Creating Dashboards in the Power BI Service

Lab Time: 40 minutes

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

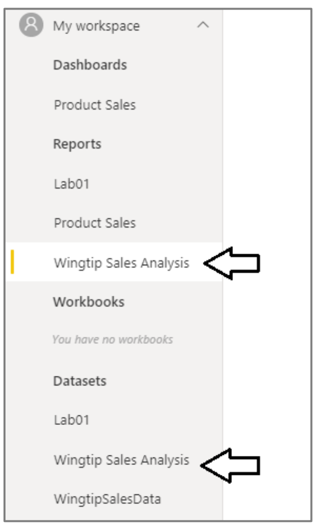
Lab Overview: In this lab you will continue to work with the report and dataset that you created in the Power BI Desktop project named **Wingtip Sales Analysis.pbix**. You will focus on the techniques required to create and deploy dashboards to an audience of business users in an Office 365 environment.

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.

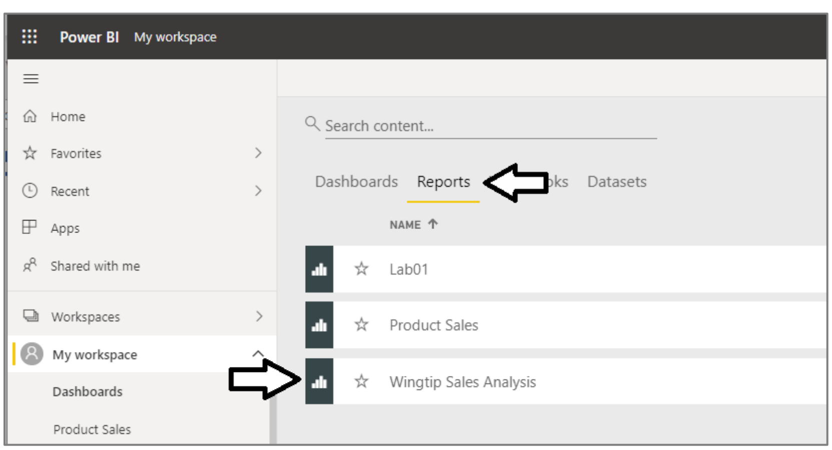
Exercise 1: Create the Wingtip Sales Analysis Dashboard

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

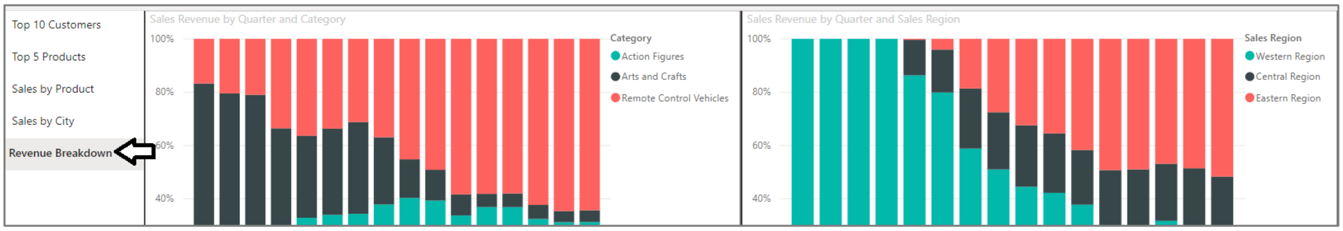
1. Inspect your personal workspace.
   a) Login to the Power BI Service and navigate to your personal workspace.
   b) Examine the resources in the left navigation menu.
   c) You should be able to confirm that there is a dataset and a report named **Wingtip Sales Analysis**.



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

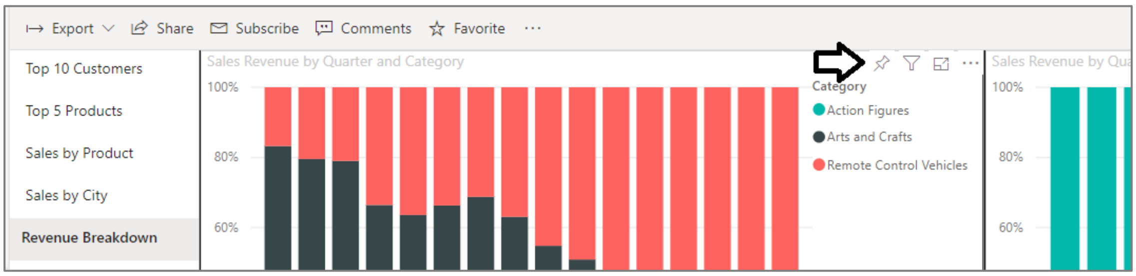


b) Navigate to the **Revenue Breakdown** page of the **Wingtip Sales Analysis** report.



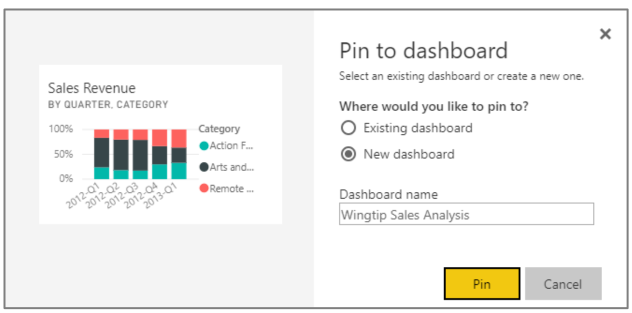
c) Hover the mouse over the top left column chart visual which displays a sales revenue breakdown by product category.

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

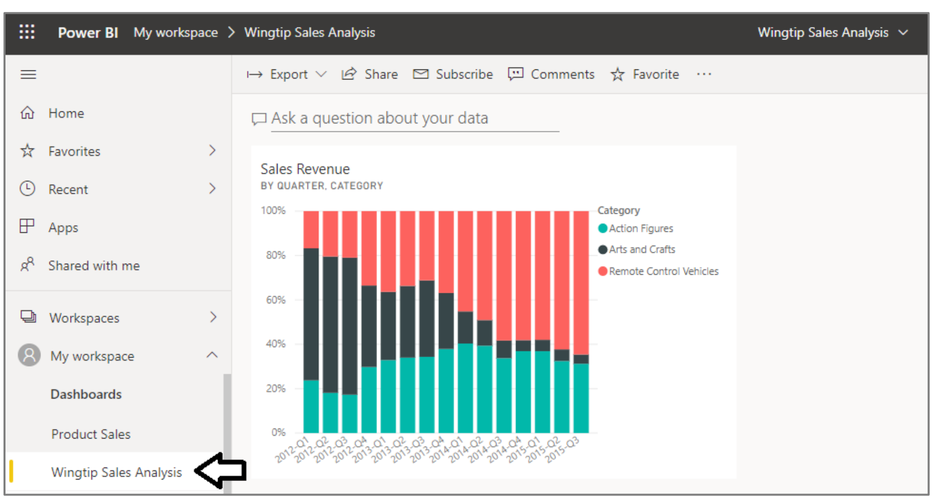


When you click the thumbtack button, you'll be prompted with the **Pin to dashboard** dialog where you must select a dashboard.

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

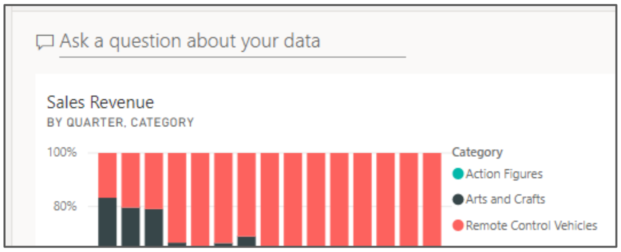


f) Click the **Wingtip Sales Analysis** link in the **Dashboards** section of the left navigation to display the new dashboard.

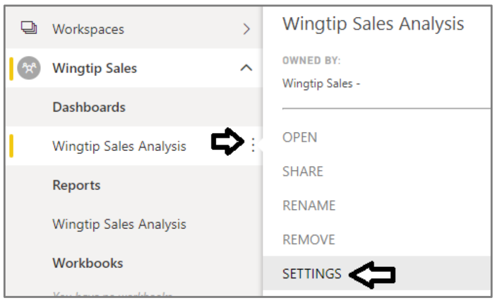


3. Remove the Q&A search box from the **Wingtip Sales Analysis** dashboard.

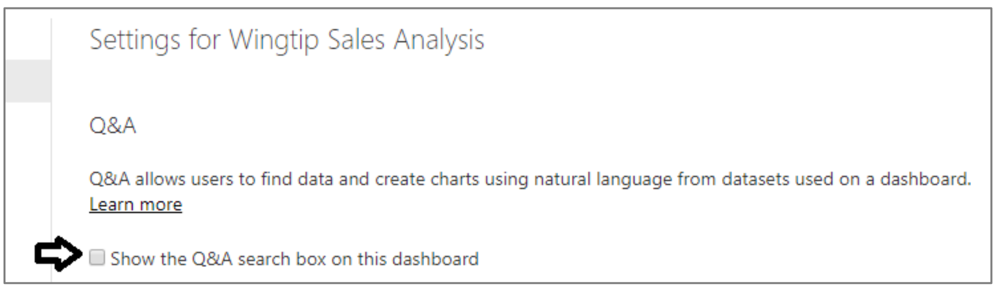
a) You can see the dashboard is initially displayed with the ***Ask a question about your data*** search box.



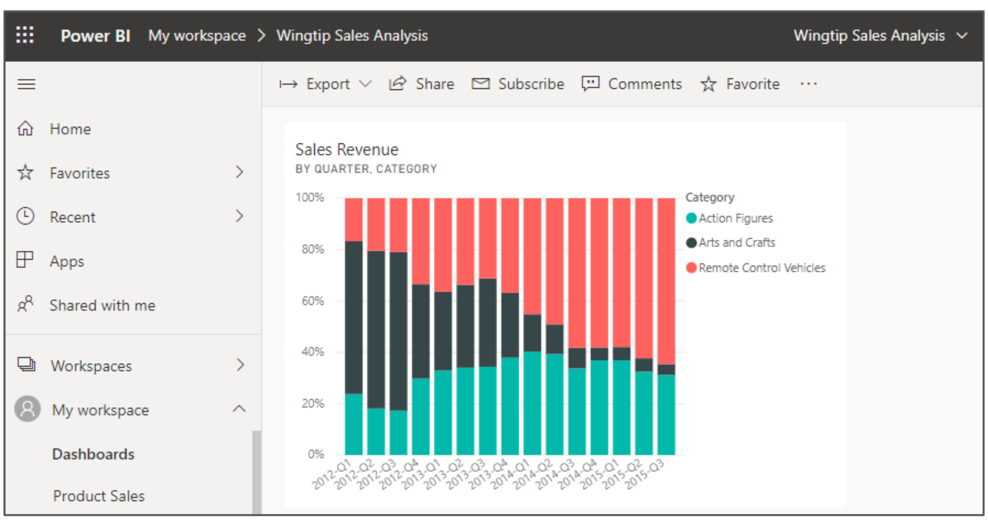
b) Click **Dashboards > SETTINGS** in the left navigation to display the **Settings for Wingtip Sales Analysis** pane.



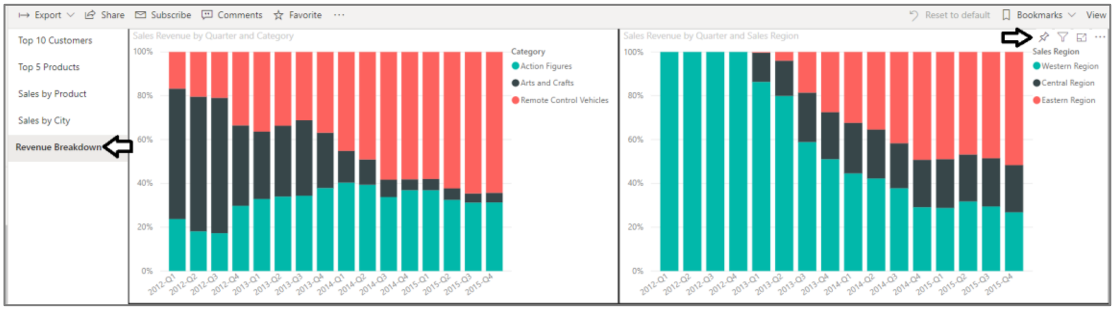
c) In the **Settings for Wingtip Sales Analysis** pane, uncheck the **Show the Q&A search box on this dashboard** checkbox.



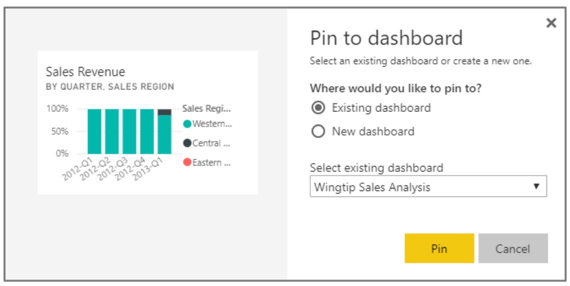
d) Click **Apply** below in the **Settings for Wingtip Sales Analysis** pane and confirm the Q&A search box is no longer showing.



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.

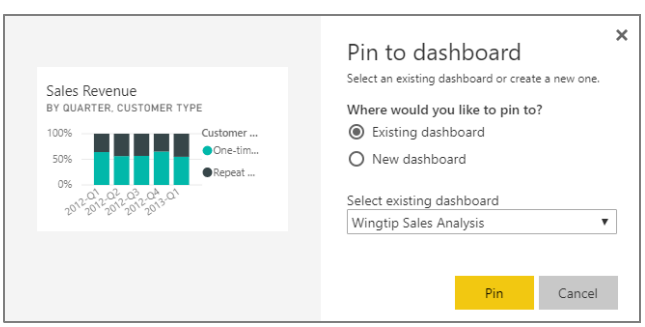


   c) Pin the visual to the **Wingtip Sales Analysis** dashboard.

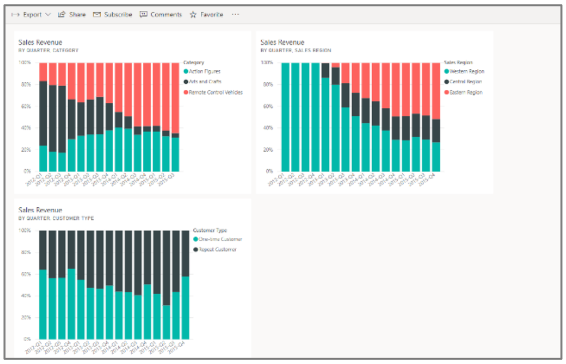


5. Add a third tile to the dashboard by pinning another visual from the **Wingtip Sales Analysis** report.
   a) Click the thumbtack button of the visual in the lower left corner.

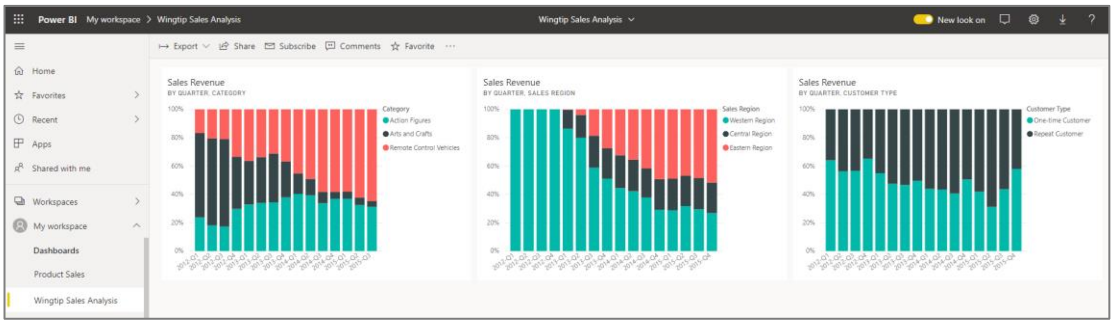
   b) Pin the visual to the **Wingtip Sales Analysis** dashboard.



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

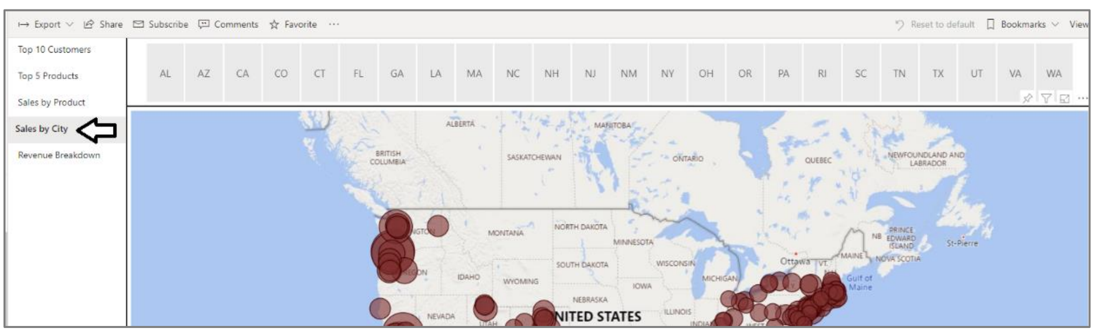


d) Using the mouse, move the tile on the bottom row up so it's positioned to the right of the two other tiles.

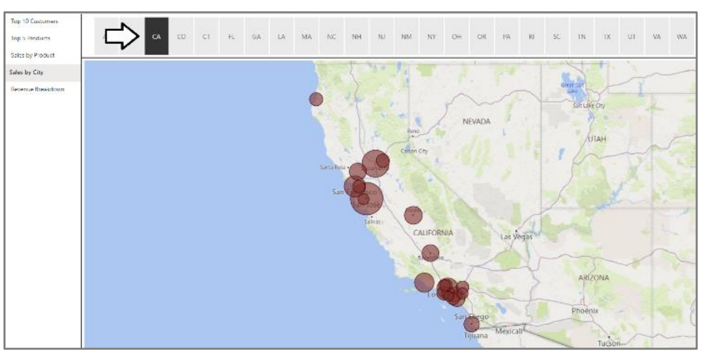


6. Add three more tiles to the **Wingtip Sales Analysis** dashboard to show sales revenue by city in CA, TX and FL.

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

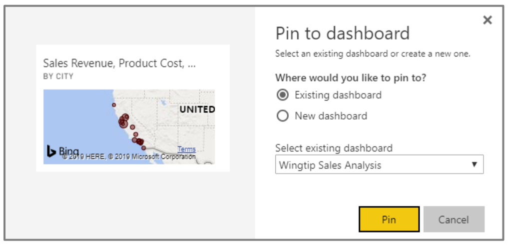


b) Click on **CA** in the top slicer to filter cities by the state of California.

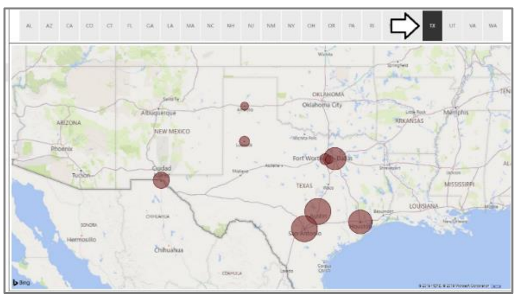


c) Once you have applied a filter for the state of **CA**, click the thumbtack button to pin the visual as a dashboard tile.

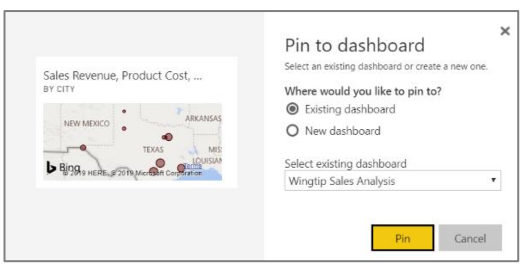
d) Pin the visual to the **Wingtip Sales Analysis** dashboard.



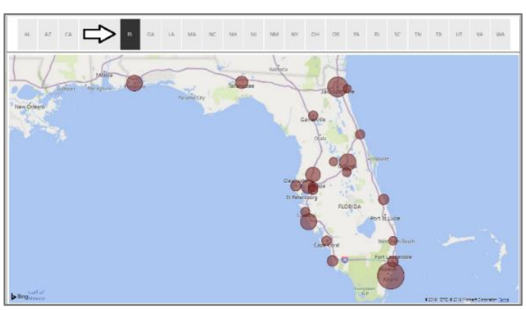
e) Click on **TX** in the top slicer to filter cities by the state of Texas.



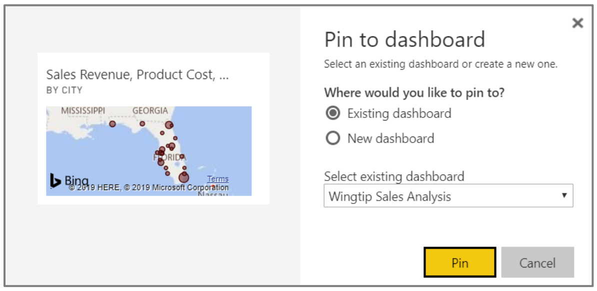
f) Pin the filtered map visual to the **Wingtip Sales Analysis** dashboard.



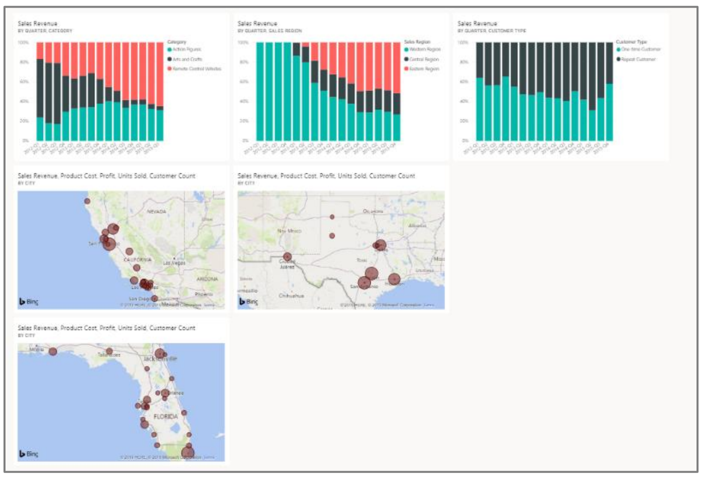
g) Click on **FL** in the top slicer to filter cities by the state of Florida.



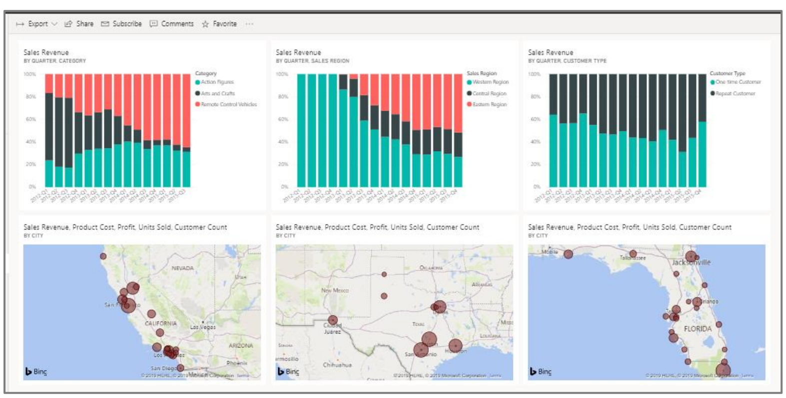
h) Pin the filtered map visual to the **Wingtip Sales Analysis** dashboard.



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

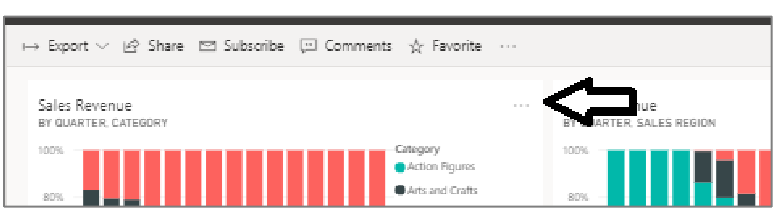


j) Rearrange the tiles in the **Wingtip Sales Analysis** dashboard to match the following screenshot.

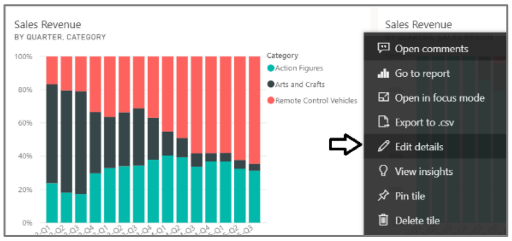


7. Remove the titles and subtitles from all six dashboard tiles

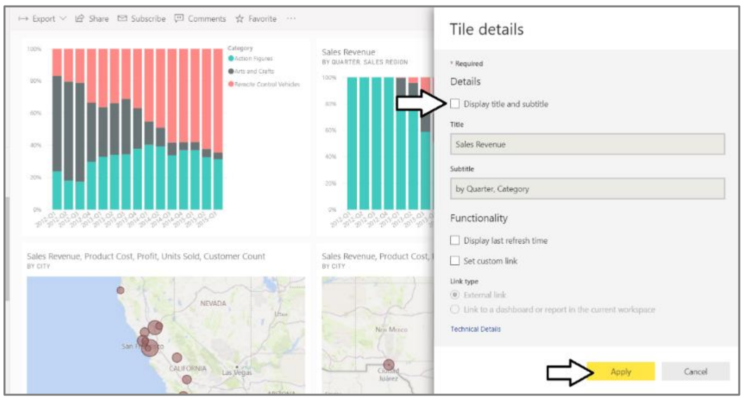
a) Click the ellipse flyout menu for the tile at the top left of the dashboard.



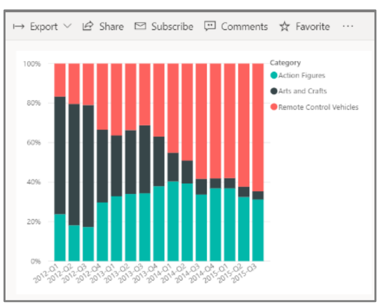
b) Select the **Edit details** to open the **Tile details** pane for this tile.



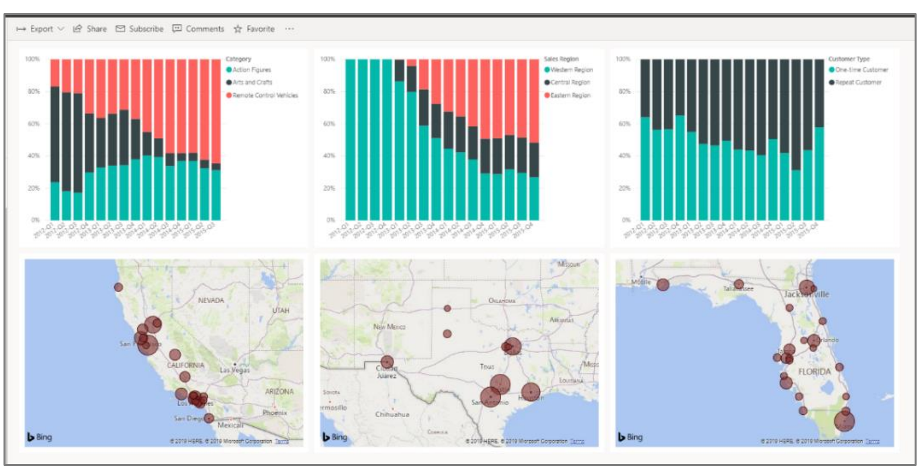
c) On the **Tile details** pane, uncheck the **Display title and subtitle** checkbox and then click **Apply**.



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



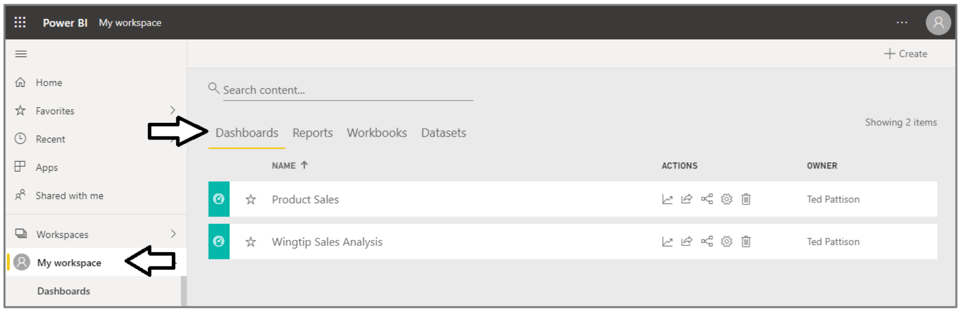
e) Follow the same set of steps to remove the title and subtitle from the other 5 tiles.



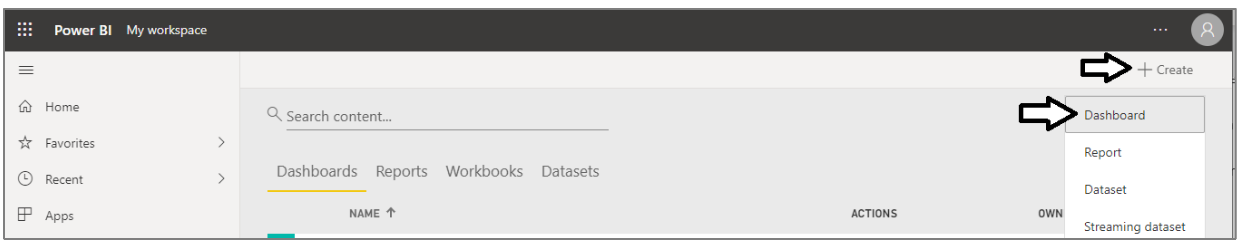
Exercise 2: Create the Power BI Training Dashboard

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

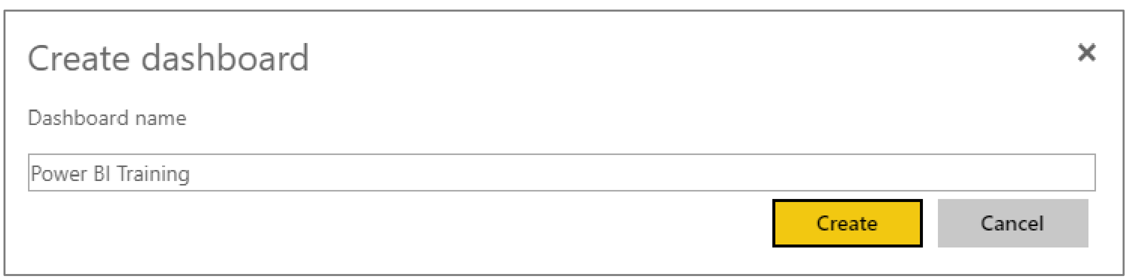
1. Create the **Power BI Training** dashboard.
   a) Click **My workspace** in the left navigation to navigate to the workspace summary page.
   b) Click the **Dashboards** link on the summary page to see the dashboards in your personal workspace.



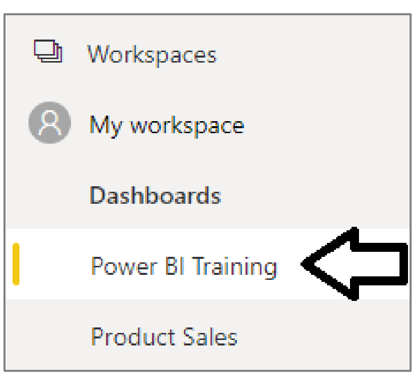
   c) Drop down the **Create** menu on the top right corner and select the **Dashboard** command.



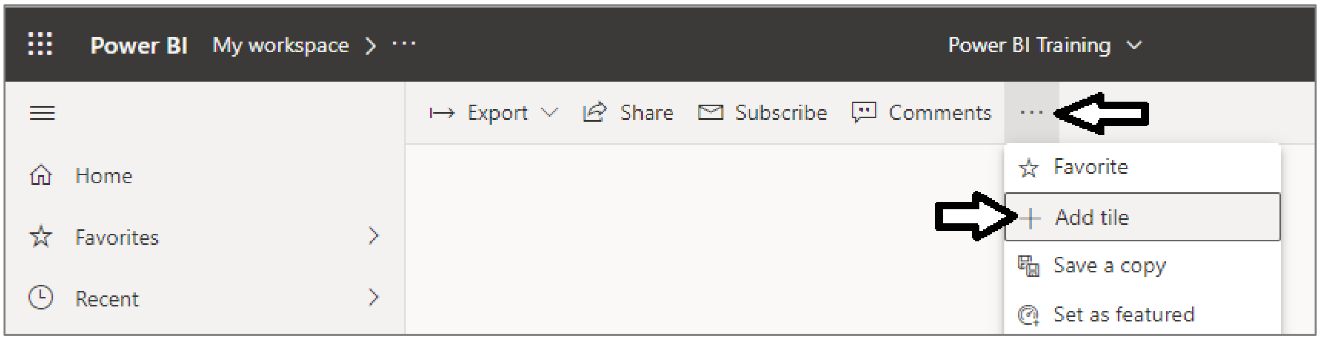
   d) In the **Create dashboard** dialog, enter a dashboard name of **Power BI Training** and then click the **Create** button.



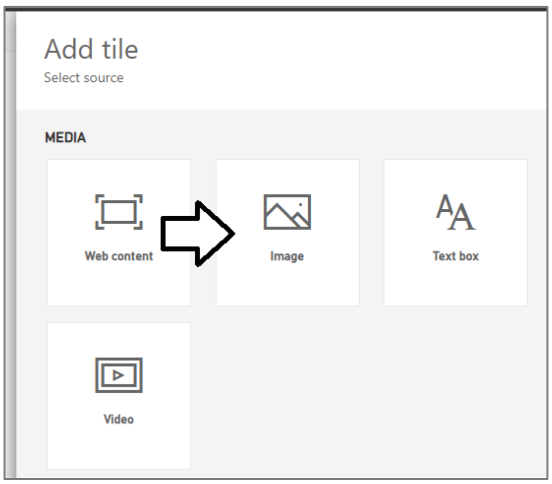
   e) Once it has been created, you should see the **Power BI Training** dashboard in the left navigation.



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**.

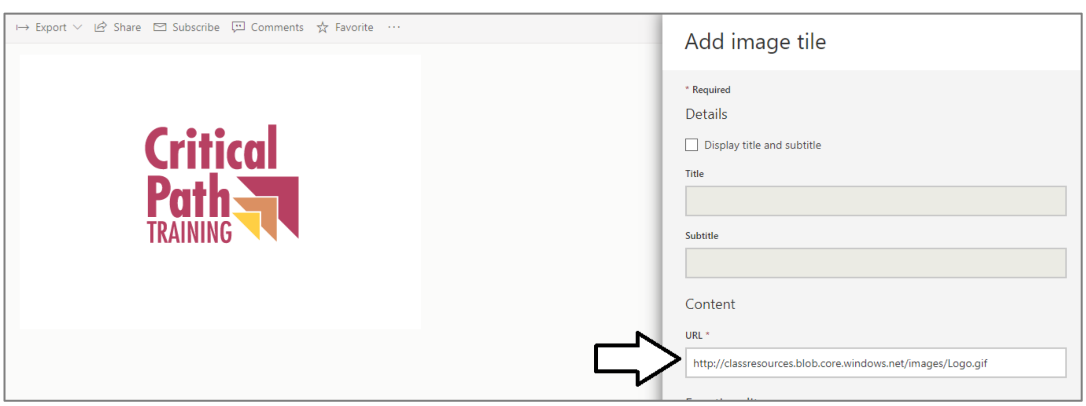


h) Click the **Next** button at the bottom of the **Add tile** pane.

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.



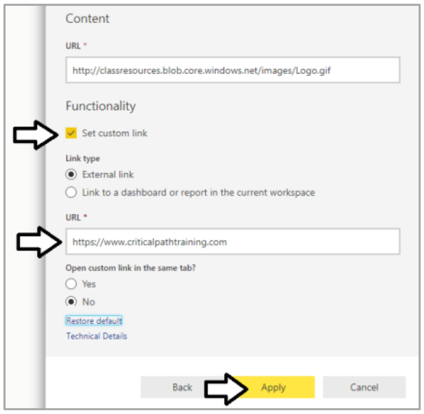
k) Copy the following URL for the Critical Path Training website into the Windows clipboard.

```
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.



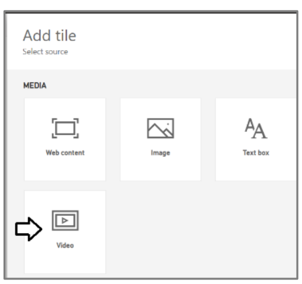
2. Add a video tile to your dashboard

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 tile, you are going to add two more video tiles. 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.

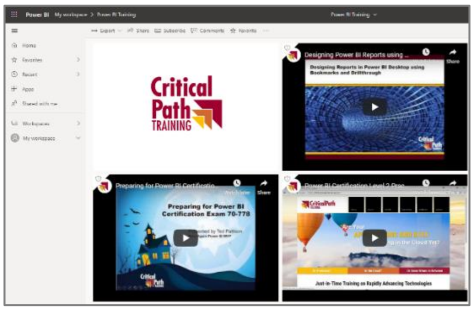
3. Add a second and a third video tile to the **Power BI Training** dashboard.
   a) Add a second video tile to the dashboard using the following YouTube URL.

   ```
   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.

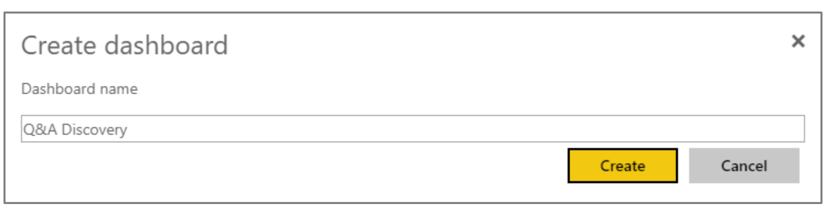


While the point of this lab exercise is for you to learn how to add dashboard tiles, you might find these videos useful, especially if you plan to get certified in Power BI by passing certification exam **70-778: Analyzing and Visualizing Data with Microsoft Power BI**.

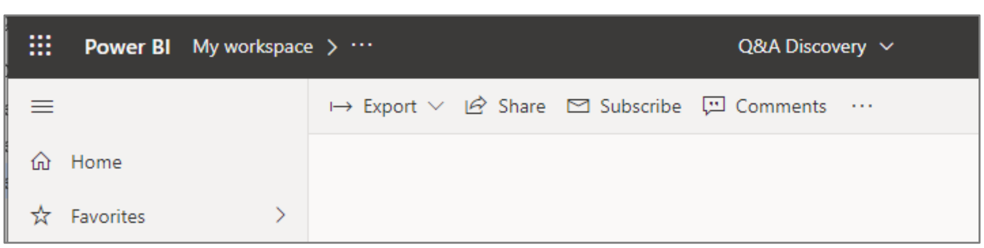
Exercise 3: Create the Q&A Discovery Dashboard

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

1. Create the **Q&A Discovery** 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.

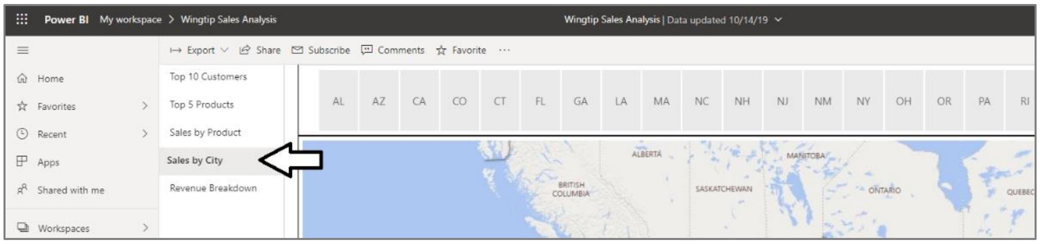


2. Add the Q&A search box to the **Q&A Discovery** dashboard.
   a) You can see that the new dashboard is initially displayed without the Q&A search box.



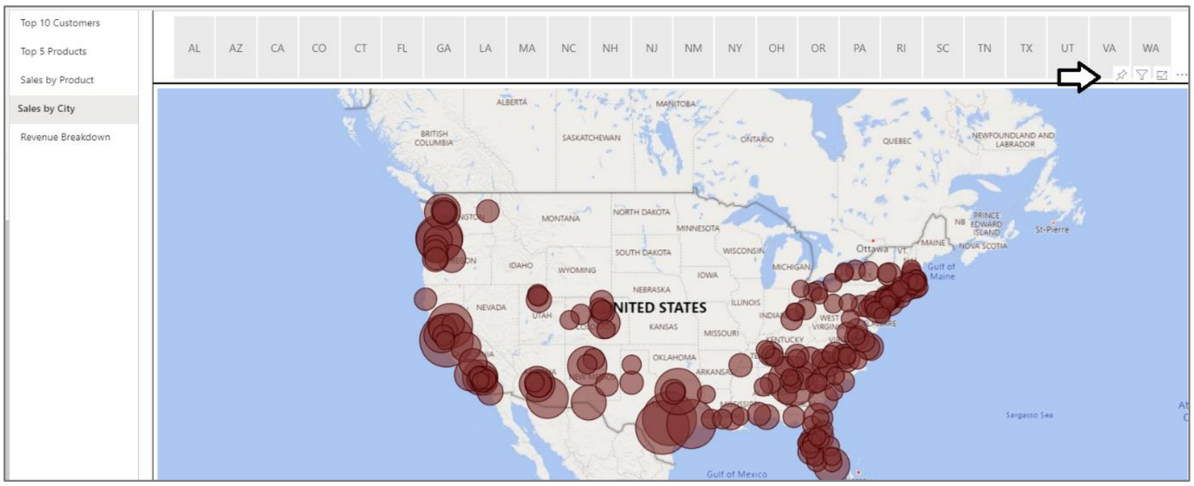
You need to pin a visual from a report to this dashboard to associate this dashboard with a dataset.

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

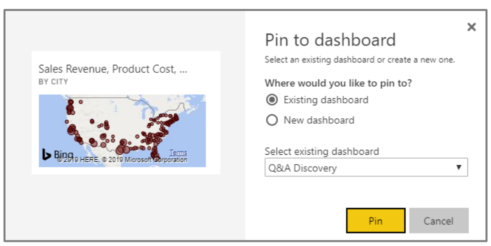


c) Hover the mouse over the map visual which displays sales by city.

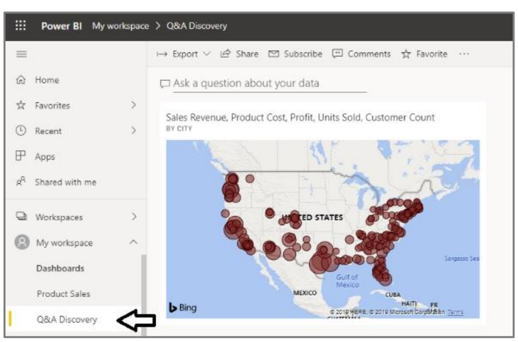
d) Locate and click the thumbtack button to pin the map visual to the **Q&A Discovery** dashboard.



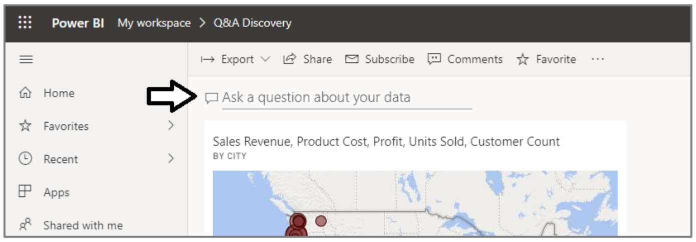
e) In the **Pin to dashboard** dialog, select **Existing Dashboard** and select the dashboard named **Q&A Discovery**



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

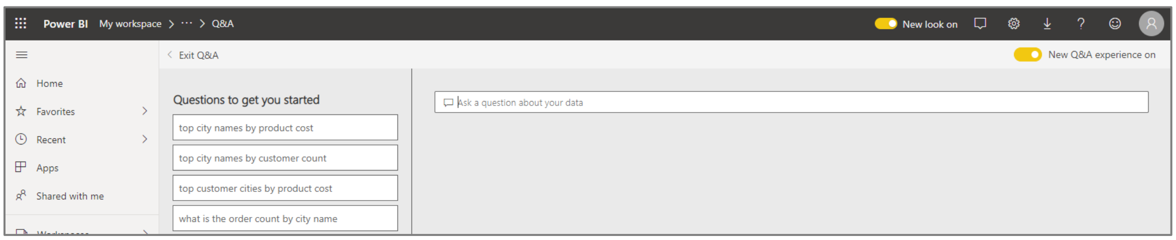


g) You should notice that the Q&A search box with the caption ***Ask a question about your data*** is now displayed.



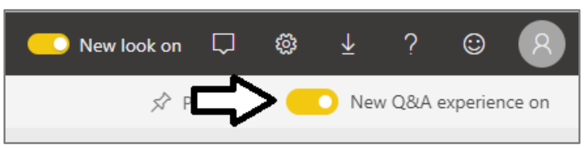
The acting of pinning the map visual from the **Wingtip Sales Analysis** report to this dashboard is what associates this dashboard with the **Wingtip Sales Analysis** dataset. Q&A search queries are run against a dataset and not a report.

h) Click on the Q&A search box to launch the new Q&A experience.

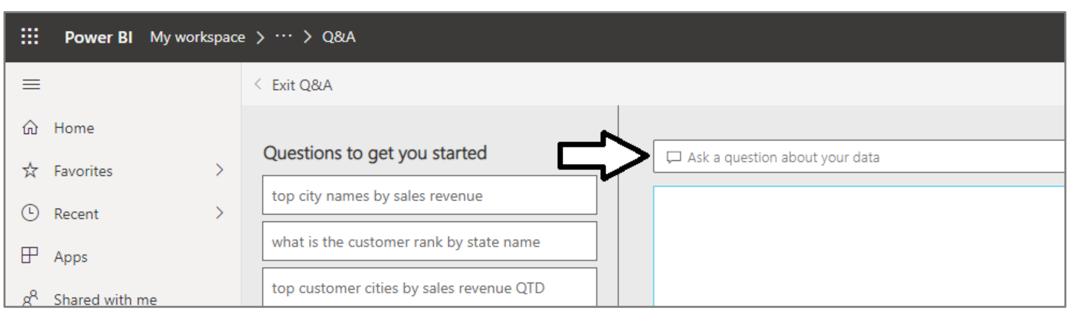


When the Q&A experience starts, what you see should match the screenshot shown above.

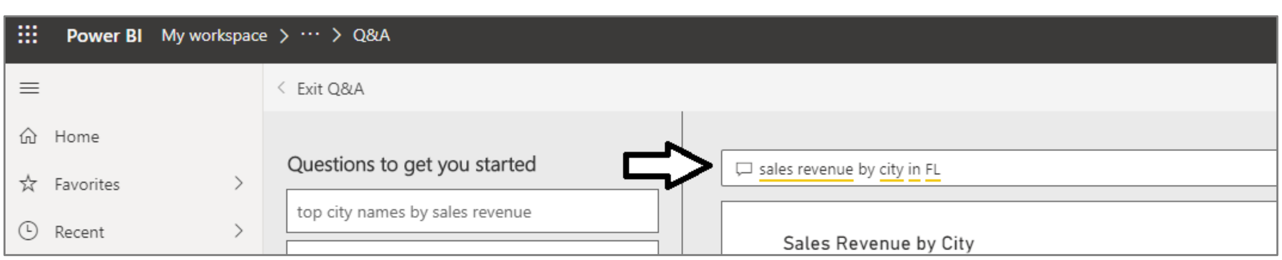
i) Note that you can switch between the New Q&A experience and the old one. You will just use the new Q&A experience.



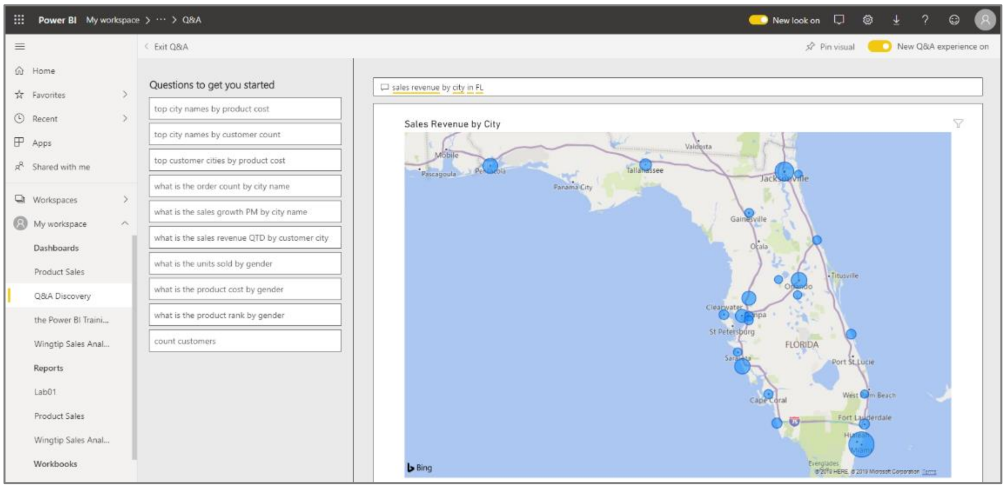
j) Using the mouse, click on the **Ask a question about your data** textbox to place the cursor in it so you can type a question.



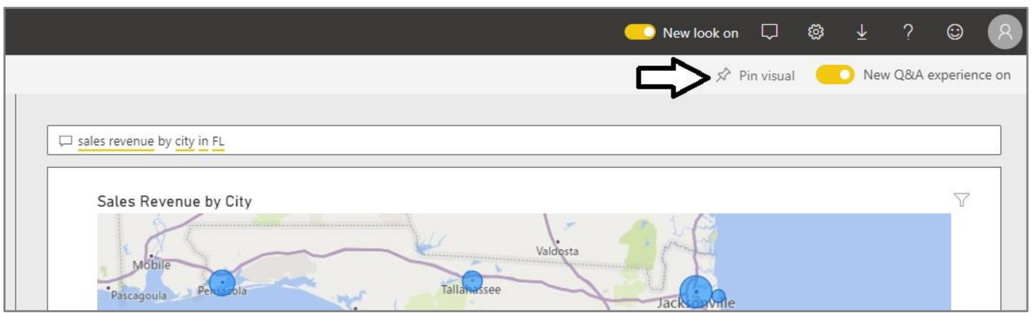
k) Type in the query text **sales revenue by city in FL**.



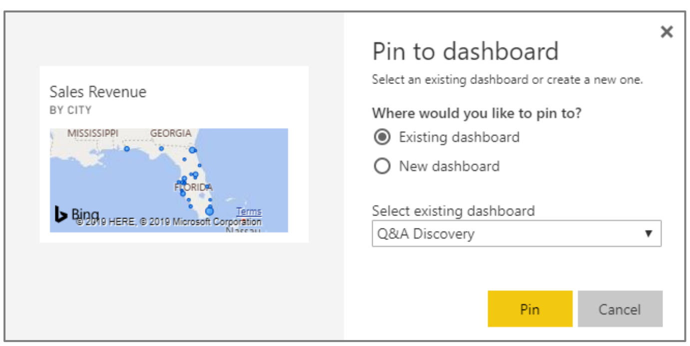
l) You should see the query is run and the Q&A experience displays the results using a map visual.



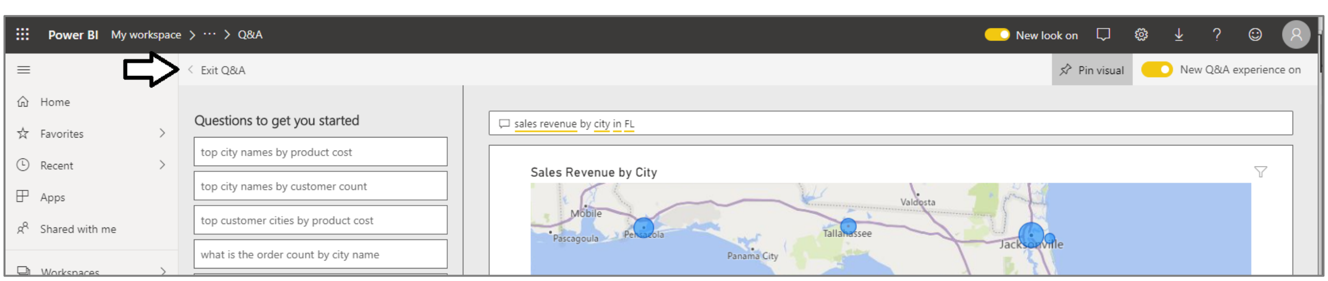
m) Click the **Pin visual** button to pin your Q&A result to the **Q&A Discovery** dashboard.



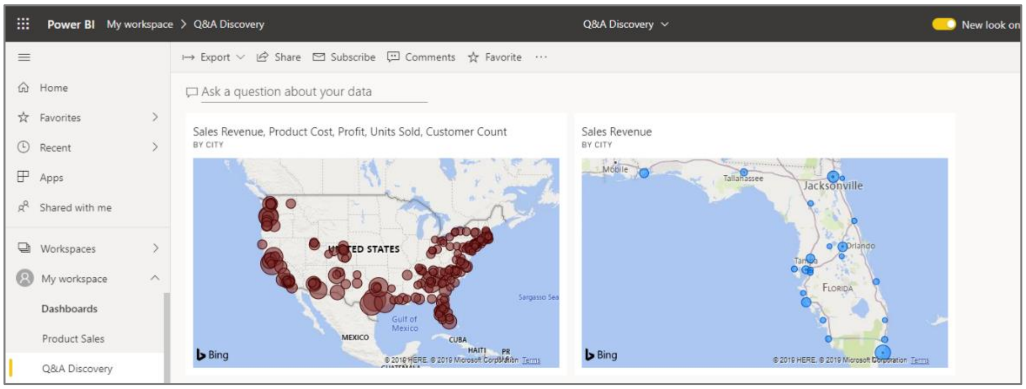
n) In the **Pin to dashboard** dialog, select **Existing dashboard**, select the **Q&A Discovery** dashboard and then click **Pin**.



o) Click the **Exit Q&A** link to leave the Q&A experience and return back to the Q**&A Discovery** dashboard.



p) You should now see that your Q&A result has been pinned as a dashboard tile.

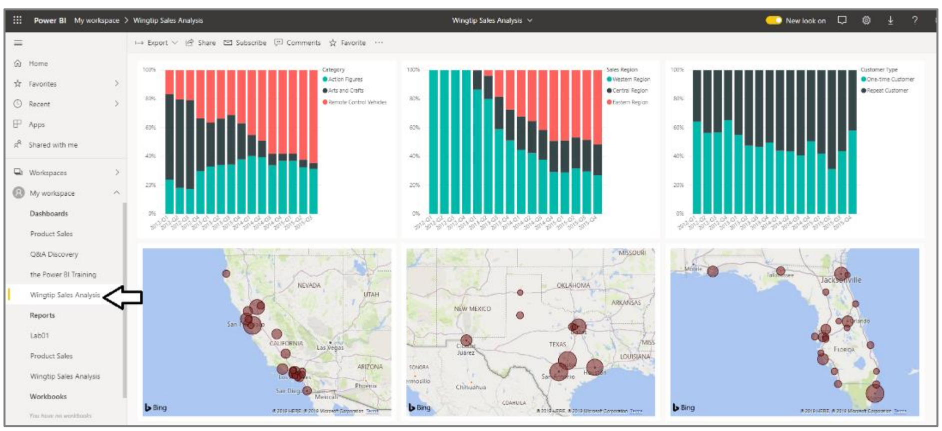


This lab does not have any more exercises using the Q&A experience. However, you can always go back in the Q&A experience and experiment by typing on various queries and seeing what type of results you get back in response.

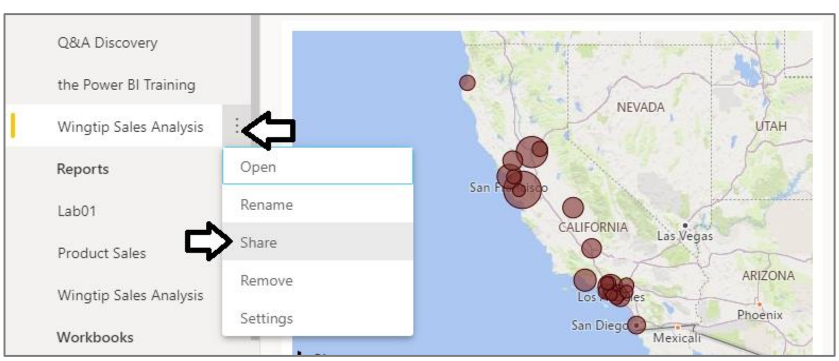
Exercise 4: Share the Wingtip Sales Analysis Dashboard

In this exercise you will share the **Wingtip Sales Analysis** dashboard that you created earlier in the first exercise in this lab.

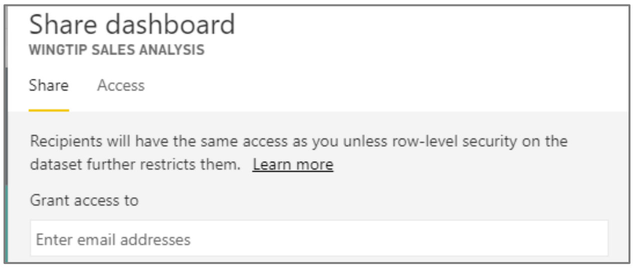
1. Inspect the **Wingtip Sales Analysis** dashboard.
   a) Navigate to the **Wingtip Sales Analysis** dashboard in your personal workspace.



2. Share the **Wingtip Sales Analysis** dashboard with another user..
   a) Use the flyout ellipse menu for the **Wingtip Sales Analysis** dashboard and click the **Share** menu command.



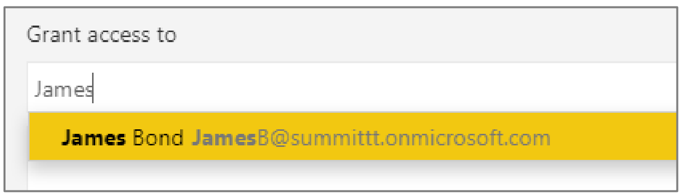
b) At this point, you should see the **Share dashboard** pane displayed on the right side of the page.



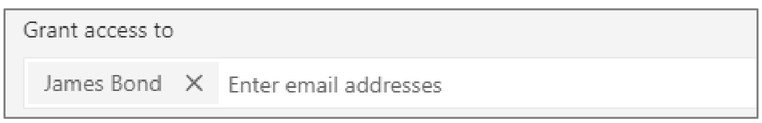
c) Place your cursor inside the **Grant access to** textbox and type the name **James Bond**.

As you type in the **Grant access to** textbox, you should be able to see the user name appear below in yellow text.

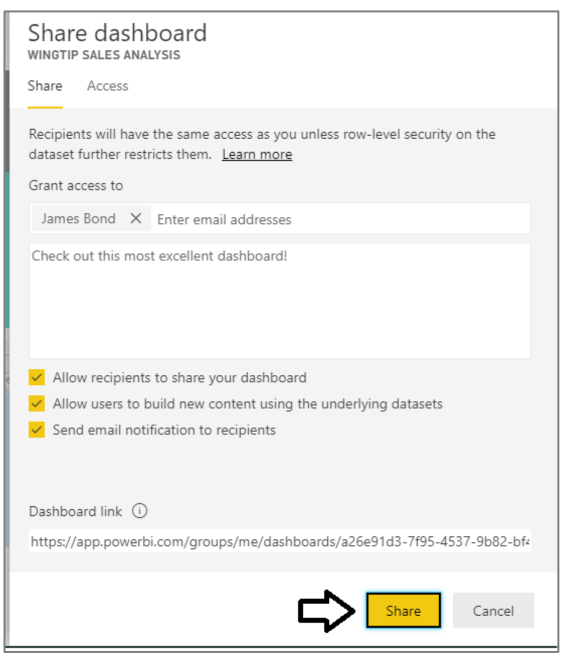
d) Click on the user name for **James Bond**.



e) You should see that the textbox is able to resolves the account name for the user **James Bond**.

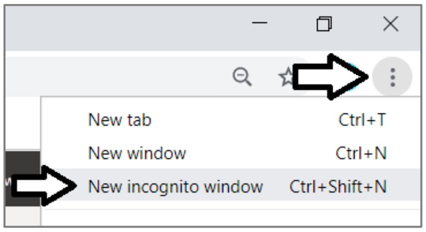


f) Click the **Share** button at the bottom of the **Share dashboard** pane to share the dashboard with the user James Bond.



Now you have completed the steps to share the dashboard. The next step is log into the Power BI Service as the user James Bond...

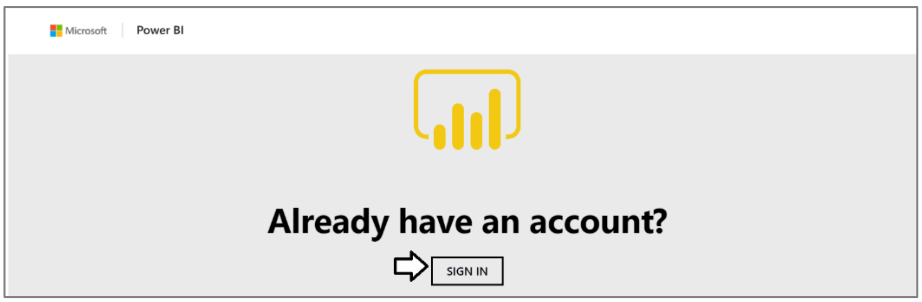
3. Launch a new browser session to sign into the Power BI Service as the user James Bong.
   a) Launch a new session of the Chrome browser in incognito mode. (or you can launch a different browser such as IE or Edge)



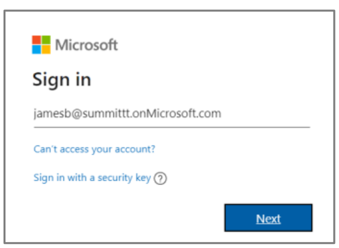
   b) In the new browser window, copy and paste the following URL into the address bar to navigate the Power BI Service.

```
https://app.powerbi.com
```

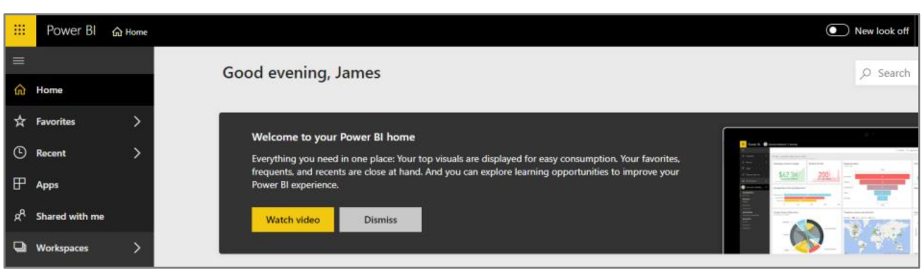
   c) When you navigate to the Power BI Service, you should see a page with a **Sign In** button. Click the **Sign in** button.



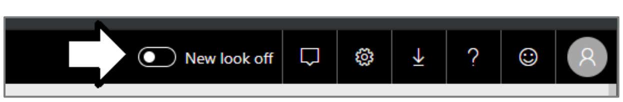
   d) Sign in using the account name and the password of the user account for James Bond.



   e) When you log into the Power BI Service, you should see the older UI experience.



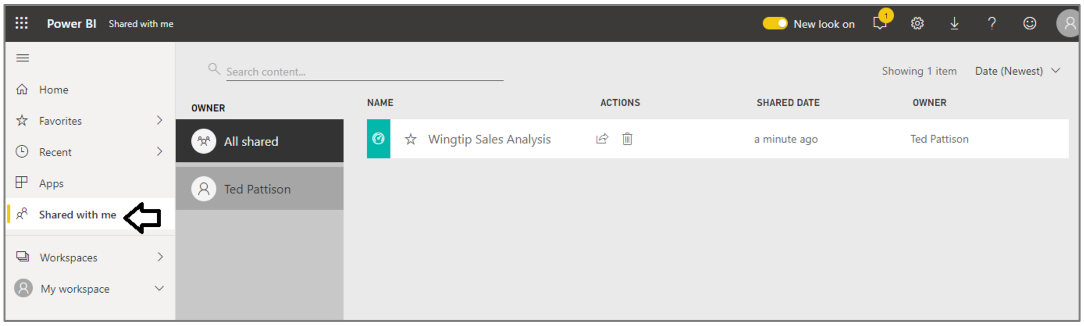
   f) Enabled the new UI experience.



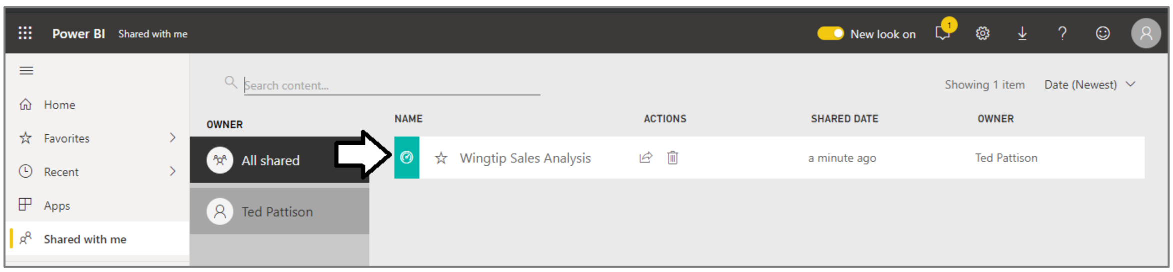
At this point, you should see the Power BI Service using the new UI experience..

g) Click the **Share with me** link.

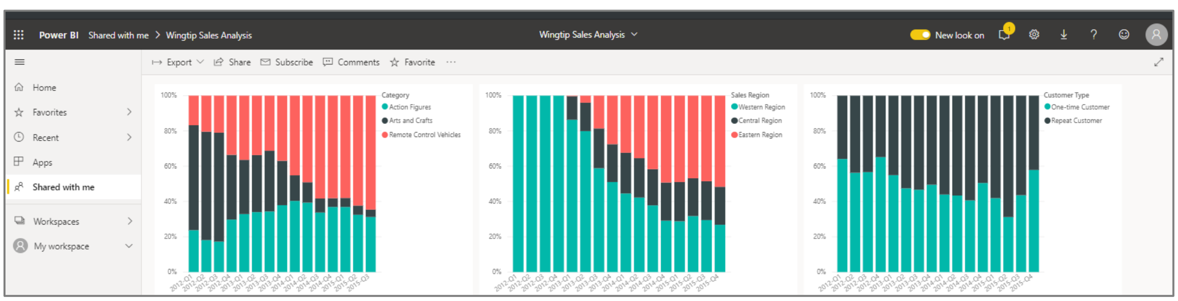
h) You should see that the **Wingtip Sales Analysis** dashboard has been shared with the current user, James Bond.



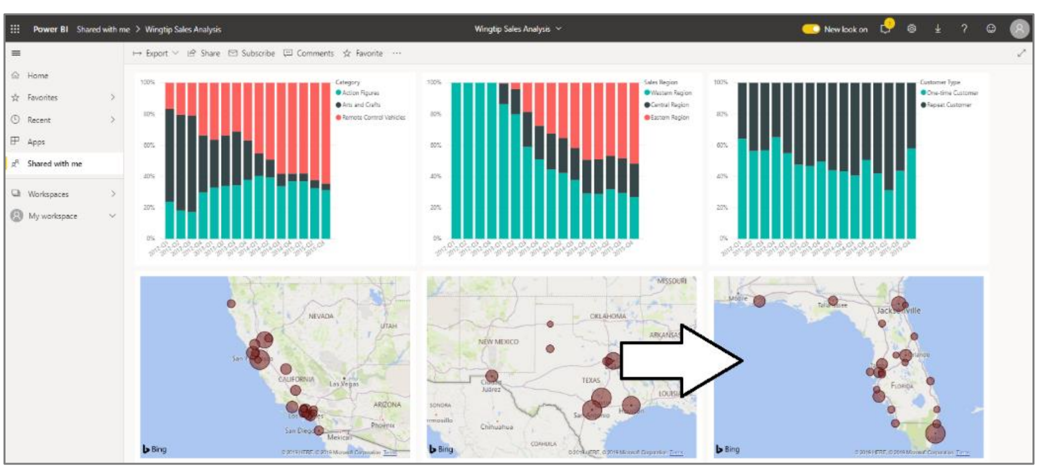
i) Click on the link for the **Wingtip Sales Analysis** dashboard to open it.



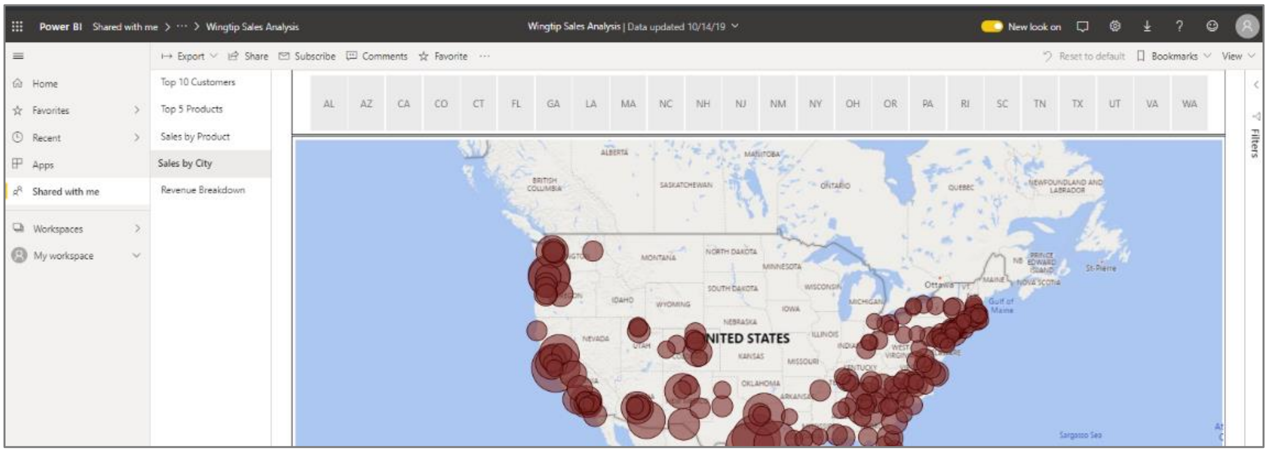
j) You should now see the **Wingtip Sales Analysis** dashboard.



k) Click on the dashboard tile with the map of Florida to navigate to the Wingtip Sales Analysis report.



l) You should now see the **Wingtip Sales Analysis** report where you can filter by different states using the slicer visual.



When you share a dashboard, you are also implicitly sharing any report that the dashboard can link to with its tiles.