SQL Day

15 edycja konferencji SQLDay

8-10 maja 2023, WROCŁAW + ONLINE

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Optimize KPI reporting using Power BI Metrics

Lars Andersen

&

Bartlomiej Graczyk

Intro – who are we

Bartłomiej Graczyk

- Lead Cloud Solution Architect, Data & Analytics
- Working with Central and Southeast Europe, Middle East and Africa (CEMA) Customers

Lars Andersen

- Program Manager on PBI CAT
- Working with Nordic, Eastern European, Italian and Spanish customer
- Started at Microsoft in January 2014

AGENDA

- Power BI Metrics – what and how?

- Creating Scorecards

- Creating Metrics

- Organize, View and Consume Metrics

- Metrics and Integrations

- Metrics and licensing requirements

Power BI Metrics – what and how?

What is Power BI Metrics?

Metrics is a data-driven, collaborative, and adaptable way to measure key business metrics and goals
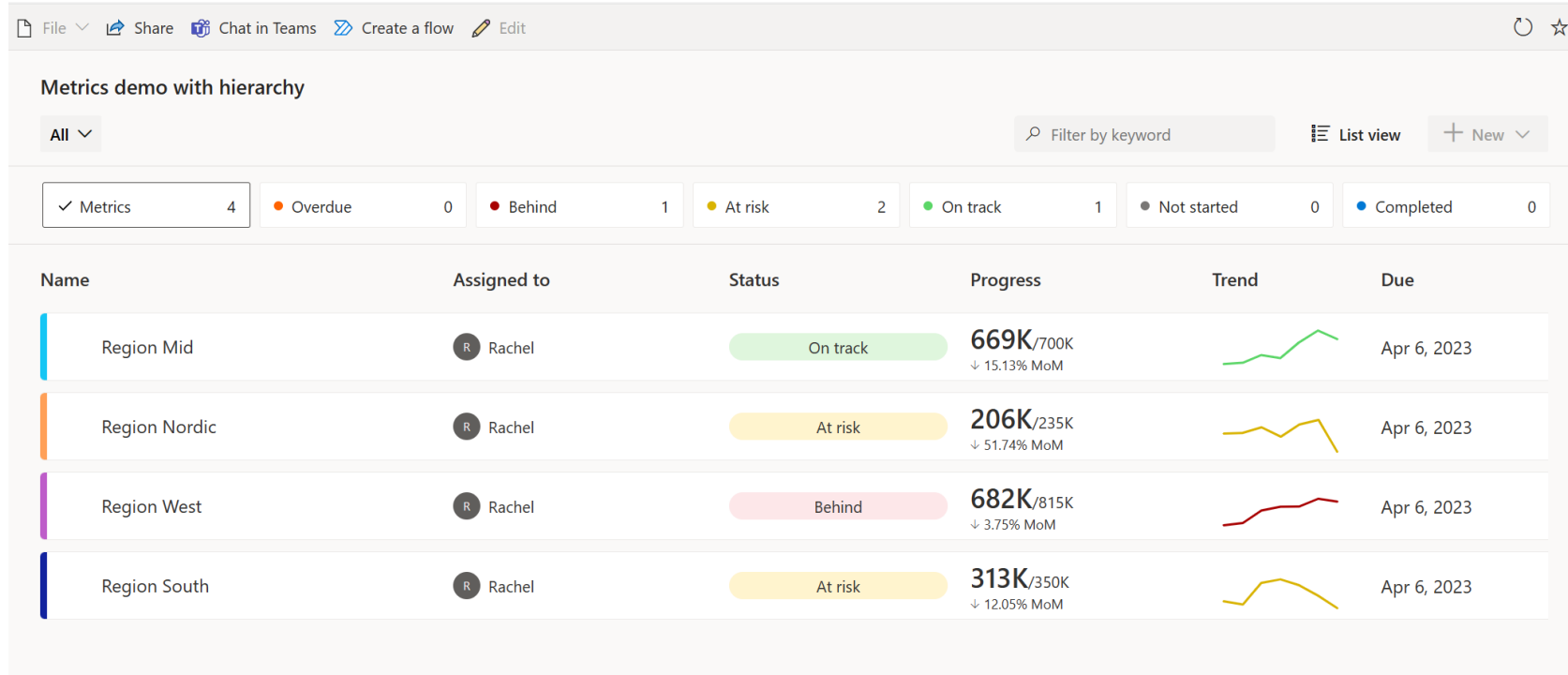
Driven by data

Built for teams

Automated action

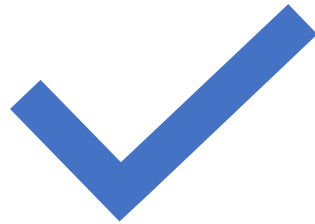# What is Power BI Metrics?

- Easy to create scorecards for KPIs

- Utilize data that already exist in Power BI reports

- Track progress for KPIs and optionally add check-in comments

How to use Power BI Metrics?

Define Metrics

Create Scorecard
Draft
Review
Publish

Check-in

Collect notes
Review
Improve, adjust
Automate

ROB (Rhythm of Business)
MBR (Monthly Business Review)
WSR (Weekly Service Review)
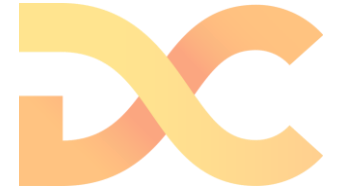
Methodologies

Measurable   Achievable   Deadline

A methodology defines an approach to goal setting, tracking, initiatives, review and improvements

- MBO: Management by Objectives
- MAD: Measurable, Attainable, and have a Deadline
- SMART: Specific, Measurable, Achievable, Relevant, Time bound
- FAST: Frequently discussed, Ambitious, Specific, and Transparent
- OKR: Objectives and Key Results

Demo
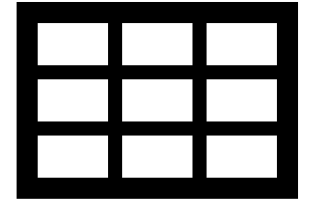
Creating Scorecards

Create Scorecard

- Always created in Power BI Service (or using Metrics Visual)
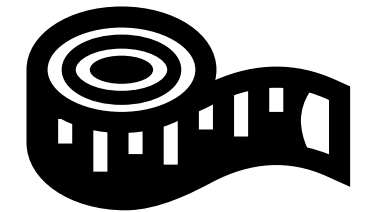- Settings: Details, Permissions & Statuses

Sharing Scorecard

- Similar to sharing other content in Power BI

- Admin, Member and Contributors on Workspace can edit Scorecards
- Viewers on Workspace will see all Scorecards in Workspace
- Scorecards can also be shared using *Share* function

Demo

Creating Metrics

Creating Metrics

- Each metric has
  - A name
  - One or more owners (optional, but recommended)
  - Value
  - Target (optional)
  - Status
  - Start date
  - End date

Creating Metrics

- Different types of metrics
    - Manual metrics
    - Connected metrics
    - Submetrics
    - Linked metrics
- Statuses
    - Easy way to see status on individual metrics
    - Each scorecard can have different statuses
    - Can be set manually or updated using rules

Permissions on Metrics

- Scorecard setting, you can configure roles with permission on metric level

Permissions on Metrics

- Scorecard setting, you can configure roles with permission on metric level
- **View** permission: user can view metric
- **Update** permission: allow users to update & check-in, control on
  - **Note**: permission to add notes
  - **Status**: permission to update status
  - **Current**: permission to update current value
- **Set for all** permission: all submetrics will inherit configured permissions
- **Default** permission: applicable if no other roles are assigned
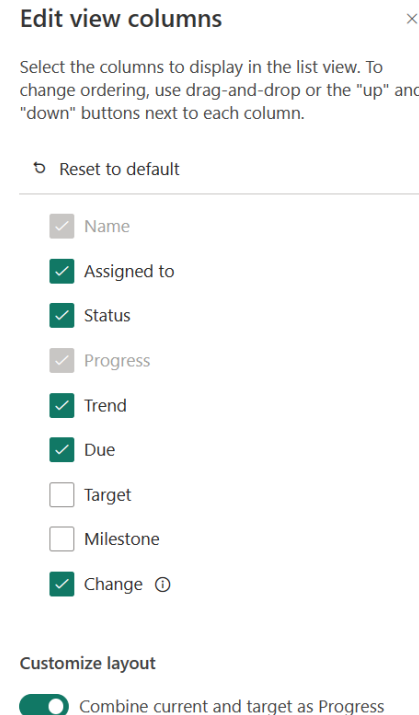
Demo
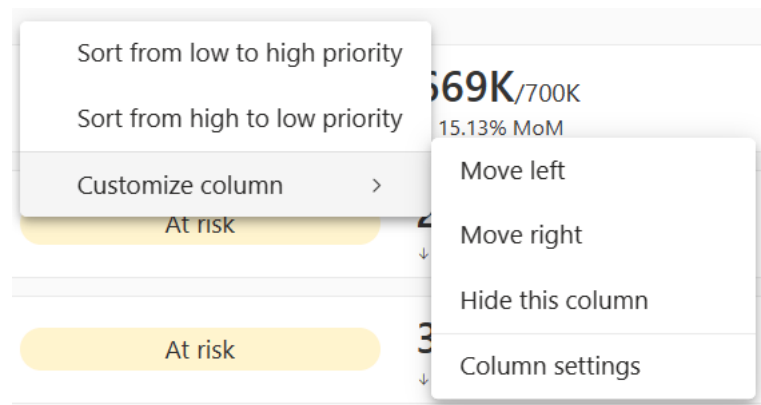
Organize, View
and Consume Metrics

Organizing content in scorecard

- You can reorder metrics, including creating/removing submetrics

- Rearrange order of columns

- Hide/unhide columns, name and progress/current cannot be hidden

Organizing content in scorecard

- You can reorder metrics, including creating/removing submetrics

- Rearrange order of columns

- Hide/unhide columns, name and progress/current cannot be hidden

- Move scorecard – to another workspace

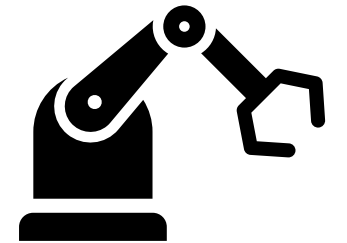- Copy scorecard – this can be used to create scorecard templates

Consume metrics

- In scorecard
- Metrics visual (preview)
- Hierarchy

Demo

Metrics and Integrations

Metrics and Power Automate (preview)

- Automate monitoring and creation of scorecard/metrics
- Actions:
  - Create a scorecard

Metrics and Power Automate (preview)

- Automate monitoring
- Actions:
  - Create a scorecard
  - Create a metric

Metrics and Power Automate (preview)

- Automate monitoring and creation of scorecard/metrics
- Actions:
  - Create a scorecard
  - Create a metric
  - Create a check-in
  - Add a note to a check-in
  - Update a check-in
  - Update a metric
  - Get metric(s)
  - Get metric check-in(s)

Metrics and Power Automate (preview)

- Triggers:
  - When a metri

Metrics and Power Automate (preview)

- Triggers:
  - When a metric changes, for example, status, owner, and so on
  - When someone adds or edits a check-in
  - When an owner is assigned to a metric
  - When a data refresh for a metric fails

- [Use Power Automate to update metrics automatically](#)

- [Power BI metrics - Connectors](#)

Metrics REST APIs (preview)

- Add/update/delete notes
  - GoalNotes (Preview) - REST API (Power BI Power BI REST APIs)

- Add/update/delete/get values
  - GoalValues (Preview) - REST API (Power BI Power BI REST APIs)

- Scorecard actions, like add/get/update/delete metric
  - Goals (Preview) - REST API (Power BI Power BI REST APIs)

- Create/update/get/remove status rules
  - GoalsStatusRules (Preview) - REST API (Power BI Power BI REST APIs)

Power BI and Viva Goals

- In Viva Goals you can point a Key Result (KR) to a data in Power BI
- Similar experience to how you connect data to metrics in Power BI

Power BI and Viva Goals

- In Viva Goals you can point a Key Result (KR) to a data in Power BI

- Similar experience to how you connect data to metrics in Power BI

Metrics and licensing requirements

Metrics and licensing requirements

- Metrics is a Pro feature*
- Pro or Premium Per User is required to
  - Author/share scorecards/metrics
  - Perform check-ins, including updating manual metrics
- Free users can view scorecards/metrics when hosted on Premium Per Capacity

- [Get started with metrics in Power BI – licensing requirements](#)

* Hierarchy is a Premium feature

Thank you

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Appendix

Create Scorecard

Create Scorecard

- Always created in Power BI Service (or using Metrics Visual)

- Use the left navigation menu
  (saves the scorecard in My Workspace and it can be moved)

Create Scorecard

- Always created in Power BI Service (or using [trophy icon] 👥 **Metrics demo**)

- Use the left navigation menu
  (saves the scorecard in My Workspace and it can be moved)

- "New" in a Workspace
  (saves the scorecard in the Workspace)

+ New ⌄   ⬆ Upload ⌄

	Report
ₒ0ₒ	Visualize your data

	Paginated report
📄	Build a paginated report

	Scorecard
🏆	**Track related metrics together**

	Dashboard
◎	Build a single-page data story

	Dataset
🗄	Create a dataset to use in a report

	Dataflow
⊸⊶	Prep, clean, and transform data
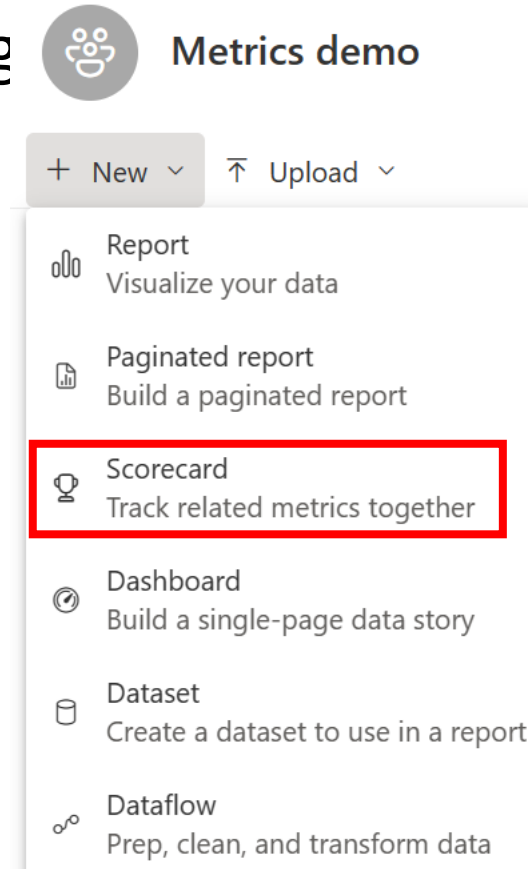
Create Scorecard

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- Scorecard can be moved to another Workspace in File menu

Create Scorecard

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- Scorecard can be move   e in File menu

- Scorecard can be copie   Workspace

Copy scorecard (preview)   ×

ⓘ When you move a scorecard to another workspace, you
    become the owner of its data connections. You may have
    to grant collaborators access to the new workspace, and
    you'll need to request access to some of the connected
    reports.

Select a workspace

Metrics demo   ⌄

☐ Include check-in history

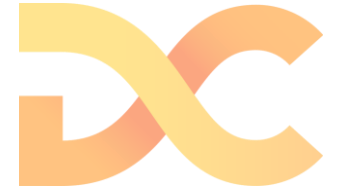**Continue**   Cancel
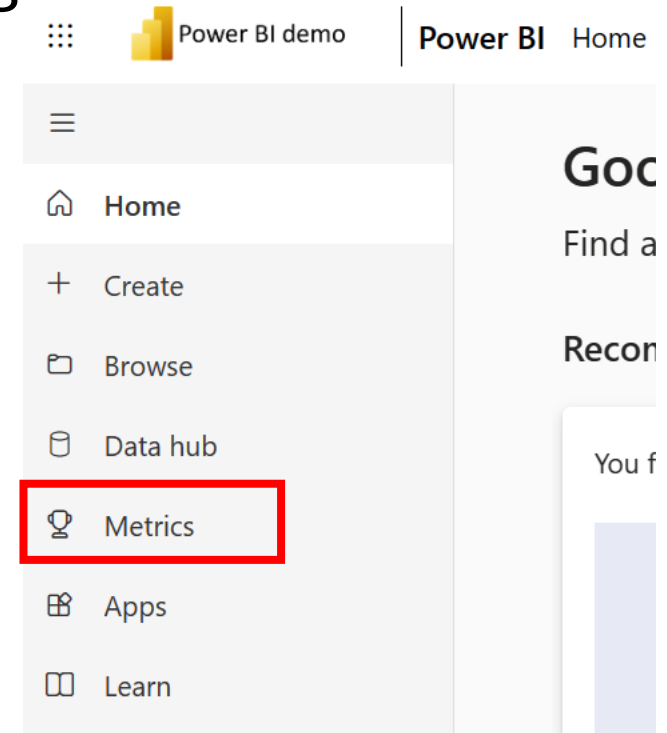
Create Scorecard

- Always created in Power BI Service (or using Metrics Visual)

- Use the left navigation menu
(saves the scorecard in My Workspace and it can be moved)

- "New" in a Workspace
(saves the scorecard in the Workspace)

- Scorecard can be moved to another Workspace in File menu

- Scorecard can be copied to existing or another Workspace

- Each Scorecard has a **dataset** with details about the scorecard
The dataset includes details about KPIs including values, targets, check-in notes and more

Settings for scorecard

- Details, e.g., name, description, contact and time zone

Edit scorecard settings

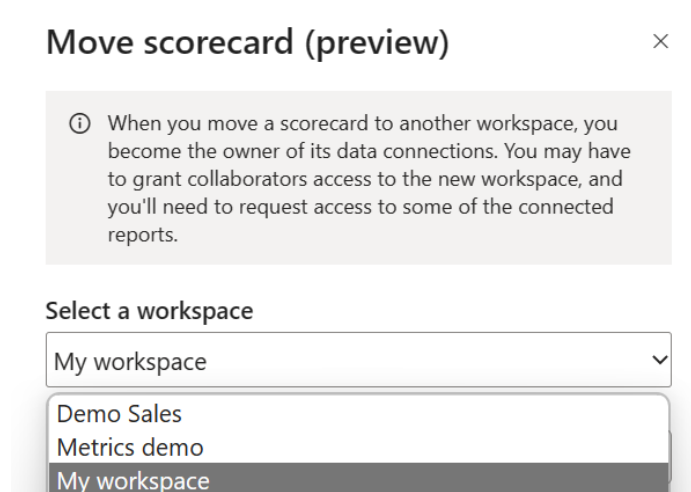**Details** Permissions Statuses

Name

Metrics Demo

Description

Contact

R Rachel ✕

Time zone

(UTC+01:00) Brussels, Copenhagen, Madrid, Paris

Notifications

Turn Teams notifications on or off for all scorecard collaborators.

Enable scorecard notifications

Settings for scorecard

- Details, e.g., name, description, contact and time zone

- Permissions, configure access to metrics
  - *more about this later*

Edit scorecard settings

Details **Permissions** Statuses

Give people access to this scorecard, or just specific metrics.

Permission roles

Add members to an existing role, or create a new role with custom permission settings.

+ Add role

View all

👁 Can view all metrics

📝 Can update 0 metrics

Default ⋮

View and update all

👁 Can view all metrics

📝 Can update all metrics

⋮

Settings for scorecard

- Details, e.g., name, description, contact and time zone

- Permissions, configure access to metrics
  - *more about this later*

- Statuses
  - *more about this later*

Edit scorecard settings

Details   Permissions   **Statuses**

+ Add status   ↺ Reset statuses

Not started		↑	↓	🗑
On track		↑	↓	🗑
At risk		↑	↓	🗑
Behind		↑	↓	🗑
Overdue		↑	↓	🗑
Completed		↑	↓	🗑

Create Metrics

Manual metrics

- Current value and Target are manually entered
- History is automatically created based on entered values

- [Create scorecards and manual metrics - Power BI](#)

Connected metrics

- Values are connected to data in a report
- Not all values must be connected – you can connect to Current value and manually enter Target or vice versa
- Values are automatically updated when datasets are refreshed
- If applicable, history is automatically created

- [Create connected metrics in Power BI](#)

Submetrics

- Require a *parent metric*

- Each *parent metric* can have none or more submetrics

Submetrics

- Require a *parent metric*

- Each *parent metric* can have none or more submetrics

- A submetric can be either connected or manual

- Submetrics can **rollup** to *parent metric*, based on SUM, AVG, MAX or MIN

Submetrics

- Require a *parent metric*

- Each *parent metric* can have none or more submetrics

- A submetric can be either connected or manual

- Submetrics can rollup to *parent metric*, based on SUM, AVG, MAX or MIN

- Rollups always show the same aggregation value of all submetrics, regardless of metric level permissions

- Support up to 5 levels

- [Create submetrics in the Power BI service](#)

Linked metrics (preview)

- Use same metric on multiple scorecards

Linked metrics (preview)

- Use same metric on multiple scorecards

- Check-ins are reflected in all scorecards

- Only users who have view access to the source metric can see the linked metric

- Metric can only be edited in source scorecard

- Check-in can happen in all scorecards, if user has permission

- Linked metrics are not filtered by hierarchies

- Rollups are based on source scorecard

- [Create linked metrics in the Power BI service](#)

Options on metrics

- Details: including check-in option and history

Options on metrics

- Details: including check-in option and history
- History: check-in date, value, status etc.

Project Learn Power BI metrics

Details **History** Status rules Time period

Keep track of the most recent change made to a check-in.
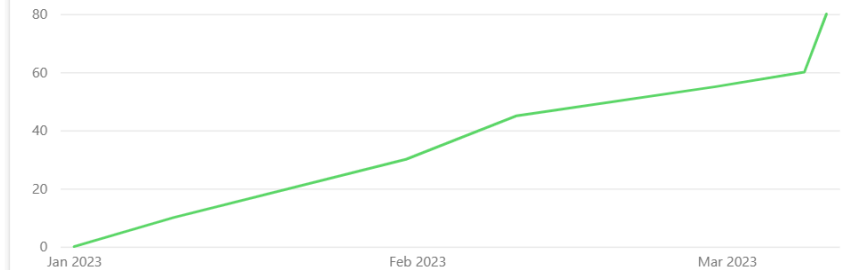
Check-in date	Value	Status	Changed by	Last modified
Apr 15, 2023	—	—	R Rachel	10 days ago
Mar 31, 2023	—	—	R Rachel	10 days ago
Mar 10, 2023	80	On track	R Rachel	10 days ago
Mar 8, 2023	60	At risk	R Rachel	12 days ago
Feb 28, 2023	55	On track	R Rachel	11 days ago
Feb 15, 2023	—	—	R Rachel	12 days ago
Feb 10, 2023	45	On track	R Rachel	11 days ago

Options on metrics

- Details: including check-in option and history

- History: check-in date, value, status etc.

- Status rules: configure automated status rules

Project Learn Power BI metrics

Details History **Status rules** Time period

If	Value	equals	100	% of target

Change status to `Completed`

If	Value	is greater than	70	% of target

Change status to `On track`

If	Value	is less than or equal to	70	% of target

Change status to `At risk`

Otherwise, change status to `Not started`

Options on metrics

- Details: including check-in option and history

- History: check-in date, value, status etc.

- Status rules: configure automated status rules

- Time period: configure change in percentage c

Project Learn Power BI metrics

Details   History   Status rules   **Time period**

Set tracking preferences for this metric

Display change on this metric

🟢 On

○ **Cycle over cycle**
Show the change every set number of days, like Month over Month.

○ **Cycle to date**
Show Month to Date, Year to Date, or any date to present.

⦿ **No cycle**
Just show the change between this metric's last 2 data points.

Label

| Label |

Display as
⦿ Percentage   ○ Absolute value

80/100
↑ 33.33% WoW

Options on metrics

- Details: including check-in option and history
- History: check-in date, value, status etc.
- Status rules: configure automated status rules
- Time period: configure change in percentage c
- Connections: exist for connected metrics, show

Revenue

Details   History   Status rules   Time period   **Connections**

View and manage connection settings

Current value

Connected report: Northwind report

Connected by: R Rachel

Refreshed Mar 9, 2023, 8:55:17 AM

| Refresh | Disconnect | Take over connection |

⬤ Clear metric values when connecting to new report

Target value

Connected report: Northwind report

Connected by: R Rachel

Refreshed Mar 9, 2023, 8:55:18 AM

| Refresh | Disconnect | Take over connection |

⬤ Clear metric values when connecting to new report

Options on metrics

- Details: including check-in option and history

- History: check-in date, value, status etc.

- Status rules: configure automated status rules

- Time period: configure change in percentage or value

- Connections: exist for connected metrics, show report and user

- Follow metric: get Teams notifications on activity

> Revenue
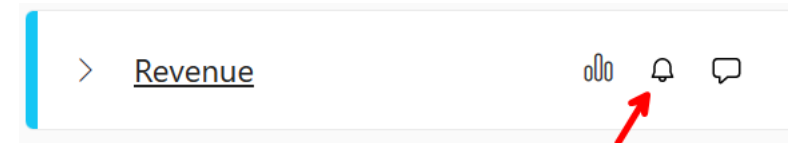
Milestone on metrics

- Relevant for metrics where targets change over time
- Setup target and due date manually

Add or edit multiple milestones (preview)

Add (or copy and paste) the metrics and due dates you'd like to set as milestones.

	Target	Due date
0	10	3/15/23
1	40	4/30/23
2	80	6/30/23
3	100	7/31/23
+		

Milestone on metrics

- Relevant for metri[...] [ov]er time
- Setup target and [...]
- Track developmen[...]

Status on Metrics

- Easy way to see status on individual metrics
- Each scorecard can have different statuses
  - Configured under Settings for scorecard

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Status on Metrics

- Easy way to see status on individual metrics

- Each scorecard can have different statuses
  - Configured under Settings for scorecard

- Status can be adjusted manually when creating metrics and performing check-in

Status on Metrics

- Easy way to see status on individual metrics

- Each scorecard can have different statuses
  - Configured under Settings for scorecard

- Status can be adjusted manually when creating metrics and performing check-in

- Status can be automated by configuring rules

Details   History   **Status rules**   Time period

+ New rule

If   Value ⌄   is greater than ⌄   Value   — ⌄

Change status to   Not started ⌄

+ Add condition   ↑ ↓ 🗑

Otherwise, change status to   Not started ⌄

- [Customize statuses on your scorecard](#)

- Create automated status rules for metrics in the Power BI service

Permission: View

Metrics demo Permissions

Employee satisfactory 🔔 ✕

Details   History   Time period

✓ Metrics	6	● Overdue	0	● Behind

80/100   At risk

↓ 15.79% WoW   Ⓡ

⌄ **Name**   **Assigned to**

⌄ Sales   Ⓡ Rachel

  Region North   Ⓡ Rachel

  Region South   Ⓡ Rachel

NPS   Ⓡ Rachel

Cost   Ⓡ Rachel

Employee satisfactory 🔔 💬 Ⓡ Rachel

100 ─────────────────────────────────────

95 ──────────────────────────────────

90 ──────────────────────────────

85 ──────────────────

80 ─────────
      Feb 05   Feb 12   Feb 19   Feb 26   Mar 05

⬤──⬤
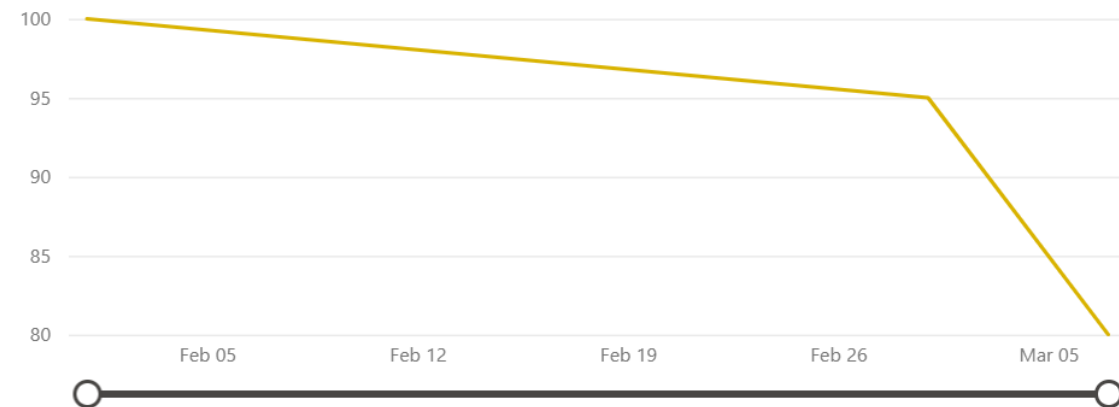
⬤ Show targets

No check-in options

Check-in history

Ⓡ Rachel   Check-in for Mar 7, 2023   At risk
                      New value **80**

Permission: Update, Current
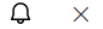
Metrics demo Permissions

✓ Metrics	6	● Overdue	0	● Behind

Name	Assigned to
∨ Sales	R Rachel
Region North	R Rachel
Region South	R Rachel
NPS	R Rachel
Cost	R Rachel
Employee satisfactory	R Rachel

Region North

Details   History   Time period
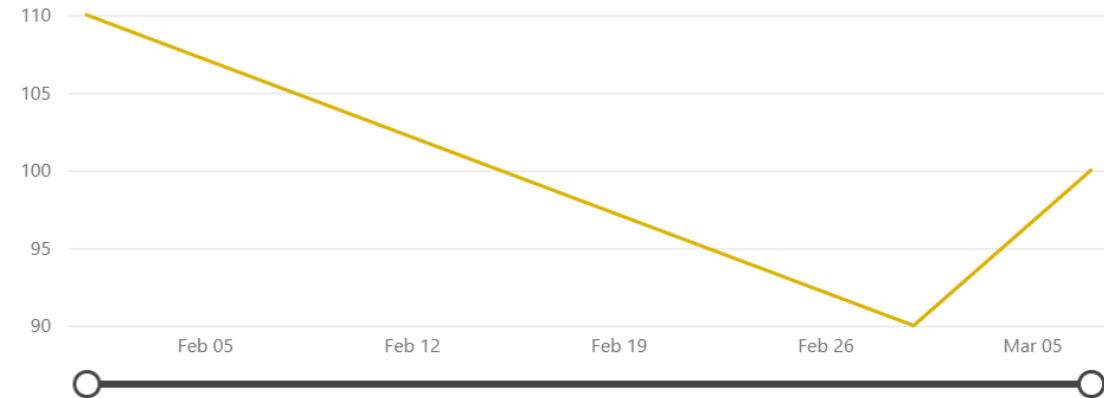
110
105
100
95
90

Feb 05   Feb 12   Feb 19   Feb 26   Mar 05

Show targets

Check-in history

Current value editable

Status is locked

New check-in
Update the metric value and status and share details in a note

3/7/2023   📅 | 100 | At risk

Save   Cancel

Permission: Update, Status

Metrics demo Permissions

✓ Metrics	6	● Overdue	0	● Behind

⌄ **Name**	**Assigned to**
⌄ Sales	(R) Rachel
Region North	(R) Rachel
Region South	(R) Rachel
NPS	(R) Rachel
Cost	(R) Rachel
Employee satisfactory	(R) Rachel

NPS

🔔 ✕

Details   History   Time period

85/120   Behind

↓ 10.53% WoW   (R)

110 ————————————————
100
90

Feb 05   Feb 12   Feb 19

○———————————————————

◯ Show targets

Status is editable

| Overdue |
| Behind |
| At risk |
| On track |
| Not started |
| Completed |

Check-in history

Current value is locked

New check-in
Update the metric value and status, and share details in a note

| 3/7/2023 📅 | **85** | Behind ⌄ |

Save   Cancel

Permission: Update, Notes

Metrics demo Permissions

✓ Metrics	6	● Overdue	0	● Behind

≫ Name	Assigned to
∨ Sales	R Rachel
Region North	R Rachel
Region South	R Rachel
NPS	R Rachel
Cost	R Rachel
Employee satisfactory	R Rachel

Cost

Details History Time period

120

100

Feb 05   Feb 12   Feb 19   Feb 26   Mar 05

◯ Show targets

Check-in history

New check-in
Update the metric value and status, and share details in a note

3/7/2023 📅   **115**

Current value is locked

Status is locked

On track

Hide note ∧

Note is editable

A ∨ **B** *I* U ≡ ≡ ≡ ⋮≣

Type @ to mention people

Save   Cancel

Permission on Metrics

- Permissions apply to underlying dataset for scorecard, except default role
- Admin, Member or Contributor will always see all metrics in scorecards

- [Protect your scorecards with metric-level permissions](#)

Organize, View
and Consume on Metrics

Viewing Metrics

- On a scorecard, you can see all metrics

- You can filter on
  - Name of metric

All ⌄			≡ New ⌄	🔍 nordic	☰ List view	+ New ⌄

✓ Metrics	4	● Overdue	0	● Behind	1	● At risk	2	● On track	1	● Not started	0	● Completed	0

Name	Assigned to	Status	Progress	Trend	Due
Region Nordic	R Rachel	At risk	**206K**/235K ↓ 51.74% MoM		Apr 6, 2023

Viewing Metrics

- On a scorecard, you can see all metrics

- You can filter on
  - Name of metric
  - Status

| ● Metrics | 4 | ● Overdue | 0 | ● Behind | 1 | ✓ At risk | 2 | ● On track | 1 | ● Not started | 0 | ● Completed | 0 |

Name	Assigned to	Status	Progress	Trend	Due
Region Nordic	R Rachel	At risk	**206K**/235K ↓ 51.74% MoM		Apr 6, 2023
Region South	R Rachel	At risk	**313K**/350K ↓ 12.05% MoM		Apr 6, 2023

Viewing Metrics

- On a scorecard, you can see all metrics

- You can filter on
  - Name of metric
  - Status

- It is possible to *follow* individual metrics and be notified in Teams when a metric is updated
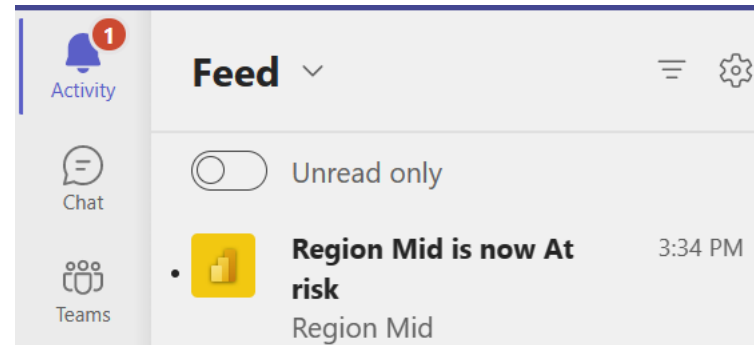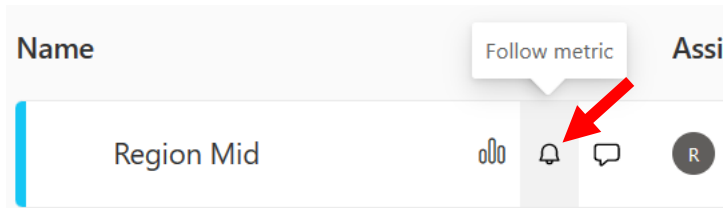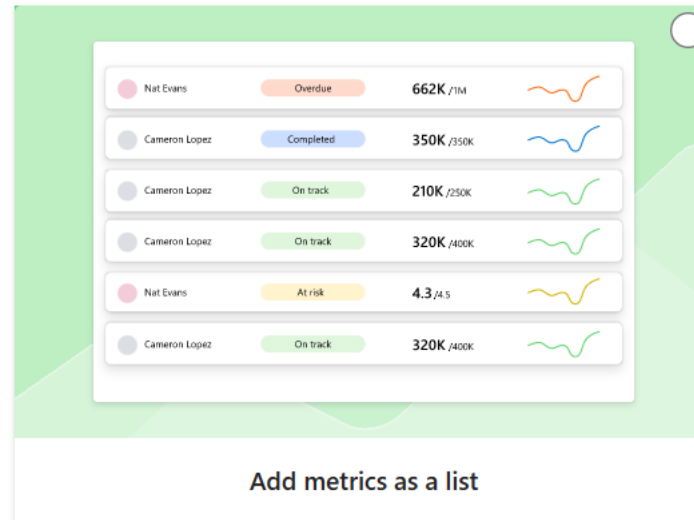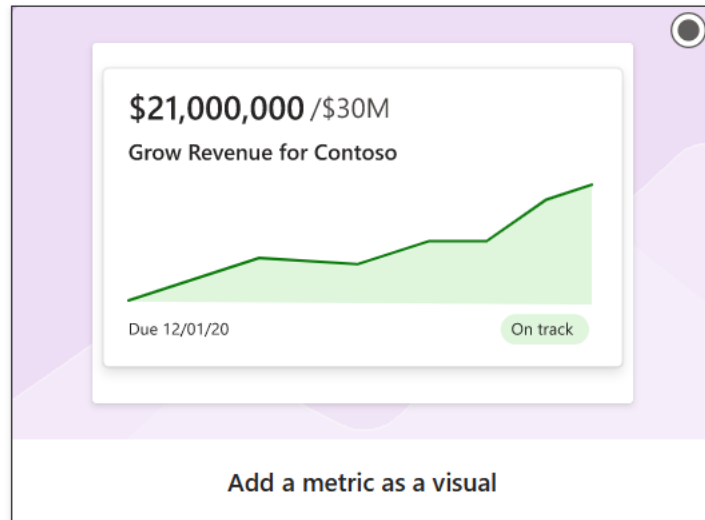
Metrics visual (preview)

- Add scorecards or individual metrics directly in your report

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report

- Create scorecards

Create scorecard

Track progress against metrics and submetrics

Scorecard name *

Give your scorecard a concise name

Workspace

My workspace

☐ Create a workspace

Description

Describe why you're tracking these metrics

Sensitivity label

ⓘ Some sensitivity label settings, such as file encryption settings and content marking, are not enforced in Power BI. Learn more

Create   Cancel

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report
- Create scorecards
- Create metrics

Create a new metric to add as a visual in this report

Create here, edit anywhere. Edit your scorecards (and metrics) anytime from the service.

Metric name *

> Give your metric a name

Current value   Edit   **Final target**   Edit

> Enter value   Enter a value

Or connect to data   Or connect to data

Start date   **Due date**

> 06/03/2023   06/04/2023

Owners

> Enter name

Status

> Not started ⌄

Or set up rules

Add to report   Cancel

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report

- Create scorecards

- Create metrics

- Connect to existing scorecard

Choose from one of your existing scorecards

Then find (or add) the metric you want displayed in this report.

Recent   **Favorites**   Shared with me   All scorecards

	Name	Owner
🏆	Metrics demo with categorical values	Metrics demo
🏆	Metrics demo with hierarchy	Metrics demo
🏆	Metrics demo with Milestones	Metrics demo
🏆	Metrics Demo Workspace	Metrics demo

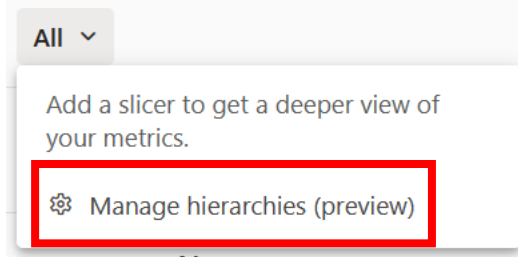🔍 Search   + New scorecard
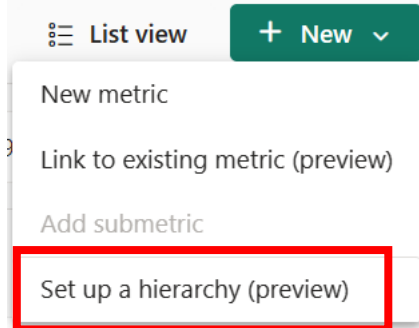
Cancel

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report
- Create scorecards
- Create metrics
- Connect to existing scorecard
- Format scorecards and metrics, e.g., font, colors, and backgrounds

Metrics visual (preview)

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report

- Create scorecards

- Create metrics

- Connect to existing scorecard

- Format scorecards and metrics, e.g., font, colors, and backgrounds

- Cross-filtering or highlighting are not supported

- Create a metrics visual in a Power BI report

Hierarchies (preview)

- Feature to automatically roll up metrics

- Require Premium Per User or Capacity

- Created at scorecard level based on datasets using in connected metric(s)

Hierarchies (preview)

- Feature to automatically roll up metrics
- Require Premium Per User or Capacity
- Created at scorecard level based on datasets using in connected metric(s)
- A hierarchy belong to one scorecard
- Metric must be connected to data

Hierarchies (preview)

- Feature to automatically roll up metrics

- Require Premium Per User or Capacity

- Created at scorecard level based on datasets using in connected metric(s)

- A hierarchy belong to one scorecard

- Metric must be connected to data

- Scorecard list view: slice metrics by one or more hierarchy level

Hierarchies (preview)

All ⌄

Accessories ⌄

✓ Metrics

Socks ⌄

✓ Metrics

Name ⌄

Name

| | Filter by keyword | | List view | + New ⌄ |

| | Filter by keyword | | List view | + New ⌄ |

| | Filter by keyword | | List view | + New ⌄ |

Socks ⌄

1 slicer(s) applied	Clear
Product (1)	⌃
All	
⌄ Accessories (1)	
Bags	
Belts	
Jewelry	
Other	
Scarves	
✓ Socks	
Sun classes	
Watches	
› Clothing	
› Furniture	
⚙ Manage hierarchies (preview)	

		0	● Behind	2	● At risk	0	● On track	2	Show 2 more

	Assigned to ⌄	Status ⌄	Progress ⌄	Trend ⌄	Due ⌄
	R Rachel	On track	**318**/334 ↓ 50%		Apr 3, 2023
	R Rachel	Behind	**159**/189 ↓ 75%		Apr 3, 2023
	R Rachel	On track	**477**/520 ↓ 40%		Apr 3, 2023
	R Rachel	Behind	**180**/188 ↓ 67.25%		Apr 3, 2023

Hierarchies (preview)

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- Scorecard list view: slice metrics by one or more hierarchy level

- Heatmap view: side by side comparison of different hierarchy levels

Hierarchies (preview)

Name
Mid
Nordic
West
East

Name
Mid
Nordic
West
East

Comparing 9 items against totals ∨

Filter by keyword   ⊞ Heatmap (preview)   ＋ New ∨

Name	Totals ∨	Bags ∨	Belts ∨	Jewelry ∨	Other ∨	Scarves ∨	Socks ∨
Mid	**669K**/803K Behind	**87**/102 At risk	**736**/743 On track	**3K**/3K At risk	**240**/257 On track	**308**/342 On track	**318**/334 On track
Nordic	**206K**/230K At risk	**72**/78 On track	**566**/617 On track	**3K**/3K On track	**600**/612 On track	**528**/564 On track	**159**/189 Behind
West	**682K**/764K At risk	**143**/155 On track	**910**/983 On track	**3K**/3K On track	**240**/281 At risk	**462**/466 On track	**477**/520 On track
East	**366K**/366K Behind	**104**/115 Behind	**614**/535 On track	**2K**/2K Behind	**533**/485 On track	**537**/575 Behind	**188**/188 Behind

Hierarchies (preview)

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- Heatmap view: side by side comparison of different hierarchy levels

- [Get started with hierarchies in Power BI metrics](#)

Follow up on Metrics

- Manual metrics must always be updated manually with new values

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- Connected metrics will automatically get values updated

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- In summary with Check-in you can
  - Add a note
  - Update value (for manual metrics)
  - Set status, if status rules have not been configured