



15 edycja konferencji SQLDay

8-10 maja 2023, WROCŁAW + ONLINE



partner złoty

Future Processing

partner srebrny



partner brązowy





Optimize KPI reporting using Power BI Metrics

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&

Bartłomiej 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



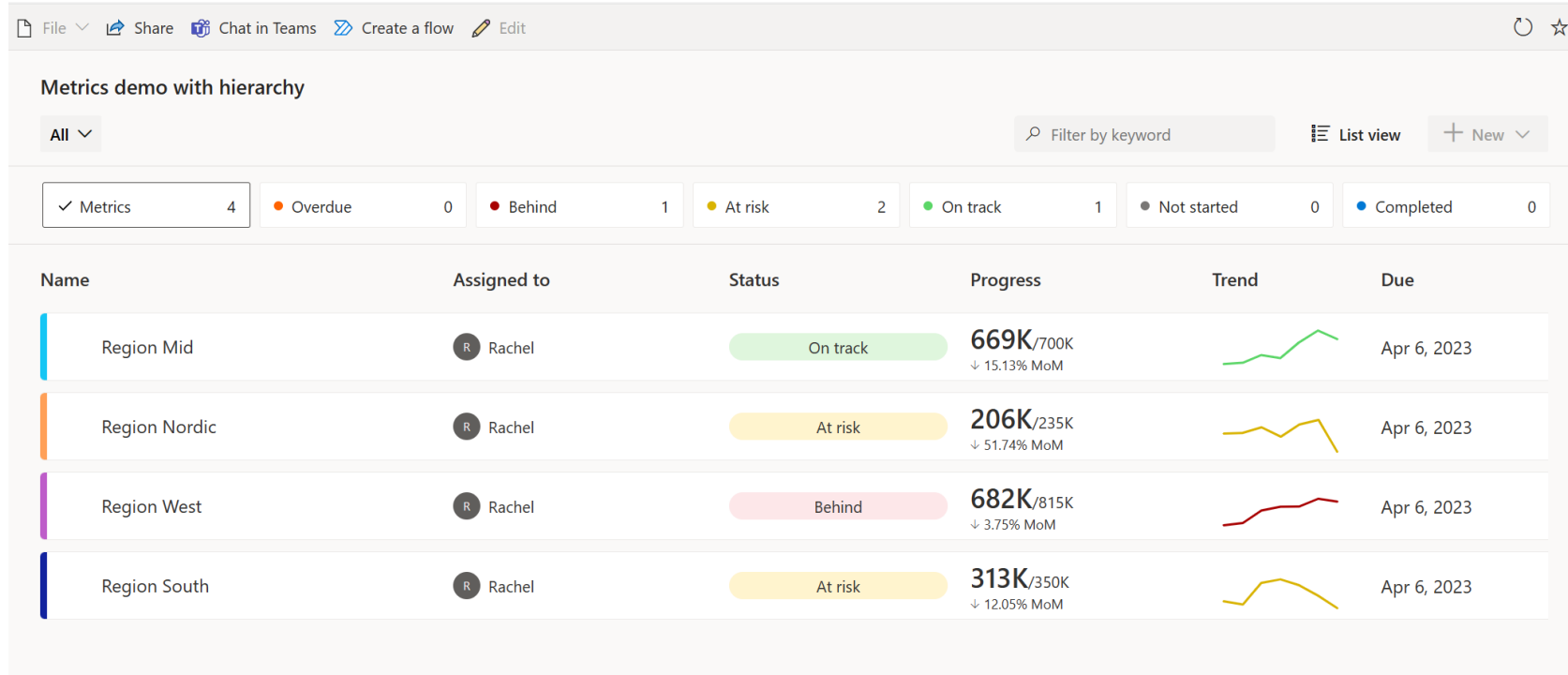
Automated
action



What is Power BI Metrics?

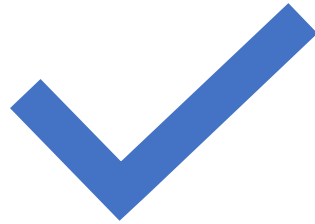


- Easy to create scorecards for KPIs
- Utilize data that already exist in Power BI reports
- Track progress for KPIs and optionally add check-in comments





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

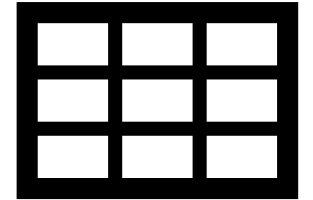
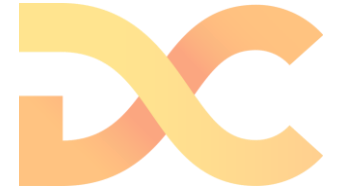
Deadline

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



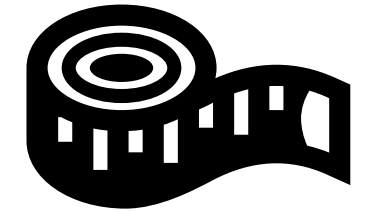
Sharing Scorecard



- 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

Metric name <input type="text" value="Name your metric"/>	Owners <div><div>R Rachel</div><div>Enter name</div></div>	Current value <input type="text" value="Enter value"/>	Final target <div><input type="text" value="Enter a value"/> Set up</div>	Status <div><div>Not started</div><div>Or set up rules</div></div>	Start date <input type="text" value="06/03/2023"/>	Due date <input type="text" value="06/04/2023"/>
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[Save](#) [Cancel](#)



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

Permission

Search

View

^ Update

Set for all ⓘ

Current

Status

Notes

Select all



Sales



Region North



Region South



NPS



Cost



Employee satisfactory





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

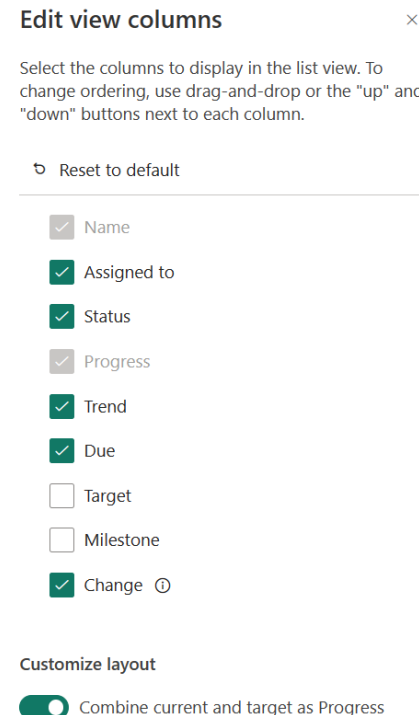
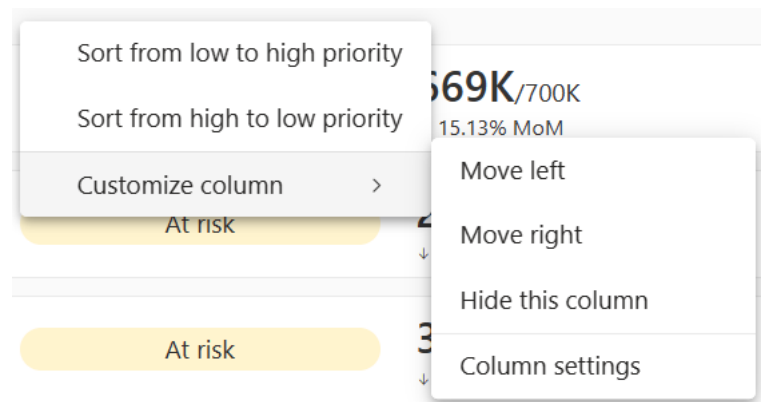




Organizing content in scorecard



- 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



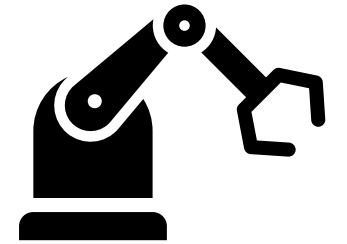
Consume metrics



- 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

The screenshot shows the configuration interface for the 'Create a scorecard (Preview)' action in Power Automate. The action is connected to a 'Manually trigger a flow' step. The configuration fields are as follows:

Field	Value
* Workspace	Metrics demo
* Name	Scorecard created by Power Automate
Description	This scorecard is created in Power Automate

At the bottom of the interface, there are two buttons: '+ New step' and 'Save'.



Metrics and Power Automate (preview)



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

Manually trigger a flow

Create a goal (Preview)

* Workspace	Metrics demo
* Scorecard id	Scorecard created by Power Automate
* Name	Power Automate created metric
Owner	The email address of the goal's owner. Example: foo@bar.com
Current value	100
Target value	110
Status	On track
Start date	The start date for the goal. Example: 2021-07-15.
Completion date	The date for the goal to be completed by. Example: 2021-07-29.
Note	Note to attach to the initial check-in on goal creation. Can be multiline text
Parent goal id	If this goal is a subgoal, the unique id of its parent goal.



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

When a metric change status

Undo Redo Comments Save Flow checker

When a goal changes (Preview)

* Workspace: Metrics demo

* Scorecard id: Scorecard created by Power Automate

* Goal id: Power Automate created metric

* Polling interval (sec): 300

Condition

Changed... contains status

+ Add

If yes

Send an email (V2)

* To: Rachel@M365x26299913.onmicrosoft.com

* Subject: Status change for metric " Changed goal ... "

* Body:

Font 12 B I U

Old status: Changed goal Old status

New status: Changed goal New status

If no

Add an action



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


 **Edit Key Result** 


*Key result title


Goal: Measure as a metric [Remove Metric](#)

*Metric name


*Target is to



Reach 


Number 

[Add Phased Targets](#) 

✓ **Progress**

 Power BI

 Automatically from a data source 

 Check-in owner: Megan Bowen



Power BI and Viva Goals

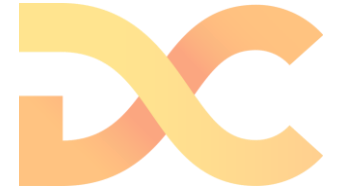


- In Viva Goals you can point a Key Result (KR) to a data in Power BI
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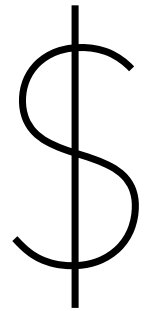
The screenshot shows the 'Edit Key Result' interface in Viva Goals. The title is 'Consumer Website traffic'. The key result title is '200 daily website visitors from'. The goal is 'Measure as a metric'. The metric name is 'NA Unique Visitors'. The progress bar shows 'power' and 'Power BI'. The 'Connect' button is highlighted.

The interface includes a sidebar with 'Pages' (Operations Analytics, Location Analytics, Website Analytics) and a main area displaying a Power BI dashboard titled 'Website traffic'. The dashboard shows metrics: 22K (Number of open), 360 (Average of Daily Users), and 131.00 (Average of Unique Visitors). A modal window titled 'Choose a measure to connect' is open, showing the measure 'Average of Unique Visitors' and the current value '131.00'. The filters and slicers affecting this value are 'Product Category is not blank' and 'Region is North & Central America'.

Check-in owner: Megan Bowen



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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partner złoty

Future Processing

partner srebrny

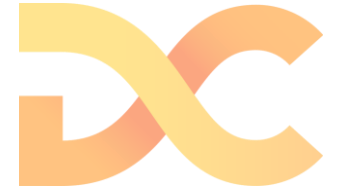


partner brązowy





Appendix



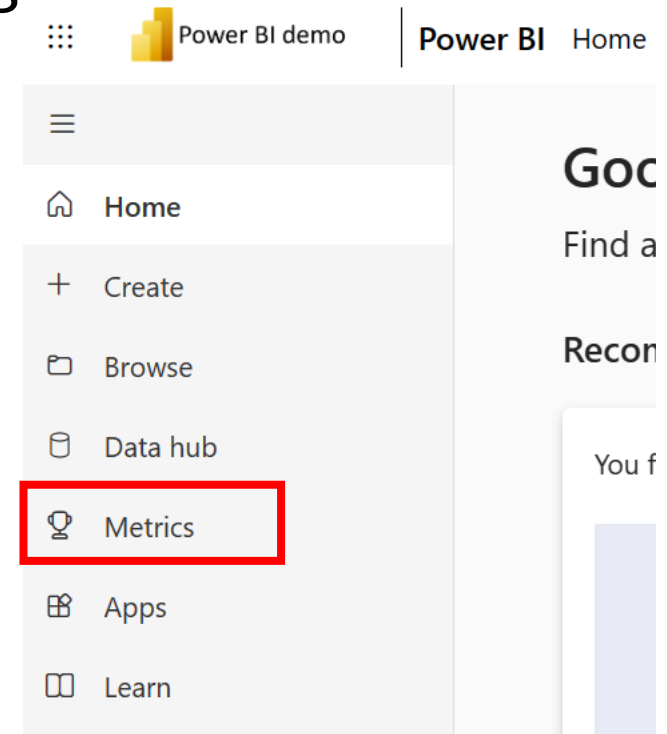
Create Scorecard



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)

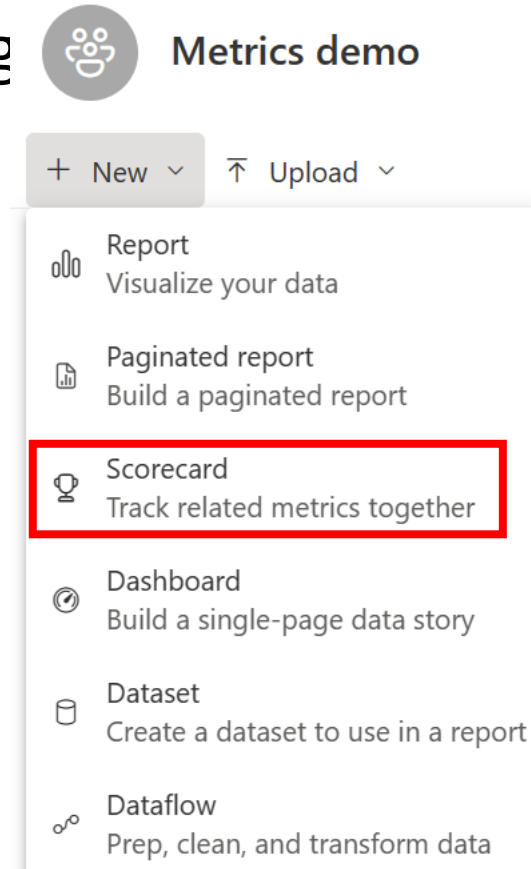




Create Scorecard



- Always created in Power BI Service (or using  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)

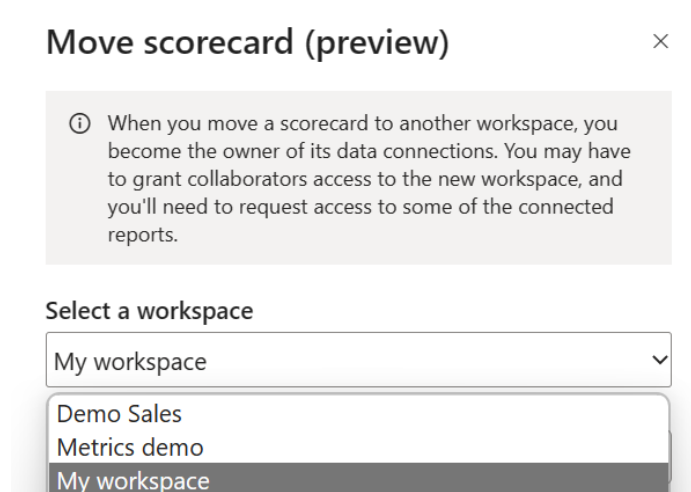
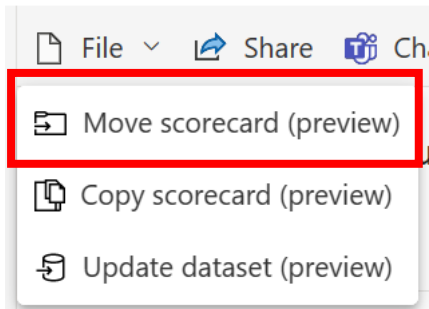




Create Scorecard



- 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





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 in File menu
- Scorecard can be copied to another 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

 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

Current value		Final target	
<input type="text" value="123"/>	<input type="text" value="Manual"/>	<input type="text" value="456"/>	<input type="text" value="Manual"/>

- [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

A screenshot of a report interface showing two input sections: 'Current value' and 'Final target'. Each section has a text input field and a 'Set up' dropdown menu. The 'Current value' dropdown is open, showing three options: 'Manual metric', 'Use submetrics', and 'Connect to data...'. The 'Final target' dropdown is closed.

Current value	Final target
<input type="text" value="Enter value"/> Set up ▾	<input type="text" value="Enter a value"/> Set up ▾
<div>Manual metric</div> <div>Use submetrics ></div> <div>Connect to data...</div>	

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



Submetrics



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

The screenshot displays a user interface for managing metrics. At the top, a 'Parent metric' card is shown with a dropdown menu open. The menu options are: 'See details', 'New submetric' (highlighted with a red box), 'Follow metric', and 'Delete this metric'. Below this, a table lists the metrics:

Metric Name	Owner	Status	Progress
Parent metric	Rachel	Not started	
Submetric1	Rachel	Completed	100/100
Submetric2	Rachel	On track	200/250



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

Current value

Enter value

Manual ▾

- ✓ Manual metric
- Use submetrics >
- Connect to data...
- ✎ Edit multiple values...

SUM

AVG

MAX

MIN

Not start

Parent metric	R Rachel	On track	300/350
Submetric1	R Rachel	Completed	100/100
Submetric2	R Rachel	On track	200/250



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

List view + New

New metric

Link to existing metric (preview)

Add submetric

Manage hierarchies (preview)

Select a scorecard, then connect a metric

Add copies of metrics from other scorecards, and edits and check-ins will sync.

Recent Favorites Shared with me All scorecards

Search

Name	Owner	Opened	Endorsement	Sensitivity
Metrics demo with categorical values	Metrics demo		—	—
Metrics demo with hierarchy	Metrics demo	4 hours ago	—	—
Metrics demo with Milestones	Metrics demo		—	—
Metrics Demo Workspace	Metrics demo	now	—	—

Cancel



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

Project Learn Power BI metrics



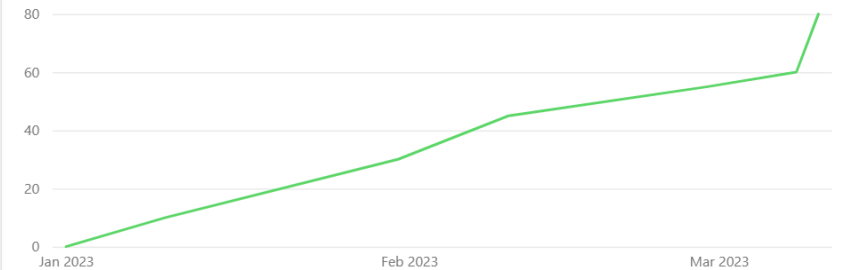
Details History Status rules Time period

80/100

↑ 33.33% WoW

On track

R



☐ Show targets

Check-in history

New check-in

R Rachel
10 days ago

Check-in for Mar 10, 2023
New value 80

On track



R Rachel 10 days ago



I learned more about metrics



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	—	—	 Rachel	10 days ago
Mar 31, 2023	—	—	 Rachel	10 days ago
Mar 10, 2023	80	On track	 Rachel	10 days ago
Mar 8, 2023	60	At risk	 Rachel	12 days ago
Feb 28, 2023	55	On track	 Rachel	11 days ago
Feb 15, 2023	—	—	 Rachel	12 days ago
Feb 10, 2023	45	On track	 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:  [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:  [Rachel](#)

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

Refresh

Disconnect

Take over connection

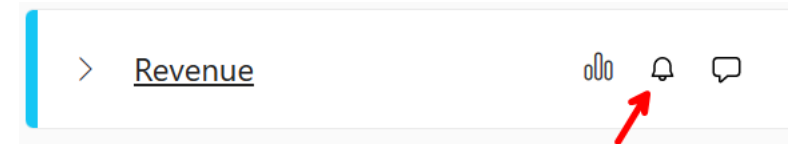
☒ Clear metric values when connecting to new report



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





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.

\$% \$ % ¢ .00

	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 metrics over time
- Setup target and milestones
- Track development



Check-in history

New check-in

R Rachel
2 minutes ago

Check-in for Mar 6, 2023
New value 100

Completed

R Rachel
4 minutes ago

Check-in for Jan 31, 2023
New value 85

On track

R Rachel
5 minutes ago

Check-in for Jan 15, 2023
New value 55

Behind



Status on Metrics



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

Edit scorecard settings



Details

Permissions

Statuses

+ Add status

↺ Reset statuses

Overdue



Behind



At risk



On track



Not started



Completed





Status on Metrics



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

Edit scorecard settings ×

Details Edit scorecard settings ×

Details Permissions Statuses

+ Add

+ Add status ↺ Reset statuses

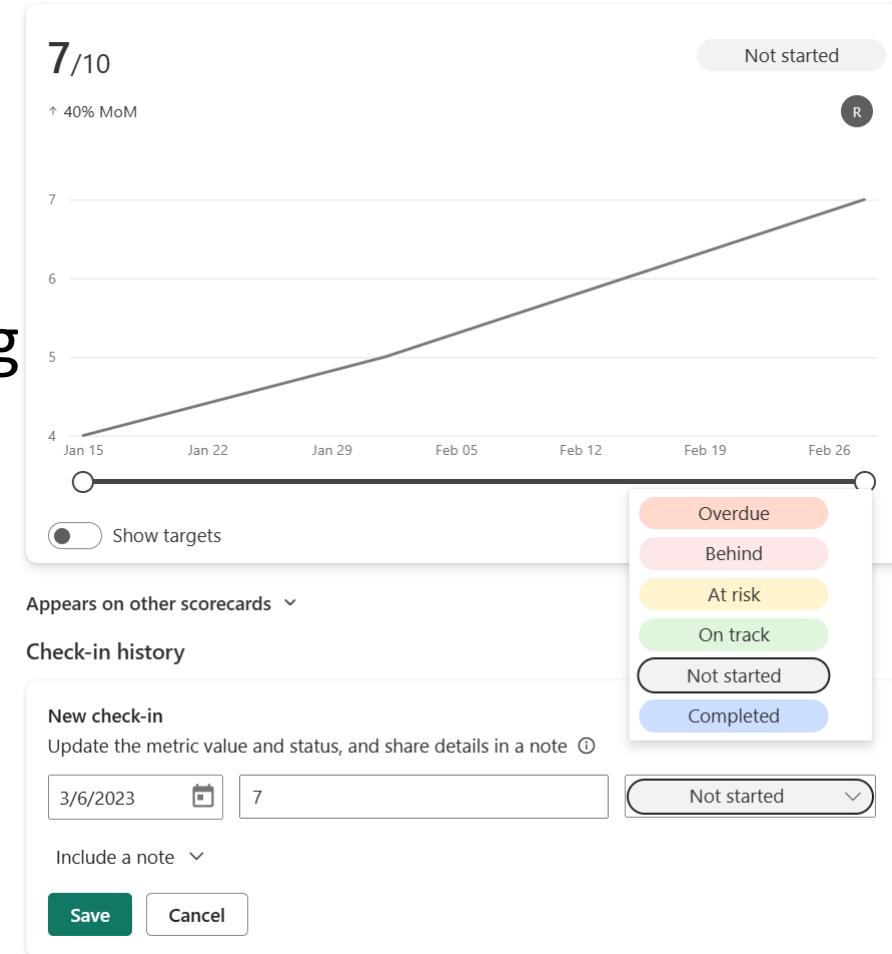
Over	Stage 1	<div><div></div></div>	↑	↓	🗑
Behir	Stage 2	<div><div></div></div>	↑	↓	🗑
At ris	Stage 3	<div><div></div></div>	↑	↓	🗑
On tr	Stage 4	<div><div></div></div>	↑	↓	🗑
Not s	Completed	<div><div></div></div>	↑	↓	🗑



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

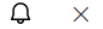
+ Add condition

Otherwise, change status to

- [Customize statuses on your scorecard](#)
- [Create automated status rules for metrics in the Power BI service](#)



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

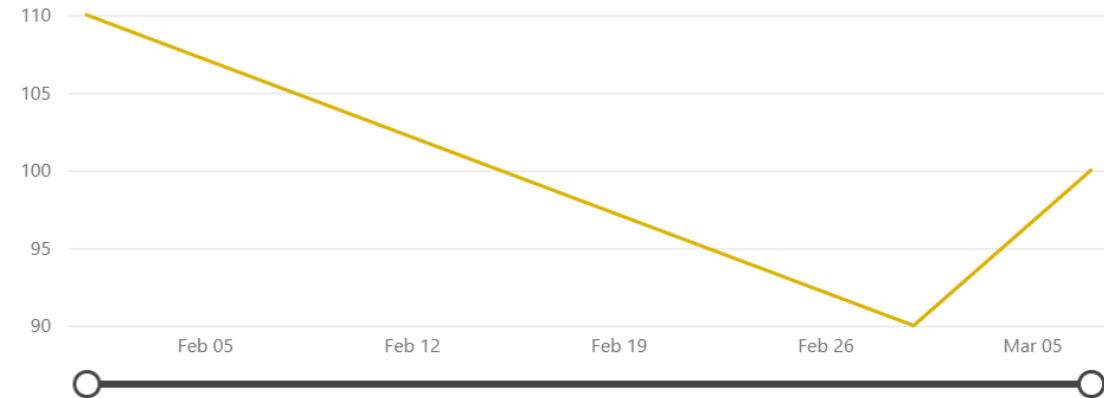
R Rachel

Employee satisfactory

R Rachel

Region North

Details History Time period



Show targets

Check-in history

New check-in

Update the metric value and status and share details in a note

3/7/2023



100

At risk

Save

Cancel

Current value
editable

Status is
locked



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

↓ 10.53% WoW

Behind

R



Feb 05 Feb 12 Feb 19

Show targets

Check-in history

New check-in

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

3/7/2023

85

Save

Cancel

Current value is locked

Status is editable

Overdue

Behind

At risk

On track

Not started

Completed

Behind



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

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

On track

Hide note ^

A B I U

Type @ to mention people

Save Cancel

Current value is locked

Status is locked

Note is editable



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 ▾

🔍

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	<div><div>R</div><div>Rachel</div></div>	At risk	206K/235K ↓ 51.74% MoM	<div></div>	Apr 6, 2023



Viewing Metrics



- On a scorecard, you can see all metrics
- You can filter on
 - Name of metric
 - Status

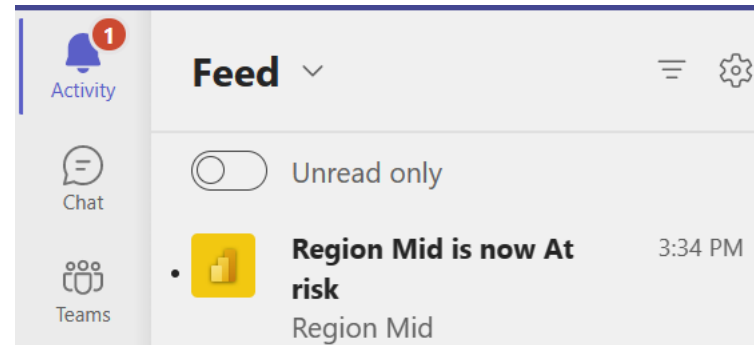
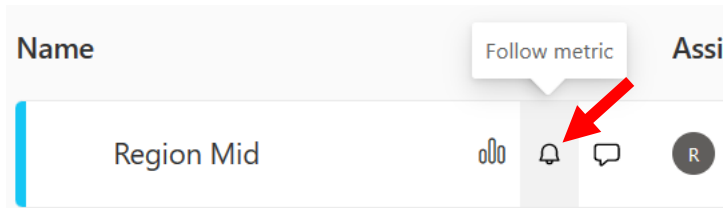
<div><div>● Metrics4</div><div>● Overdue0</div><div>● Behind1</div><div>✓ At risk2</div><div>● On track1</div><div>● Not started0</div><div>● Completed0</div></div>						
Name	Assigned to	Status	Progress	Trend	Due	
Region Nordic	<div>R</div> Rachel	At risk	206K/235K ↓ 51.74% MoM		Apr 6, 2023	
Region South	<div>R</div> 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





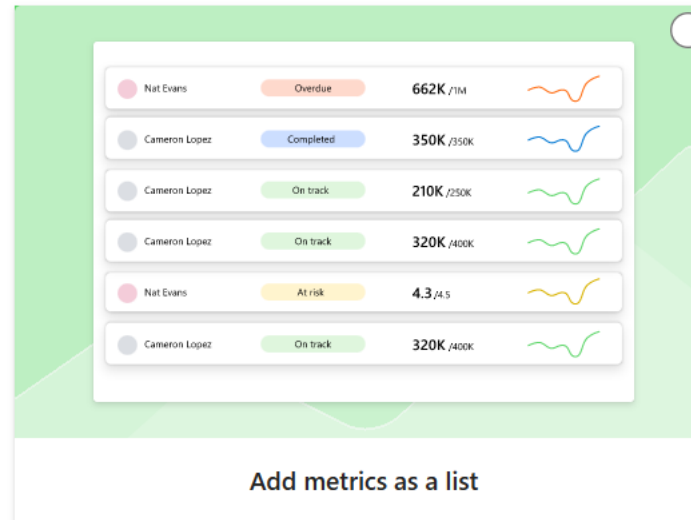
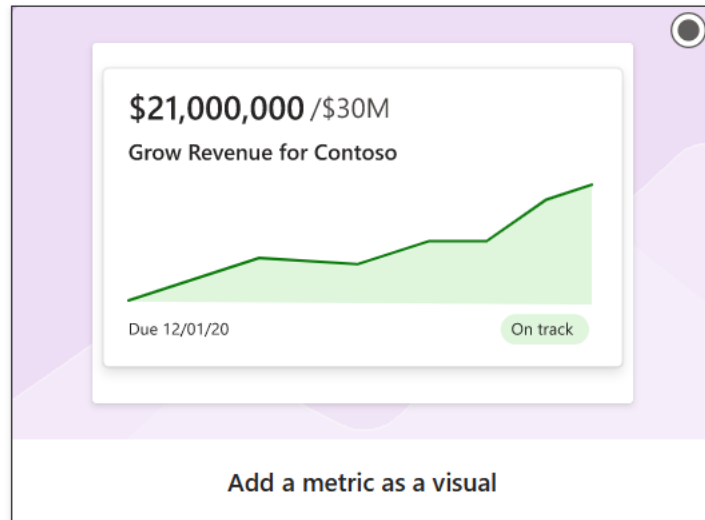
Metrics visual (preview)



- Add scorecards or individual metrics directly in your report

Add a metric to this report

Choose from (or add to) existing scorecards, or create a brand new metric and scorecard. [What's a scorecard?](#)





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

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](#)

Workspace

My workspace

☐ Create a workspace

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 *

Current value

[Edit](#)

Final target

[Edit](#)

Or [connect to data](#)

Or [connect to data](#)

Start date

Due date



Owners

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

Q Search

+ New scorecard



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

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 demo with hierarchy

All ▾		Filter by keyword		List view	+ New ▾
Metrics demo with hierarchy		Filter by keyword		List view	+ New ▾
✓ Metrics	4	● Overdue	0	● Behind	1
		● At risk	2	● On track	1
Show 2 more					
Name	Region	Assigned to	Status	Progress	Trend
Region Mid	Region	R Rachel	On track	669K/700K ↓ 15.13% MoM	
Region Nordic	Region	R Rachel	At risk	206K/235K ↓ 51.74% MoM	
Region West	Region	R Rachel	Behind	682K/815K ↓ 3.75% MoM	
Region South	Region	R Rachel	At risk	313K/350K ↓ 12.05% MoM	



Metrics visual (preview)



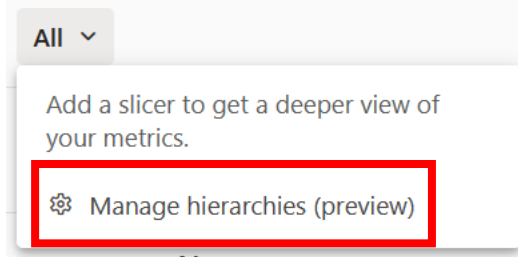
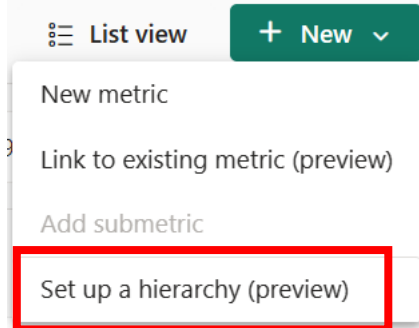
- Add scorecards or individual metrics directly in your report
 - Create scorecards
 - Create metrics
 - Connect to existing scorecard
 - Format scorecards and metrics, e.g., font, colors, and backgrounds
 - Cross-filtering or highlighting are not supported
-
- [Create a metrics visual in a Power BI 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



Set up your first hierarchy

Once you build your hierarchy, slice your scorecard to compare progress across your data.

[+ New hierarchy](#)

Map hierarchy	Assign owner	Preview hierarchy
<div><div>+ New hierarchy</div><div><div>Hierarchies</div><div><div>Product</div><div><div>Category</div><div>Subcategory</div></div></div></div><div><div>Datasets</div><div><div>Sales Demo Metrics</div></div></div></div>		<div><div>Search</div><div><div>Product</div><div><div>Accessories</div><div>Clothing</div><div>Furniture</div><div><div>Beds</div><div>Bookcases</div><div>Chairs</div><div>Couches</div><div>Lamps</div><div>Tables</div></div></div></div></div>



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)



UI Mockup showing a hierarchy selection interface and a data table.

Left Panel (Hierarchy Selection):

- All** (dropdown)
- Accessories** (dropdown, highlighted with a red arrow)
- Socks** (dropdown, highlighted with a red arrow)
- Product (1)** (dropdown)
- 1 slicer(s) applied** (Clear button)
- Product (1)** (dropdown)
- All**
- Accessories (1)**
 - Bags
 - Belts
 - Jewelry
 - Other
 - Scarves
 - Socks** (checked, highlighted with a red arrow)
 - Sun classes
 - Watches
- Clothing**
- Furniture**
- Manage hierarchies (preview)**

Table Header:

- Filter by keyword
- List view
- + New

Table Body:

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)



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



<div> Add columns <div> Filter by keyword Heatmap (preview) New </div> </div>									
Name	<div> Comparing 3 items against totals <div> Filter by keyword Heatmap (preview) </div> </div>								
Mid	Name	<div> Comparing 9 items against totals <div> Filter by keyword Heatmap (preview) New </div> </div>							
Nordic	Mid	Name	Totals	Bags	Belts	Jewelry	Other	Scarves	Socks
West	Nordic	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
East	West	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
	East	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)



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











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

3/6/2023 

1234

At risk 

Hide note 

  **B** *I* U       x^2 x_2  

Adding a not to check-in of manual metric. Setting the status to At risk

Save

Cancel





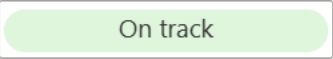

Follow up on Metrics











- Manual metrics must always be updated manually with new values
- Connected metrics will automatically get values updated

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

3/6/2023  **313.33K** 

Hide note ^

A  **B** *I* U      x^2 x_2  

Adding a note to check-in of connected metric. There is a rule on the status, so it will be updated when data gets updated

Save Cancel



Follow up on Metrics



- Manual metrics must always be updated manually with new values
- Connected metrics will automatically get values updated
- In summary with Check-in you can
 - Add a note
 - Update value (for manual metrics)
 - Set status, if status rules have not been configured