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POWER BI DASH BOARDS

What is Dash Board?

A Single page [**now a days multiple pages**] representation [with multiple visuals from multiple reports] of **high level business** information for **a specific subject area or business or functionality.**

How is it helpful?

a) To see all the units of business and status in a **single view**

b) We can take faster decision making based on that

Who is it helpful?

Initially it was **for top management team** in the organization, now a days it is **even for executive r**egarding their daily sales or purchases.

What we present in the dashboard? Are there any recommendations?

Different people suggest differently.

Usually a dashboard contain tiles with the below items

a) **KPIs, Cards, gauges etc…** [more and more]

b) **Simple analyzable visuals** [story telling visuals] such as charts [stacked, line, Pie, Waterfall donut, and scatter], histograms, shape or normal maps etc…

c) **Book marks**

d) **Work book interested areas**

e) **Tiles** [logos, emblems, address etc…] { Image, Textbox}

Etc…

Can we take slicers in a dashboard?

No, we can't take

How Many Ways IT companies creating Power BI Dashboards?

a) Multi page reporting and navigation [we completed in the project]

Multiple ways

1.From Bookmarks dashboard

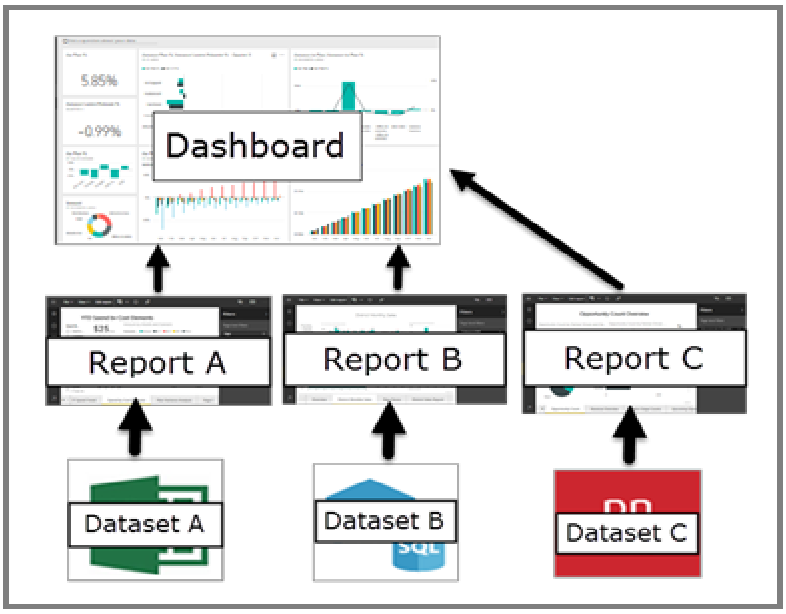
2.From system insights and other system generated visuals

3.Multiple visuals from multiple reports

b) Using Dash board Template [available cloud service]

How Many Datasets does a dashboard use? [Multiple datasets]

If the dashboard constructed from multiple reports, then it uses multiple datasets



How many visuals a dashboard support?

There is no restriction like that, but **9-15 visuals presentation is good for a dash board**.

Is there any specification in the layout of dashboard?

KPIs, Gauges, Cards, Pie, Donut etc… on **top or side bars.** [**Quick value representations**]

Tables, Matrices, charts, and other similar components [**Water fall, Funnel chat etc…**] **in middle.**

Maps, Graphs etc… **in the last row.**

What is pinning?

Taking visuals or any other relevant information as tile to Dashboards is called as pinning.

Can we share or subscribe a dashboard?

Yes, we can

Differences between Dash Board and Report?

Disfference between Dashboards and Reports

Capability	Dashboards	Reports
Pages	One page	One or more pages
Data sources	One or more reports and data sets per dashboard	A single data set per report
Available in Power BI Desktop	No	Yes, can create and view reports in Desktop
Pinning	Can pin existing visualizations (tiles) only from current dashboard to your other dashboards	Can pin visualizations (as tiles) to any of your dashboards. Can pin entire report pages to any of your dashboards.
Subscribe	Can't subscribe to a dashboard	Can subscribe to report pages
Filtering	Can't filter or slice	Many different ways to filter, highlight, and slice
Set alerts	No	Yes
Modify/change visualization type	No. In fact, if a report owner changes the visualization type in the report, the pinned visualization on the dashboard does not update	Yes

When do we go for Tile add and Report Live Page Add?

User interaction provided in Live Page, so we go for it in Dash Board, Whereas Tile is an individual visual.

How many ways we create dashboard?

There are many ways of dash board presentation.

Trainer observed the below ways

Type 1: Dashboard with Native tiles and heterogeneous information [the below example]

Type 2: Dashboard with a report single page followed by actions [refer to project doc practice]

Type 3: Dashboard with a report multiple pages as multiple tiles [refer to project doc practice]

Type 4: Dashboard with multiple tiles from multiple report pages [refer to project doc practice]

Type 5: Dash board with a report / page with Usage Metrics information

Type 6: Dash board with only book marks pinning.

Note: The above all types explained in the class room [watch the video]

Can I pin slicer to a dashboard?

No

Can I pin a page which a slicer to the dashboard?

Yes, as slicer inside dashboard no difference in the operation.

Can we download a dashboard and what is the extension of it?

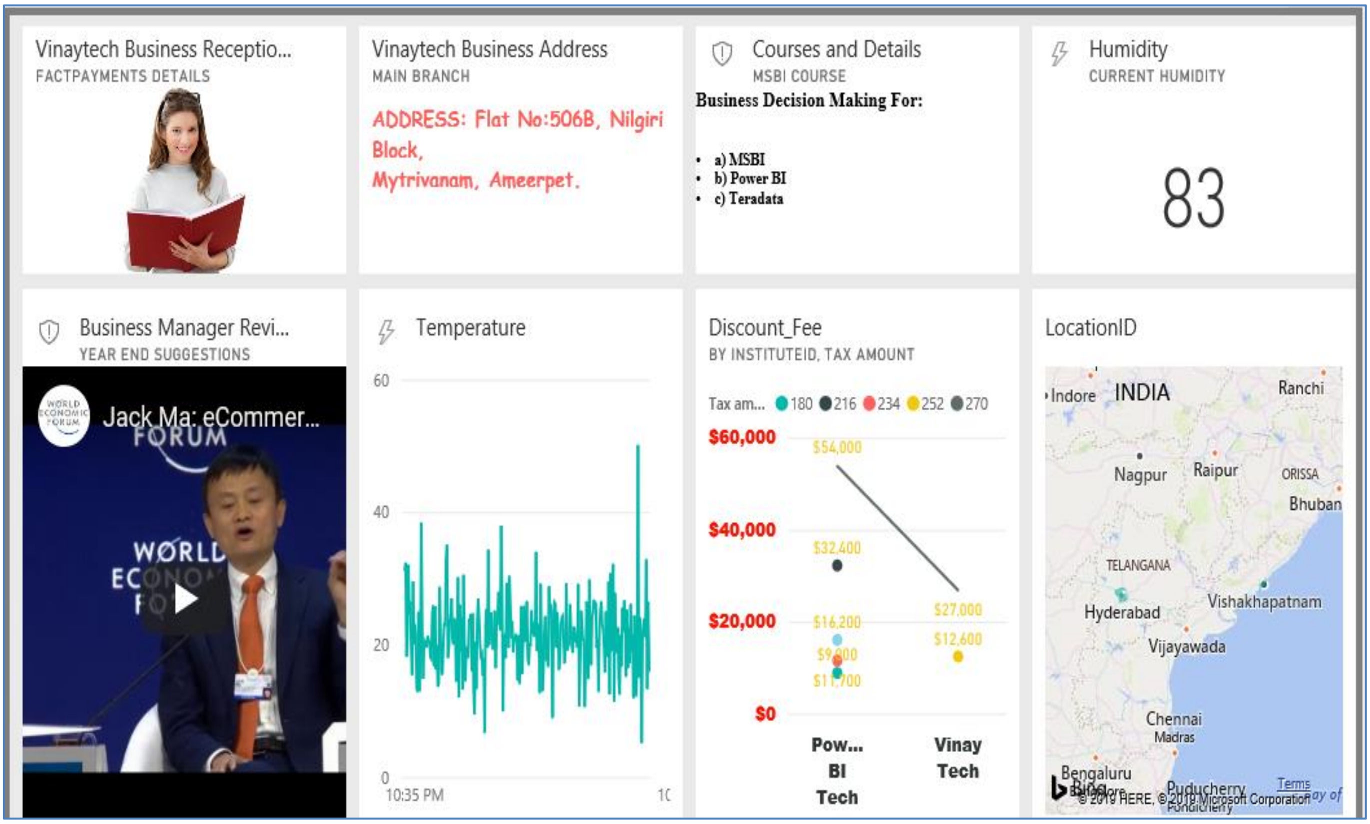
Yes, .Pbix is the extension

Can we download a dashboard and what is the extension of it?

Constructing a DashBoard with all possible tiles

Here you will learn what kind of tiles we can take to construct a report.

It will not represent the real-time flow. Refer to the projects given for the dashboards look & feel.



Practical to implement:

a) Identify workspace where you have reports, work books, datasets [normal or live data set stream], book marks, data flows etc…

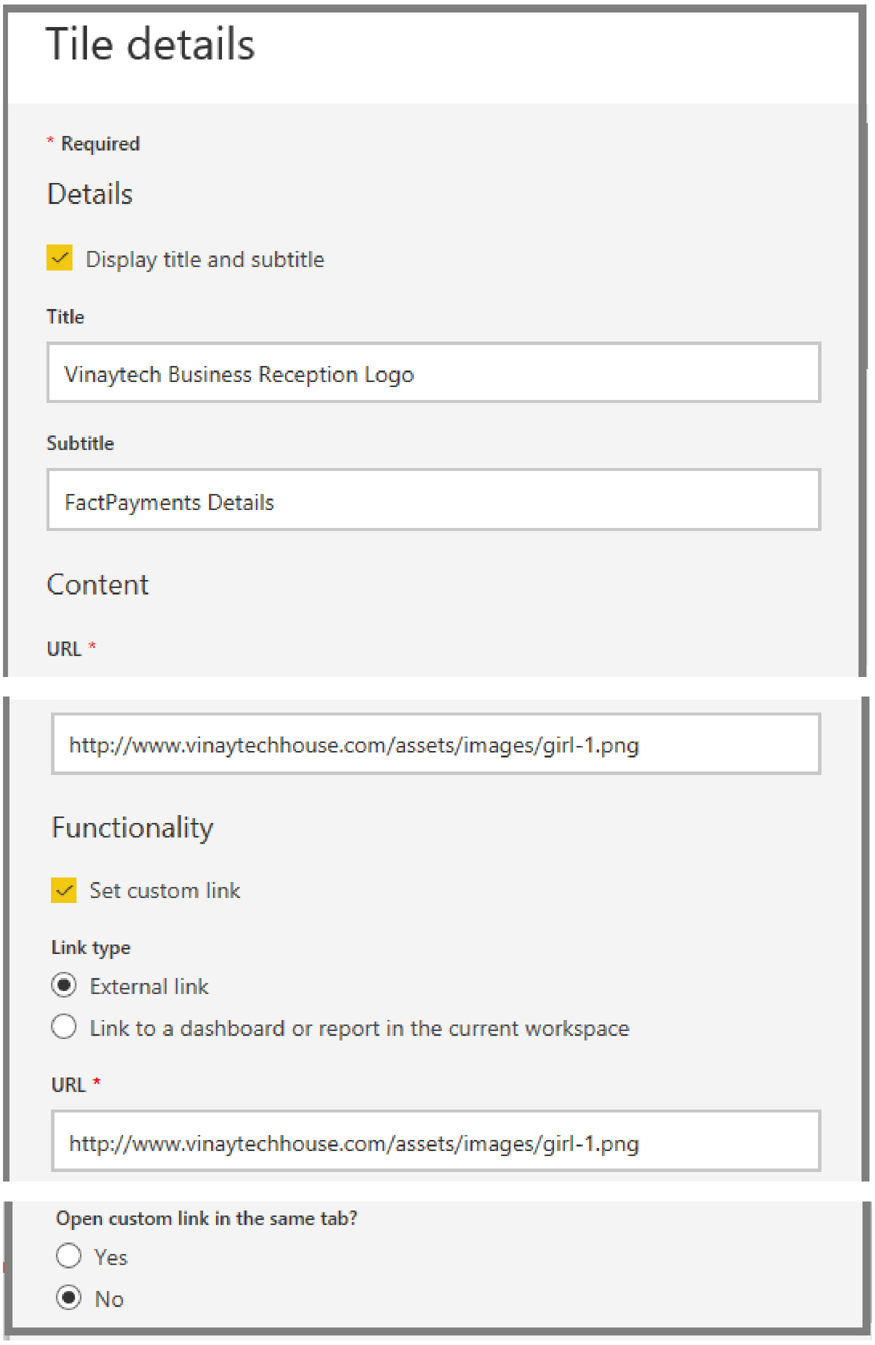
Note: Create reports, required book marks, and create data sets.

b) Within the work space→ Go to Dashboards→ Create→

Name: Vinaytech Business Details Analytics Dashboard

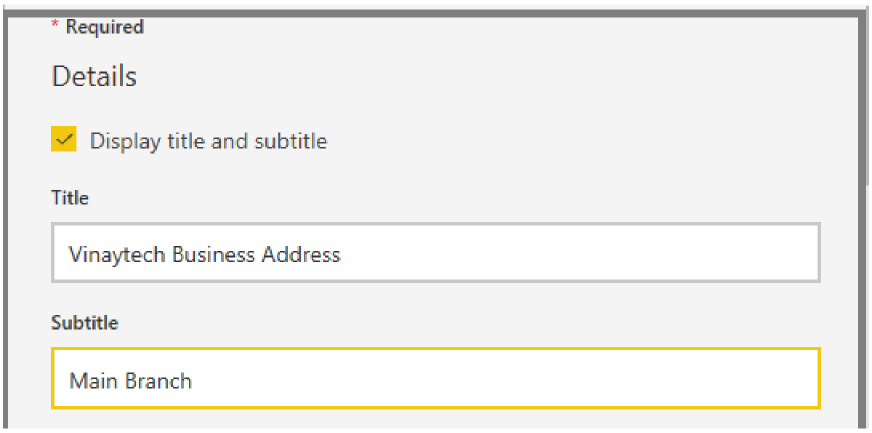
Note: Proper name will help to recognize your dash board quickly

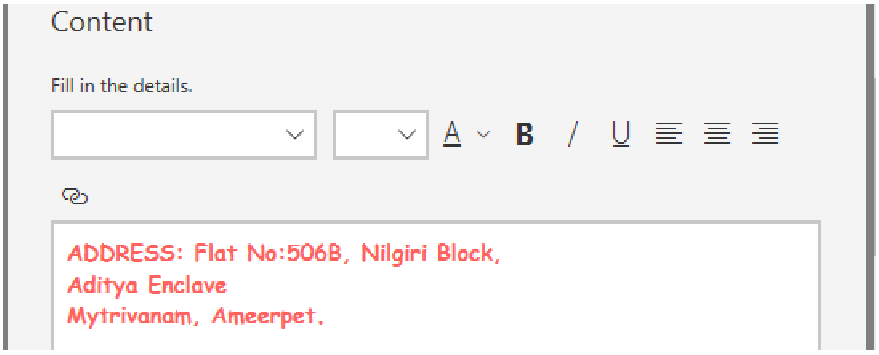
c) Tile with image



http://www.vinaytechhouse.com/assets/images/girl-1.png

d)Tile with Textbox

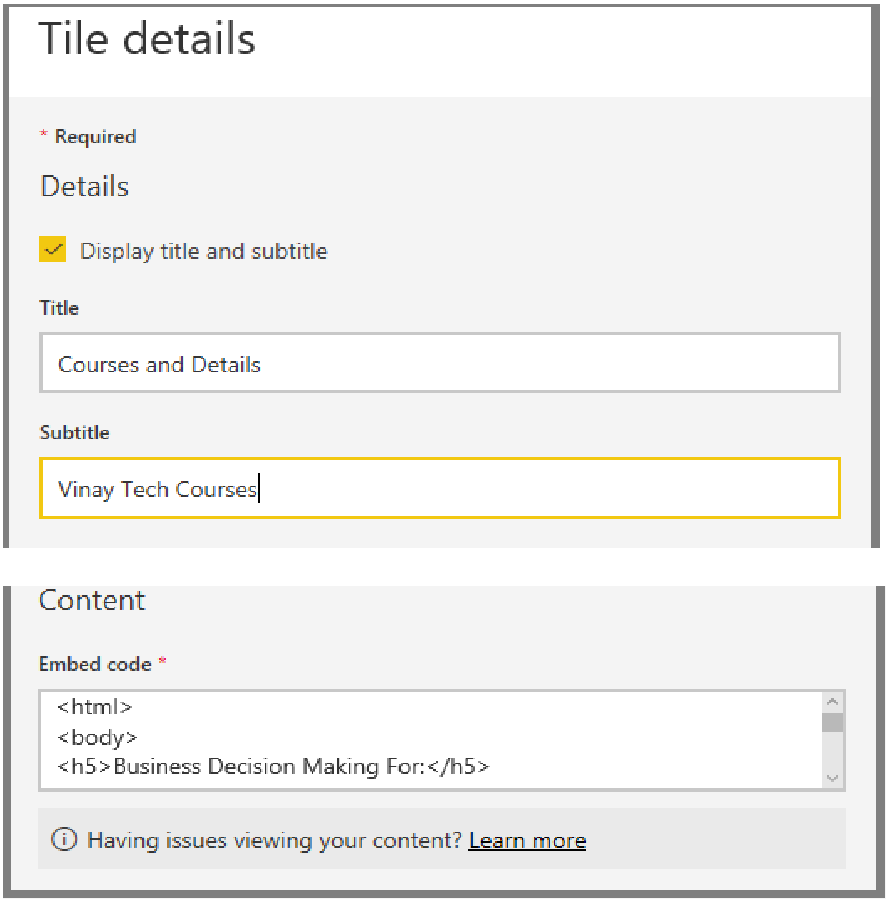




Custom Link:

http://www.vinaytechhouse.com/RegisterToday.html

e)Tile with Web Content



<u>Embed code:</u>

<html>

<body>

<h5>Business Decision Making For: </h5>

<h6>
a) MSBI

b) Power BI

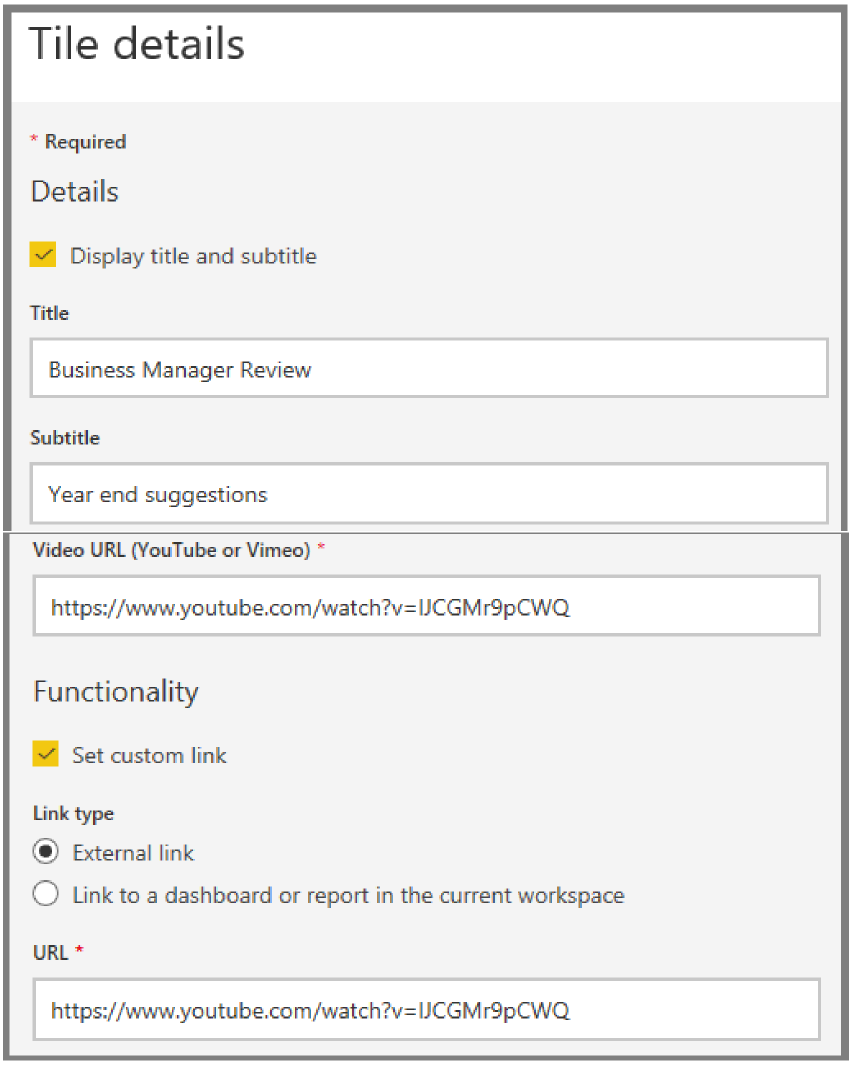
c) Teradata

</h6>

</body>

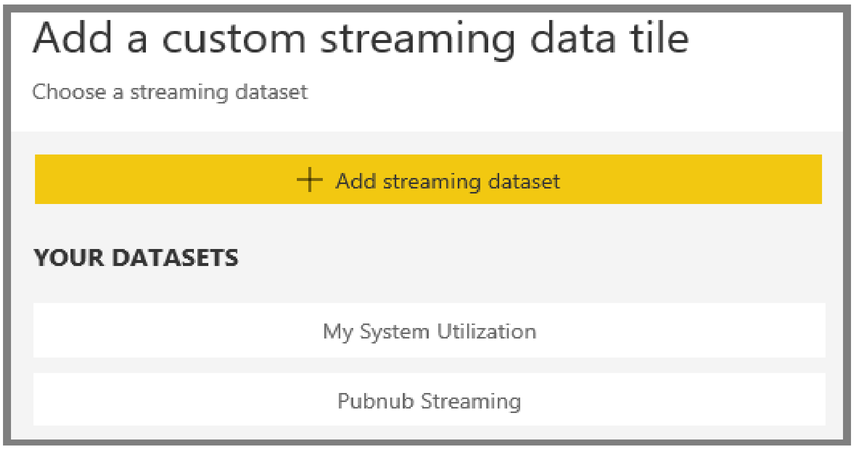
</html>

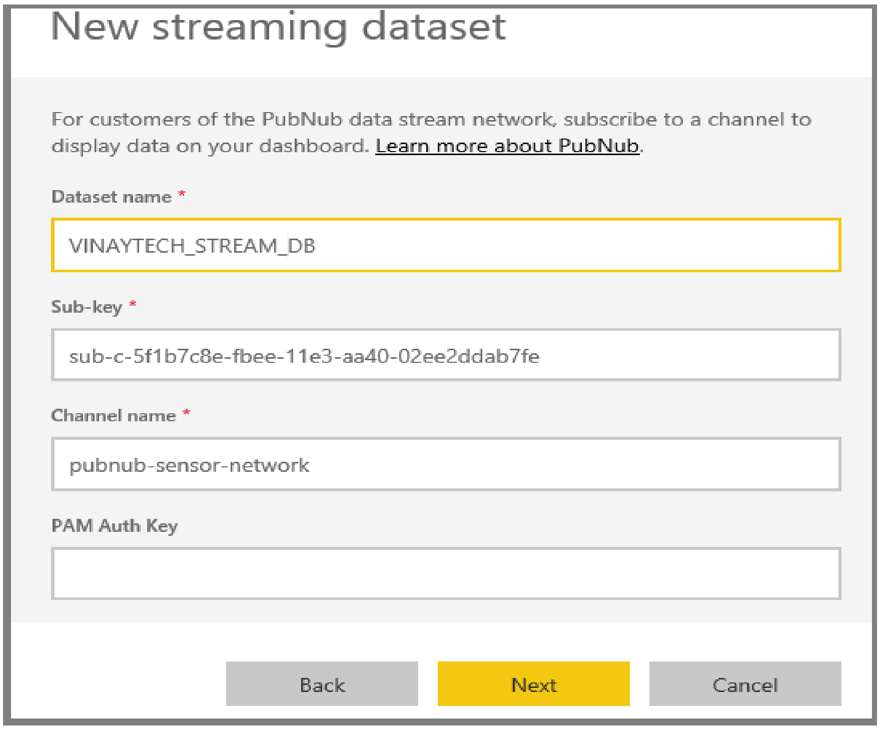
f)Tile with Video



https://youtu.be/eNpvRv70JcQ

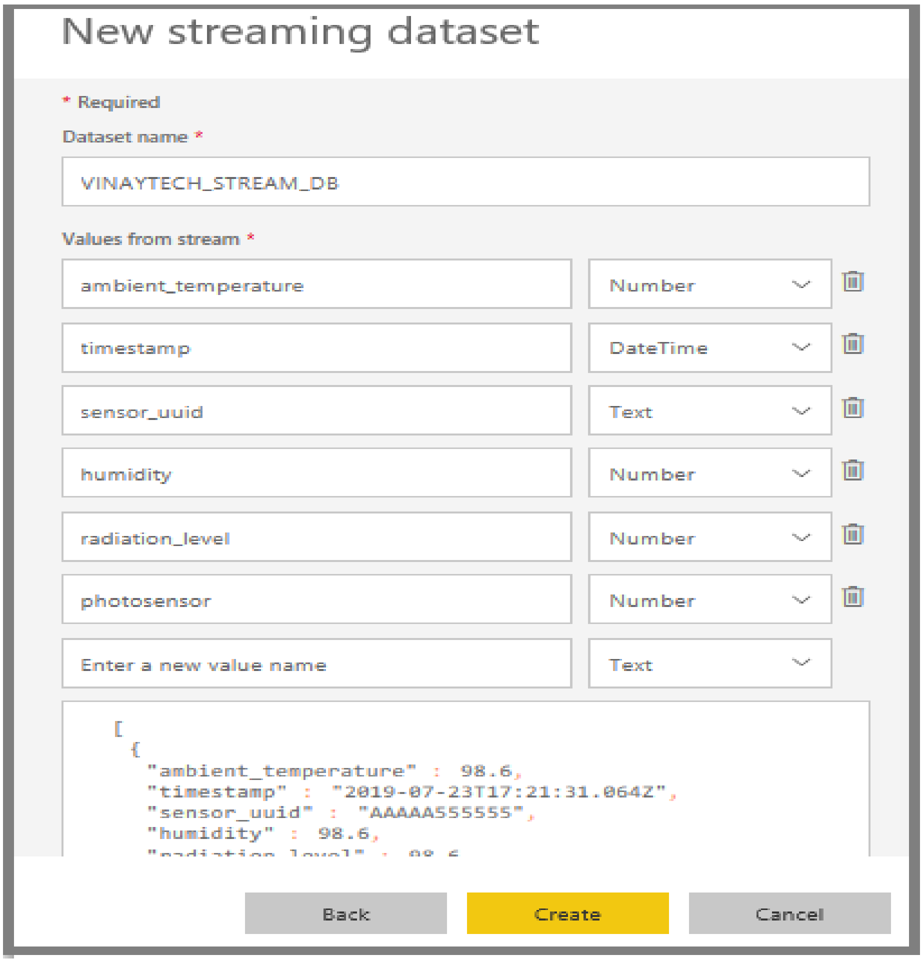
g)Tile with Real-Time Data[Custom Streaming Data-Pubnub]





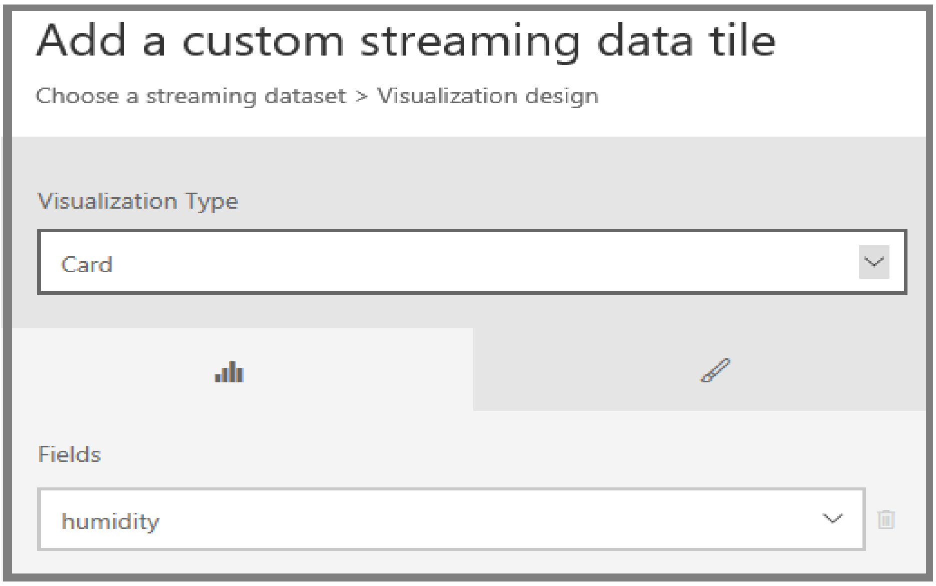
Subscribekey: `sub-c-5f1b7c8e-fbee-11e3-aa40-02ee2ddab7fe`

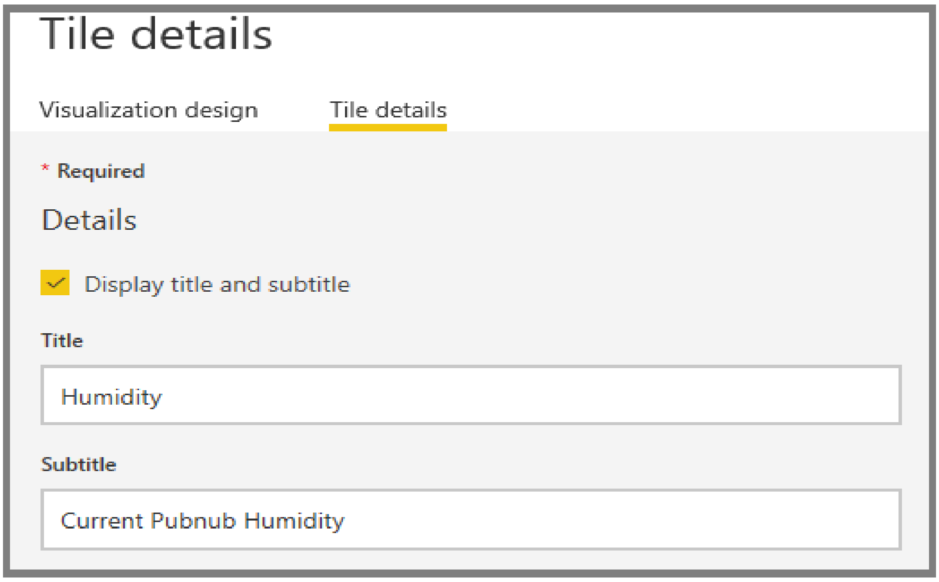
Channel name: `pubnub-sensor-network`



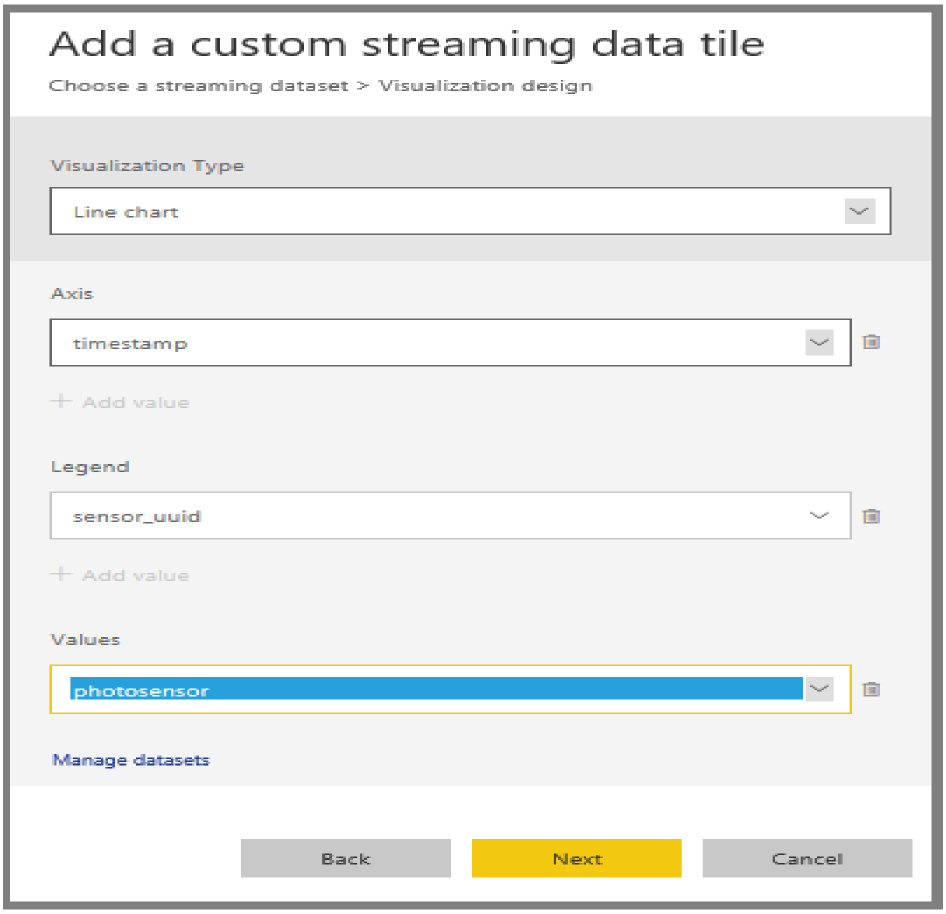
Click Create

Click Tile→New Tile→Custom Streaming Data→ Select the created data source

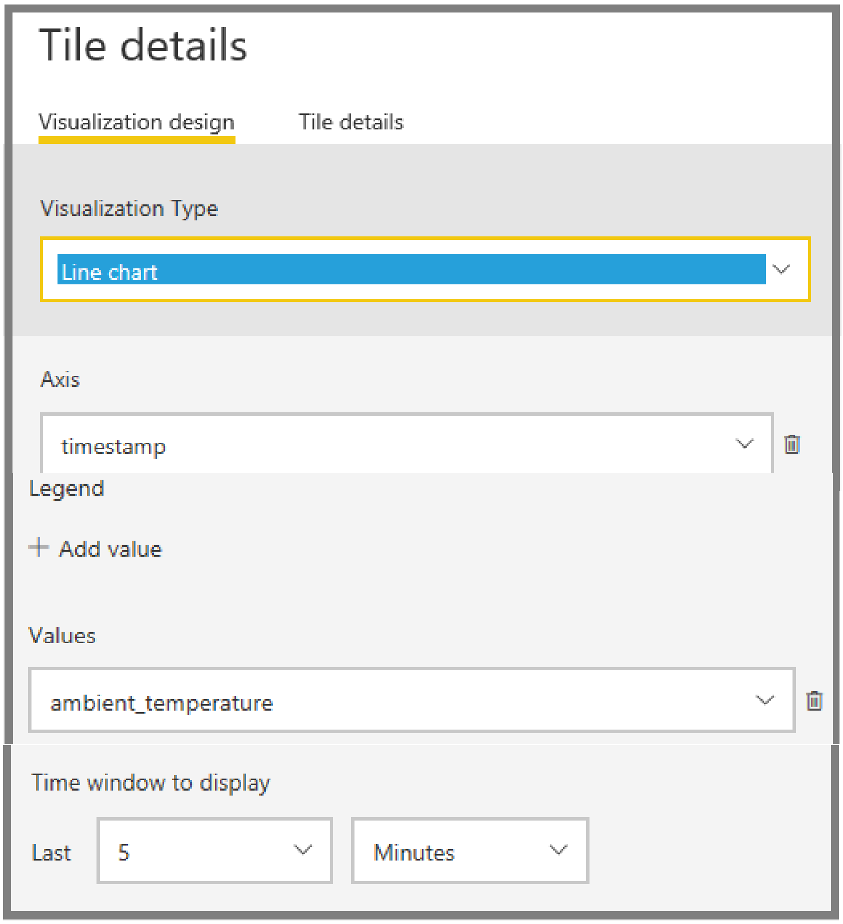




Similarly add another tile like below



h)Tile with Real-Time Data[Custom Streaming Data]



i) **Tile from a report visual**

Go to a report→ visual→pin visual

j) **Tile from a report book mark**

Go to a report→ book marks→pin book marks

k) **Tile from a report live page**

Go to a report→ click pin live page

l) **Tile from a work book**

Go to work book→ Pin workbook

Or

Highlight required rows of a work book→ Pin

j) **Go to usage metrics → Pin Live page / Pin Visual**

k) **Go to Insights→ choose any visual→Pin Visual**

SCENARIO: CREATE A DASHBOARD WITH MULTIPLE TILES AND EACH TILE TALKS ABOUT A REPORT PAGE

Dashboard Type 1: [Home Page as a single tile]

There is a report with Home Page and Other Pages, from home page there are navigations. In this situation, **pin the Homepage as a single tile in the dashboard.**

Dashboard Type 2: [Multiple pages as multiple tiles]

There is a report with Home Page and Other Pages, from home page there are navigations. **Take each individual page as a single tile in the dashboard**.

Dashboard Type 3: [Multiple pages from multiple reports as multiple tiles]

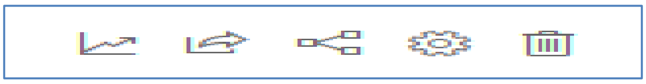
Pin **multiple pages from multiple reports** and construct a dash board.

Dashboard Type 4: [The very beging dash board]

Practical Observation:

a) Workspace→ Update APP
b) Go to mobile, verify all the three types of dashboards
c) Provide comments if required
d) Go to a report if possible from a tile, by clicking ellipse.

Dashboard Properties



a) Usage Metrics
b) Sharing
c) View Related
d) Settings
e) Delete

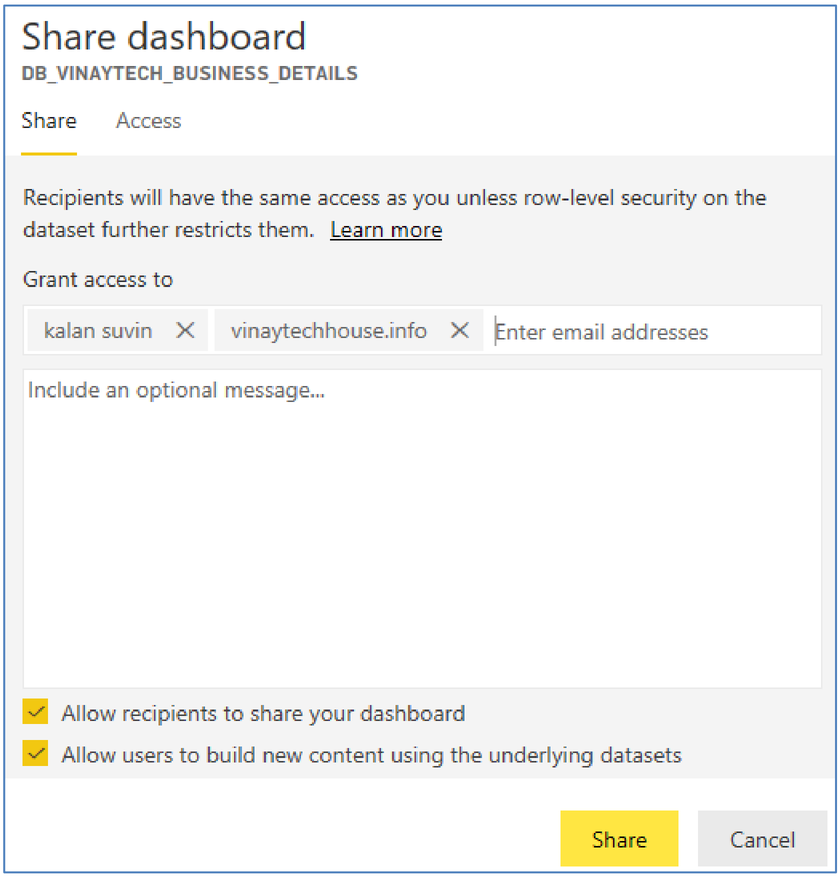
Usage Metrics:

Talks about

a) Users
b) Views
c) Number of views
d) Frequency of views
e) Plat form [mobile / web]
f) Distribution etc…

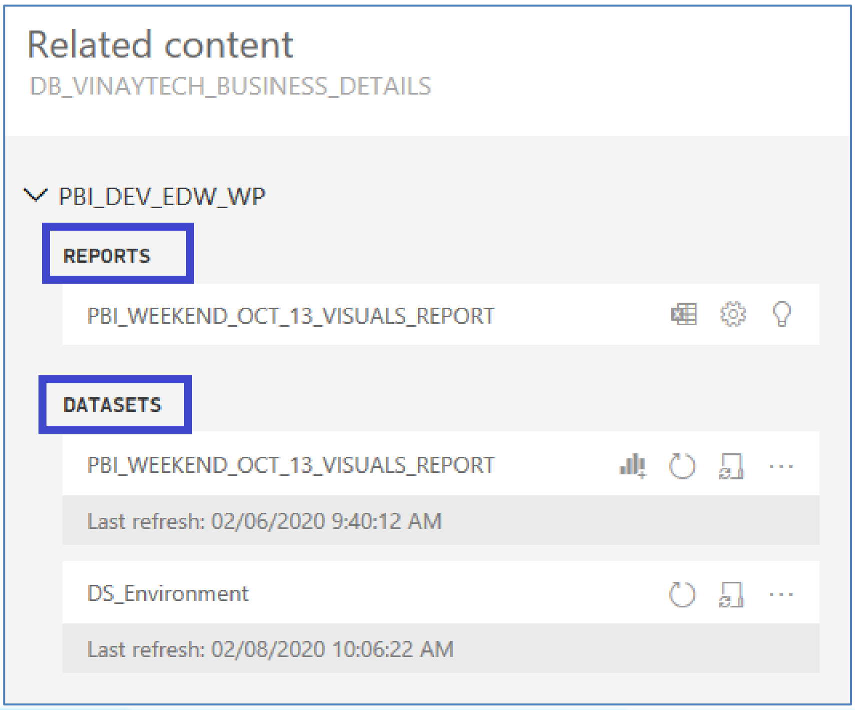
b)Sharing:

Sharing to the respective people by providing or removing additiona; reshare options.



c)View Related

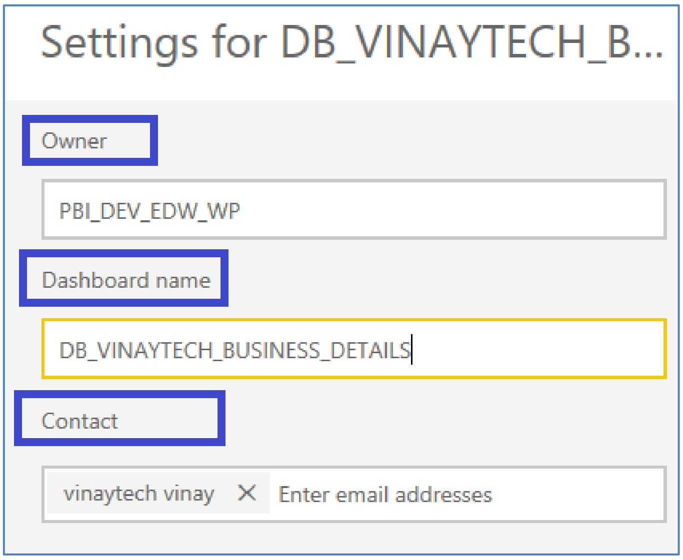
Displays the datasets and reports it is using

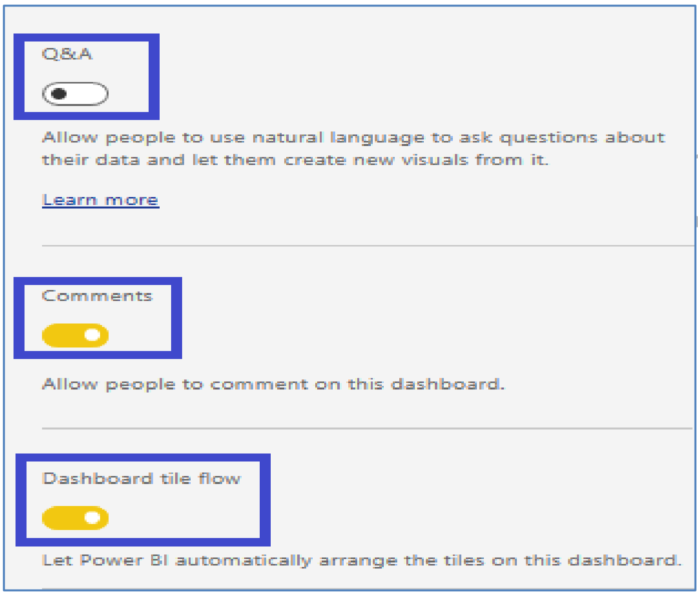


d)Delete

Remving the dashboard

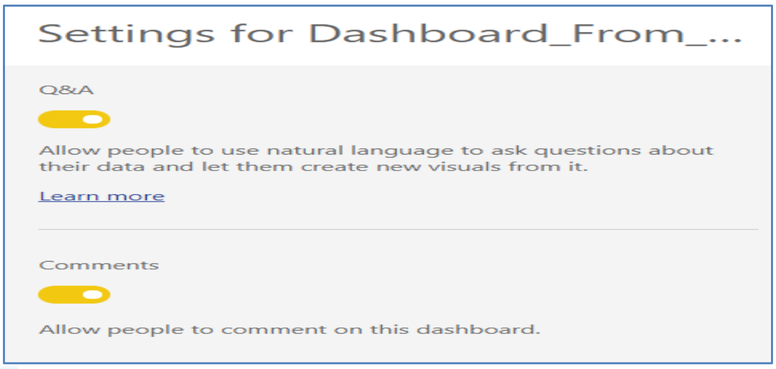
e)Settings:





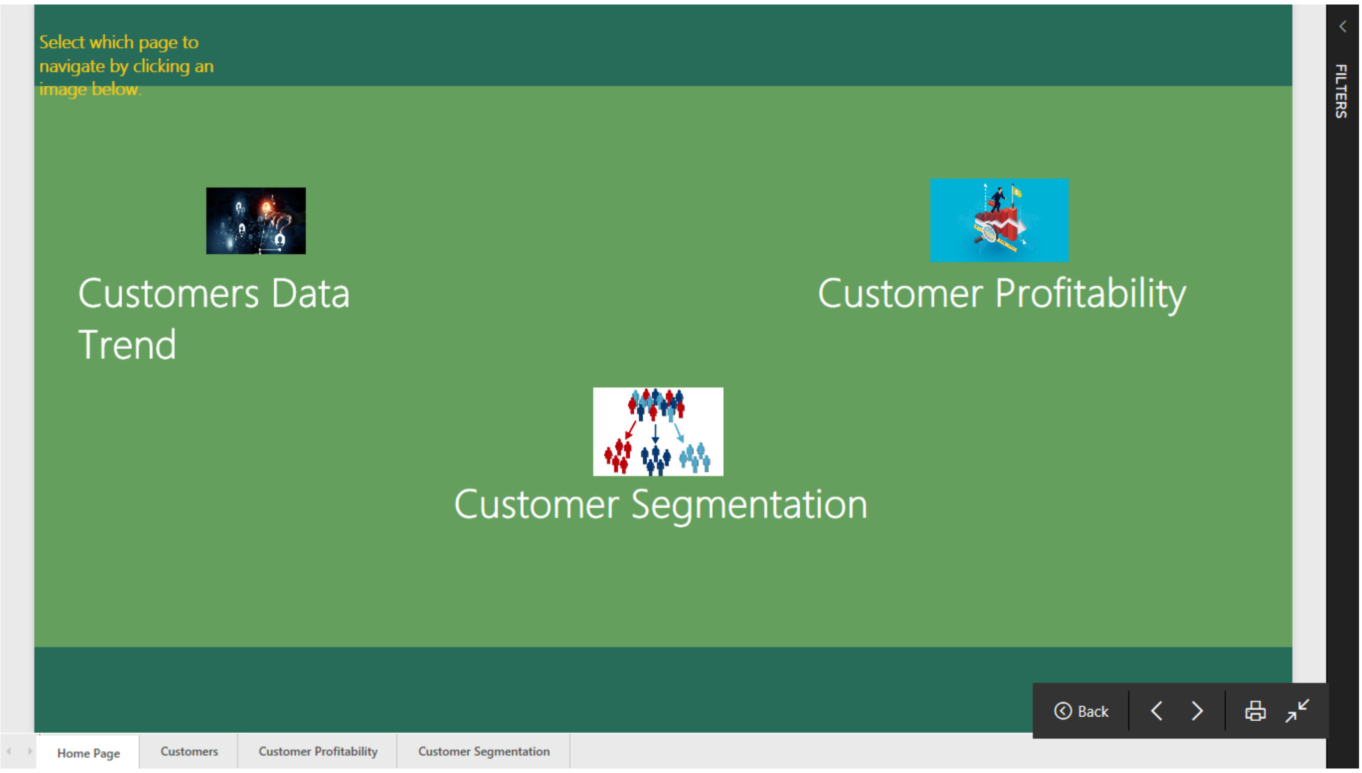
How do you allow customers to ask natural language question?

Go to settings→ Enable Q & A

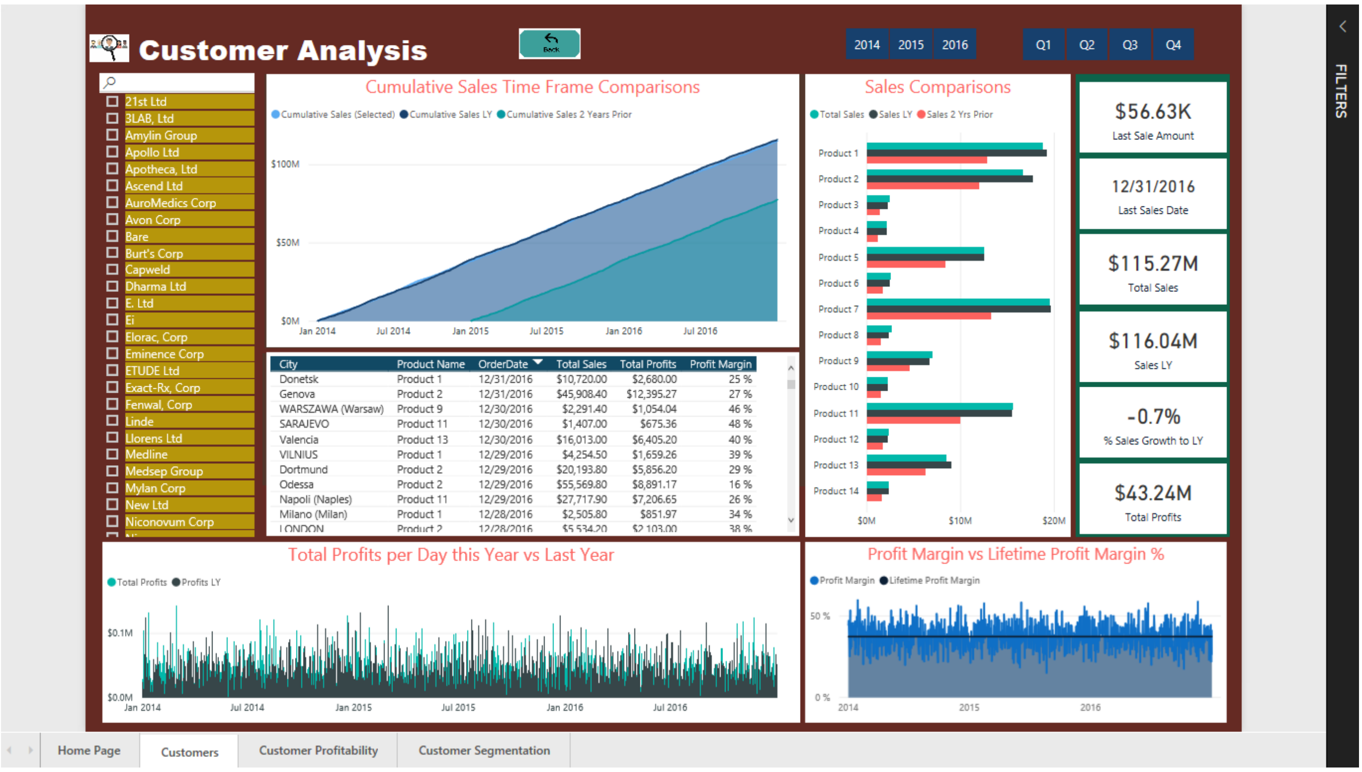


Additional Practice

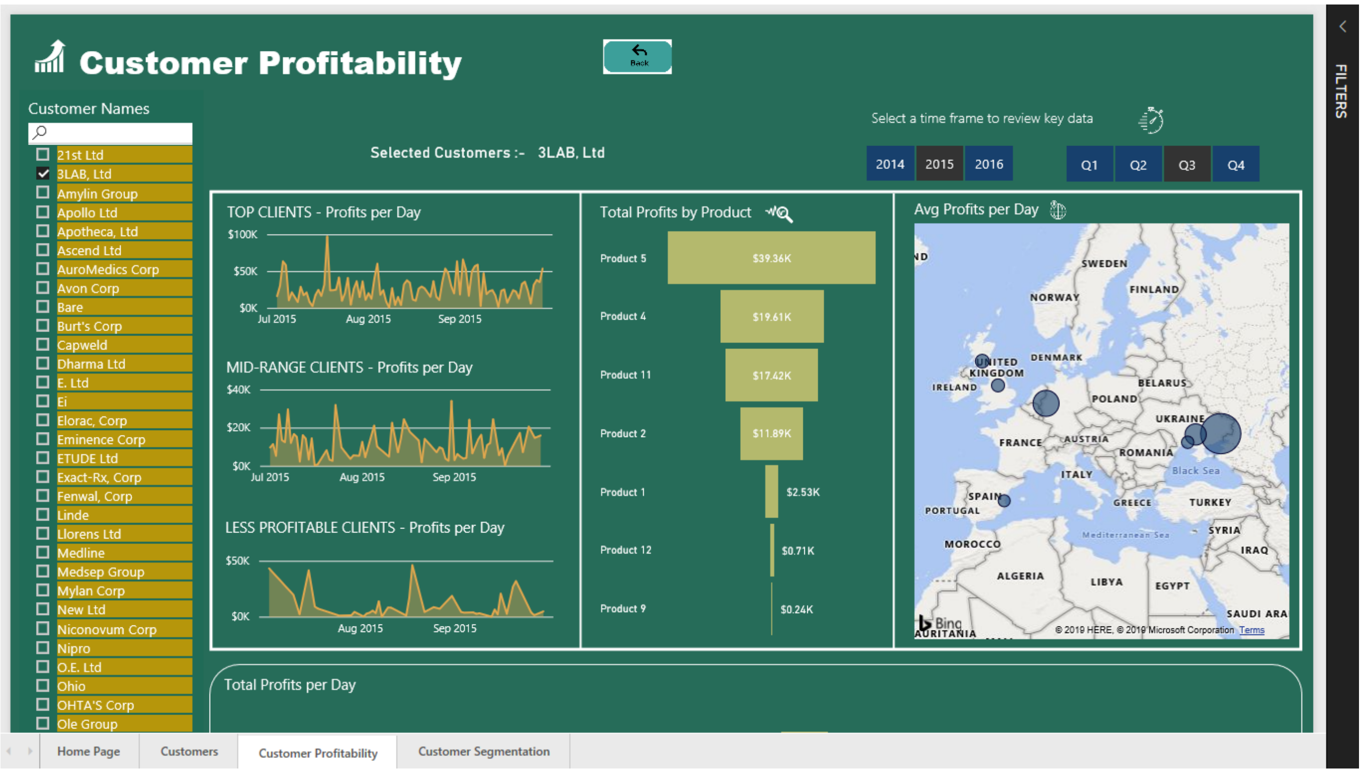
Home page for DashBoard [which has multiple pages with multiple bookmarks]



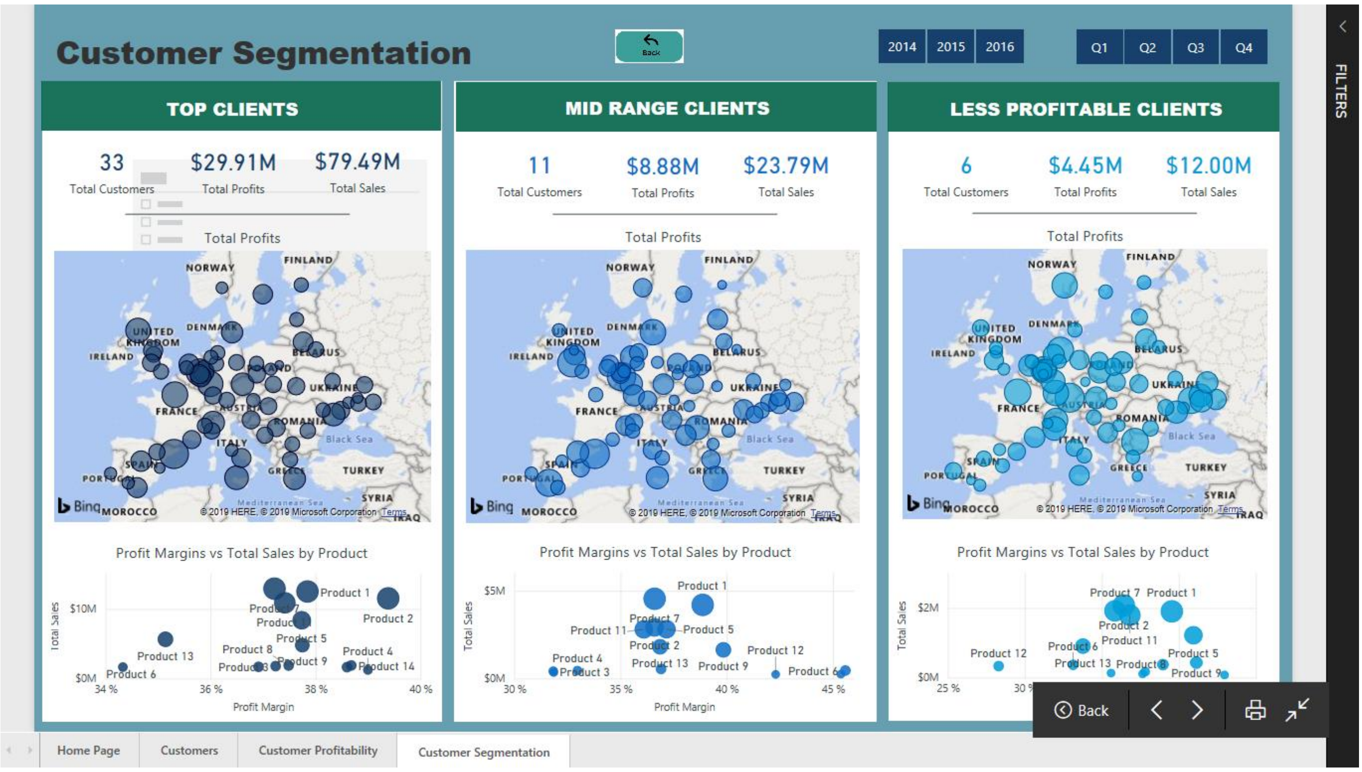
Customer Trend Analysis Book Mark



Customer profitability book mark



Customer Segmentation Bookmark



LIVE STREAMING DATA FAQS:

Can I use filters on push dataset? How about streaming dataset?

Unfortunately, streaming datasets do not support filtering. For push datasets, you can create a report, filter the report, and then pin the filtered visuals to a dashboard. However, there is no way to change the filter on the visual once it's on the dashboard.

Separately, you can pin the live report tile to the dashboard, in which case you can change the filters. However, live report tiles will not update in real-time as data is pushed in – you'll have to manually update the visual by using the *refresh dashboard tiles* option in the **More** menu.

When applying filters to push datasets with *DateTime* fields with millisecond precision, *equivalence* operators are not supported. However, operators such as greater than (>) or less than (<) do operate properly.

How do I see the latest value on a push dataset? How about streaming dataset?

Streaming datasets are designed for displaying the latest data. You can use the **Card** streaming visual to easily see latest numeric values. Unfortunately, the card does not support data of type *DateTime* or *Text*. For push datasets, assuming you have a timestamp in the schema, you can try creating a report visual with the last N filter.

Can I connect to push or streaming datasets in Power BI Desktop?

Unfortunately, this is not available at this time.

Given the previous question, how can I do any modeling on real-time datasets?

Modeling is not possible on a streaming dataset, since the data is not stored permanently. For a push dataset, you can use the update dataset/table REST APIs to add measures and relationships.

How can I clear all the values on a push dataset? How about streaming dataset?

On a push dataset, you can use the delete rows REST API call. There is currently no way to clear data from a streaming dataset, though the data will clear itself after an hour.

I set up an Azure Stream Analytics output to Power BI, but I don't see it appearing in Power BI – what's wrong?

Here's a checklist you can use to troubleshoot the issue:

1. Restart the Azure Stream Analytics job (jobs created before the streaming GA release will require a restart)
2. Try reauthorizing your Power BI connection in Azure Stream Analytics

3. Which workspace did you specify in the Azure Stream Analytics output? In the Power BI service, are you checking in that (same) workspace?
4. Does the Azure Stream Analytics query explicitly output to the Power BI output? (using the INTO keyword)
5. Does the Azure Stream Analytics job have data flowing through it? The dataset will only get created when there is data being transmitted.
6. Can you look into the Azure Stream Analytics logs to see if there are any warnings or errors?

WORKING ON SUBSCRIPTIONS

What is subscription?
Sending regularly **emails or other alerts** regarding reports and dashboards is called as subscription.

What is the advantage of subscription?
We can **stay up-to-date on** our most important dashboards and reports.

Subscription process

a)Subscribe to report pages, and dashboards that matter most to you, and **Power BI will email a snapshot to your inbox.**

b)You tell Power BI how often you want to receive the emails: daily, weekly, or when the data refresh. You **can even set a specific time** for Power BI to send the emails or have it run now.

c) You receive an email with a snapshot of the report page or dashboard, with a link to open the report or dashboard. On mobile devices with Power BI apps installed, selecting this link launches the Power BI app, instead of opening the report or dashboard in the Power BI web site.

How many subscriptions a report or dashboard will support?

You can set up to **24 different subscriptions** per report or dashboard.

What are the locations you can create subscriptions?

Power BI Service only

What kind of accounts required to create subscription?

Creating a subscription can be done by:

- Users with a **Power BI Pro** license
- Users viewing content in a **Premium workspace** or app may also subscribe to content located there, even without a Power BI Pro license.

Do we need Edit Permission to the content to create subscription?

You don't need edit permissions to the content (dashboard or report) to create a subscription for yourself, but you must have edit permissions to create one for someone else.

What are the situations we can't create a Subscription?

a)RLS (Row level security) available b) Live Connection to Analysis Services

What are the content suitable for subscription?

a) **Dashboard b) Report page c) Paginated Report**

Note: Paginated report subscription creation is different from dashboard and report.

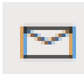
The email and snapshot will use the language set in Power BI settings. If no language is defined, Power BI uses the language according to the locale setting in your current browser.

To see or set your language preference, select the cog icon > **Settings** > **General** > **Language**.

When you receive the email it includes a link to "go to report or dashboard". On mobile devices with Power BI apps installed, selecting this link launches the app (as opposed to the default action of opening the report or dashboard on the Power BI website).

Subscription Creation Practical:

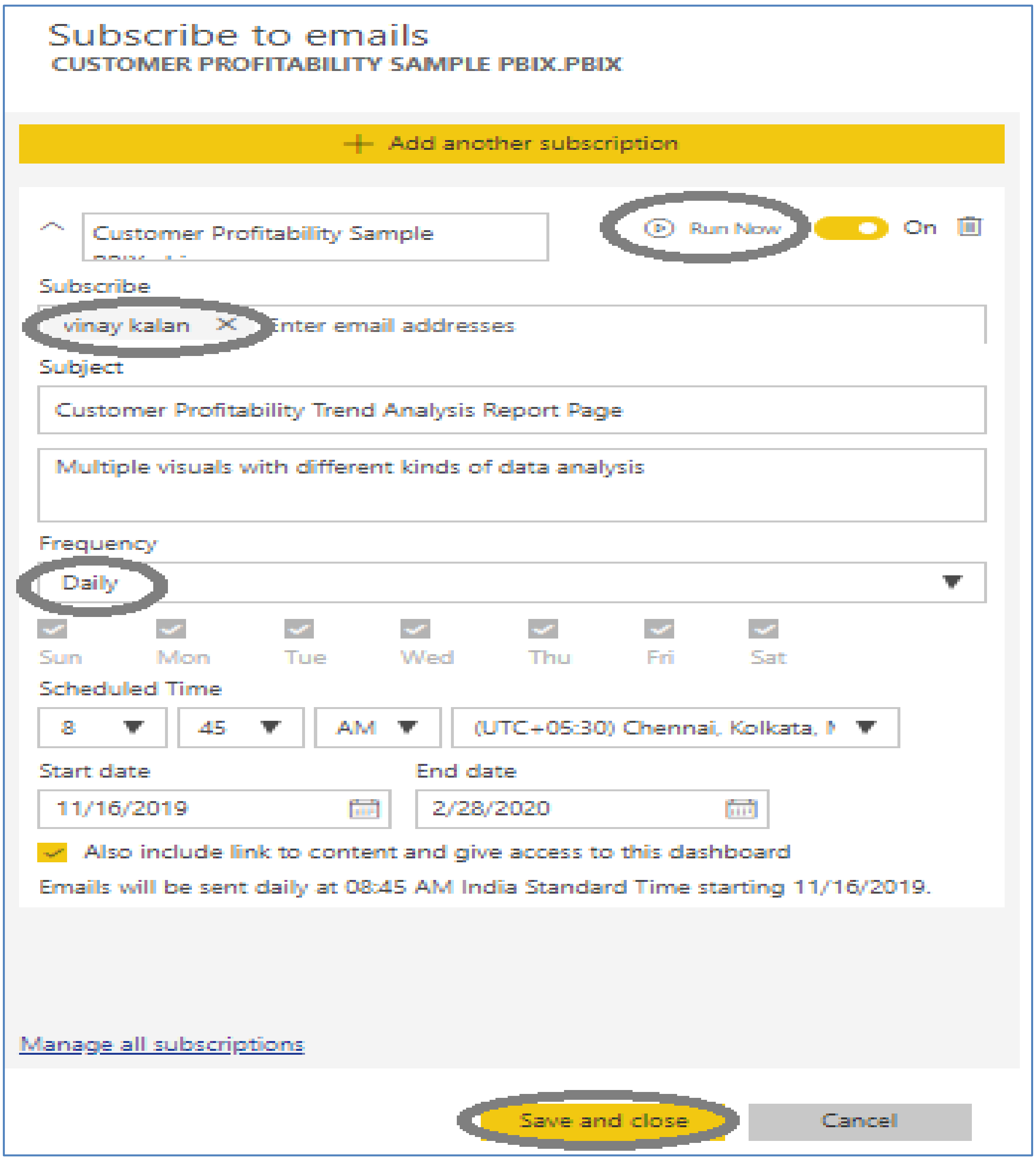
Case Study 1: Regular delivery subscription

1. Open the dashboard or report.
2. From the top menu bar, select **Subscribe** or select the envelope icon 

3. Use the yellow slider to turn the subscription on and off. Setting the slider to **Off** doesn't delete the subscription. To delete the subscription, select the trashcan icon.
4. Your email is already in the **Subscribe** box. You can add other email addresses to the subscription as well, but only in the same domain. If the report or dashboard is hosted in Premium capacity, you can subscribe other individual email addresses and group aliases. If the report or dashboard isn't hosted in Premium capacity, you can subscribe other individuals, but they too must have Power BI Pro licenses.
5. Fill in the email **Subject** and **Message** details.
6. Select a **Frequency** for your subscription: **Daily**, **Hourly**, **Weekly**, **Monthly**, or **After Data Refresh (Daily)**. To receive the subscription email only on certain days, select **Hourly** or **Weekly** and select the days you'd like to receive it. For example, if you'd like to receive the subscription email only on weekdays, select **Weekly** and clear the boxes for **Sat** and **Sun**. If you select **Monthly**, enter the day(s) of the month you wish to receive the subscription mail.
7. If you choose **Daily**, **Hourly**, **Monthly**, or **Weekly**, you can also choose a **Scheduled Time** for the subscription. You have it run on the hour, or at 15, 30, or 45 minutes past. Select morning (AM) or afternoon/evening (PM). You can also specify the time zone. If you choose **Hourly**, select the **Scheduled Time** you want the subscription to start, and it will run every hour after that.

8. By default, the start date for your subscription is the date you create it. You have the option to select an end date. If you don't set an end date, the end date is automatically one year after the start date. You can change it to any date in the future (up to the year 9999) at any time before the subscription ends. When a subscription reaches an end date, it stops until you re-enable it. You'll receive notification(s) before the scheduled end date to ask if you'd like to extend it.

In the screenshot below, notice that when you subscribe to a report, you're actually subscribing to a report *page*. To subscribe to more than one page in a report, select **Add another subscription** and select a different page.



9.Select **Save and close**. Those subscribed receive an email and snapshot of the dashboard or report page for the frequency and time you selected. In all, you may create up to 24 subscriptions per report or dashboard, and can provide unique recipients, times, and frequencies for each subscription.

All subscriptions set to **After Data Refresh** for your dashboard or report will still only send an email after the first scheduled refresh.

Case Study 2: On-Demand or Right Away Subscriptions

a)Select **Run Now** for the subscriptions for the dashboard or report you want to send.

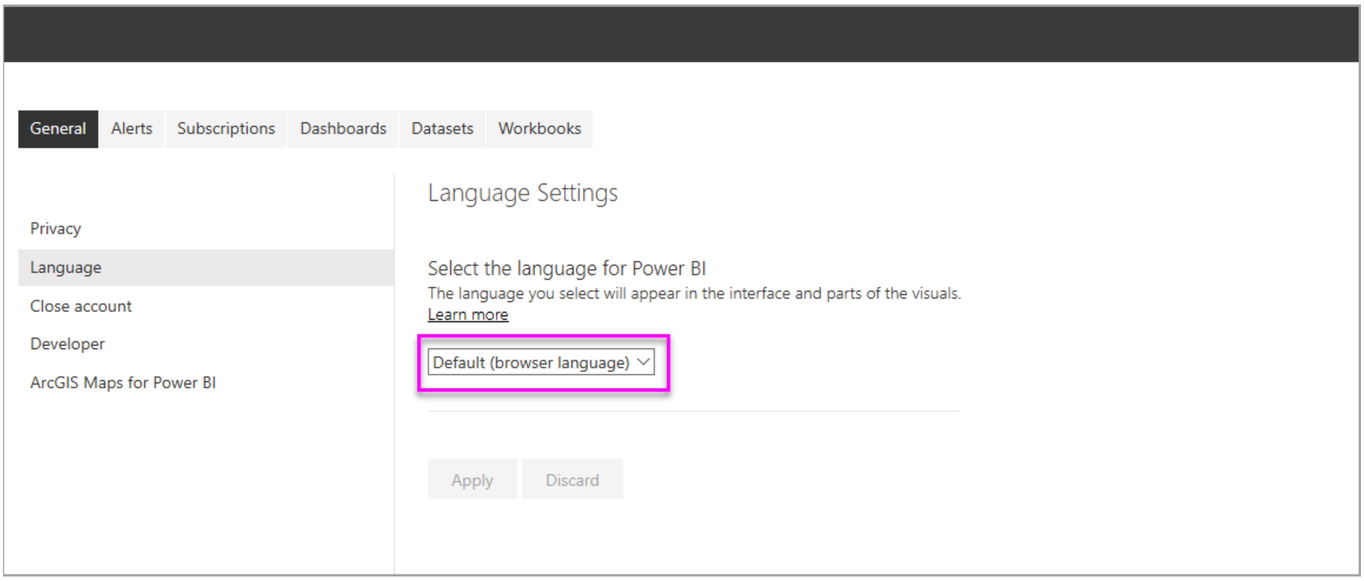
B)You'll see a notification that an e-mail is on its way to everyone for that particular subscription.

c)Taking this action doesn't count against your limit of **24 scheduled subscription runs per** day per report or dashboard.

d) It does NOT trigger a data refresh of the underlying dataset.

Case Study 3: Change the Email Language Setting

The email and snapshot use the language set in Power BI settings. If no language is defined, Power BI uses the language according to the locale setting in your current browser. To see or set your language preference, select the cog icon > **Settings** > **General** > **Language**.

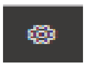


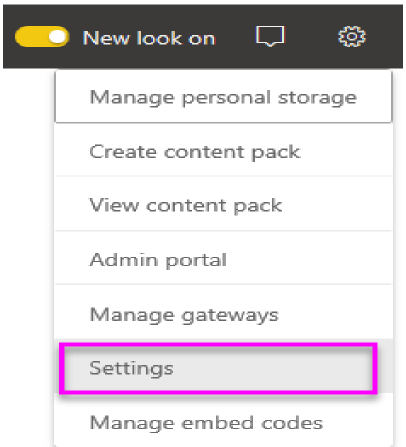
Case Study 4: Manage Subscriptions

Only the person **who created the subscription can manage it**.

There are **two paths** to the screen for managing your subscriptions.

a)The **first** is by selecting **Manage all subscriptions** from the **Subscribe to emails** dialog.

b)The **second** is by selecting the Power BI cog icon  from the top menubar and choosing **Settings**.



Important points to observe

a)The particular subscriptions displayed depend on which workspace is currently active. To see all of your subscriptions at once for all workspaces, be sure that **My Workspace** is active.

b)A subscription ends if the Pro license expires, the owner deletes the dashboard or report, or the user account used to create the subscription is deleted.

Important Points to remember

- Dashboards with **over 25 pinned tiles, or 4 pinned live report pages**, may not render **fully in subscription e-mails sent to users.** Subscriptions to dashboards over these number of tiles aren't blocked. However, they're considered unsupported if you encounter issues. Consider modifying them accordingly to fall within a supported range.

- On rare occasions, e-mail subscriptions may take longer than fifteen minutes to be delivered to their recipients. If this happens, we recommend running your data refresh and e-mail subscription at different times to ensure timely delivery. If the issue persists, contact Power BI support.

- For dashboard email subscriptions, if any tiles have row-level security (RLS) applied, those tiles don't display.

- For report email subscriptions, if the dataset uses RLS, you can create a subscription for yourself. You can't subscribe others to a report with row-level security (RLS) applied unless you are using a paginated report, which will allow you to send the subscription to others using your security context.

- Report page subscriptions are tied to the name of the report page. If you subscribe to a report page and then rename it, you have to re-create your subscription.

- Your organization may configure certain settings in Azure Active Directory that limit the ability to use email subscriptions in Power BI. These limitations include, but aren't limited to, having multi-factor authentication or IP range restrictions when accessing resources.

- Currently, email subscriptions for reports/dashboards using live connection datasets aren't supported when subscribing users other than yourself unless you are using a paginated report, which will allow you to send the subscription to others using your security context.

- Email subscriptions don't support most custom visuals. The one exception is those custom visuals that have been certified.

- Email subscriptions don't support R-powered custom visuals at this time.

- Email subscriptions are sent with the report's default filter and slicer states. Any changes to the defaults that you make after subscribing don't show up in the email. Paginated Reports do support this capability and allow you to set the specific parameter values per subscription.

- For dashboards subscriptions specifically, certain types of tiles aren't yet supported. These include: streaming tiles, video tiles, custom web content tiles.

- If you share a dashboard with a colleague outside of your tenant, you can't also create a subscription for that colleague. So if you are aaron@xyz.com, you can share with anyone@ABC.com, but you can't yet subscribe anyone@ABC.com and they can't subscribe to shared content.

- Power BI automatically pauses refresh on datasets associated with dashboards and reports that haven't been visited in more than two months. However, if you add a subscription to a dashboard or report, it doesn't pause even if it goes unvisited.

- If you aren't receiving the subscription emails, ensure that your User Principal Name (UPN) can receive emails.

- If your dashboard or report is in Premium capacity, you can use group email aliases for subscriptions, instead of subscribing colleagues one email address at a time. The aliases are based on the current active directory.

Case Study 5: Subscribe yourself and others paginated reports in Power BI Service

You can now set up email subscriptions for yourself and others for paginated reports in the Power BI service. In general, the process is the same as subscribing to reports and dashboards in the Power BI service.

In setting up subscriptions, you choose how often you want to receive the emails: daily, weekly, monthly, or hourly. You can also choose the time(s) you'd like the subscription to run. In all, you can set up to 24 different subscriptions for every report.

Paginated reports subscriptions important points and differences

- Unlike subscriptions for dashboards or Power BI reports, your subscription contains an attachment of the entire report output.

  The following attachment types are supported:

  PDF, PowerPoint presentation (PPTX), Excel Workbook (XLSX), Word Document (DOCX), CSV file, and XML.

- You may include a preview image of the report in the email body. This is optional, and may differ slightly than the first page of your attached report document, depending on the attachment format selected.
- The maximum report attachment size is 25 MB.
- You can subscribe other users for paginated reports that connect to any currently supported data sources, including Azure Analysis Services or Power BI datasets. Keep in mind the report attachment reflects the data based on your permissions, just as SQL Server Reporting Services does today.
- Email subscriptions can be sent with either the currently selected or default parameters for your report. You may set different parameter values for each subscription you create for your report.
- If your report author has set expression-based parameters (for example, the default is always today's date), the subscription uses that as the default value. You can change other parameter values and choose to use current values, but unless you explicitly change that value as well, the subscription uses the expression-based parameter.
- There is no **After Data Refresh** option for frequency with paginated reports. You always get the latest values from the underlying data source.

WORKING ON ALERTS IN POWER BI SERVICE

Set alerts to notify you when data in your dashboards changes beyond limits you set.

a)You can set alerts on tiles if you have a **Power BI Pro license**. You can also set alerts if **someone shares a dashboard that's in a Premium capacity**.

b)Alerts can only be **set on tiles pinned from report visuals, and only on gauges, KPIs, and cards.**

c)Alerts can be set on visuals created from streaming datasets that you pin from a report to a dashboard.

d)Alerts can't be set on streaming tiles created directly on the dashboard using **Add tile** > **Custom streaming data**.

e)Only you can see the alerts you set, even if you share your dashboard. Even the dashboard owner can't see alerts you set on your view of their dashboard.

f)Data alerts are fully synchronized across platforms; set and view data alerts in the Power BI mobile apps and in the Power BI service. They aren't available for Power BI Desktop. You can even automate and integrate alerts with Microsoft Flow.

Warning

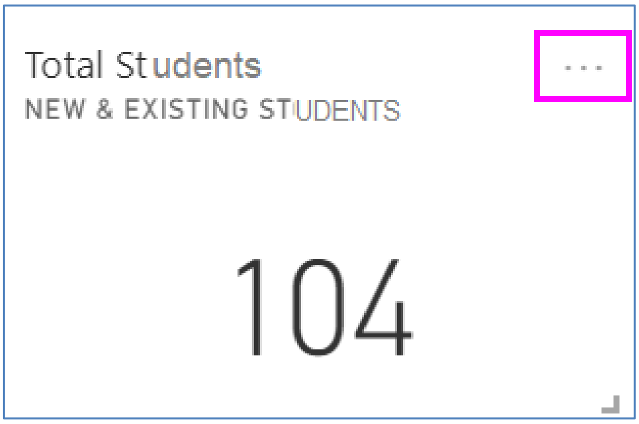
Data-driven alert notifications provide information about your data. If you view your Power BI data on a mobile device and that device is lost or stolen, we recommend using the Power BI service to turn off all data-driven alert rules.

Set data alerts in the Power BI service

Add some alerts to tiles on the dashboard. Then follow the step-by-step instructions below the video to try it out yourself.

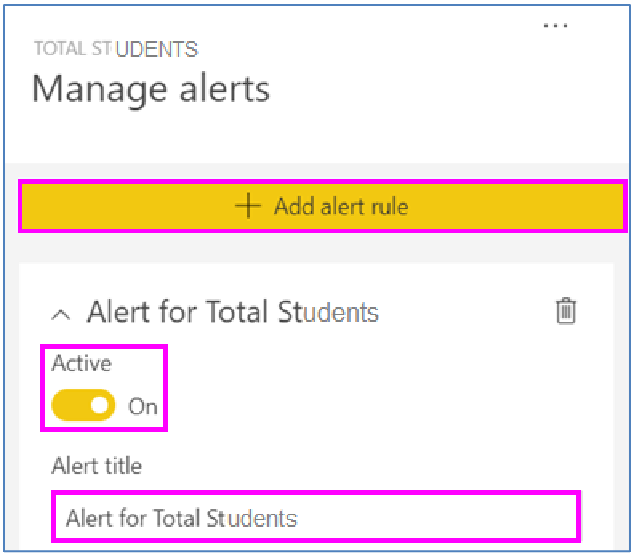
This example uses a card tile [which has count of studentid measure] from Vinaytech_Business_Details report on the Vinaytech_Business_Details dashboard

Step 1: Start on a dashboard. From the Total Students **tile, select the ellipses.**



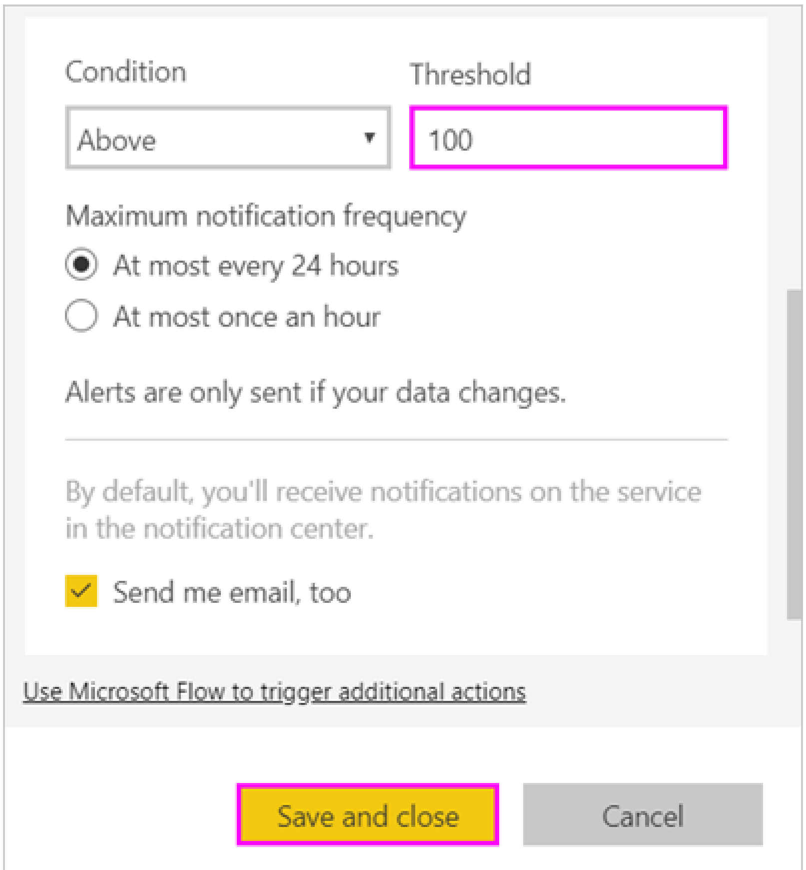
Step 2: Select the bell icon to add one or more alerts for Total Students**.**

To start, select **+ Add alert rule**, ensure the **Active** slider is set to **On**, and give your alert a title. Titles help you easily recognize your alerts.



Step 3: Specify condition, threshold, frequency, and click save

Scroll down and enter the alert details. In this example, you'll create an alert that notifies you once a day if the number of total students goes above 100.



Alerts appear in your **Notification center**. Power BI also sends you an email about the alert, if you select the check box.

Select **Save and close**.

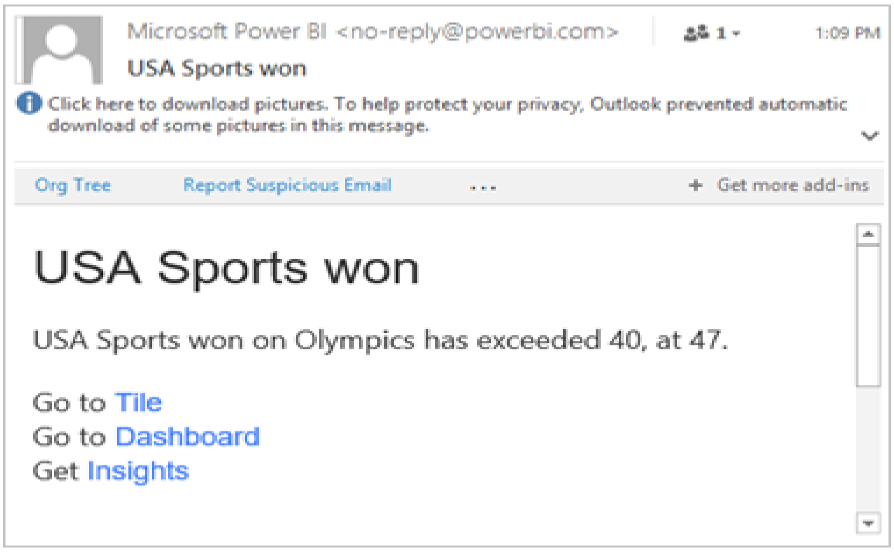
Step 4: Receiving alerts

Go to the table [Factpayments and add rows]

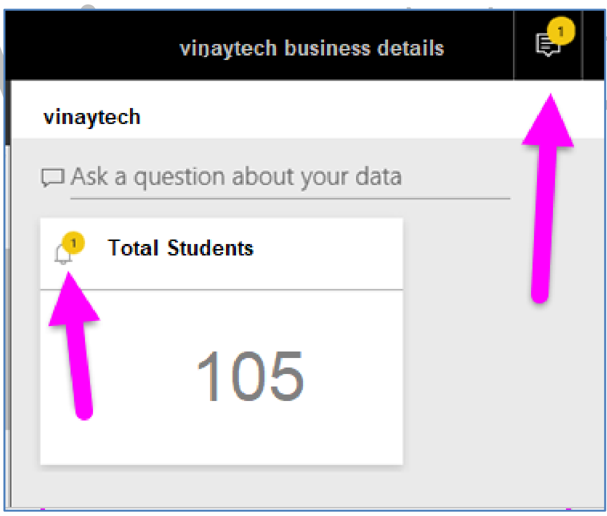
When the tracked data reaches one of the thresholds you've set, several things happen. First, Power BI checks to see if it's been more than an hour or more than 24 hours (depending on the option you selected) since the last alert. If the data is past the threshold, you'll get an alert.

Next, Power BI sends an alert to your **Notification center** and, optionally, an email. Each alert contains a direct link to your data. Select the link to see the relevant tile where you can explore, share, and learn more.

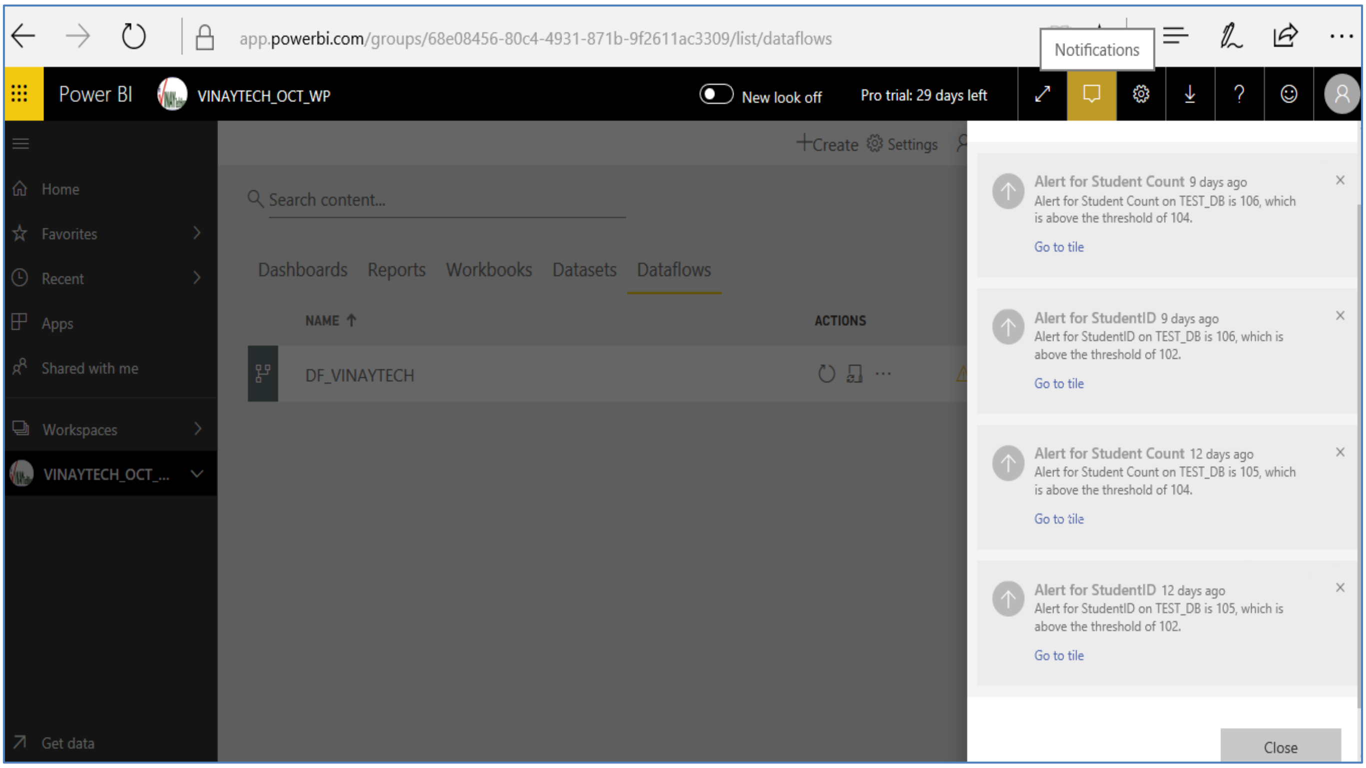
- If you've set the alert to send you an email, you'll find something like this in your Inbox.



- Power BI adds a message to your **Notification center** and adds a new alert icon to the applicable tile.



- Your **Notification center** displays the alert details.



Note

Alerts only work on refreshed data. When data refreshes, Power BI looks to see if an alert is set for that data. If the data has reached an alert threshold, Power BI triggers an alert.

Step 5: Managing alerts

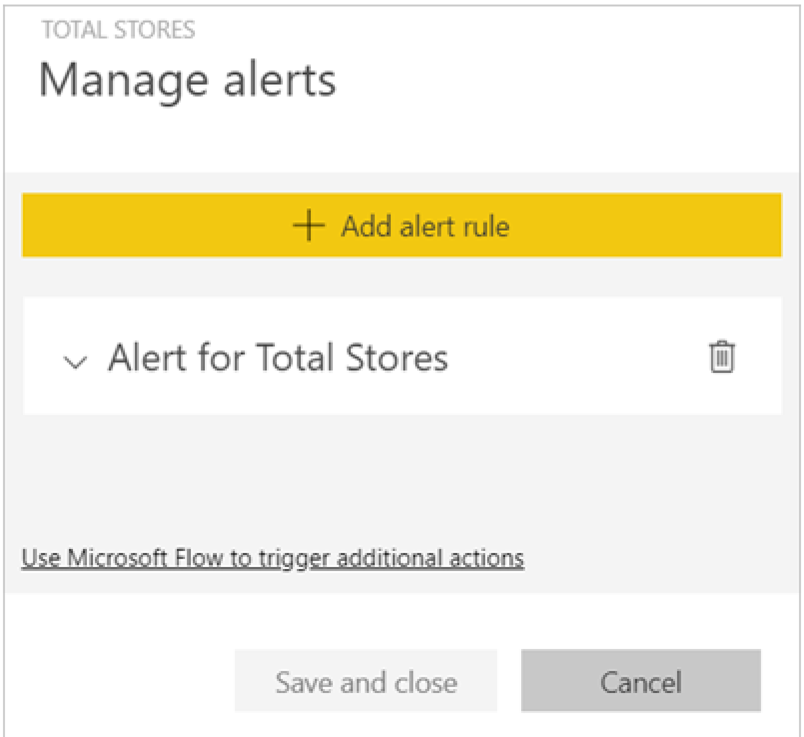
There are many ways to manage your alerts:

- From the dashboard tile.
- From the Power BI Settings menu.
- On a tile in the Power BI mobile apps.

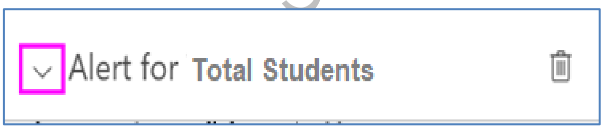
From the dashboard tile

1. If you need to change or remove an alert for a tile, reopen the **Manage alerts** window by selecting the bell icon .

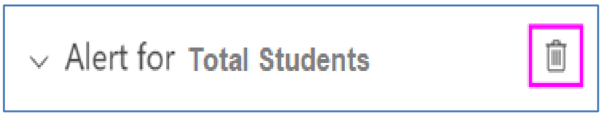
Power BI displays the alert(s) that you've set for that tile.



2. To modify an alert, select the arrow to the left of the alert name.



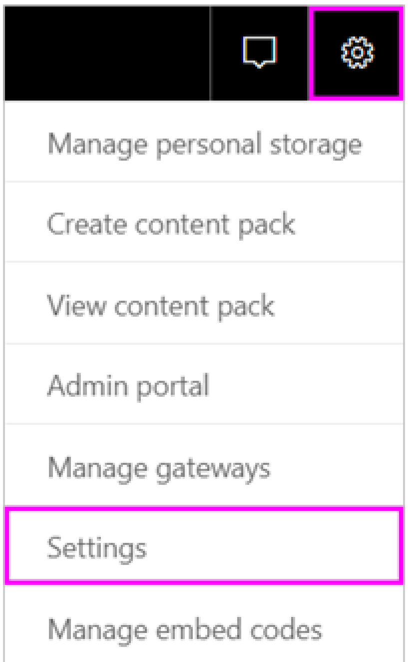
3. To delete an alert, select the trashcan to the right of the alert name.



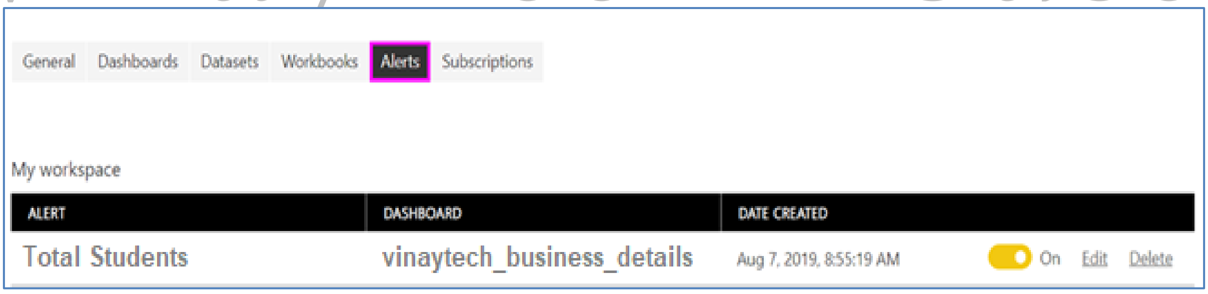
1. Select the gear icon from the Power BI menu bar and select **Settings**.

Step 6: Monitoring alerts in Power BI

From Power BI settings



2. Under **Settings** select **Alerts**.



3. From here you can turn alerts on and off, open the **Manage alerts** window to make changes, or delete the alert.

Limitations

Alerts aren't supported for card tiles with date/time measures.

- Alerts only work with numeric data types.
- Alerts only work on refreshed data. They don't work on static data.
- Alerts only work on streaming datasets if you build a KPI, card, or gauge report visual and then pin that visual to the dashboard.

Create and publish a Power BI organizational content pack

How many ways we share our work or collaborate our work with teams?

Two ways

a)Modern way : APPSPACE

b) Legacy way: Content Pack

What is Content Pack?

Content pack is the way to collaborate items and work together with collaborators and stake holders.

Are we using content pack in latest versions?

It is limited to **Myworkspace,** so create **new workspaces and appspace** to implement content pack kind of functionality in latest versions.

How many types of content packs available?

Two types

a) **Organizational content pack:** Created by us
b) **Service content pack:** By others as a service [needs installation]

Differences between ContentPack and AppSpace?

Content Pack	Appspace
Can't available in mobile apps	Available [Mobile and Tab]
Only **collaborators**	**Admin, members, contributor, and users**
Pro account compulsory	**Premium or Pro**

What kind of account required to create content pack or work with content pack?

Creating content packs is different from sharing dashboards or collaborating on them in a group.

Creating an **organizational content pack** requires a **Power BI Pro account** for you and your colleagues.

Note

You can't create or install organizational content packs in the new workspace experiences preview.

Can you define a situation where content pack is helpful? :

Imagine you're the Release Manager at VINAYTECH and you're getting ready for a new product launch. You've created a dashboard with reports that you'd like to share with the other employees managing the launch.

You want a way to package up the dashboard and reports as a solution for your colleagues to use.

In the Power BI service, go to **Get Data > Samples > Opportunity Analysis Sample** > **Connect** to get your own copy.

1. In the left navigation pane, select the **Opportunity Analysis Sample** dashboard.
2. From the top navigation bar, select the cog icon > **Create content pack**.
   In the **Create Content Pack** window, enter the following information.

   Keep in mind that your organization's content pack library could end up with hundreds of content packs published for the organization or for groups. Take time to give your content pack a meaningful name, to add a good description, and to select the right audience. Use words that will make your content pack easy to find via search.

   a. Select **Specific Groups** and enter the full email addresses for individuals, Office 365 groups, distribution groups, or security groups. For example:

      salesmgrs@vinaytechhouse.com; sales@vinaytechhouse.com

      For this tutorial, try using your own or your group's email address.

   b. Name the content pack **Sales Opportunities**.

      Consider including the name of the dashboard in the name of the content pack. That way, your colleagues will find the dashboard more easily after they connect to your content pack.

   c. Recommended: Add a **description**. This helps coworkers more easily find the content packs that they need. Besides a description, add keywords your coworkers might use to search for this content pack. Include contact information in case your coworkers have a question or need help.

d. **Upload an image or logo** to make it easier for group members to find the content pack — it's faster **to scan for an image than it is to find text**. We used an image of the Opportunity Count 100% column chart tile in the screen shot below.

e. Select the **Opportunity Analysis Sample** dashboard to add it to the content pack. Power BI automatically adds the associated report and dataset. You can add others, if you want.

Only the dashboards, reports, datasets, and workbooks that you can edit are listed. Thus, any that were shared with you aren't in the list.

If you have Excel workbooks, you see them under Reports, with an Excel icon. You can add them to the content pack, too.

Note

If members of the group can't view the Excel workbook, you may need to **share the workbook with them in OneDrive for Business**.

3. Select **Publish** to add the content pack to the group's organizational content pack library.

You see a success message when it publishes successfully.

4. When members of your group go to **Get Data > My Organization**, they tap in the search box and type "Sales Opportunities".

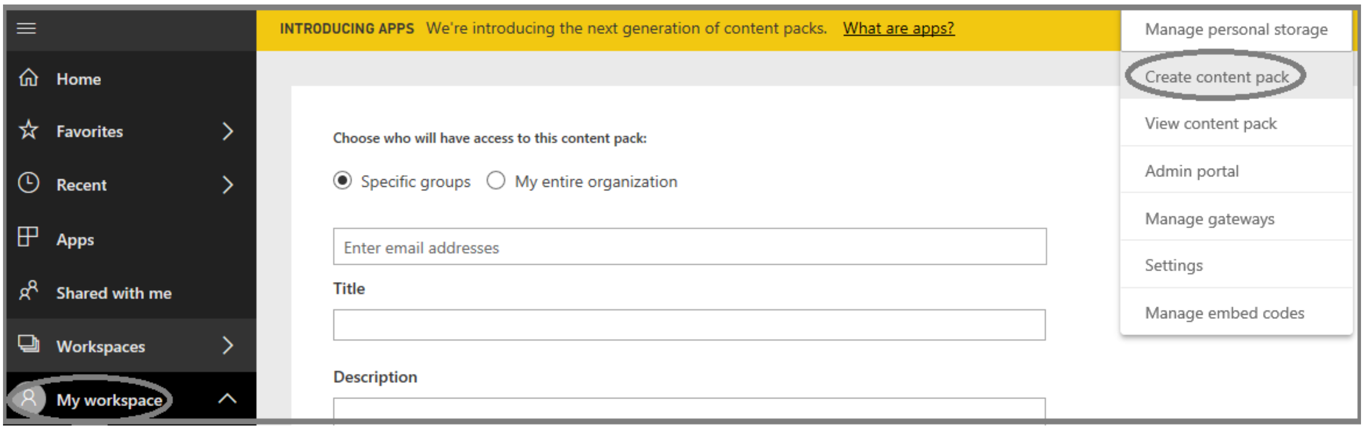
They see your content pack.

The URL displayed in your browser is an unique address for this content pack. Want to tell your coworkers about this new content pack? Paste the URL into an email.

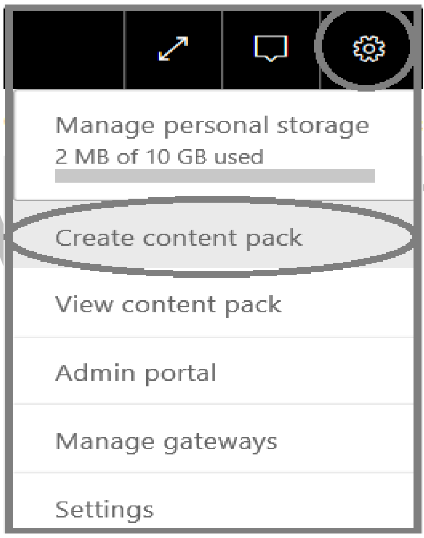
5. They select **Connect**, and now they can view and work with your content pack.

Simple steps [classroom practice]

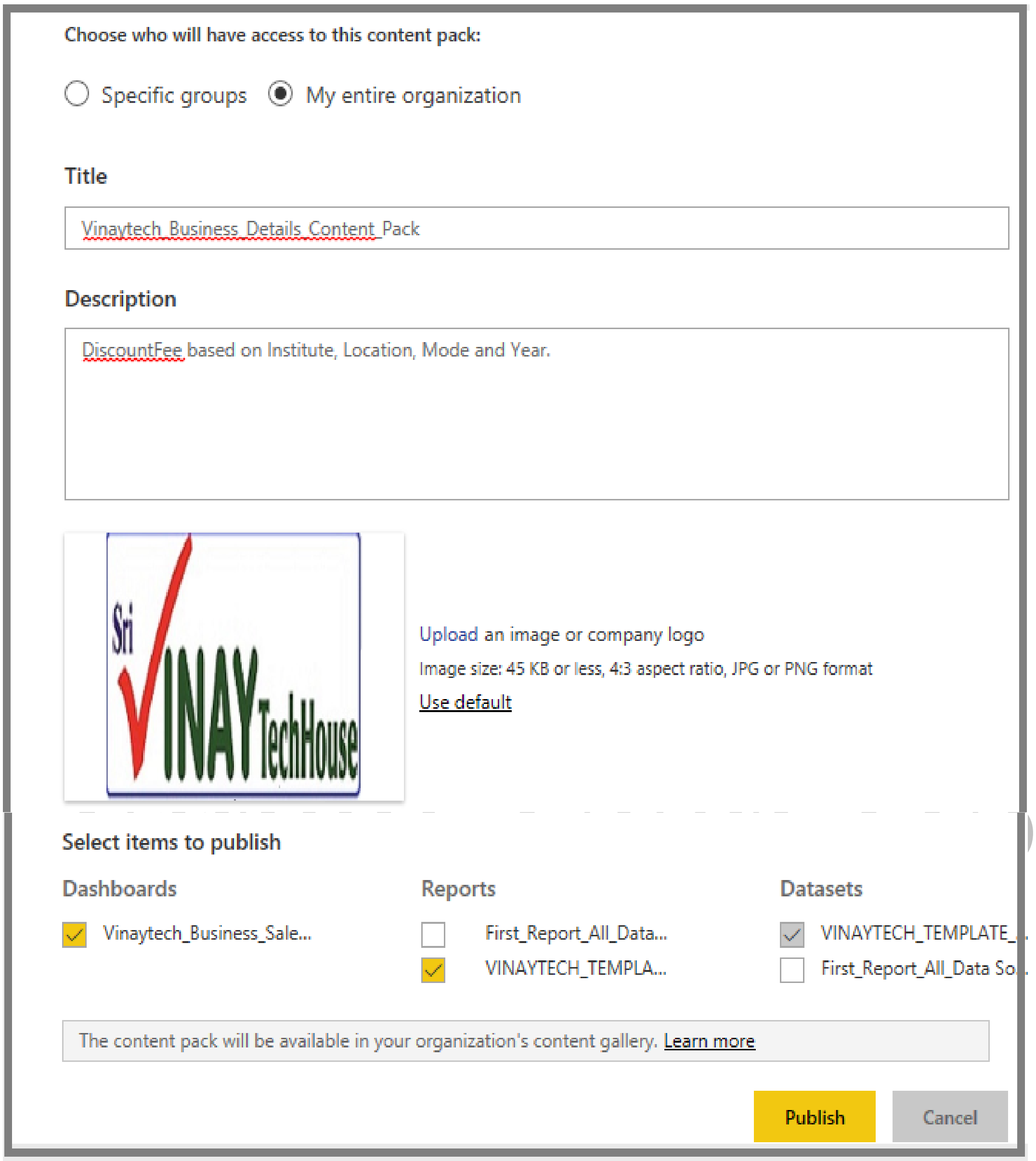
Go to Myworkspace [do not use personal workspace]→go to settings on top



Step1: Go to the below navigation and do the below



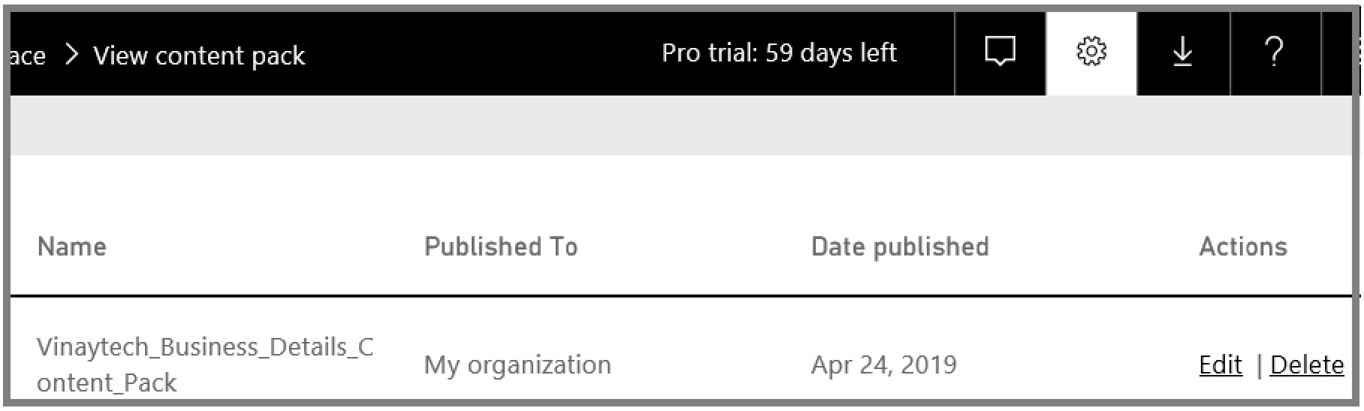
Step2: Specify like below



Note: Content selection and include or exclude option at apps are same.

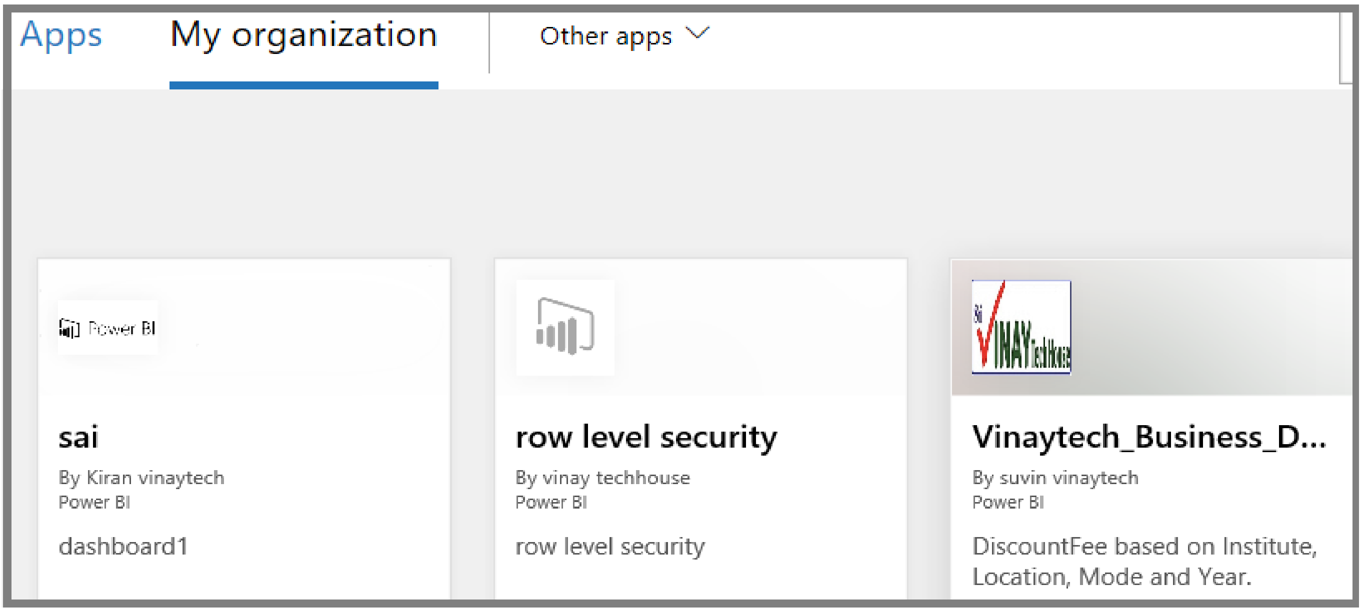
Step 3:

Settings →View Content Pack→



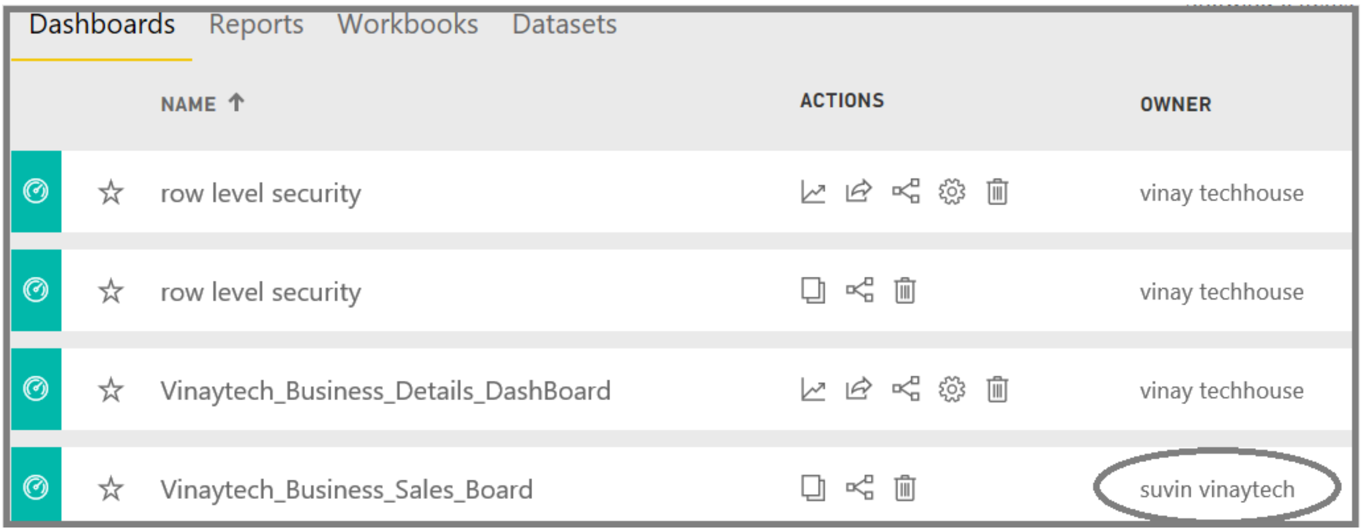
Connect from another account in the Organization

Get Data→ Organizational Content Pack→



Click Get it Now

Verify under Dashboards and Reports of My Workspace



Similarly go to Reports→ Click Report→It won't show you data.

Now, you should go to the actual dataset [suvin@vinaytechhouse.com.],

security→ Row Level Security→Add user→Specify Vinay@vinaytechhouse.com-->

Go to Vinay@vinaytechhouse.com...account and browse. It shows visuals with no data.

go to report at Power BI Desktop→ Modify with Row Level Security→ Publish

Content Pack→Publish→ Verify again

Additional Scenario: Working on Service Content Packs

These require Installation of the respective service. They are from outside of the organization.

1. Go to Myworkspace
2. Click Get data
3. Go down, choose Service Content Packs
4. Select the one you like, click Install
5. Go to "shared with you" in the left hand side and see the retrieved service pack.