

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



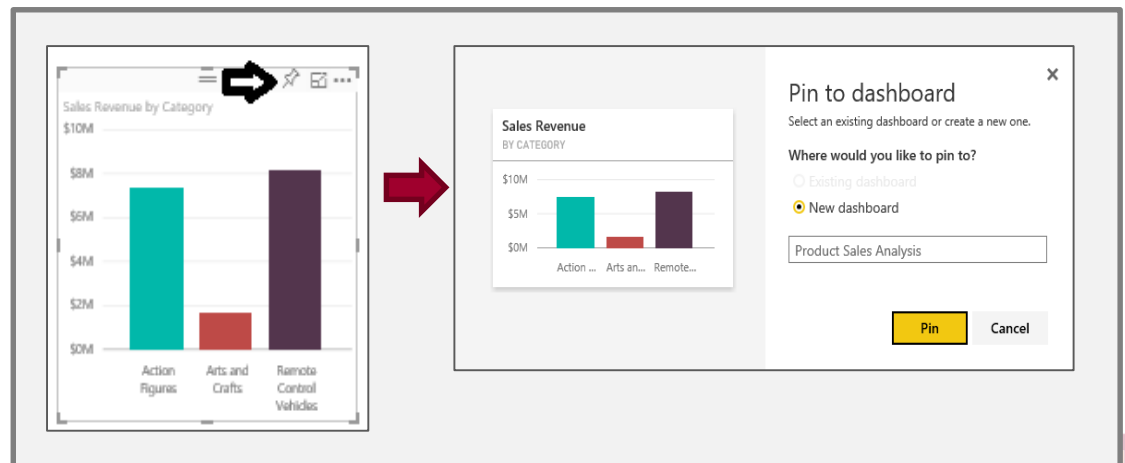
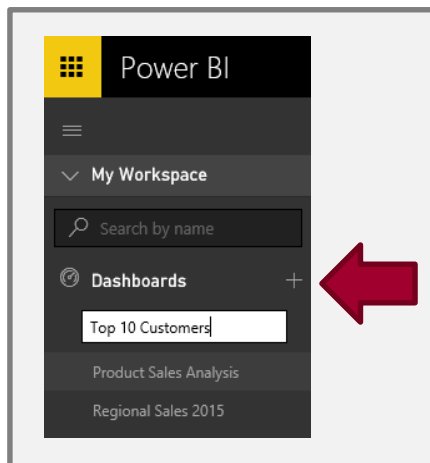
Dashboards in Power BI

- 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



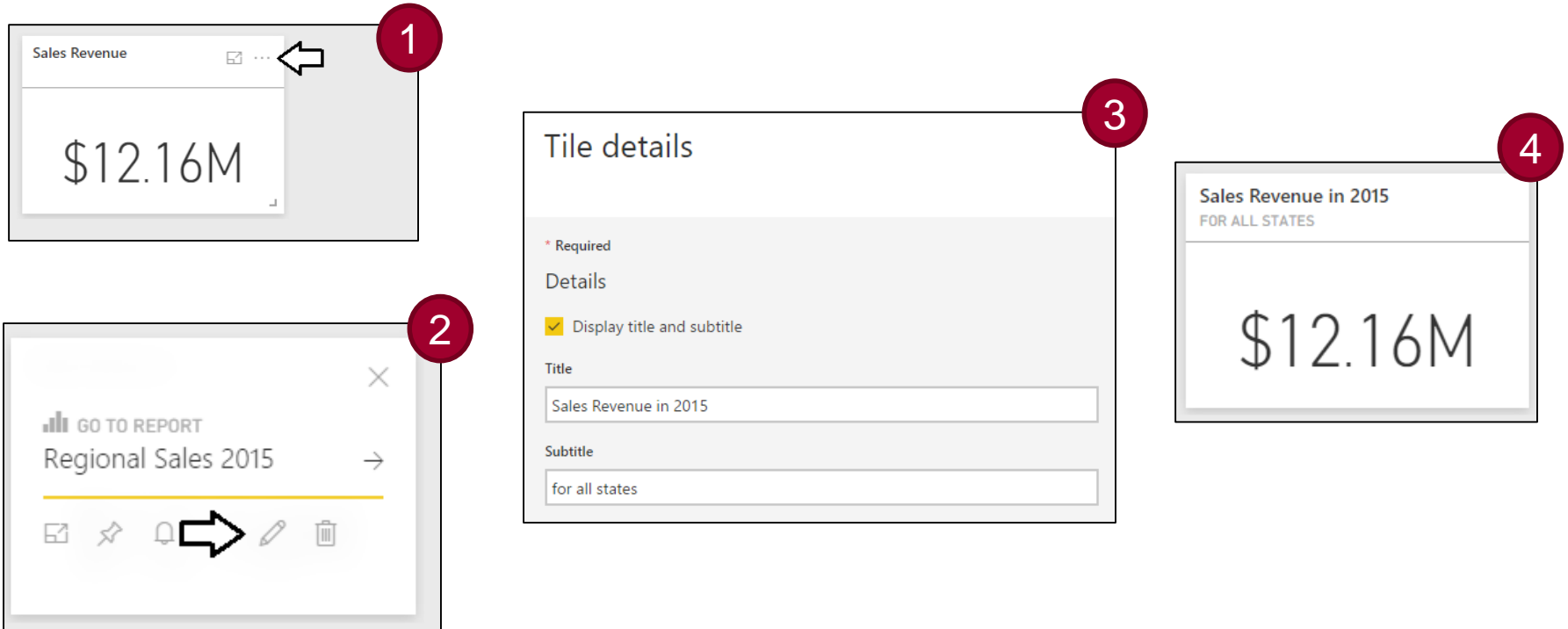
Creating Dashboards

- 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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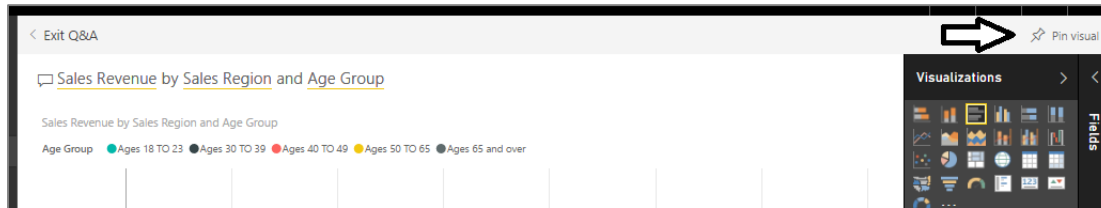
The Q&A Search Box

- 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

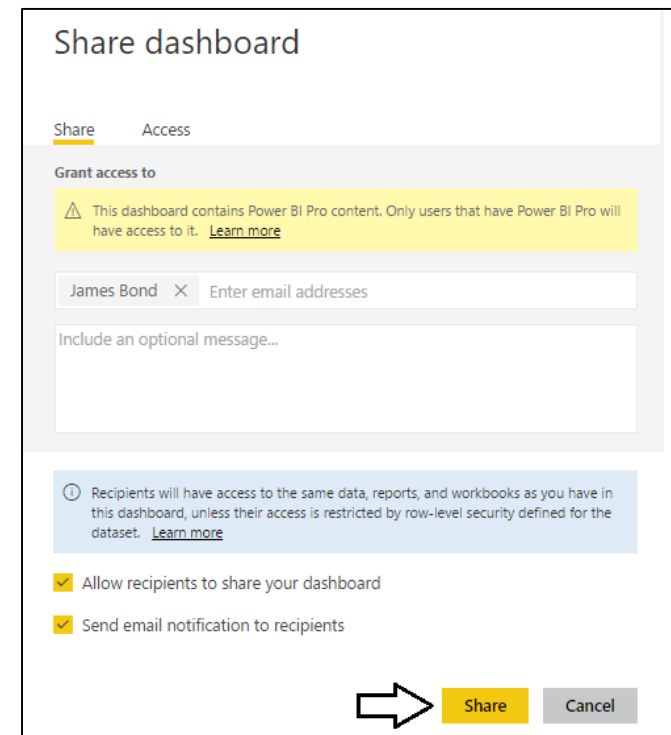
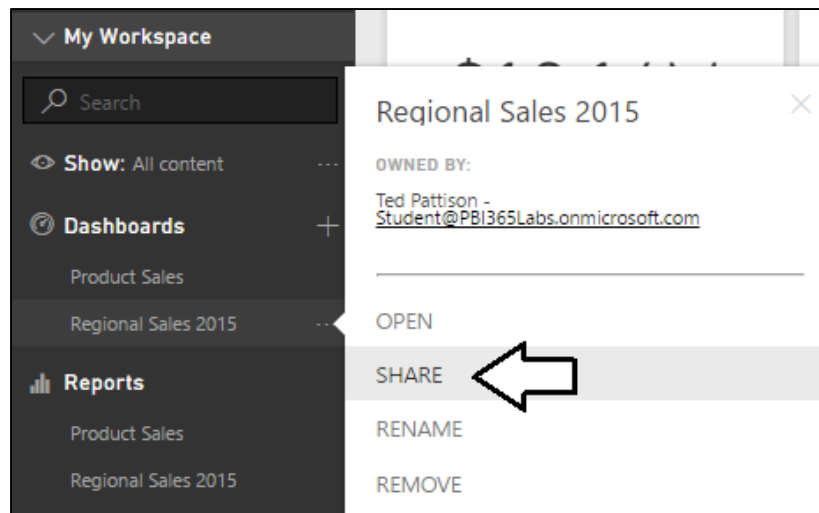
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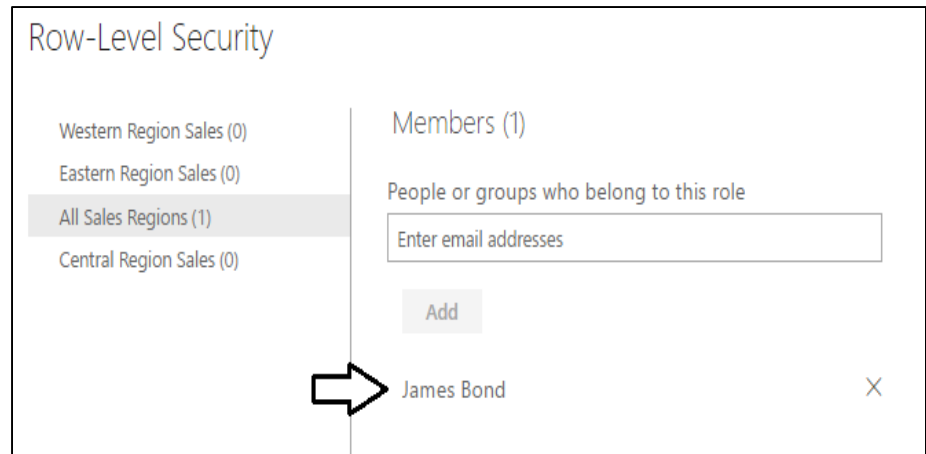
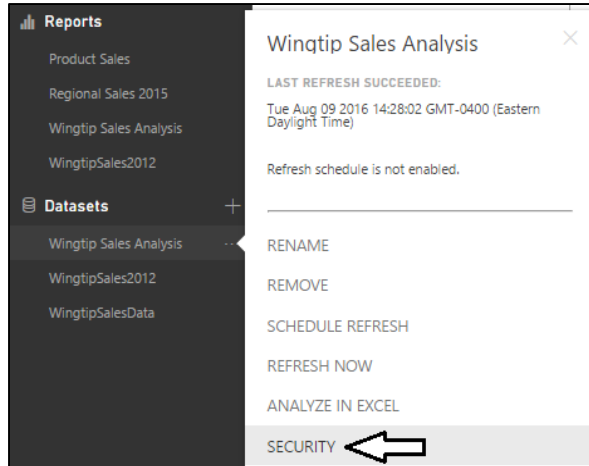
Sharing Dashboards

- 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



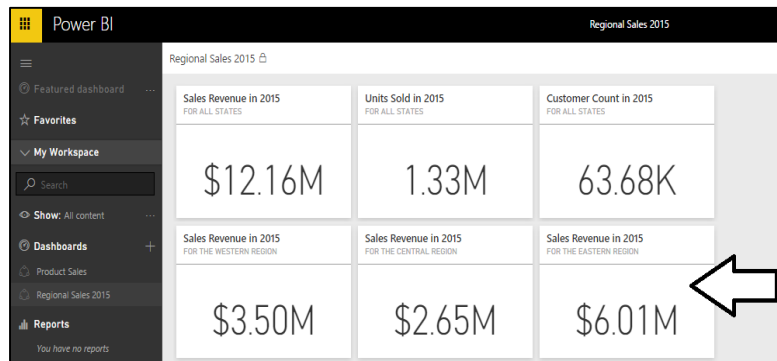
Configuring Row-level Security

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

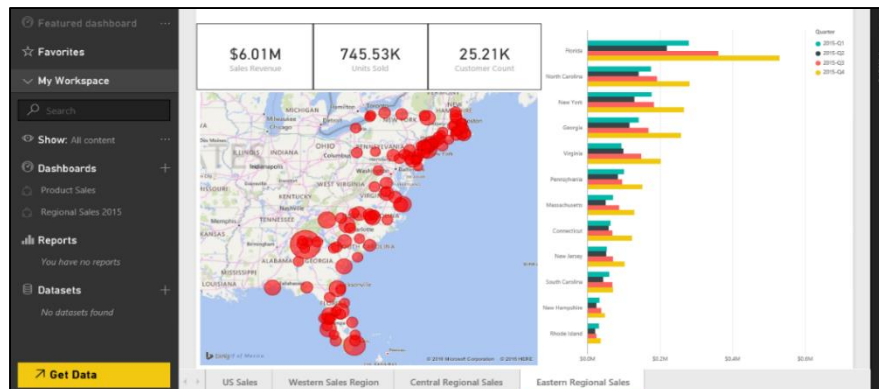


Testing Dashboard Sharing

- 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

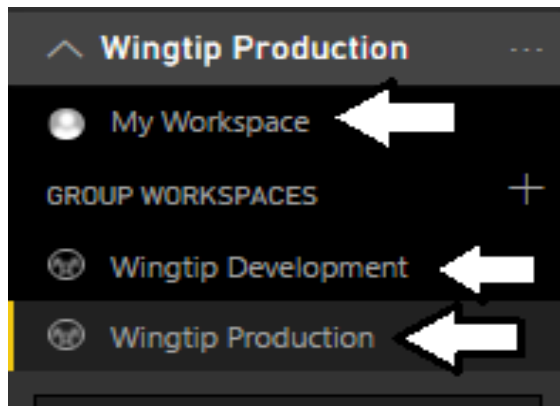
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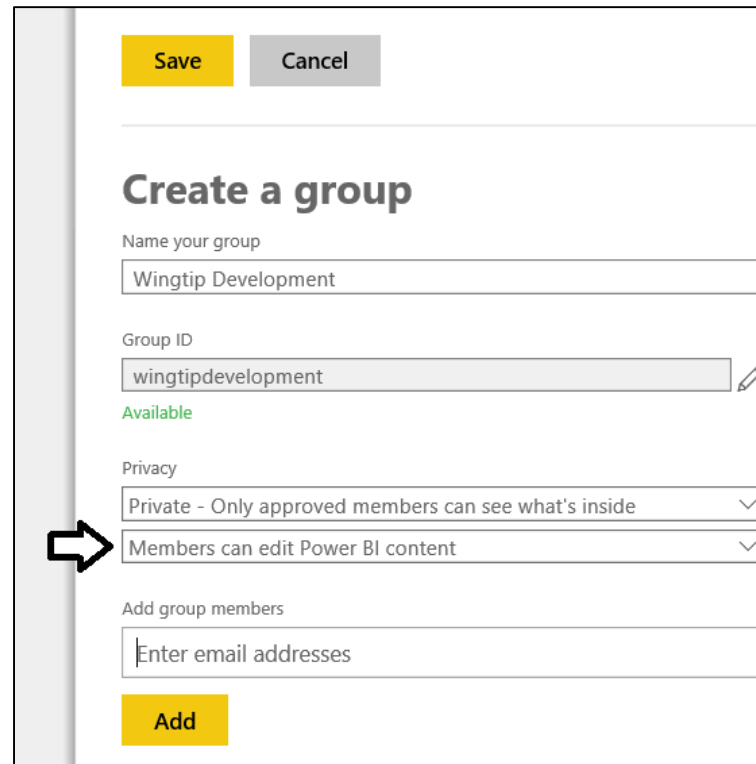
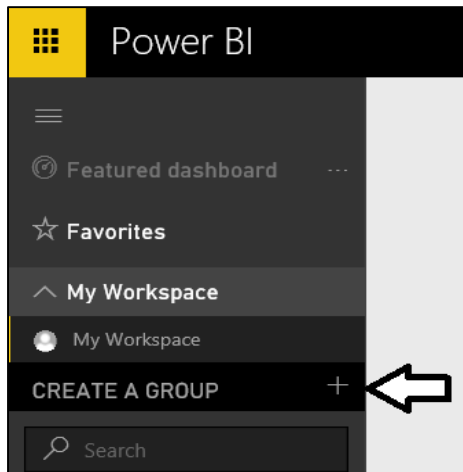
Understanding Group Workspaces

- 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**

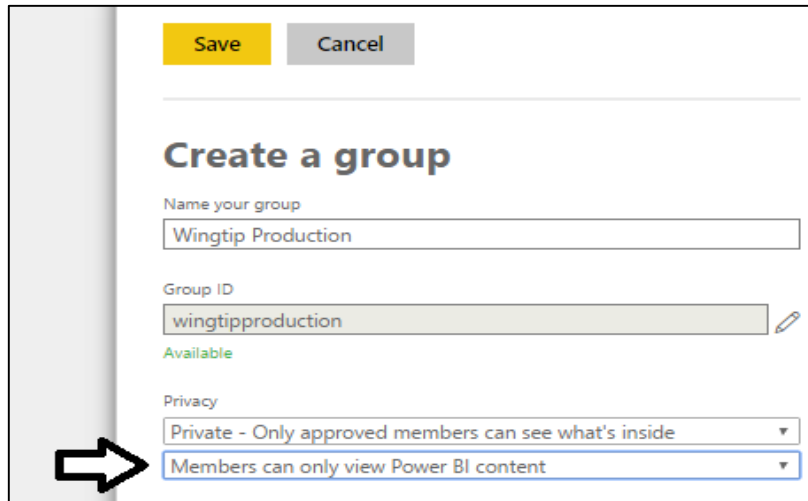


A screenshot of the 'Create a group' form in Power BI. The form is light-themed and has a yellow 'Save' button and a grey 'Cancel' button at the top. The title 'Create a group' is prominently displayed. Below the title, there are several input fields and dropdown menus. The first field is 'Name your group' with the text 'Wingtip Development'. The second field is 'Group ID' with the text 'wingtipdevelopment' and a green 'Available' status indicator. The third field is 'Privacy' with a dropdown menu showing 'Private - Only approved members can see what's inside'. The fourth field is 'Members can edit Power BI content' with a dropdown menu showing 'Members can edit Power BI content'. A white arrow points to this dropdown menu. Below these fields is a section titled 'Add group members' with a text input field containing 'Enter email addresses' and a yellow 'Add' button.

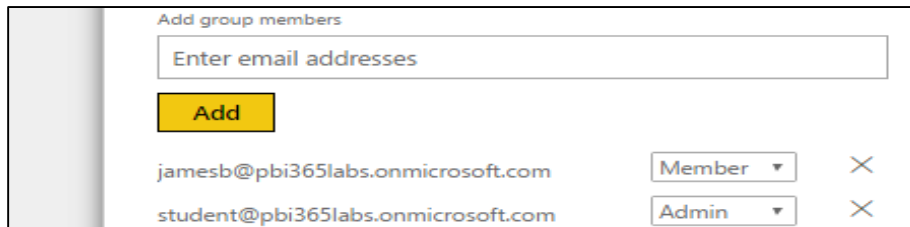


Creating Group Workspaces for Production

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



- Add users as standard members or as admin



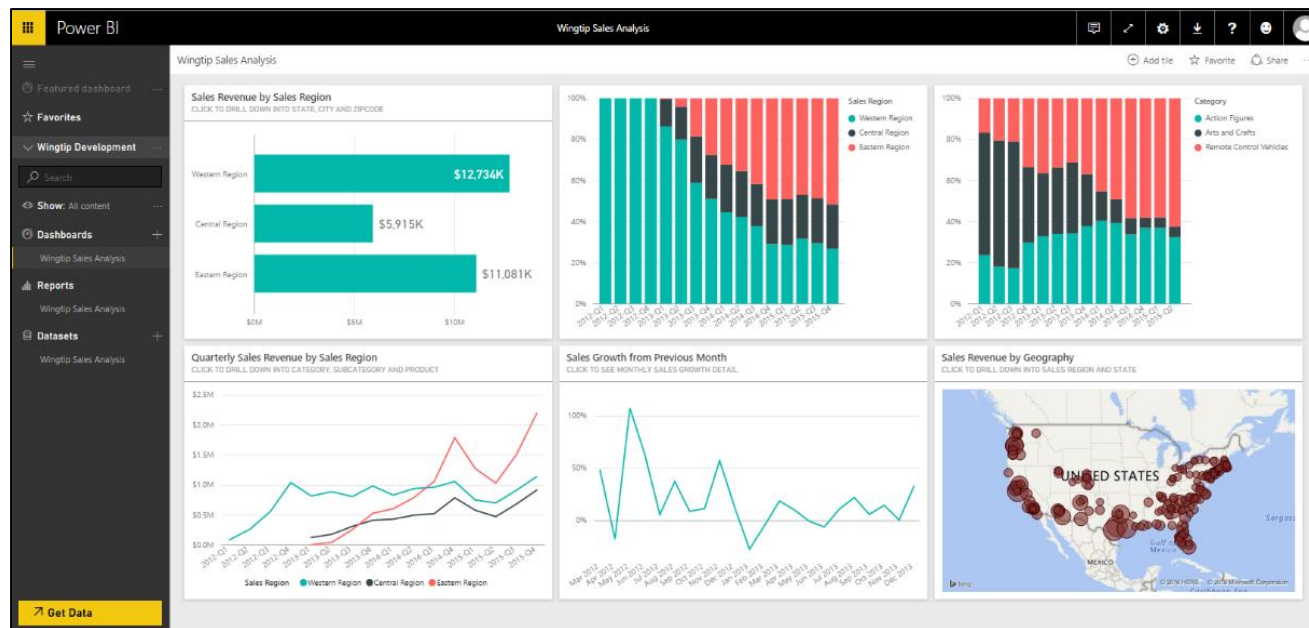
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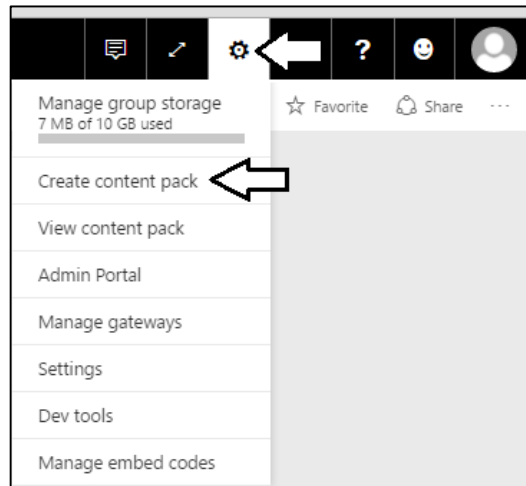
Building Solutions in a Development Workspace

- 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.

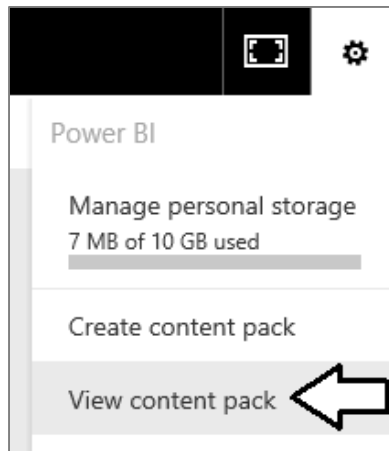
A screenshot of the 'Select items to publish' section. It is divided into three columns: 'Dashboards', 'Reports', and 'Datasets'. Each column has a checkbox next to 'Wingtip Sales Analysis', all of which are checked.

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

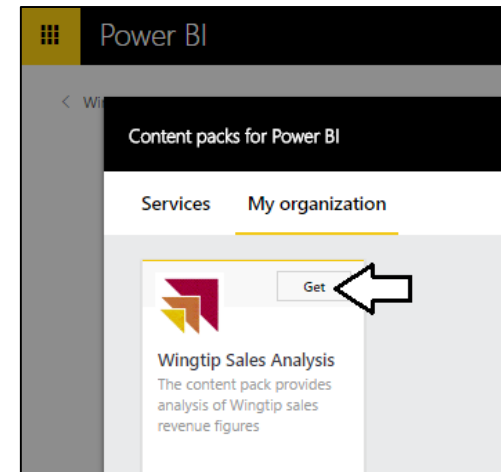
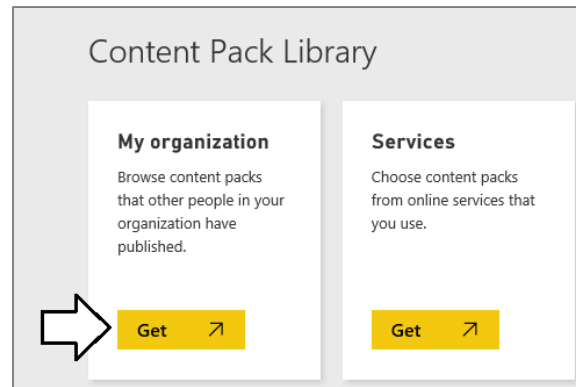
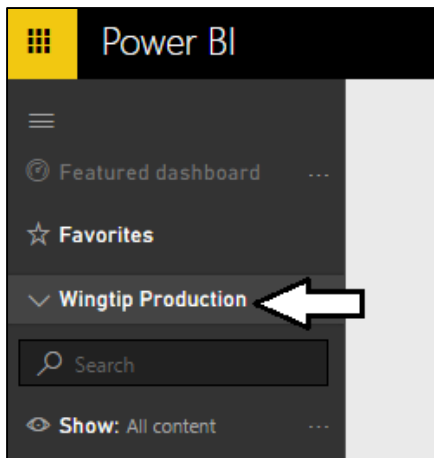


Wingtip Development			
Name	Published To	Date published	Actions
➡ Wingtip Sales Analysis	My Organization	Aug 09, 2016	Edit Delete



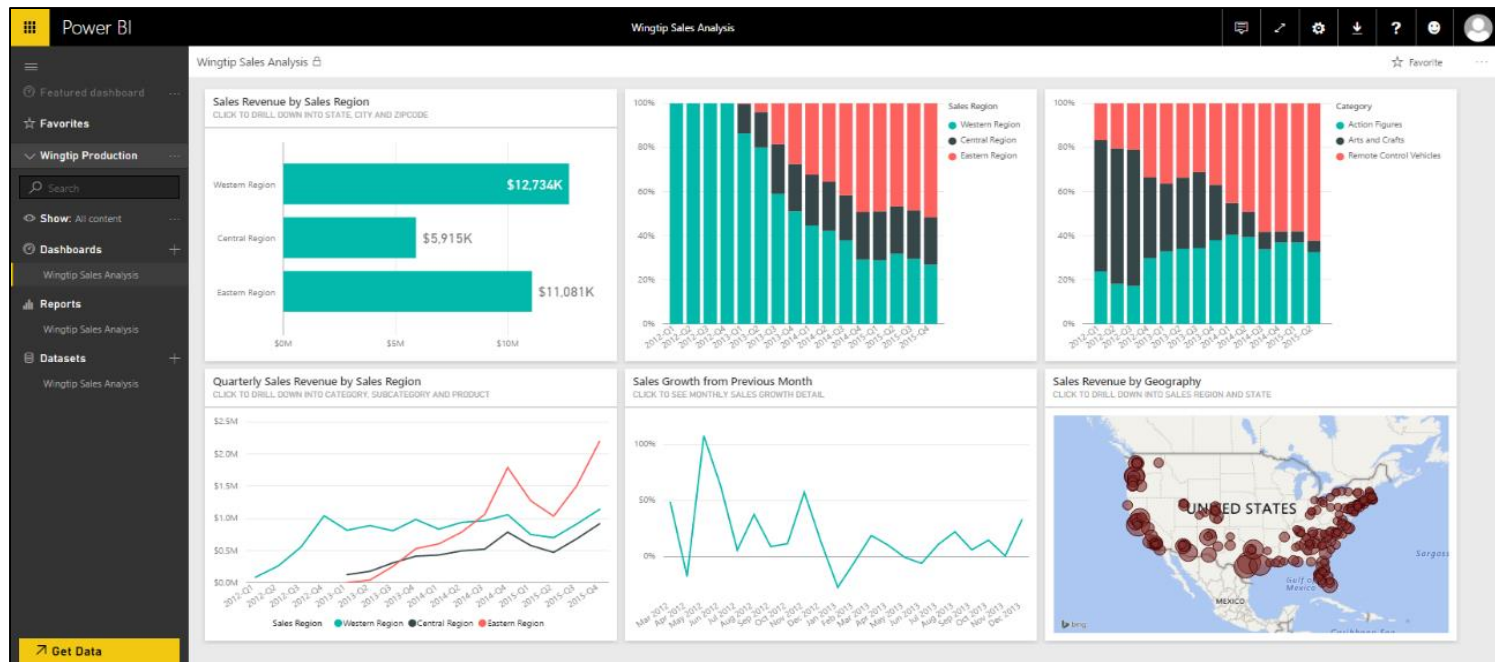
Deploying a Content Pack

- 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





DEMO

Deploying a Dashboard using an Organizational Content Pack

Summary

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