Reports & Dashboards

Overview

Defining Reports and Dashboards

Unique Features of Reports

Unique Features of Dashboards

Defining Reports and Dashboards

Power BI: Introduction to Business Analytics

What is a "report"?

How are reports used in Power BI?

What is a "dashboard"?

How are dashboards used in Power BI?

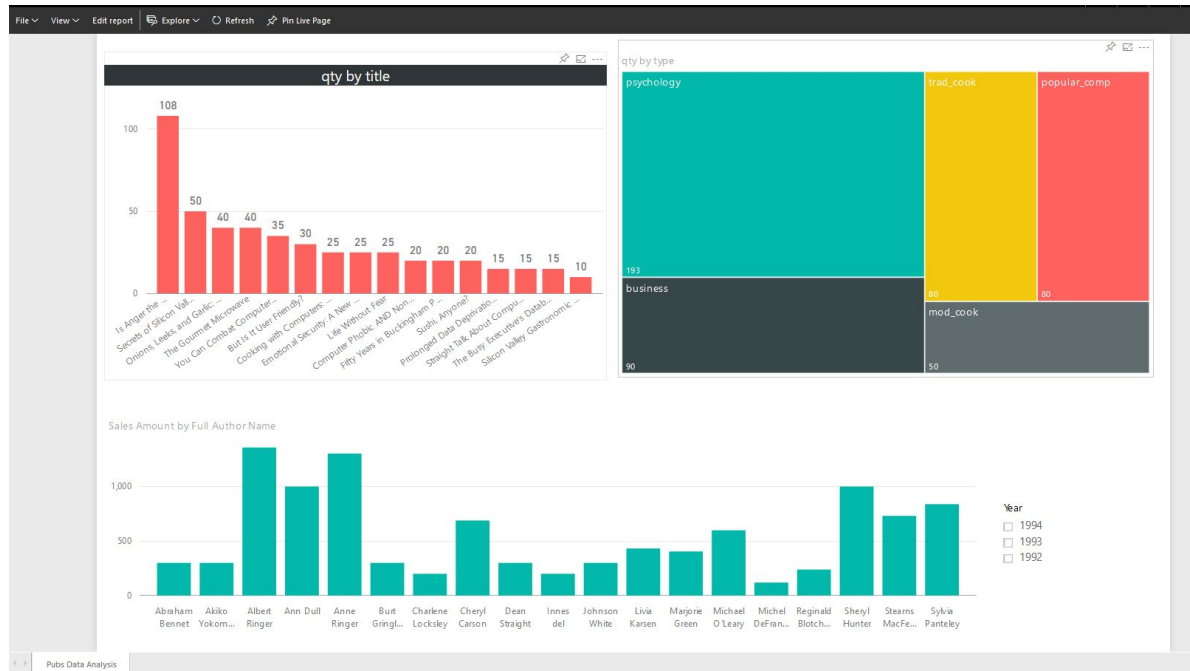Course Author: Joshua Michalik

What is a "report"?

Any informational piece of work in any format. Tables, charts, text, numbers, or anything.

Power BI Reports

A combination of visual elements on a page which can be inter-related. Can be filtered, sliced, and diced.
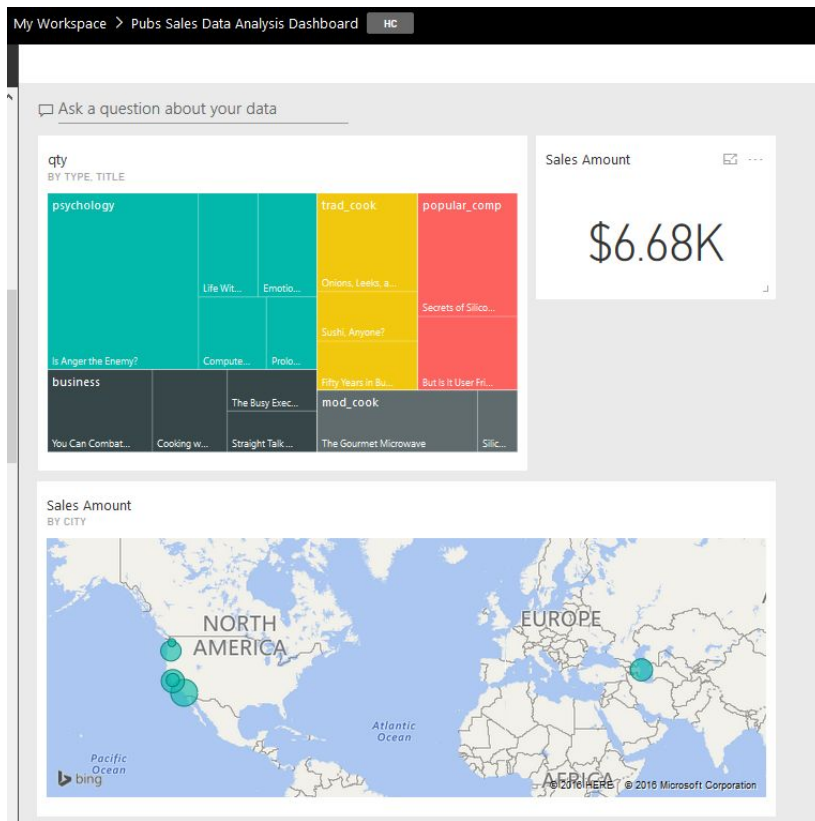
What is a "dashboard"?

"A dashboard is a visual display of the most important information needed to achieve one or more objectives."

Power BI Dashboards

High-level view of key KPIs of 1+ reports. Also includes a point of navigation for reports.

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Unique Features of Reports

Slicers

Multi-Pages

Interactivity

Drill Down/Up

Publish to Web

Explore Data

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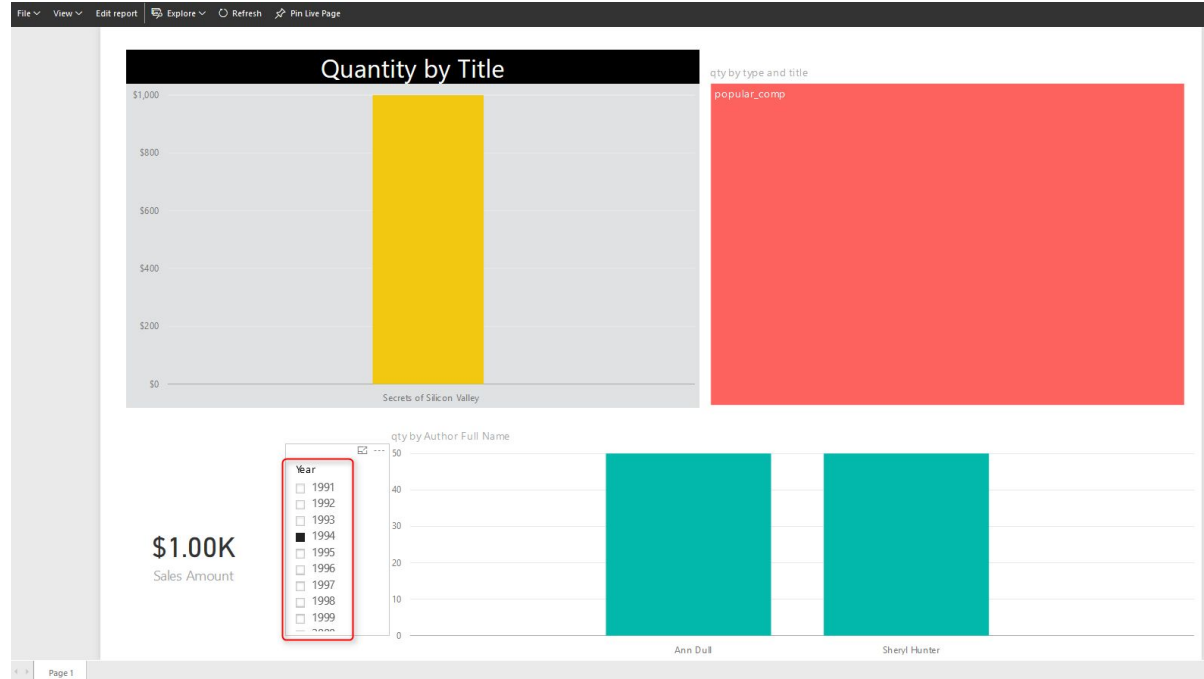
Slicers
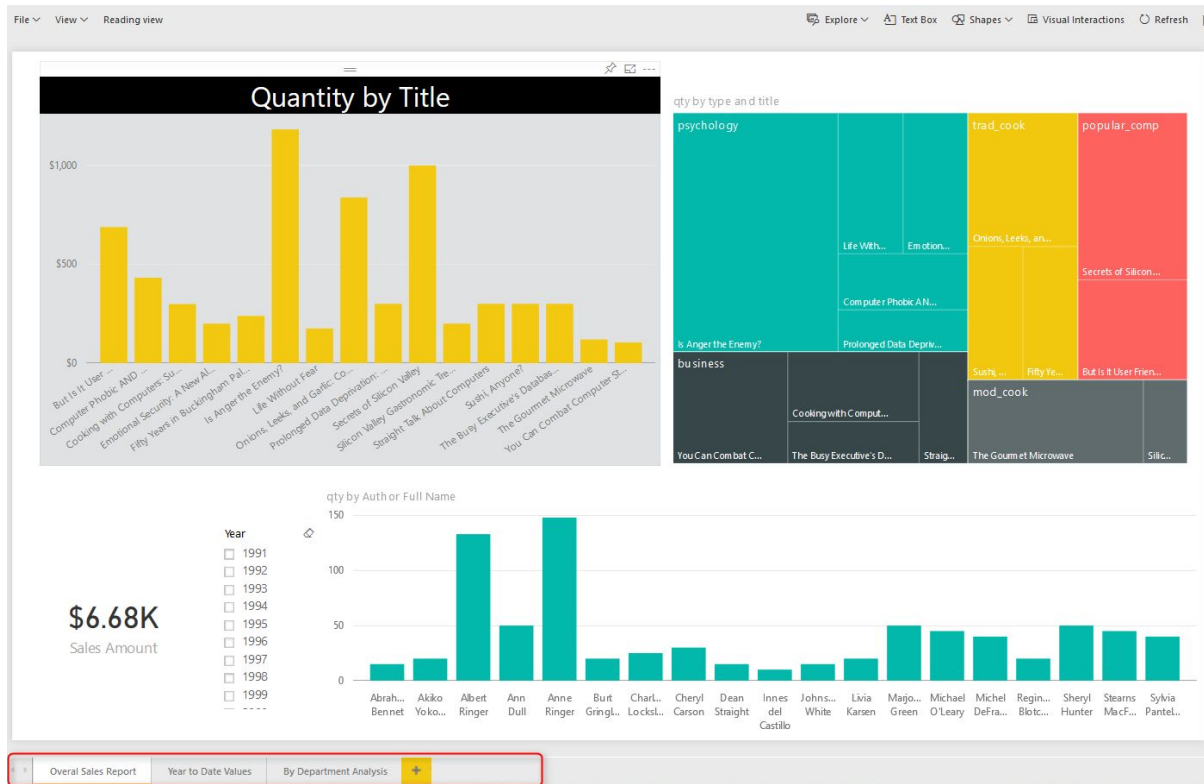
You can simply slice and dice the data.

Dashboards see a static view, except when the "Pin Live Page" option is used.

Multi-Pages

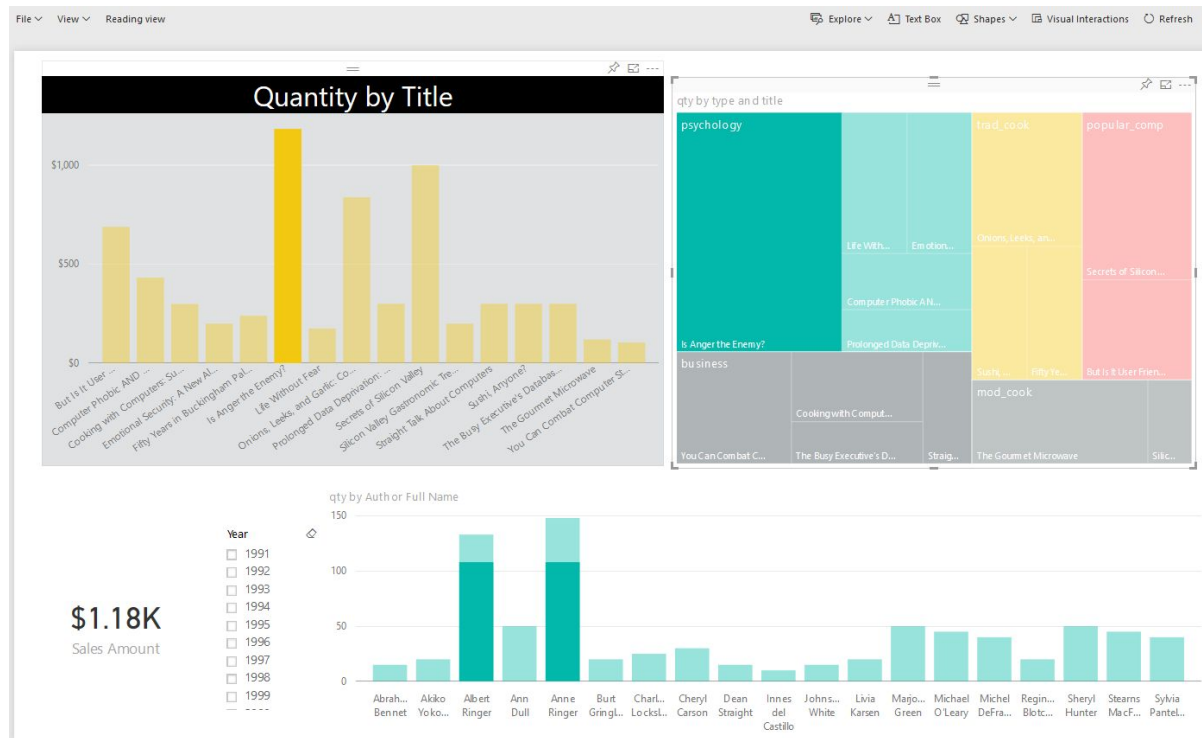Like Excel, you can have multiple pages. Navigate between pages at the bottom.

Dashboards are only one page.

Interactivity

Select a particular element in a chart and it will highlight other elements.

Clicking in dashboards results in navigation.

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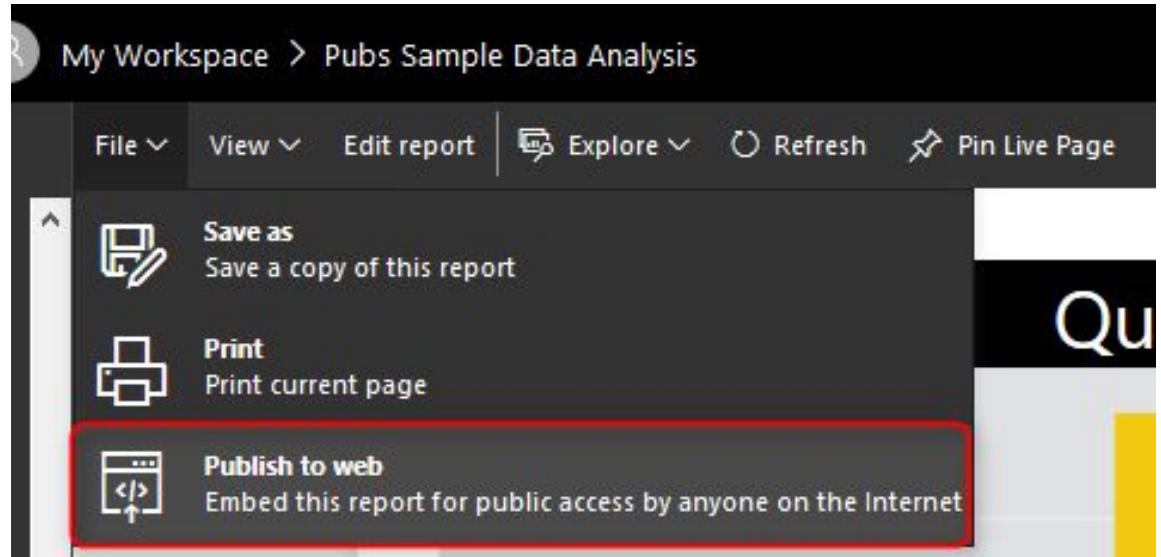*Course Author: Joshua Michalik*

Drill Down/Up

Hierarchies exist in certain visual elements, such as the Calendar. This allows you to zoom in to see more details about data or zoom out to see a wider scope.

Publish to the Web

Publishing Reports to the Web makes them available as web pages or embedded on a site.

Explore Data

See the records of an individual visual element or see particular values in a chart by using the options Explore Data and See Records.

title	Sales Amount ▼	stor_id	ord_num	payterms	title_id
Is Anger the Enemy?	$821.25	7066	QA744...	ON invoice	PS20...
Is Anger the Enemy?	$219.00	7131	N914008	Net 30	PS20...
Is Anger the Enemy?	$109.50	7067	D4482	Net 60	PS20...
Is Anger the Enemy?	$32.85	6380	722a	Net 60	PS20...

< Back to Report   **QUANTITY BY TITLE**

Unique Features of Dashboards

Automatic Refresh

Sharing

Customization by User

Featured Dashboard

Power Q&A

Real-time Monitoring

Alerts

Related Insights

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Automatic Refresh

Dashboards show info based on the latest data

Elements are updated live

Dashboards include "views" into reports

DirectQuery data sets refresh every 15 minutes.

Reports must be refreshed manually

Allows for analyzing data points without interference

Reports can be scheduled for refresh

Sharing

Easily share links to the
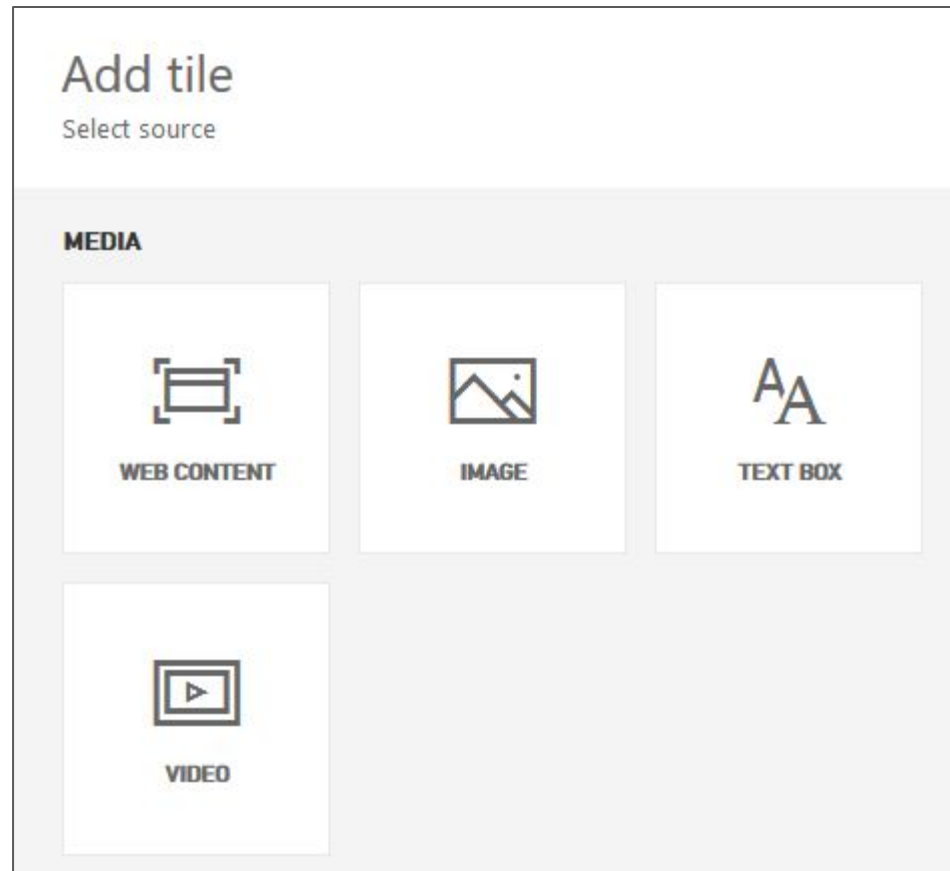dashboard via email
address

Share dashboard

Share   Access

Grant access to

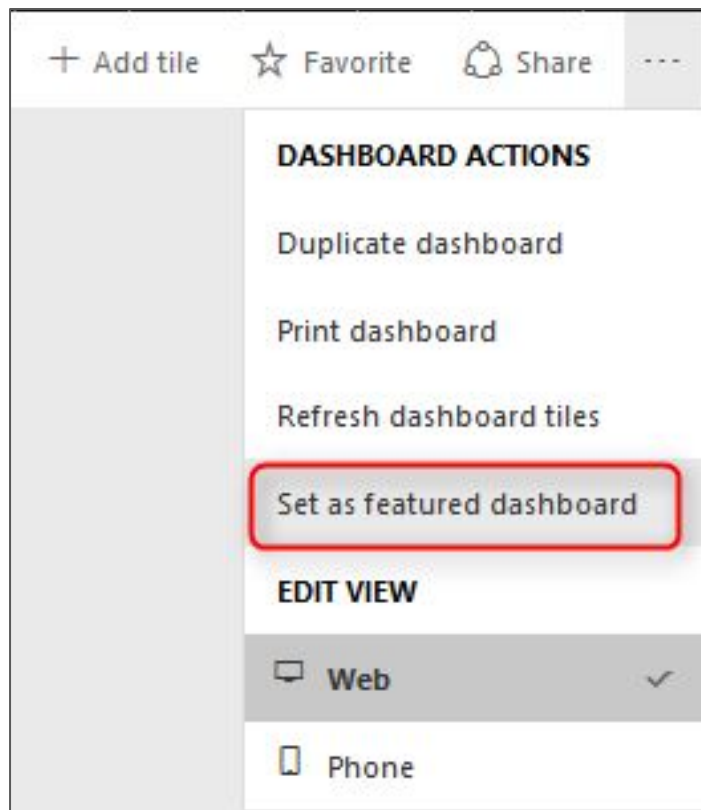Enter email addresses

Include an optional message...

Customization by User

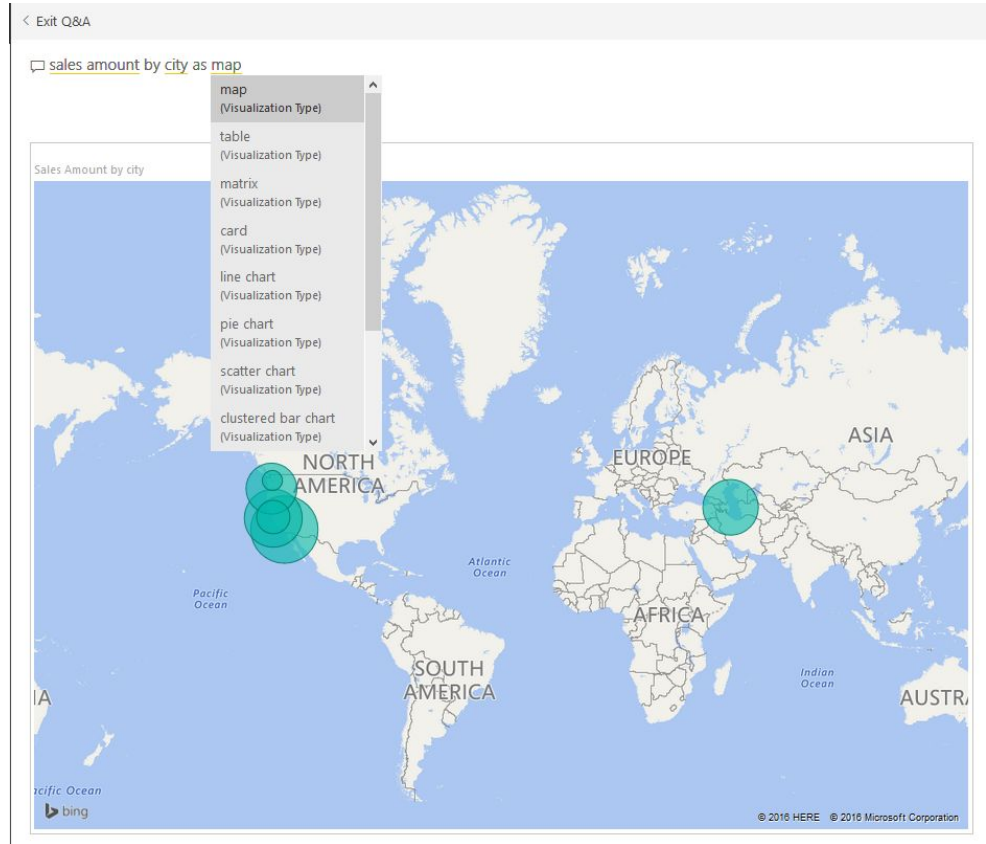Adjust size and order of the tiles to the user

Featured Dashboard
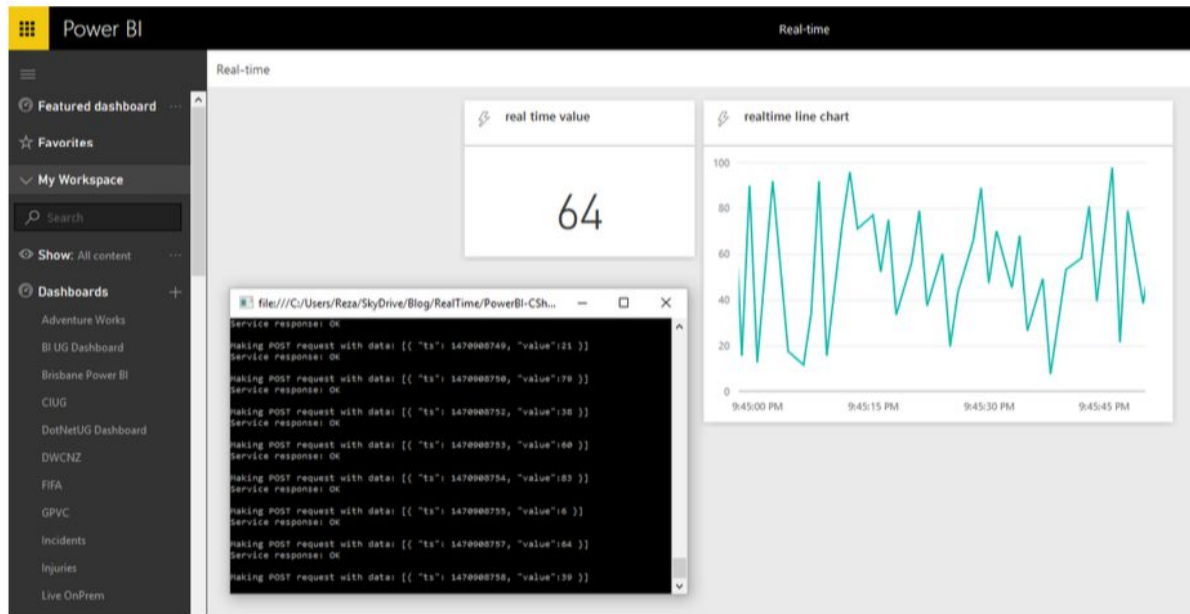
A Dashboard can be set as the featured dashboard

Power Q&A

Ask Natural Language questions to receive answers in the form of visuals

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Real-time Monitoring

As data is updated, real-time monitoring allows the user to receive notifications and alerts

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Alerts

Each tile can be set up to create an alert when certain data points are hit

Course Author: Joshua Michalik

Related Insights

Search through patterns in the datasets and automatically visualize them.

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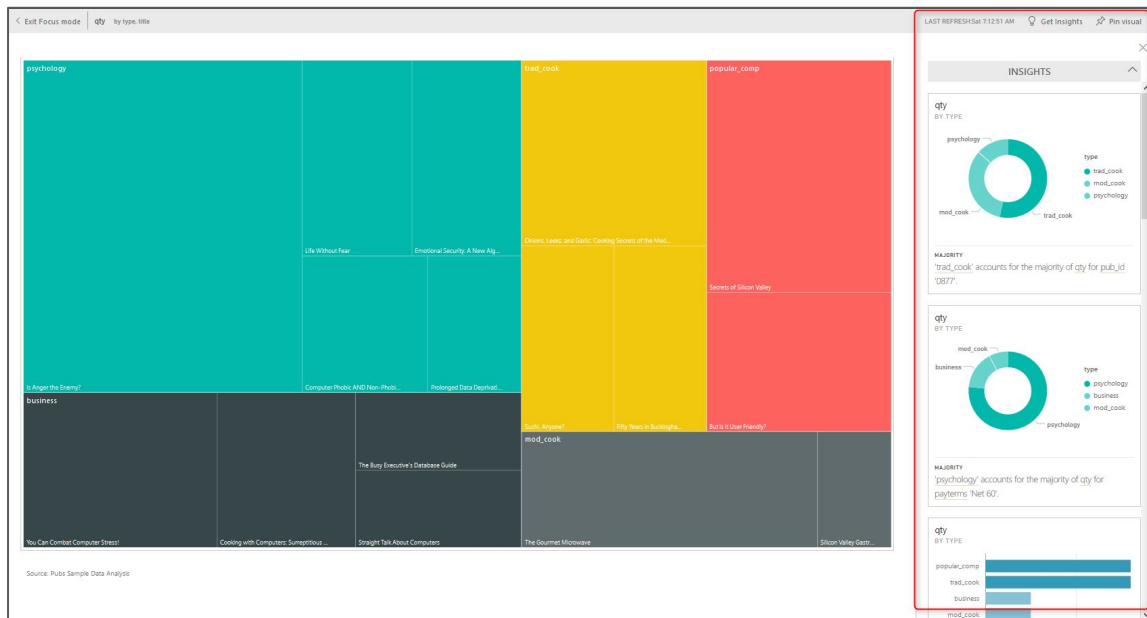
Review

Review

What is the difference between a report
and a dashboard?

What are some unique features of a report?

Why would you build a dashboard?