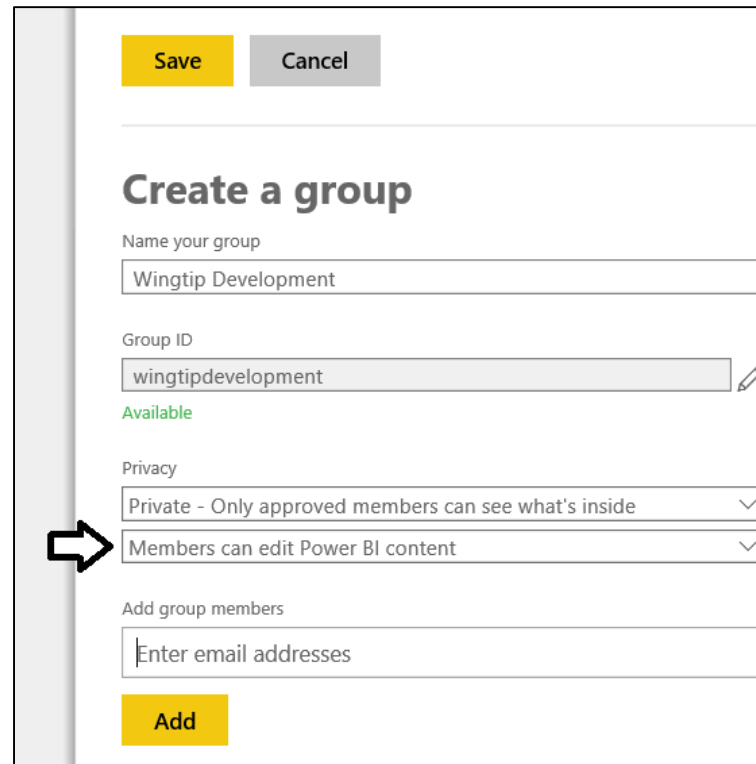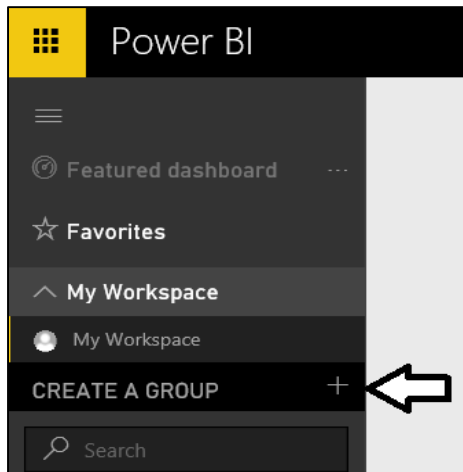 - Sharing dashboard provides indirect access to reports and datasets
  - Does not require Power BI Pro license
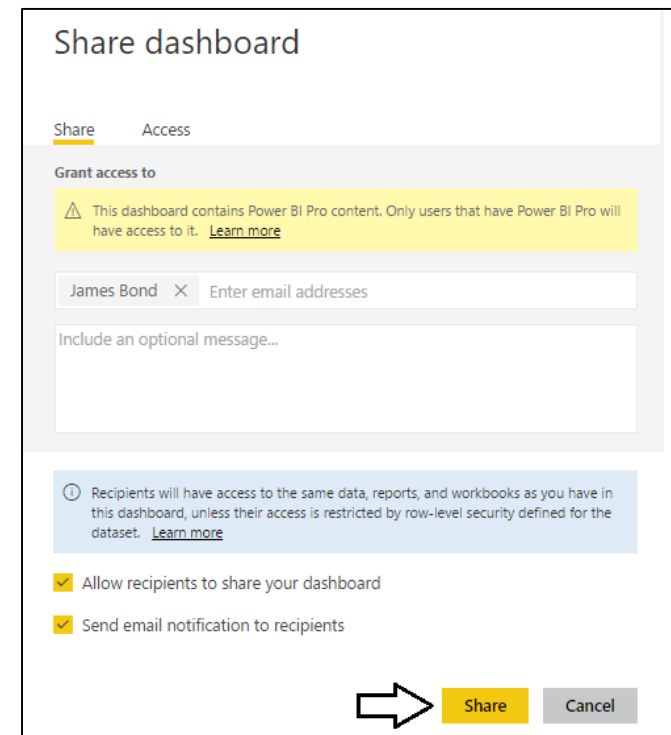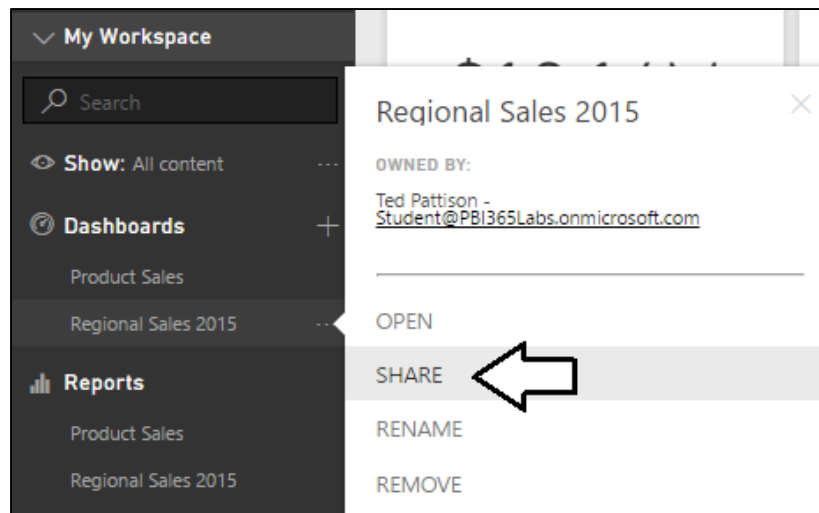
Configuring Row-level Security

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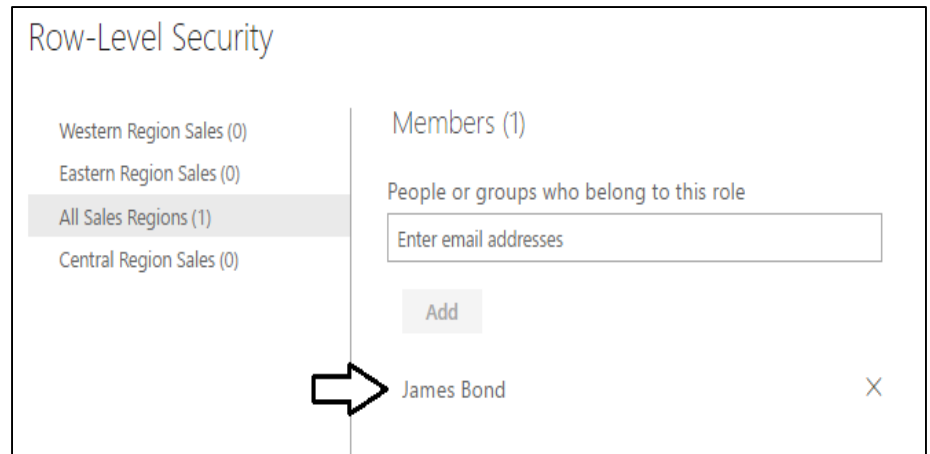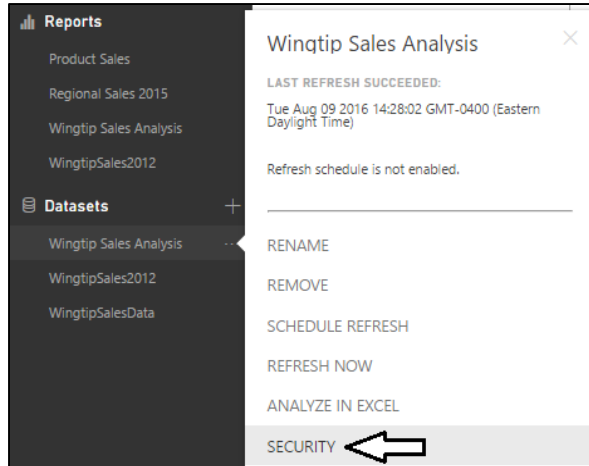
Testing Dashboard Sharing

- Login as secondary user
  - Make sure you can access the dashboard
  - Observe there is a link to dashboard but not to report or dataset
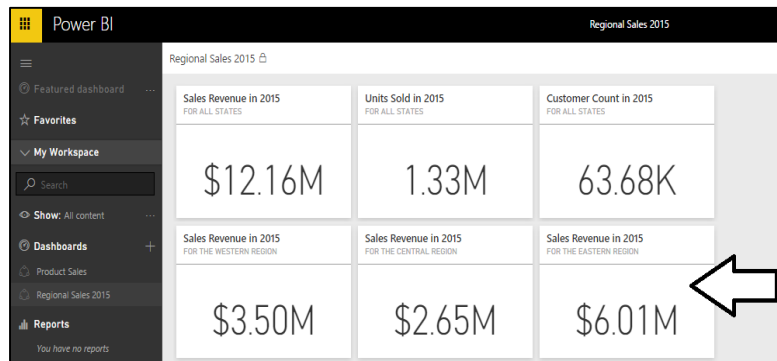
  - Clicking on dashboard tile navigates user to report
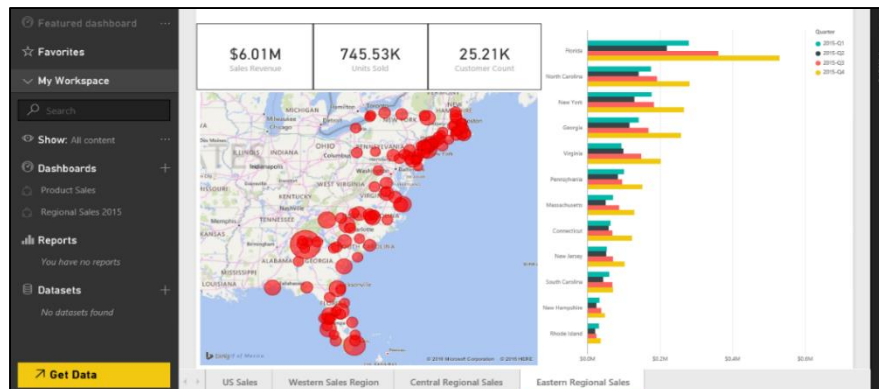
DEMO

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
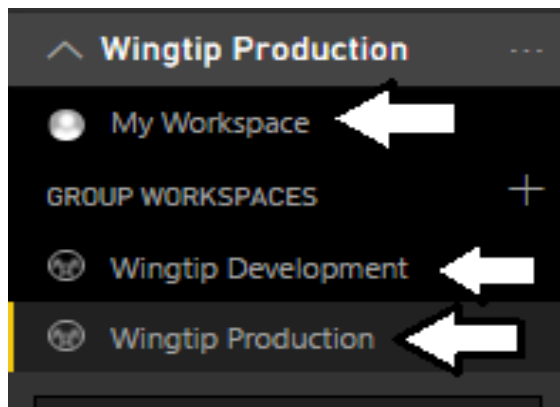
Creating Group Workspaces for Development

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

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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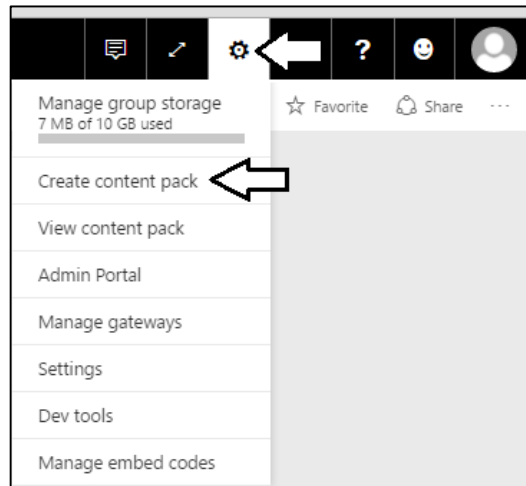- ➢ Working with Organizational Content Packs

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
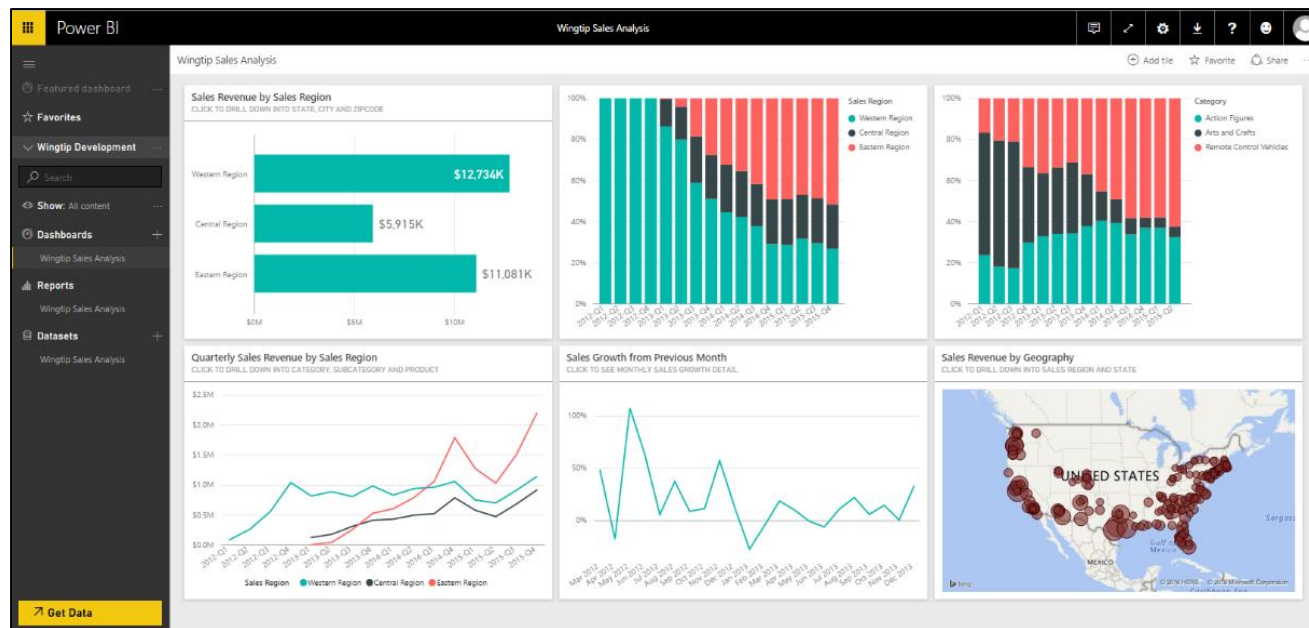
Creating a Content Pack

- 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

Viewing Content Packs

- You can view/edit content pack in workspace
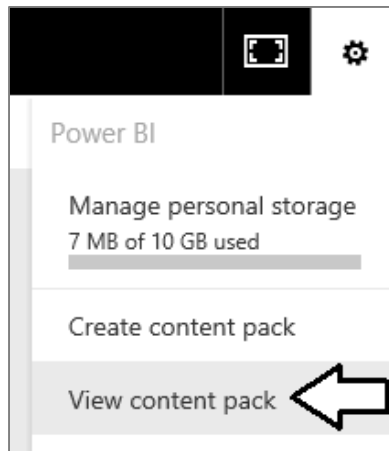
Deploying a Content Pack

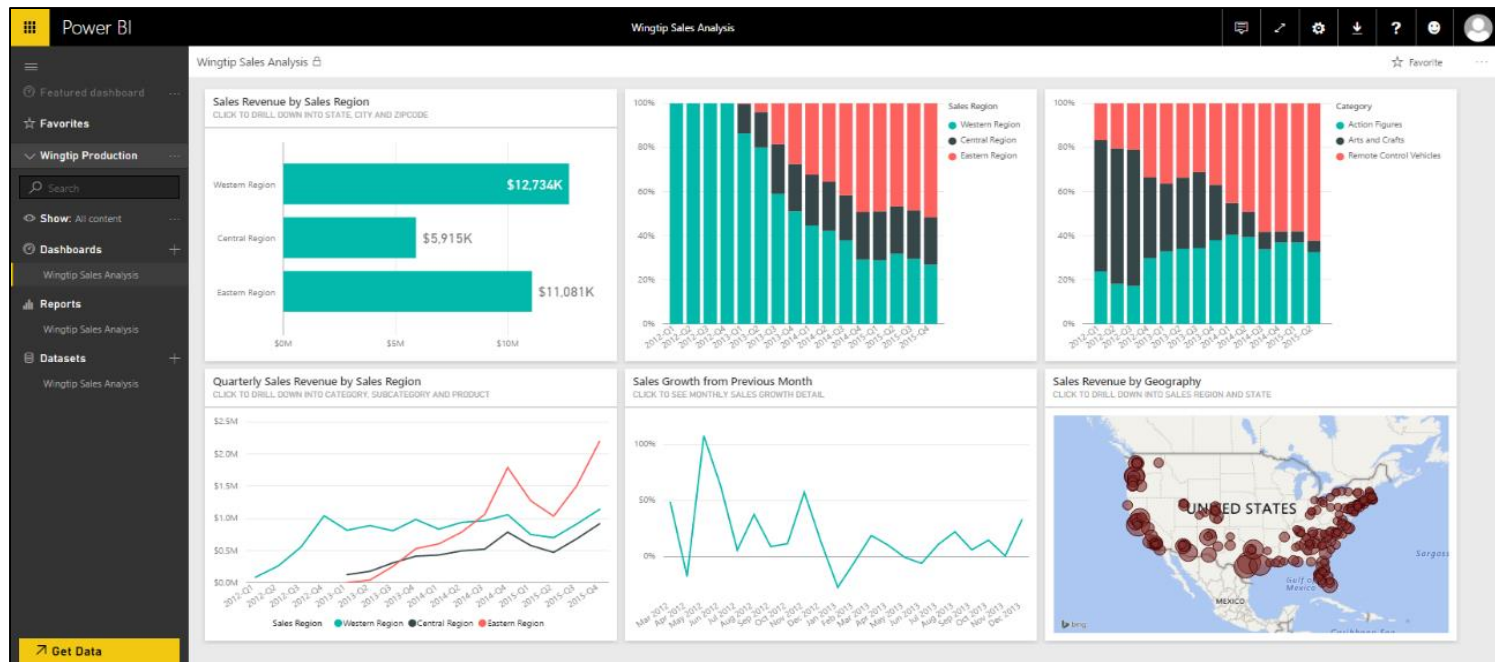- Content pack can be activated in other workspace
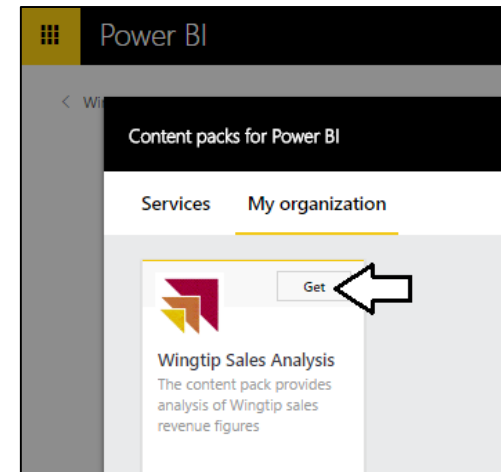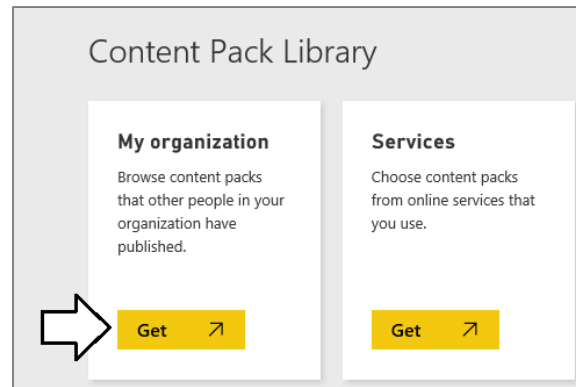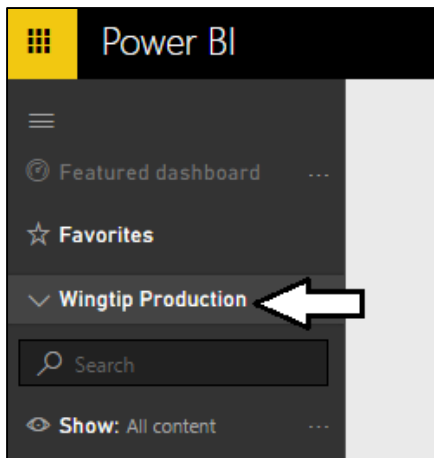
Read-only Workspaces

- 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

DEMO

Deploying a Dashboard using an Organizational Content Pack

Summary

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- ✓ Sharing Dashboards with Other Office 365 Users
- ✓ Staging & Deployment using Group Workspaces
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