Creating Dashboards in the Power BI Service

Lab Time: 40 minutes

Lab Folder: C:\Student\Modules\05_Dashboards\Lab

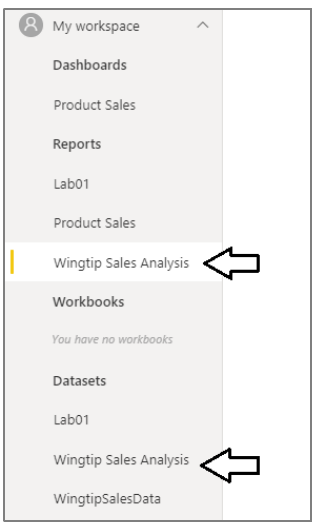
Lab Overview: In this lab you will continue to work with the report and dataset that you created in the Power BI Desktop project named **Wingtip Sales Analysis.pbix**. You will focus on the techniques required to create and deploy dashboards to an audience of business users in an Office 365 environment.

Lab Dependency: This lab assumes you have completed the lab titled **Designing Interactive Reports in Power BI Desktop** in which you created a multipage report in the **Wingtip Sales Analysis.pbix** project and then you published this report and its underlying dataset to your personal workspace in the Power BI Service.

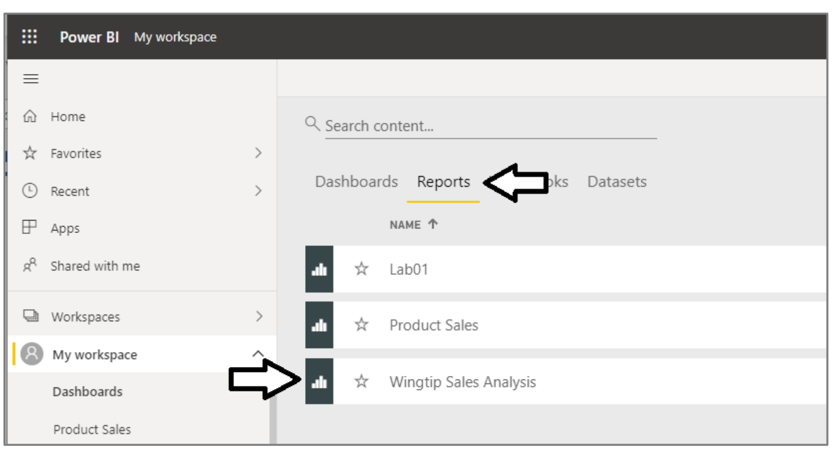
Exercise 1: Create the Wingtip Sales Analysis Dashboard

In this exercise you will create a new dashboard named **Wingtip Sales Analysis**.

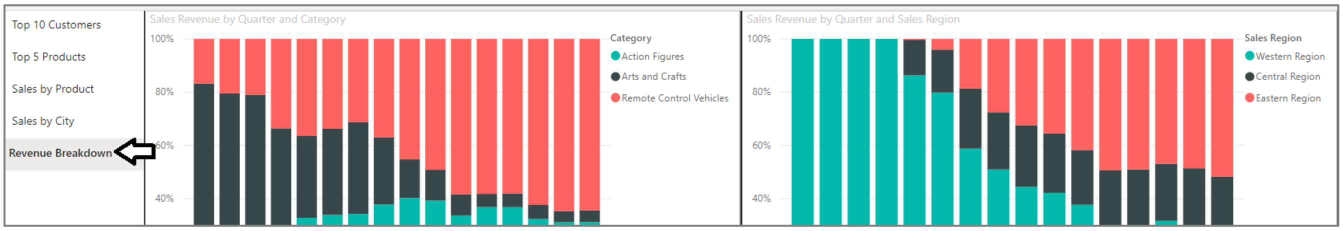
1. Go to My Workspace.
   a) Login to the Power BI Service and navigate to your personal workspace.
   b) Examine the resources in the left navigation menu.
   c) You should be able to confirm that there is a dataset and a report named **Wingtip Sales Analysis**.



2. Create a new dashboard named **Wingtip Sales Analysis**.
   a) Navigate to the **Reports** tab and open the report named **Wingtip Sales Analysis**.

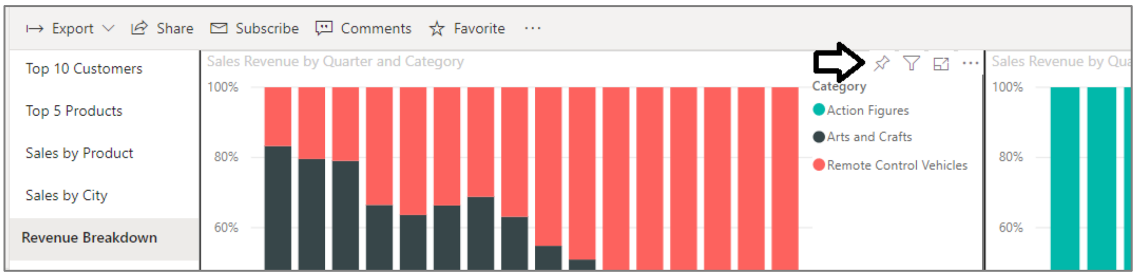


b) Navigate to the **Revenue Breakdown** page of the **Wingtip Sales Analysis** report.



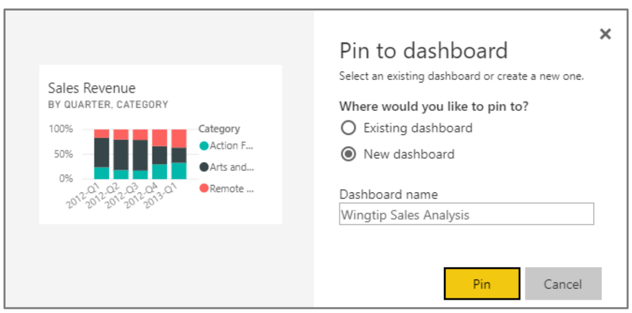
c) Hover the mouse over the column chart visual which displays a sales revenue breakdown across sales regions and states.

d) Locate and click the button with the thumbtack icon to pin this report visual to a new dashboard.

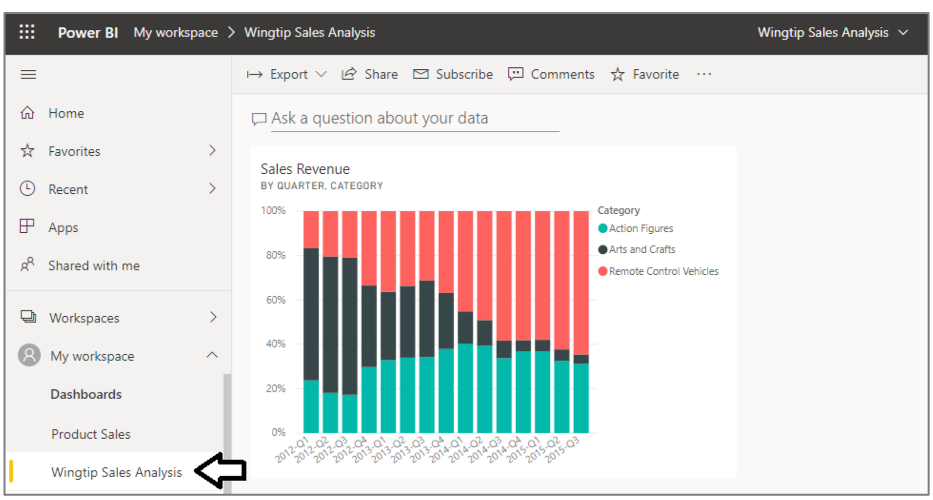


When you click the thumbtack button, you'll be prompted with the **Pin to dashboard** dialog which prompts you to select a dashboard.

e) Select **New Dashboard**, give it a name of **Wingtip Sales Analysis** and click the **Pin** button.

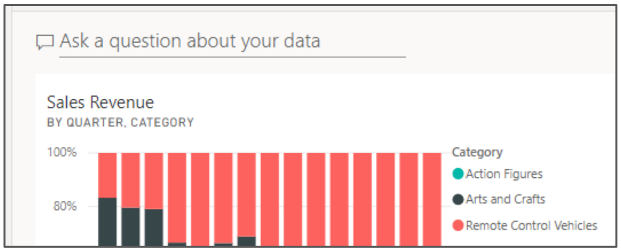


f) Click the **Wingtip Sales Analysis** link in the **Dashboards** section of the left navigation to display the new dashboard.

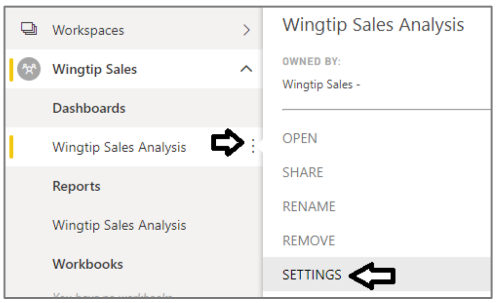


3. Remove the Q&A search box from the **Wingtip Sales Analysis** dashboard.

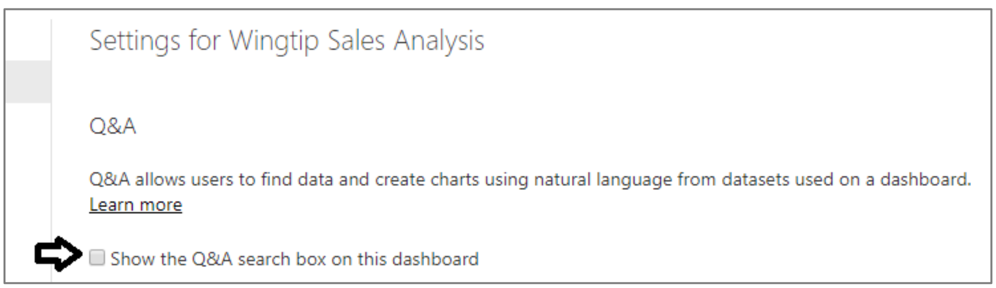
   a) You can see that the new dashboard is initially displayed with the Q&A search box in the upper left corner.



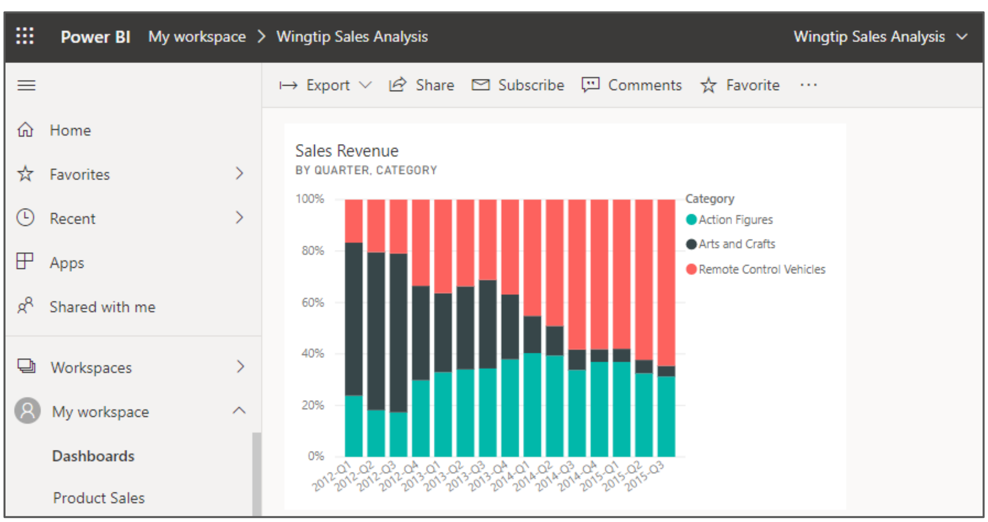
   b) Click **Dashboards > SETTINGS** in the left navigation to display the **Settings for Wingtip Sales Analysis** pane.



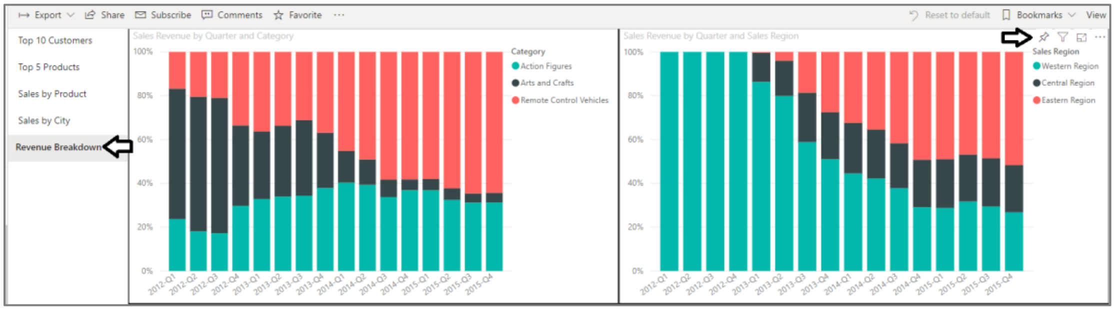
   c) In the **Settings for Wingtip Sales Analysis** pane, uncheck the **Show the Q&A search box on this dashboard** checkbox.



   d) Click **Apply** below in the **Settings for Wingtip Sales Analysis** pane and confirm the Q&A search box is no longer showing.



4. Add a second tile to the dashboard by pinning another visual from the **Wingtip Sales Analysis** report.
   a) Navigate the **Revenue Breakdown** page of the **Wingtip Sales Analysis** report.
   b) Click the thumbtack button of the visual in the upper right corner.



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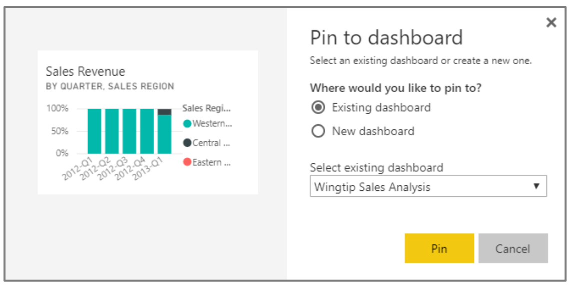
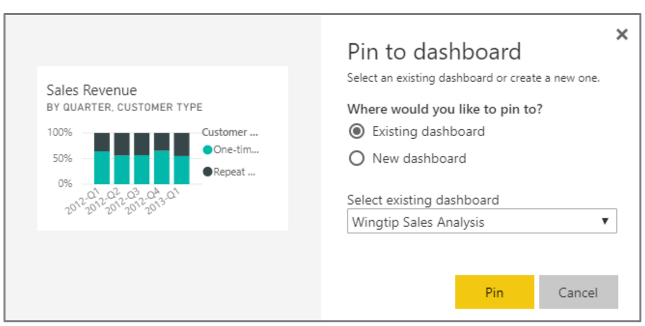
   c) Pin the visual to the **Wingtip Sales Analysis** dashboard.

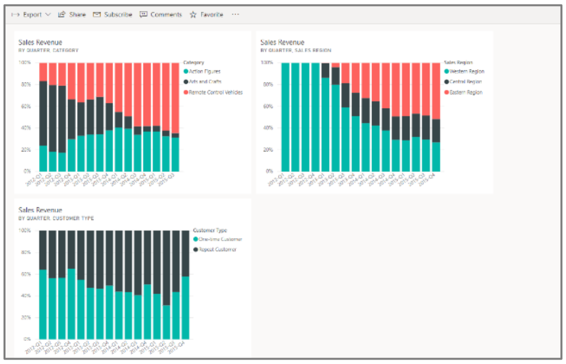


5. Add a third tile to the dashboard by pinning another visuals from the **Wingtip Sales Analysis** report.
   a) Click the thumbtack button of the visual in the lower left corner.

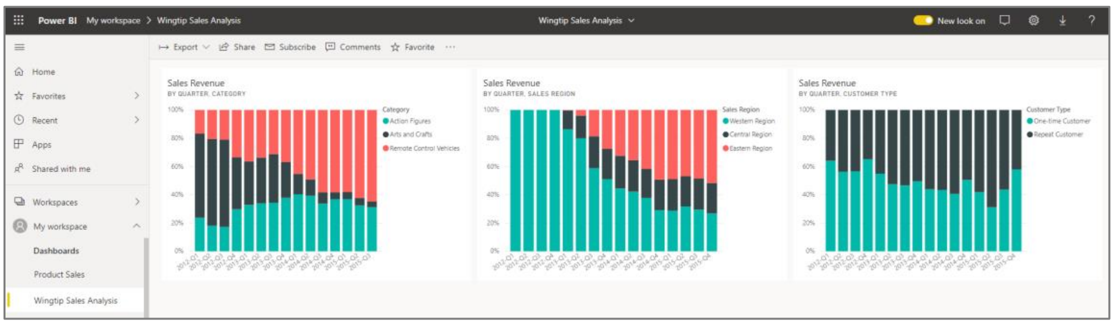
   b) Pin the visual to the **Wingtip Sales Analysis** dashboard.



c) Navigate to the **Wingtip Sales Analysis** dashboard. The layout of dashboard tiles should match the following screenshot.

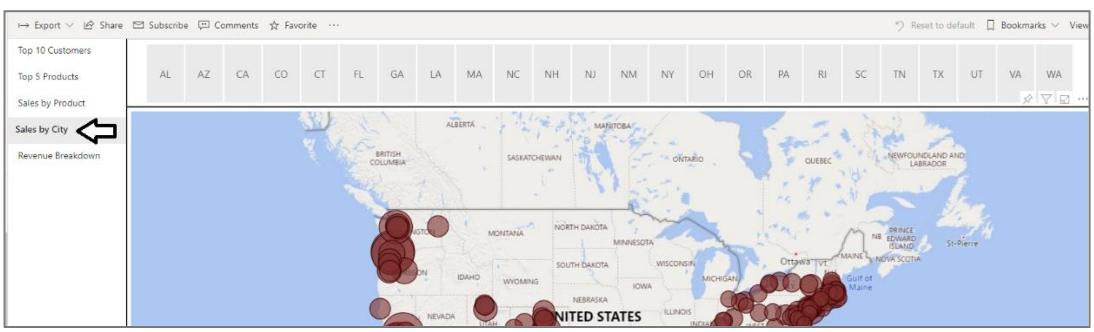


d) Using the mouse, move the tile on the bottom row up so it's to the right of the two other tiles.

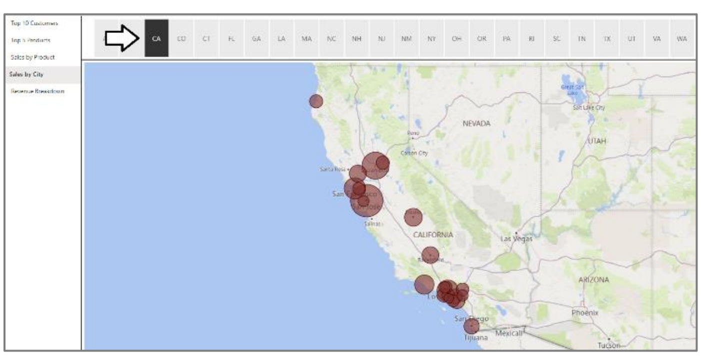


6. Add three more tiles to the **Wingtip Sales Analysis** dashboard to show sales revenue by city in CA, TX and FL.

a) Navigate to the **Sales by City** page of the **Wingtip Sales Analysis** report.

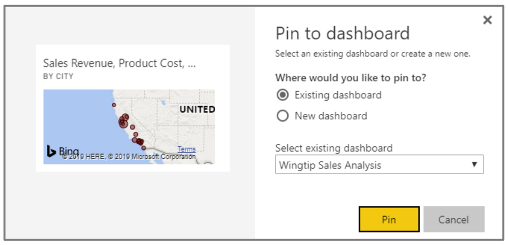


b) Click on **CA** in the top slicer to filter cities by the state of California.

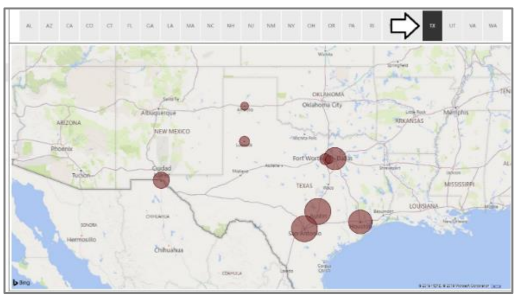


c) Once you have applied a filter for the state of **CA**, click the thumbtack button to pin the visual as a dashboard tile.

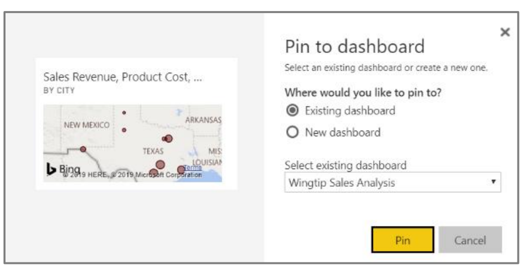
d) Pin the visual to the **Wingtip Sales Analysis** dashboard.



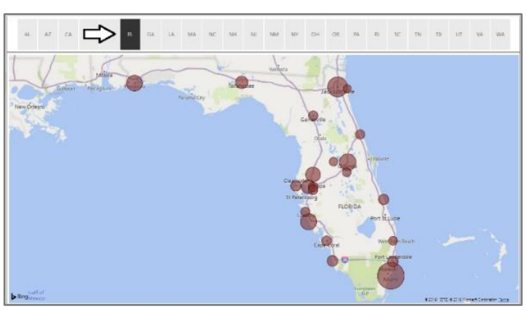
e) Click on **TX** in the top slicer to filter cities by the state of Texas.



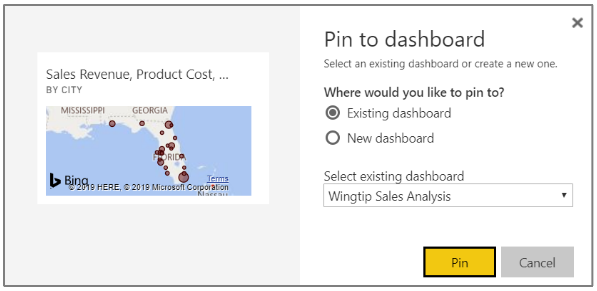
f) Pin the visual to the **Wingtip Sales Analysis** dashboard.



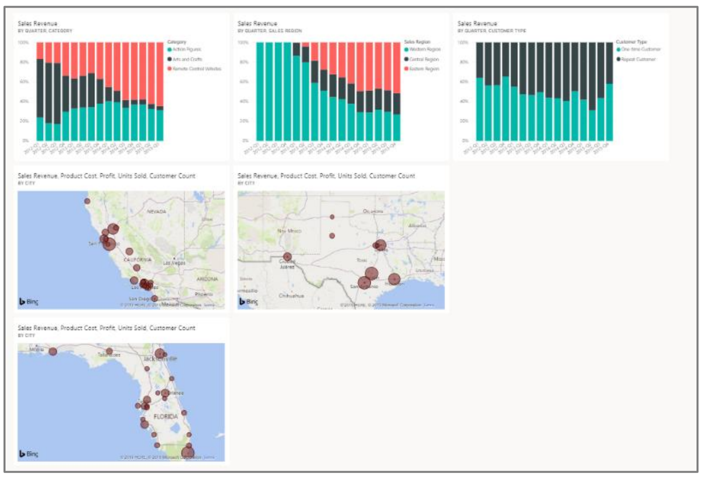
g) Click on **FL** in the top slicer to filter cities by the state of Florida.



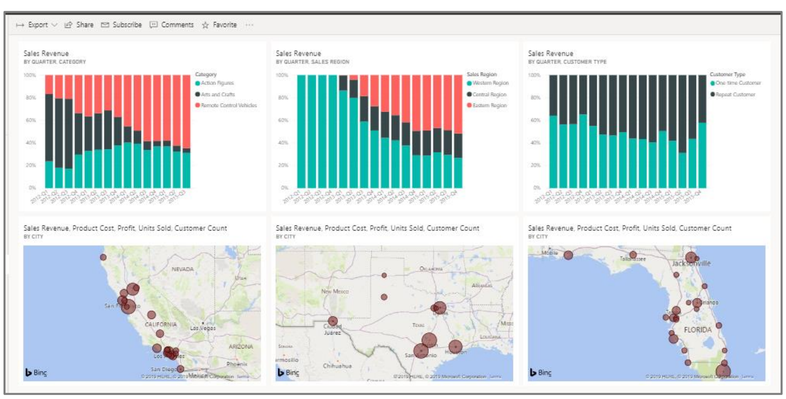
h) Pin the visual to the **Wingtip Sales Analysis** dashboard.



i) Navigate to the **Wingtip Sales Analysis** dashboard. The layout of dashboard tiles should match the following screenshot.

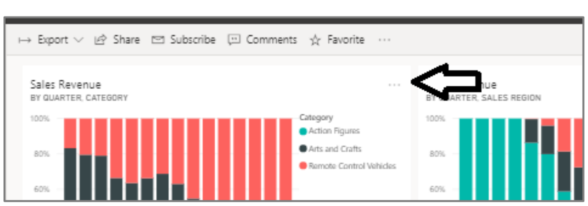


j) Rearrange the tiles in the **Wingtip Sales Analysis** dashboard to match the following screenshot.

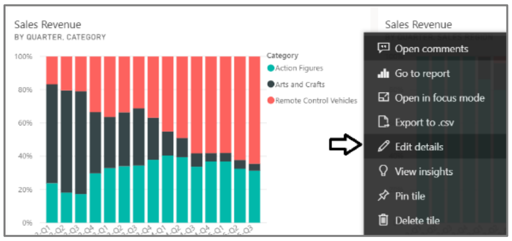


7. Remove the titles and subtitles from all six dashboard tiles

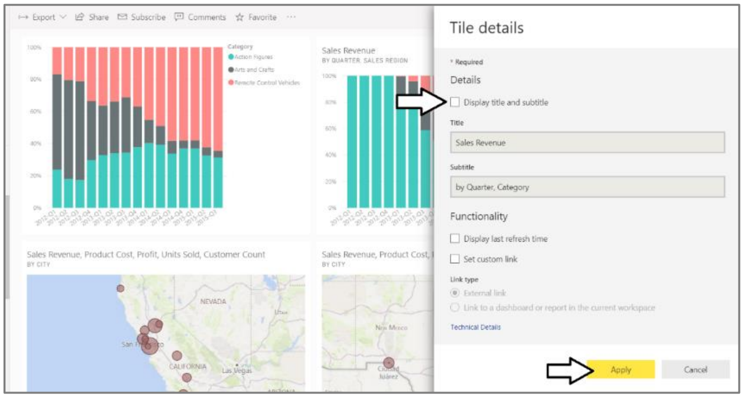
   a) Click the ellipse flyout menu for the tile at the top left of the dashboard.



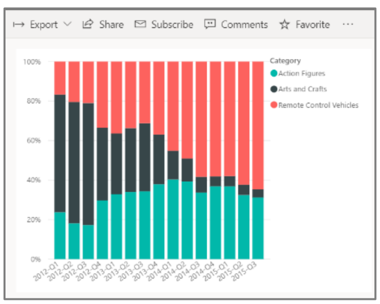
b) Select the **Edit details** to open the **Tile details** pane for this tile.



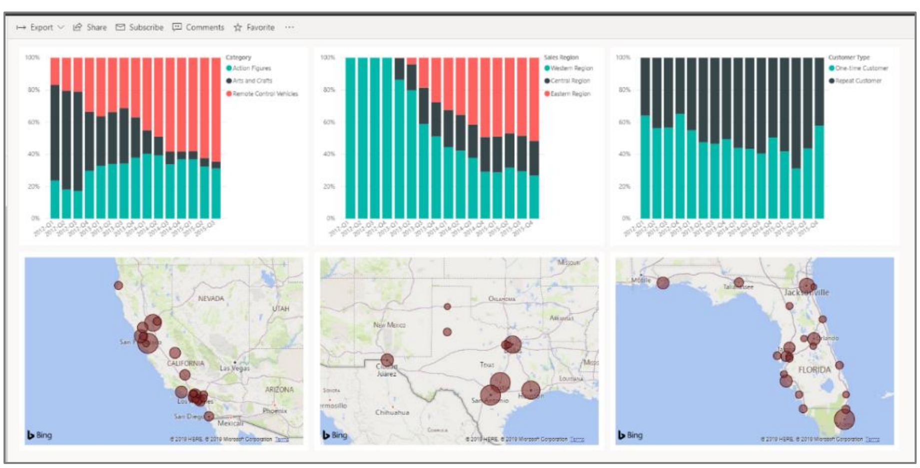
c) On the **Tile details** pane, uncheck the **Display title and subtitle** checkbox and then click **Apply**.



d) The top left tile should now display without a title or subtitle.



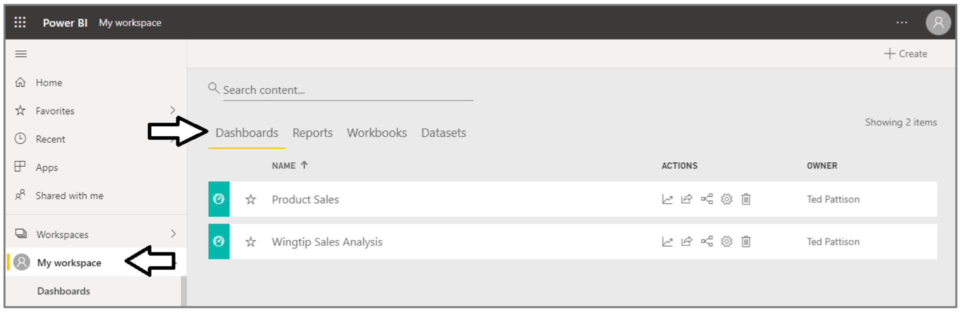
e) Follow the same set of steps to remove the title and subtitle from the other 5 tiles.



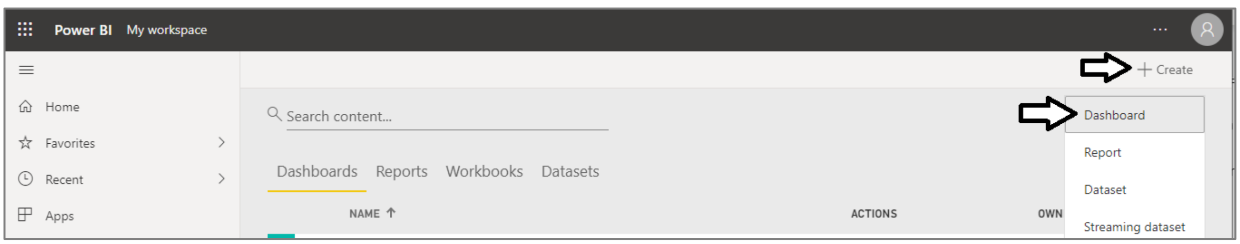
Exercise 2: Create the Power BI Training Dashboard

In this exercise you will create a new dashboard named **Power BI Training** which contains an image and several videos.

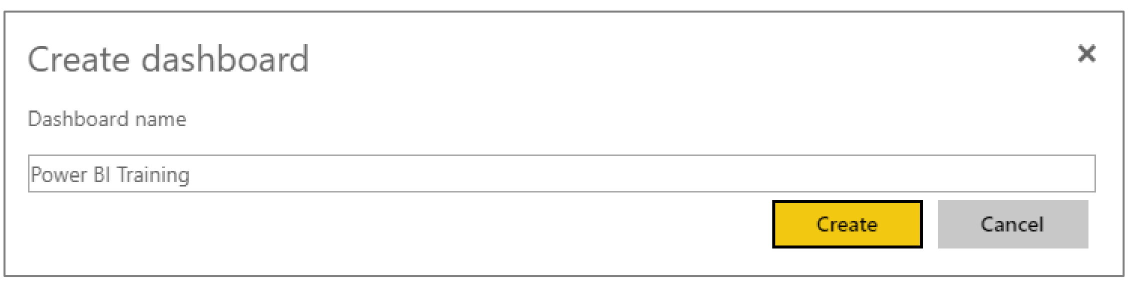
1. Create the **Power BI Training** dashboard.
   a) Click **My workspace** in the left navigation to see the workspace summary page.
   b) Click the **Dashboards** link on the summary page to see the dashboards in your personal workspace.



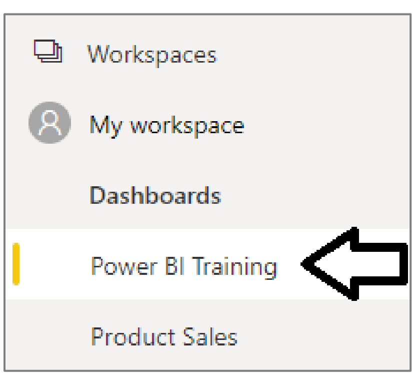
   c) Drop down the **Create** menu on the top right corner and select the **Dashboard** command.



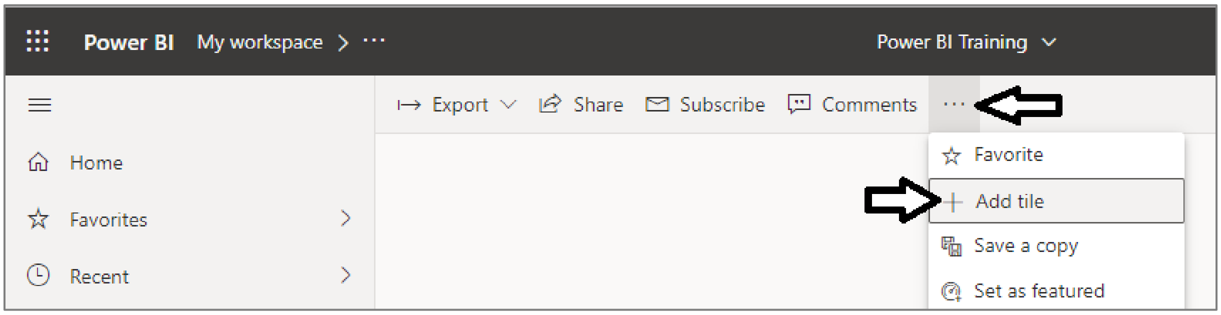
   d) In the **Create dashboard** dialog, enter a dashboard name of **Power BI Training** and then click the **Create** button.



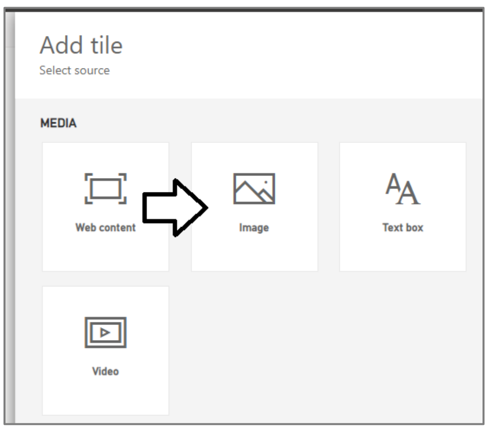
   e) Once it has been created, you should see the **Power BI Training** dashboard in the left navigation.



f) Drop down the ellipse menu at the top of the dashboard and select the **Add tile** command.



g) In the **Add tile** pane, select **Image**.

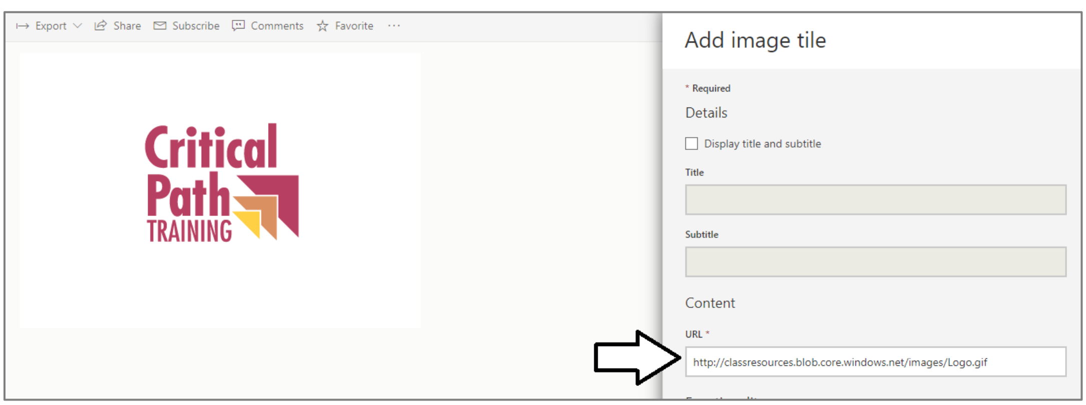


h) Click the **Next** button at the bottom of the **Add tile** pane.

i) Copy the following URL to an image logo into the Windows clipboard.

```
http://classresources.blob.core.windows.net/images/Logo.gif
```

j) Paste the image URL in the clipboard into the **URL** textbox in the **Content** section of the **Add image tile** pane.



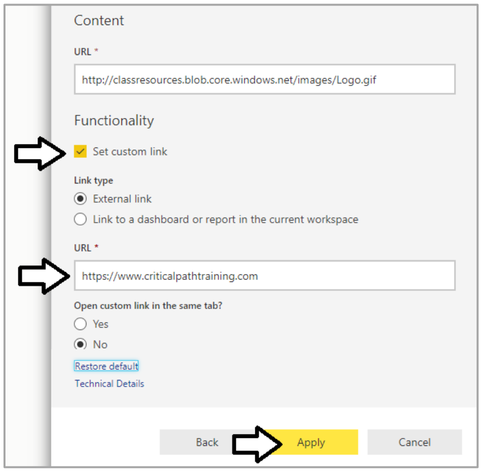
k) Copy the following URL for the Critical Path Training website into the Windows clipboard.

```
https://www.criticalpathtraining.com
```

l) Check the check box for the **Set custom link** option in the **Functionality** section of the **Add image tile** pane.

m) Paste the website URL in the clipboard into the **URL** textbox in the **Functionality** section of the **Add image tile** pane.

n) Click the Apply button at the bottom of the **Add image tile** pane.



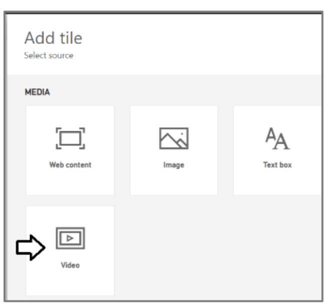
2. Add a video to your dashboard

a) Drop down the ellipse menu at the top of the dashboard and select the **Add tile** command.

b) Copy the following YouTube video URL into the Windows clipboard.

```
https://youtu.be/qHmsonZRb24
```

c) In the **Add tile** pane, select **Video**.



d) Paste the YouTube video URL into the **Video URL** textbox and then click **Apply** at the bottom of the **Add video tile** pane.

Now that you have added the first video, you are going to add two more. When adding the second and third video tile to the dashboard, you can follow the same set of steps that you did to add the first one.

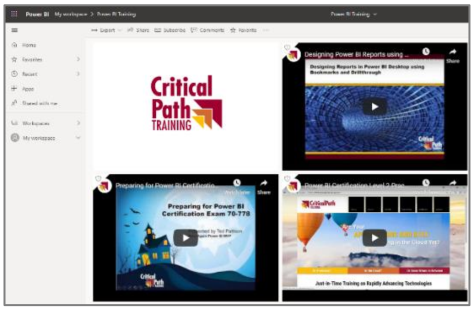
3. Add a second and a third video tile to the **Power BI Training** dashboard.
   a) Add a second video tile to the dashboard using the following YouTube URL.

```
https://youtu.be/CTgzCTFMNnk
```

   b) Add a third video tile to the dashboard using the following YouTube URL.

```
https://youtu.be/TOPtxY7kP-A
```

   c) Rearrange the tiles in the dashboard to match the following layout.

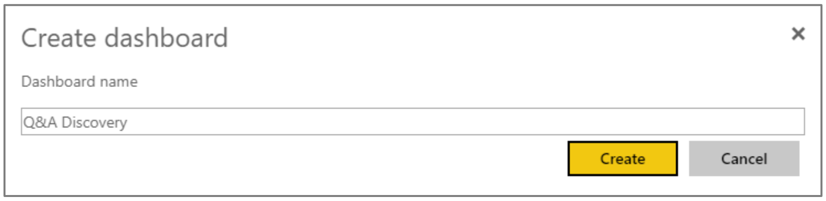


While the point of this lab exercise is for you to learn how to add dashboard tiles, you might find these videos useful, especially if you plan to get certified in Power BI by passing certification exam **70-778: Analyzing and Visualizing Data with Microsoft Power BI**.

Exercise 3: Create the Q&A Discovery Dashboard

In this exercise you will create a new dashboard named **Q&A Discovery**.

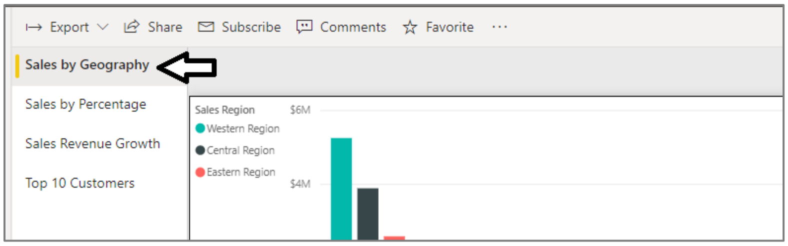
1. Create the **Power BI Training** dashboard.
   a) Click **My workspace** in the left navigation to see the workspace summary page.
   b) Click the **Dashboards** link on the summary page to see the dashboards in your personal workspace.
   c) Drop down the **Create** menu on the top right corner and select the **Dashboard** command.
   d) In the **Create dashboard** dialog, enter a dashboard name of **Power BI Training** and then click the **Create** button.



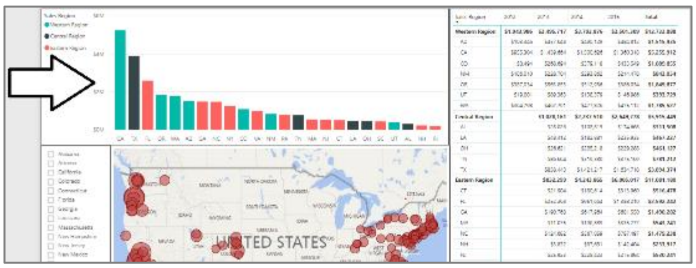
2. Add the Q&A search box to the **Q&A Discovery** dashboard.
   a) You can see that the new dashboard is initially displayed without the Q&A search box.

You need to pin a visual from a report as a dashboard tile to associate the dashboard with a dataset.

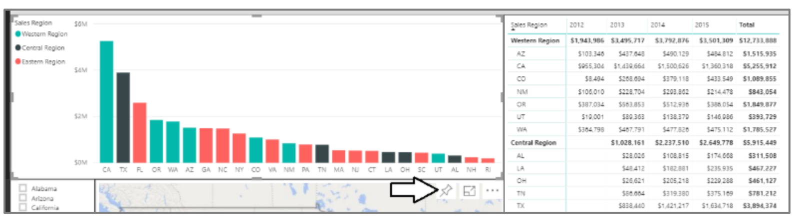
b) Navigate to the **Sales by Geography** page of the **Wingtip Sales Analysis** report.



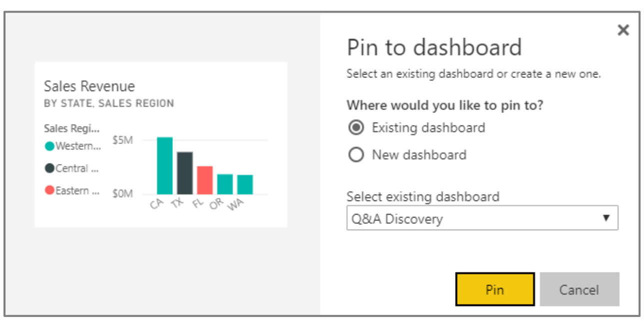
c) Hover the mouse over the column chart visual which displays a sales revenue breakdown across sales regions and states.



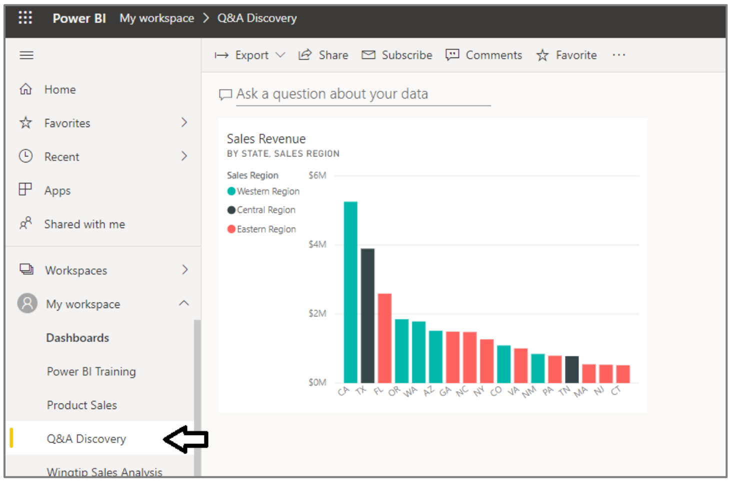
d) Locate and click the button with the thumbtack icon to pin this report visual to a new dashboard.

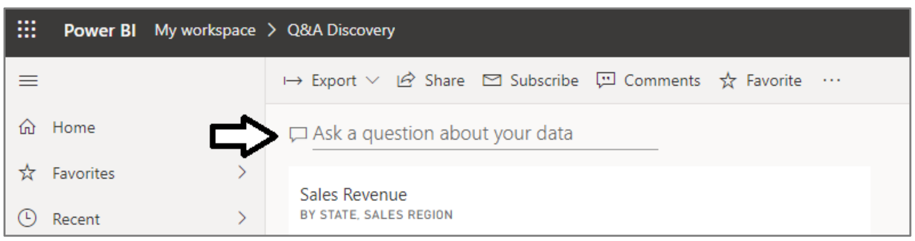


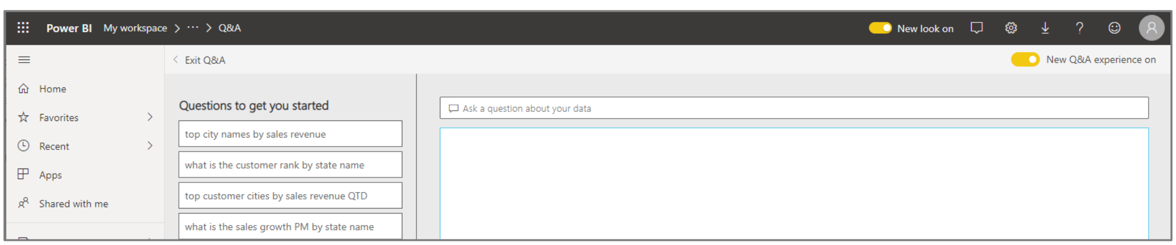
e) In the **Pin to dashboard** dialog, select **Existing Dashboard** and select the dashboard named **Q&A Discovery**

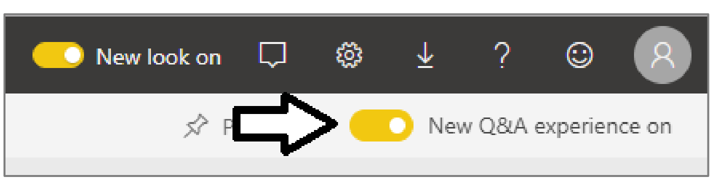


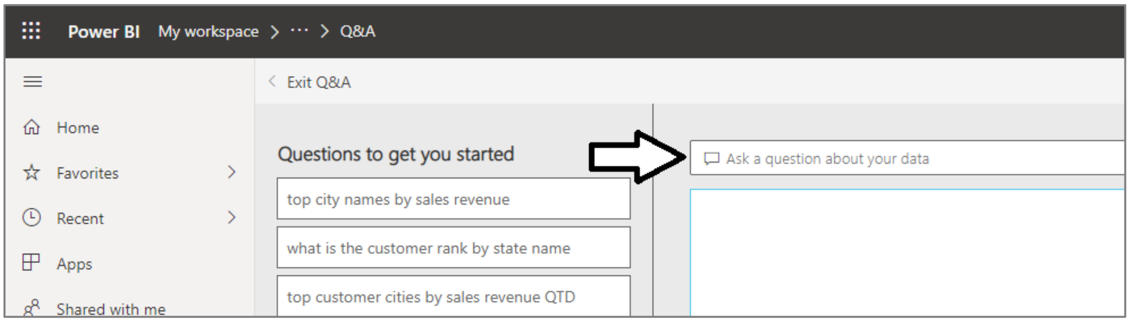
f) Navigate to the **Q&A Discovery** dashboard using the left navigation menu..

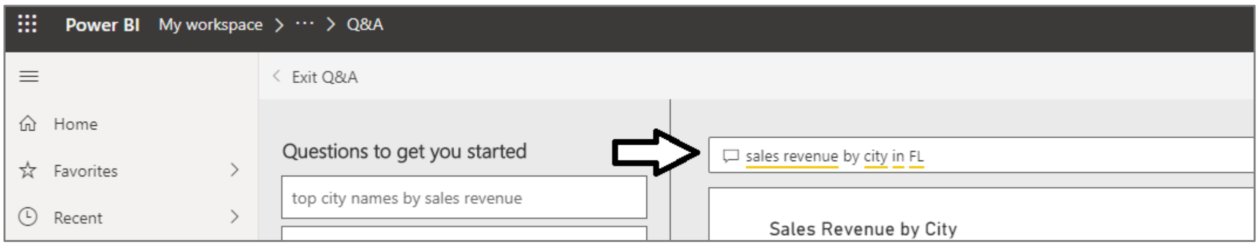

Power BI My workspace > Q&A Discovery
Export Share Subscribe Comments Favorite
Home
Favorites
Recent
Apps
Shared with me
Workspaces
My workspace
Dashboards
Power BI Training
Product Sales
Q&A Discovery
Wingtip Sales Analysis
Ask a question about your data
Sales Revenue
BY STATE, SALES REGION
Sales Region
Western Region
Central Region
Eastern Region
$6M
$4M
$2M
$0M
CA TX FL OR WA AZ GA NC NY CO VA NM PA TN MA NJ CT

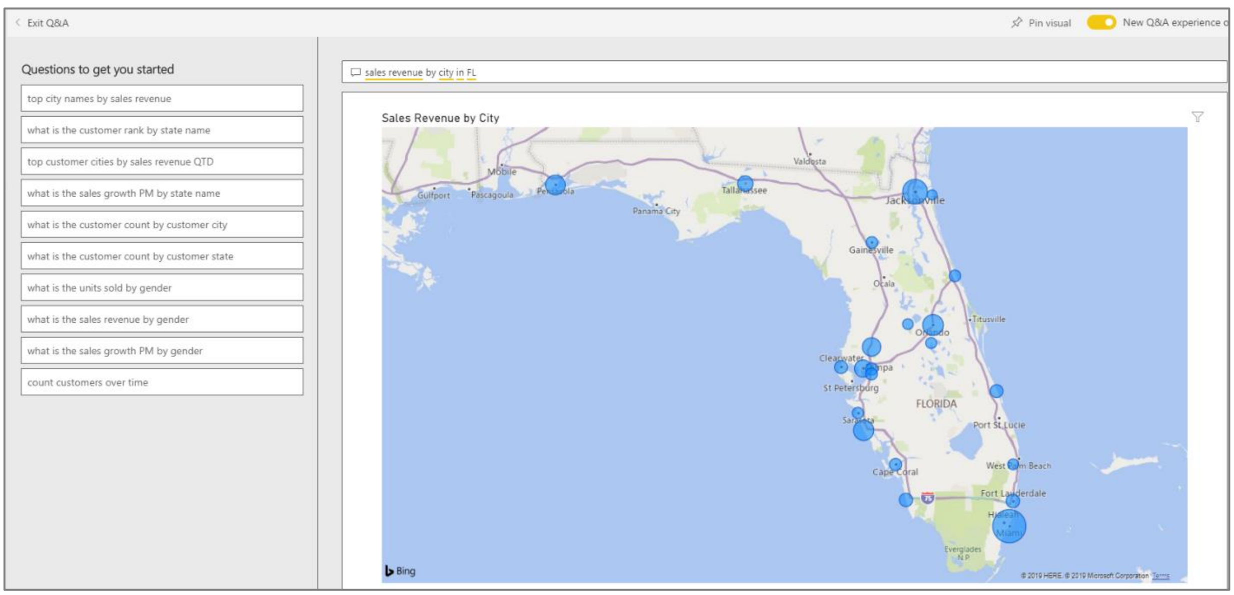

Power BI My workspace > Q&A Discovery
Export Share Subscribe Comments Favorite
Home
Favorites
Recent
Ask a question about your data
Sales Revenue
BY STATE, SALES REGION

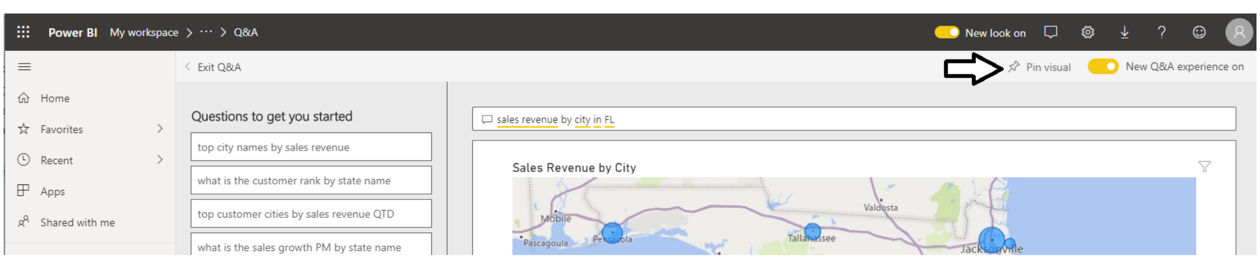

Power BI My workspace > ··· > Q&A
New look on
Exit Q&A
New Q&A experience on
Home
Favorites
Recent
Apps
Shared with me
Questions to get you started
top city names by sales revenue
what is the customer rank by state name
top customer cities by sales revenue QTD
what is the sales growth PM by state name
Ask a question about your data

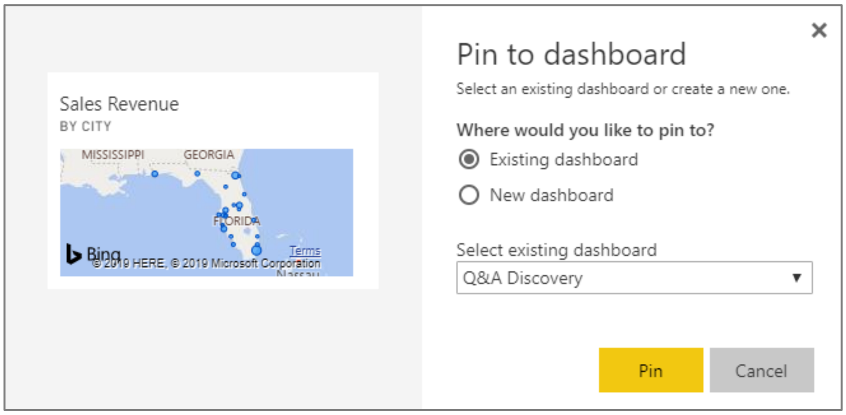

New look on
New Q&A experience on

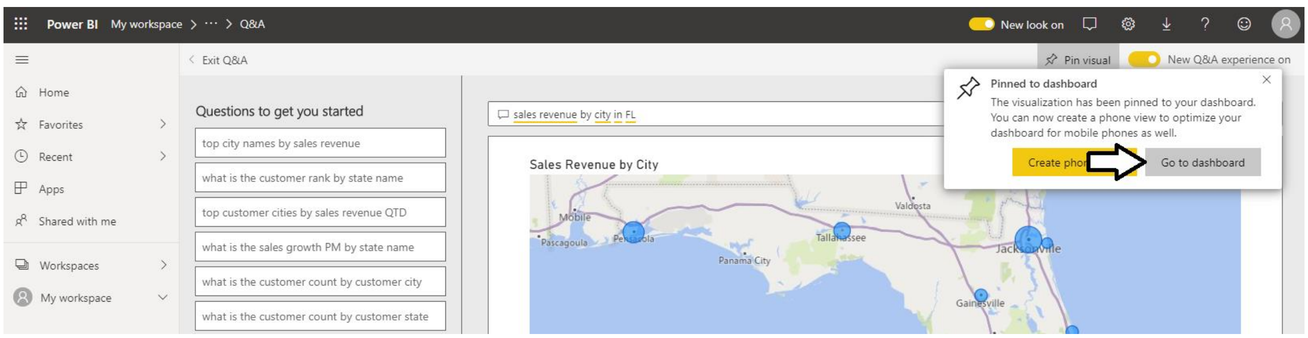

Power BI My workspace > ··· > Q&A
Exit Q&A
Home
Favorites
Recent
Apps
Shared with me
Questions to get you started
top city names by sales revenue
what is the customer rank by state name
top customer cities by sales revenue QTD
Ask a question about your data

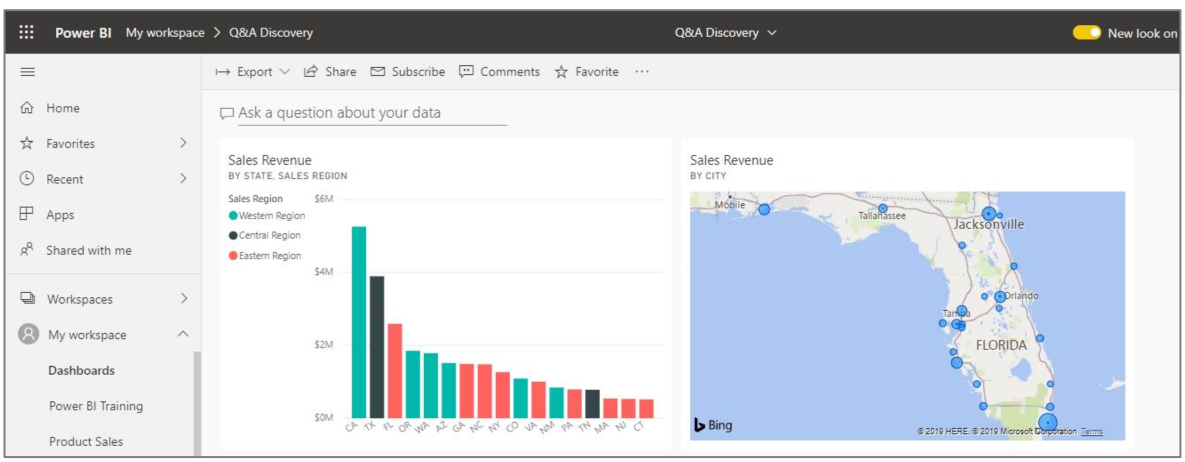

Power BI My workspace > ··· > Q&A
Exit Q&A
Home
Favorites
Recent
Questions to get you started
top city names by sales revenue
sales revenue by city in FL
Sales Revenue by City

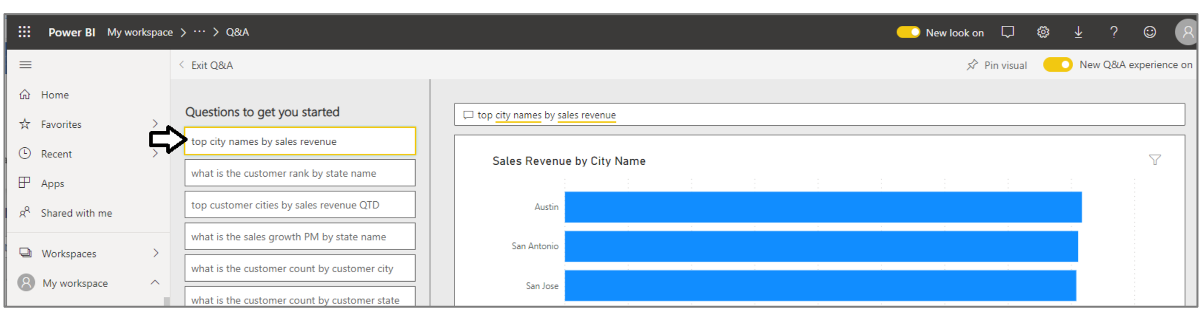

Exit Q&A
Pin visual
Questions to get you started
top city names by sales revenue
what is the customer rank by state name
top customer cities by sales revenue QTD
what is the sales growth PM by state name
what is the customer count by customer city
what is the customer count by customer state
what is the units sold by gender
what is the sales revenue by gender
what is the sales growth PM by gender
count customers over time
sales revenue by city in FL
Sales Revenue by City


Power BI My workspace > ··· > Q&A
New look on
Exit Q&A
Pin visual
New Q&A experience on
Home
Favorites
Recent
Apps
Shared with me
Questions to get you started
top city names by sales revenue
what is the customer rank by state name
top customer cities by sales revenue QTD
what is the sales growth PM by state name
sales revenue by city in FL
Sales Revenue by City


Sales Revenue
BY CITY
Pin to dashboard
Select an existing dashboard or create a new one.
Where would you like to pin to?
Existing dashboard
New dashboard
Select existing dashboard
Q&A Discovery
Pin
Cancel


Power BI My workspace > ··· > Q&A
New look on
Exit Q&A
Pin visual
New Q&A experience on
Home
Favorites
Recent
Apps
Shared with me
Workspaces
My workspace
Questions to get you started
top city names by sales revenue
what is the customer rank by state name
top customer cities by sales revenue QTD
what is the sales growth PM by state name
what is the customer count by customer city
what is the customer count by customer state
sales revenue by city in FL
Sales Revenue by City
Pinned to dashboard
The visualization has been pinned to your dashboard. You can now create a phone view to optimize your dashboard for mobile phones as well.
Go to dashboard


Power BI My workspace > Q&A Discovery
Q&A Discovery
New look on
Export
Share
Subscribe
Comments
Favorite
Home
Favorites
Recent
Apps
Shared with me
Workspaces
My workspace
Dashboards
Power BI Training
Product Sales
Ask a question about your data
Sales Revenue
BY STATE, SALES REGION
Sales Region
Western Region
Central Region
Eastern Region
Sales Revenue
BY CITY


Power BI My workspace > ··· > Q&A
New look on
Exit Q&A
Pin visual
New Q&A experience on
Home
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Workspaces
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Questions to get you started
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what is the customer count by customer city
what is the customer count by customer state
Sales Revenue by City Name
Austin
San Antonio
San Jose

1.

Exercise 4: Share the Wingtip Sales Analysis Dashboard

In this exercise you will create a new dashboard named **Wingtip Sales Analysis**.

1. Go to My Workspace.