



# Business Analytics with Power BI

Microsoft Services



## Module 2: Power BI Service

### Lesson 2: Pinning and Navigation

# Pinning and Navigation

## Power BI Interface



Get Data



**Pinning and Navigation**



Keeping Data Current



Q&A and Quick Insights



Sharing



Connect from Excel



Mobile Reports

The screenshot shows the Power BI web interface. The top navigation bar includes the Power BI logo, the user's name 'Personal\_FEMAR', and various action icons. The left sidebar contains navigation options: Favorites, Recent, Apps, Shared with me, Workspaces, and the selected 'Personal\_FEMAR' workspace. The main content area displays the 'Dashboards' tab with a search bar and a list of pinned items. The list has columns for NAME, ACTIONS, OWNER, and CLASSIFICATION. The items listed are:

NAME	ACTIONS	OWNER	CLASSIFICATION
☆ AWInfoGraphic.pbix	[Icons: Pin, Copy, Share, Settings, Delete]	Personal_FEMAR	MBI
☆ Customer Profitability Sample	[Icons: Pin, Copy, Delete]	Satya Narayan Mishra	MBI
★ IAM Dashboard	[Icons: Pin, Copy, Share, Settings, Delete]	Personal_FEMAR	MBI
☆ Tailspain Toys CY2015	[Icons: Pin, Copy, Share, Settings, Delete]	Personal_FEMAR	MBI
☆ US Sales Dashboard	[Icons: Pin, Copy, Share, Settings, Delete]	Personal_FEMAR	MBI

# Pinning and Navigation

## Dataset

- Get Data
- Pinning and Navigation**
- Keeping Data Current
- Q&A and Quick Insights
- Sharing
- Connect from Excel
- Mobile Reports

Power BI Personal\_FEMAR

Search content...

Dashboards Reports Workbooks **Datasets**

Showing 10 item(s) Name (A-Z) ▾

NAME	ACTIONS	LAST REFRESH	NEXT REFRESH	API ACCESS
AWInfoGraphic		24/04/2017 18:41:44	N/A	---
...		...	...	...
...		...	...	...
...		...	...	...
...		...	...	...
...		...	...	...
...		...	...	...
...		...	...	...
...		...	...	...
...		...	...	...

**Diagram:**

```
graph TD; Dataset[a dataset] --> Report[A report]; Dataset --> Dashboard[dashboard];
```

# Pinning and Navigation

## Report

- Get Data
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Power BI Personal\_FEMAR

Search content...

Dashboards **Reports** Workbooks Datasets

Showing 10 item(s) Name (A-Z)

NAME	ACTIONS	OWNER
Microsoft Graph		Personal_FEMAR
IAM Dashboard		Personal_FEMAR
IT Spend Analysis Sample		Satya Narayan Mishra
Sales and Marketing Sample		Satya Narayan Mishra
synoptictest		Personal_FEMAR
test		Personal_FEMAR
testDQ		Personal_FEMAR

Get Data

Microsoft Confidential

A report

datasets

dashboard

- A report is composed of one or more pages of visualizations
- Can be developed in Desktop (or Microsoft Excel) or in the service
- Gets its data from one dataset
- Can be used for building dashboards as a whole or bit by bit

# Pinning and Navigation

## Report

- Get Data
- Pinning and Navigation**
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# Pinning and Navigation

## Report



Get Data



**Pinning and Navigation**



Keeping Data Current



Q&A and Quick Insights



Sharing



Connect from Excel



Mobile Reports



# Pinning and Navigation

## Report



Get Data



**Pinning and Navigation**



Keeping Data Current



Q&A and Quick Insights



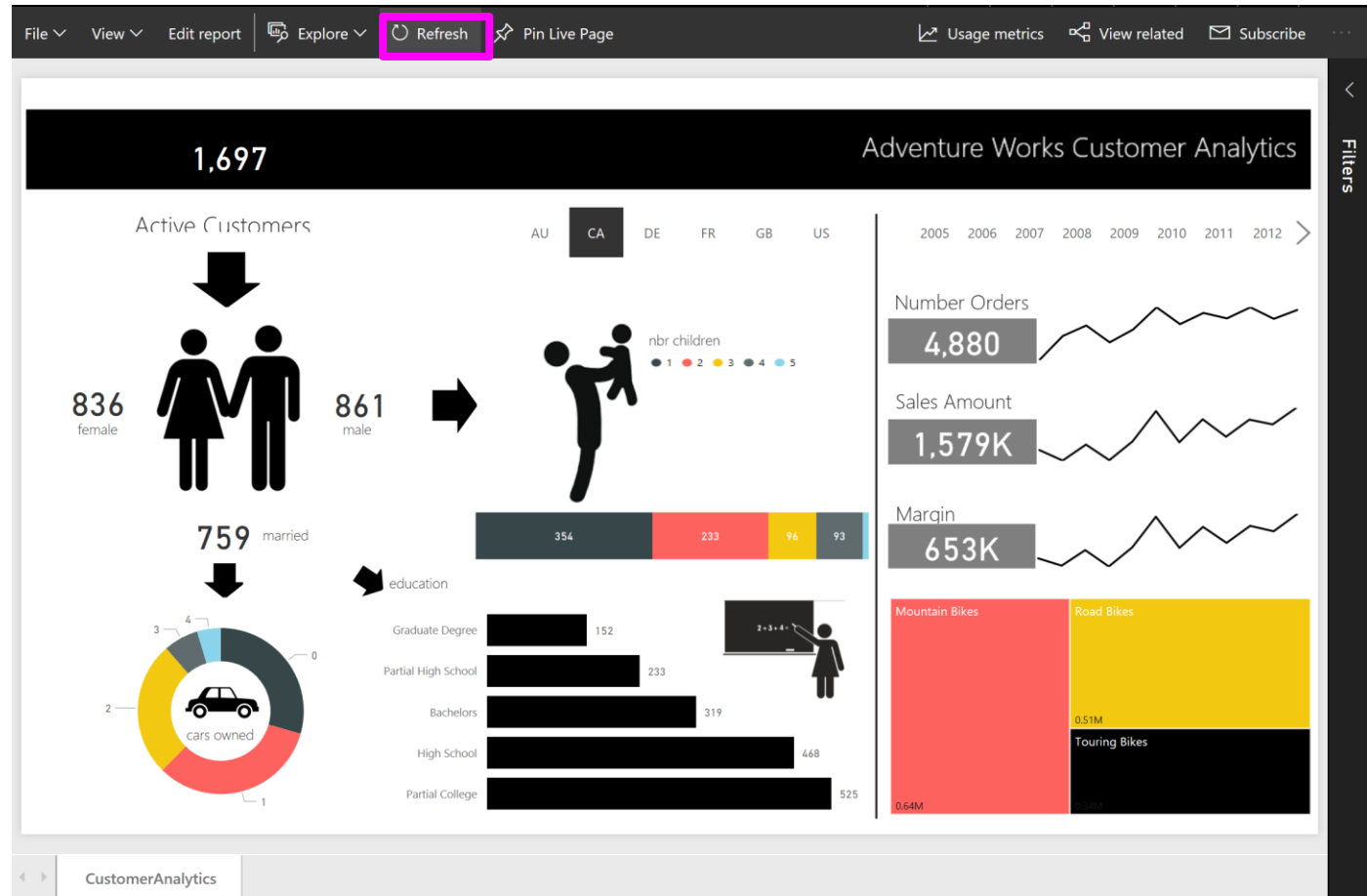
Sharing



Connect from Excel










Mobile Reports

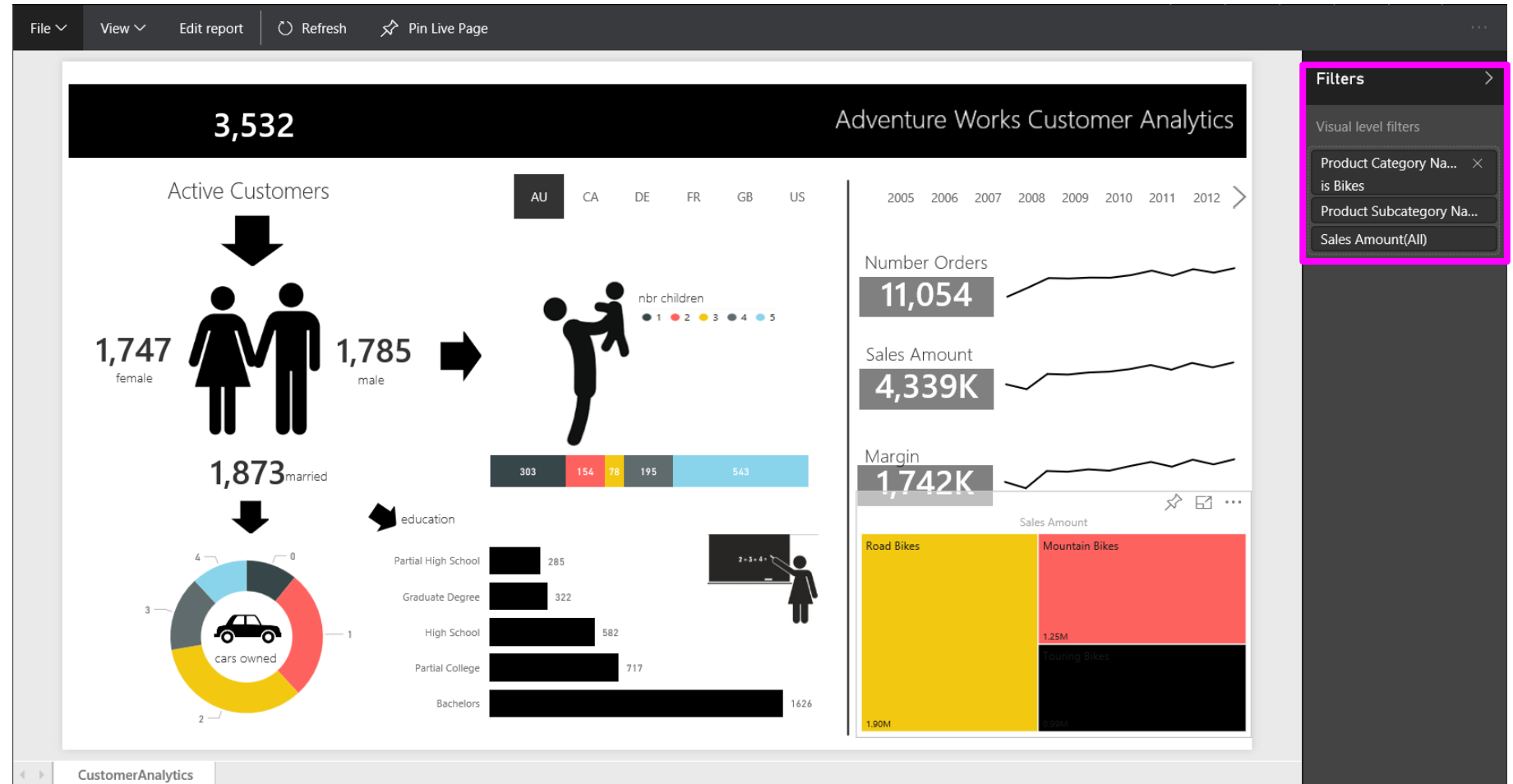




# Pinning and Navigation

## Report

-  Get Data
-  **Pinning and Navigation**
-  Keeping Data Current
-  Q&A and Quick Insights
-  Sharing
-  Connect from Excel
-  Mobile Reports



# Pinning and Navigation

## Report



Get Data



Pinning and Navigation



Keeping Data Current



Q&A and Quick Insights



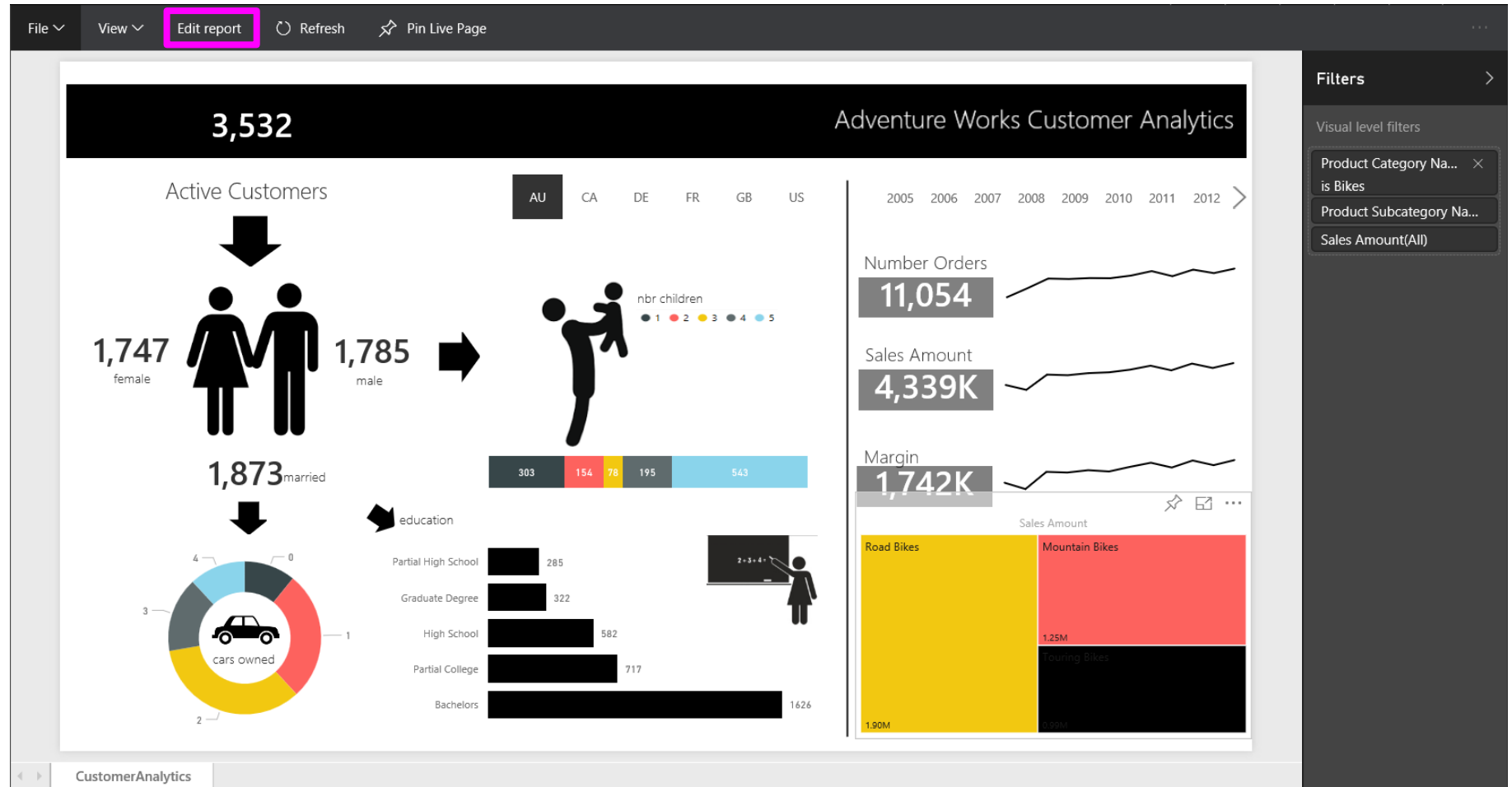
Sharing



Connect from Excel



Mobile Reports



# Pinning and Navigation

## Report – Editing View



Get Data



Pinning and Navigation



Keeping Data Current



Q&A and Quick Insights



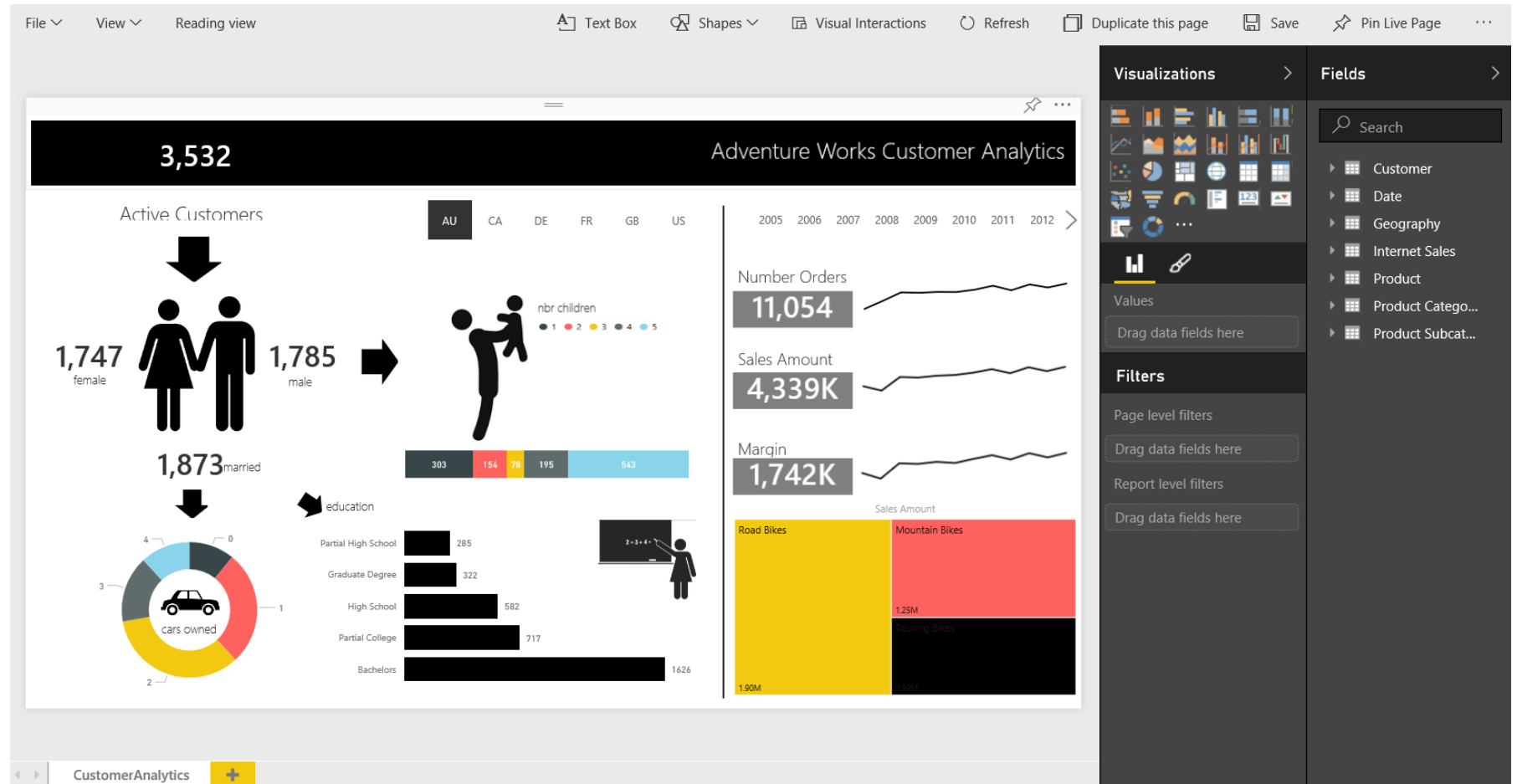
Sharing



Connect from Excel



Mobile Reports



# Pinning and Navigation

## Report – Editing View

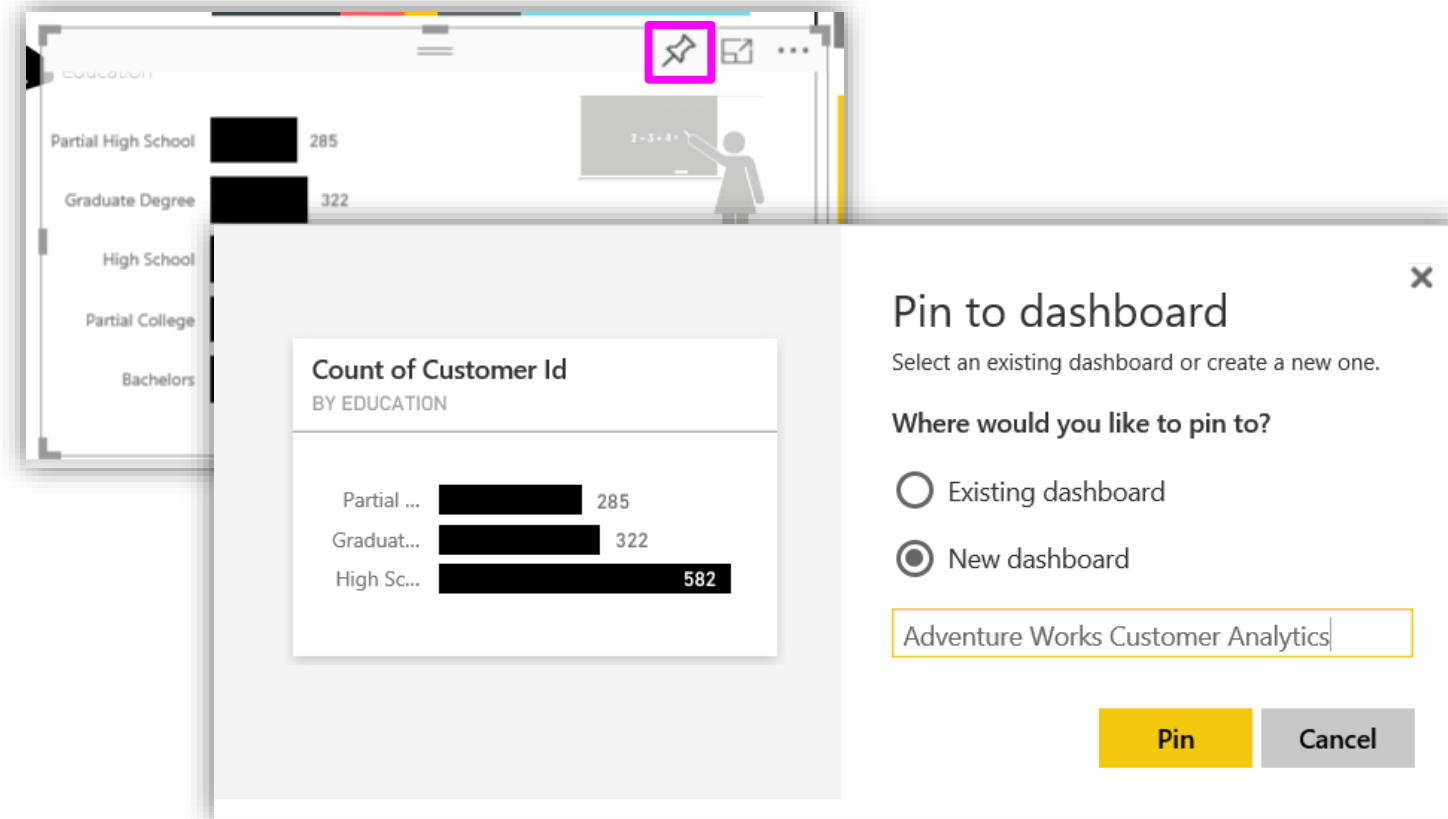
- It is possible to **alter** an existing report page or to **create** new pages in the Editing View
- Similar reporting functionality to Power BI Desktop
- Can also use **Custom Visualizations**
- In the end a **Save** has to be done to commit the changes
- Use the *breadcrumb* to return to reading view



# Pinning and Navigation

## Report - Pinning

- Individual visualizations can be pinned to dashboards as tiles



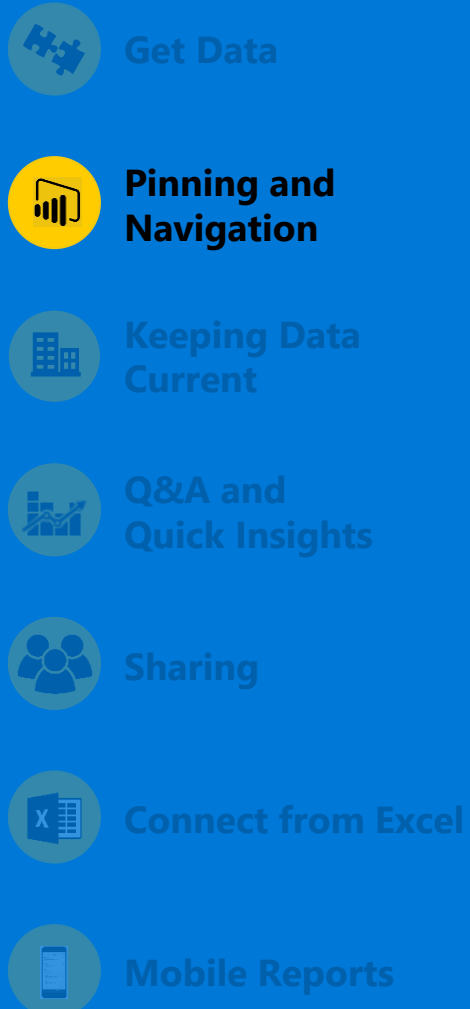
# Pinning and Navigation

## Report - Pinning

- An entire page can be pinned to a dashboard



- They become **live tiles** and can be interacted with straight from the dashboard with the same interactivity as in Reading View
- When a change happens in this report, the **changes are synchronized to the dashboard**
- This does not happen with individual visualizations



# Pinning and Navigation

## Dashboard

- Get Data
- Pinning and Navigation**
- Keeping Data Current
- Q&A and Quick Insights
- Sharing
- Connect from Excel
- Mobile Reports

Power BI Personal\_FEMAR

Search content...

Dashboards Reports Workbooks Datasets

Showing 5 item(s) Name (A-Z)

- NAME ACTIONS OWNER CLASSIFICATION
- AWinfoGraphic.pptx Personal\_FEMAR MBI
- Customer Profitability Sample Satya Narayan Mishra MBI
- AM Dashboard Personal\_FEMAR MBI
- T... Personal\_FEMAR MBI
- Personal\_FEMAR MBI

- A dashboard aggregates most important visualizations from several different reports (and datasets)
- It is composed of tiles and widgets
- Tiles can be updated in real-time
- Each tile can navigate back to its underlying report or to a custom URL

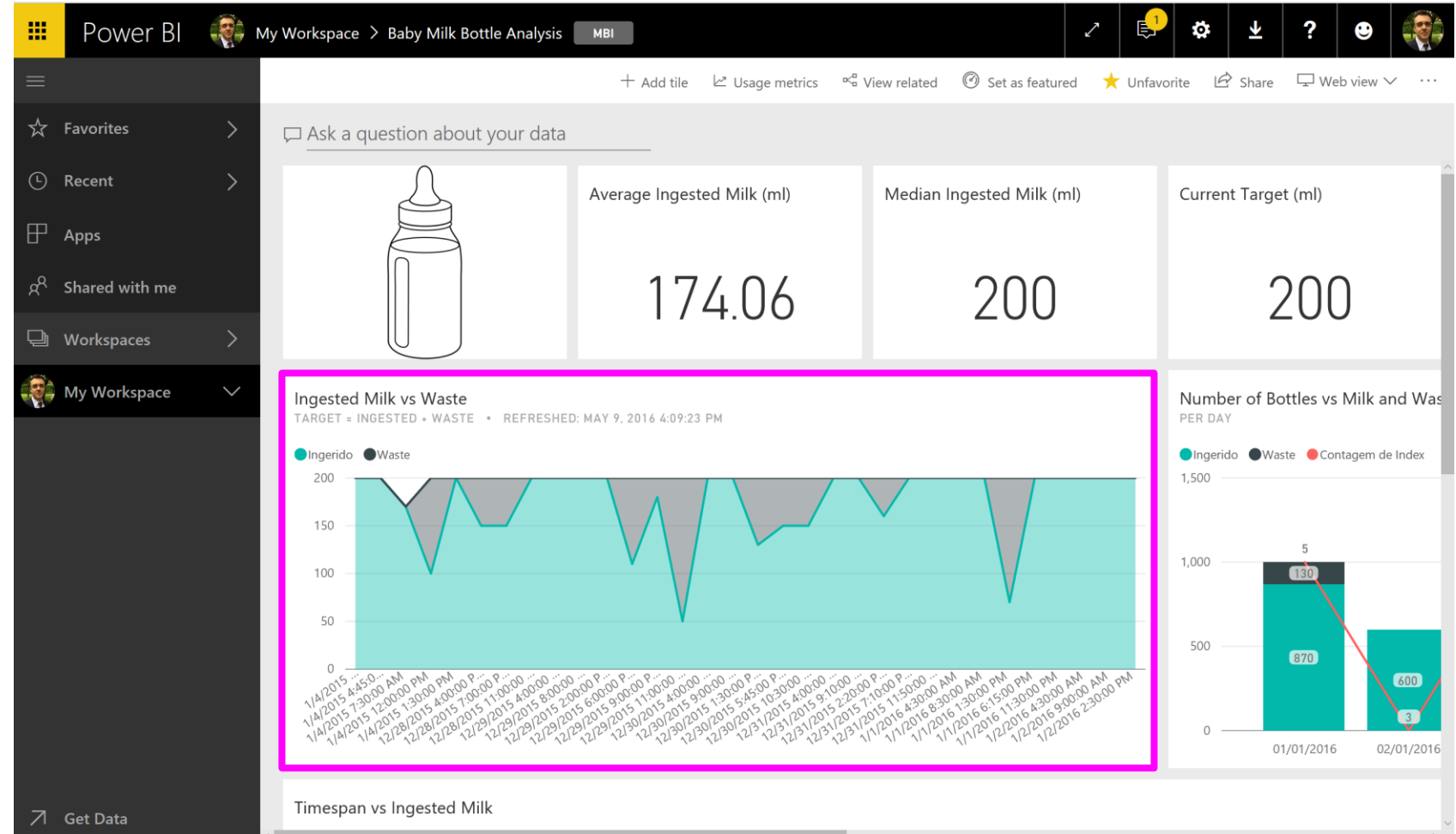
a dashboard

A report

datasets

# Pinning and Navigation

## Dashboard - Tiles

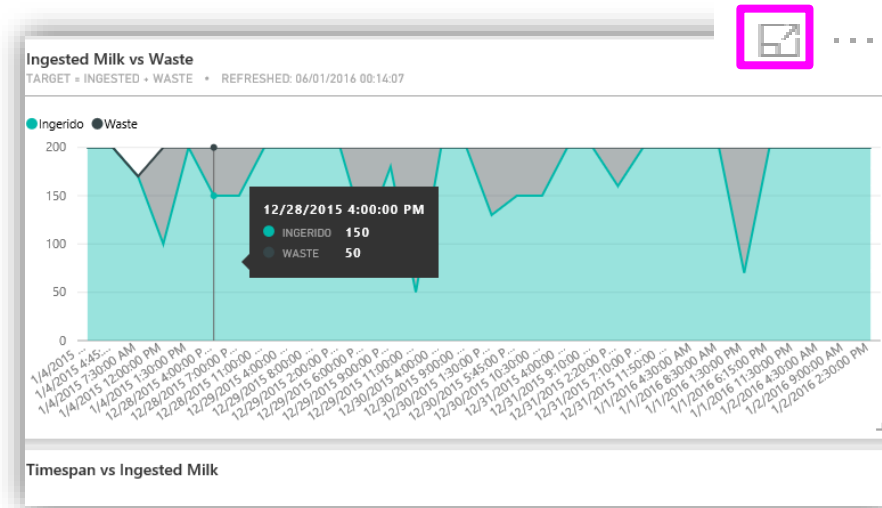




# Pinning and Navigation

## Dashboard - Tiles

- A tile can display a **tooltip**
- And can be opened in **Focus Mode** which maximizes the tile

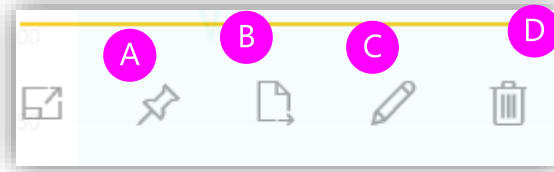


- Interactivity is limited when compared to reports except if a **Live Page** was pinned – in that case, it is the same

# Pinning and Navigation

## Dashboard - Tiles

- Additional options exist



- A** Pin the tile to another dashboard
- B** Export its data as a .csv file
- C** Edit the tile details
- D** Delete tile

**C**

### Tile details

\* Required

#### Details

☒ Display title and subtitle

**Title \***

Ingested Milk vs Waste

**Subtitle**

Target = Ingested + Waste

#### Functionality

☒ Display last refresh time

☐ Set custom link

**URL \***

Open custom link in the same tab?

☐ Yes

☒ No

[Restore default](#)

**Apply** **Cancel**

# Pinning and Navigation



Get Data



**Pinning and Navigation**



Keeping Data Current



Q&A and Quick Insights



Sharing



Connect from Excel



Mobile Reports

## URL Parameters

- Every report has an **universal URL link** that is unique to it
- It is possible to pass on parameters on that URL to automatically filter the report when it is rendered
- There is a specific format that needs to be followed

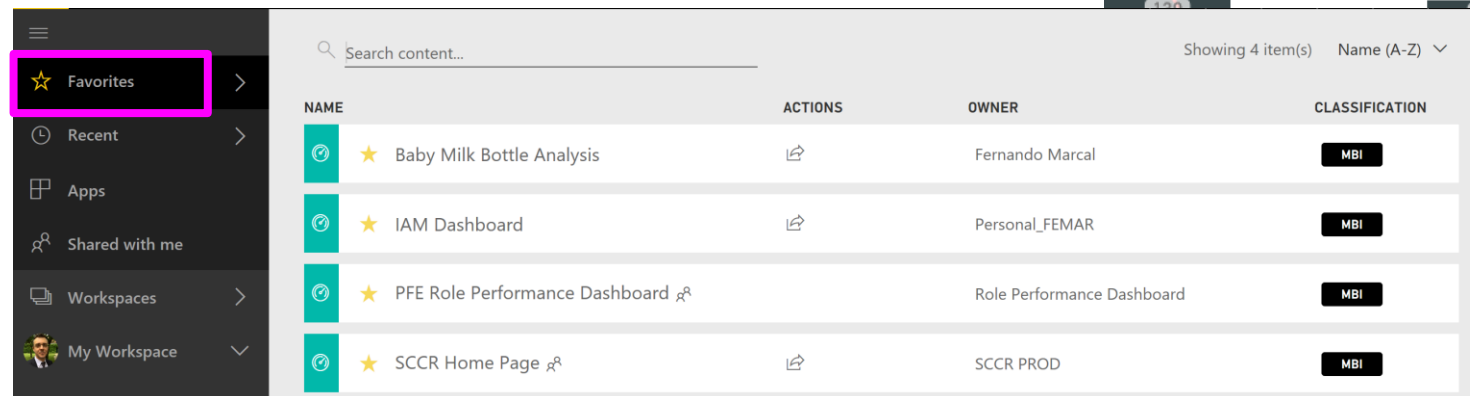
```
<reportURL>?filter=<Table>/<Field1> eq 'value' and <Table>/<Field2> eq 'value2'
```

```
<report URL>?filter=Store/Territory eq 'NC' and Sales/Month eq 'May'
```

# Pinning and Navigation

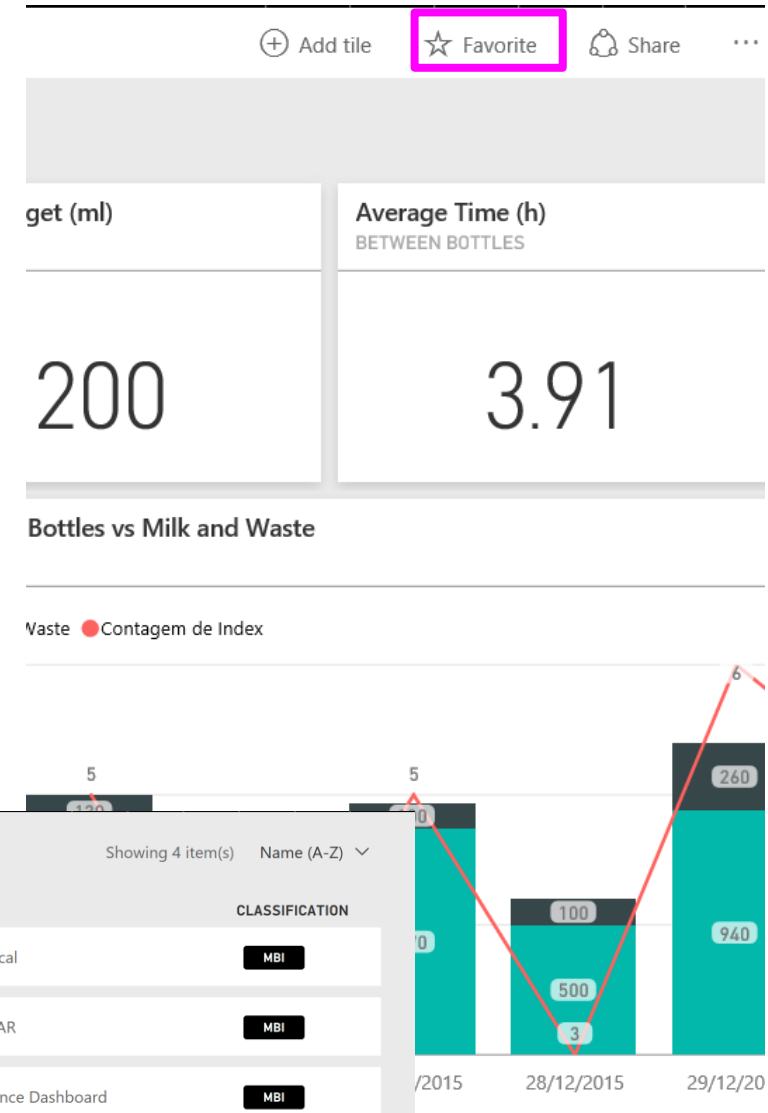
## Dashboard - Favorites

- The most **relevant** dashboards can be defined as favorites
- They will appear in a **dedicated area**
- Work **across groups**
- **Fully synchronized across platforms** – can set or view from mobile app and Power BI Service



A screenshot of the Power BI Favorites list. On the left, a sidebar menu has the 'Favorites' option highlighted with a pink box. The main area displays a table of four favorite dashboards. Each row includes a star icon, the dashboard name, an Actions column with a link icon, the Owner, and a Classification column with an 'MBI' tag.

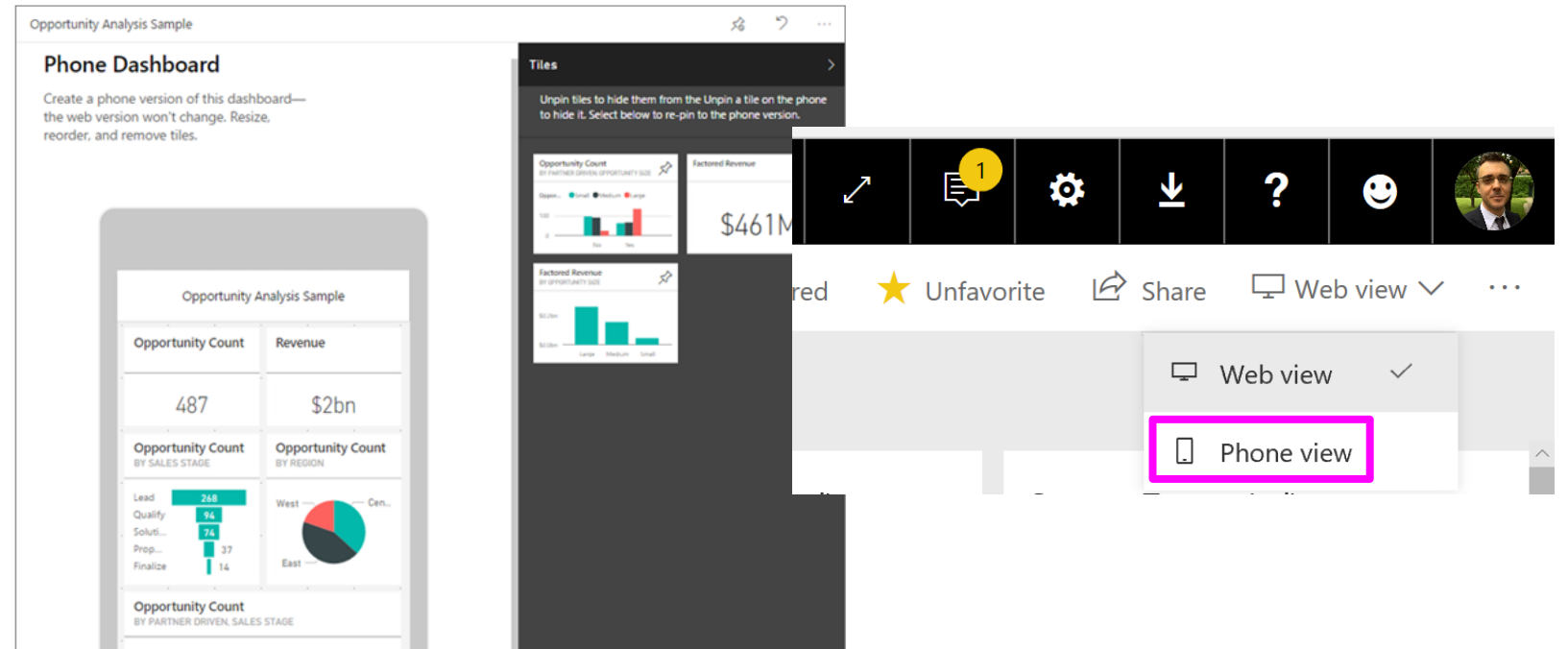
NAME	ACTIONS	OWNER	CLASSIFICATION
★ Baby Milk Bottle Analysis		Fernando Marcal	MBI
★ IAM Dashboard		Personal_FEMAR	MBI
★ PFE Role Performance Dashboard		Role Performance Dashboard	MBI
★ SCCR Home Page		SCCR PROD	MBI



# Pinning and Navigation

## Dashboard – Phone View

- Create a **customized view** of any dashboard that you own specifically **for phones**
- Drag, resize, pin/unpin tiles to the phone view

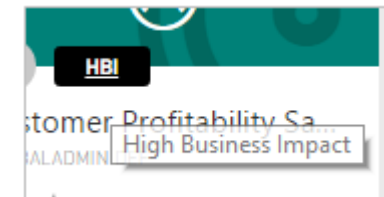
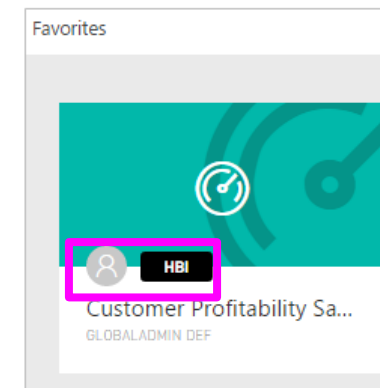
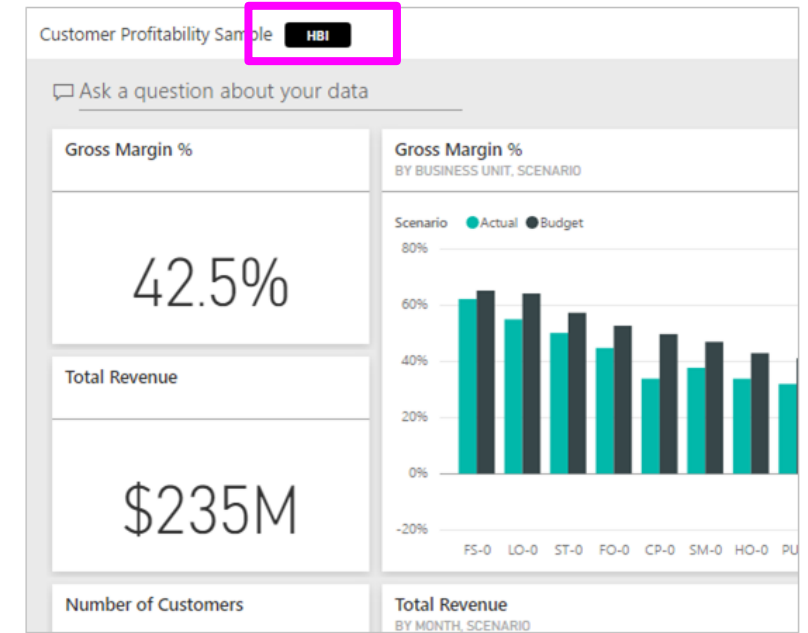


# Pinning and Navigation

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## Dashboard – Data Classification

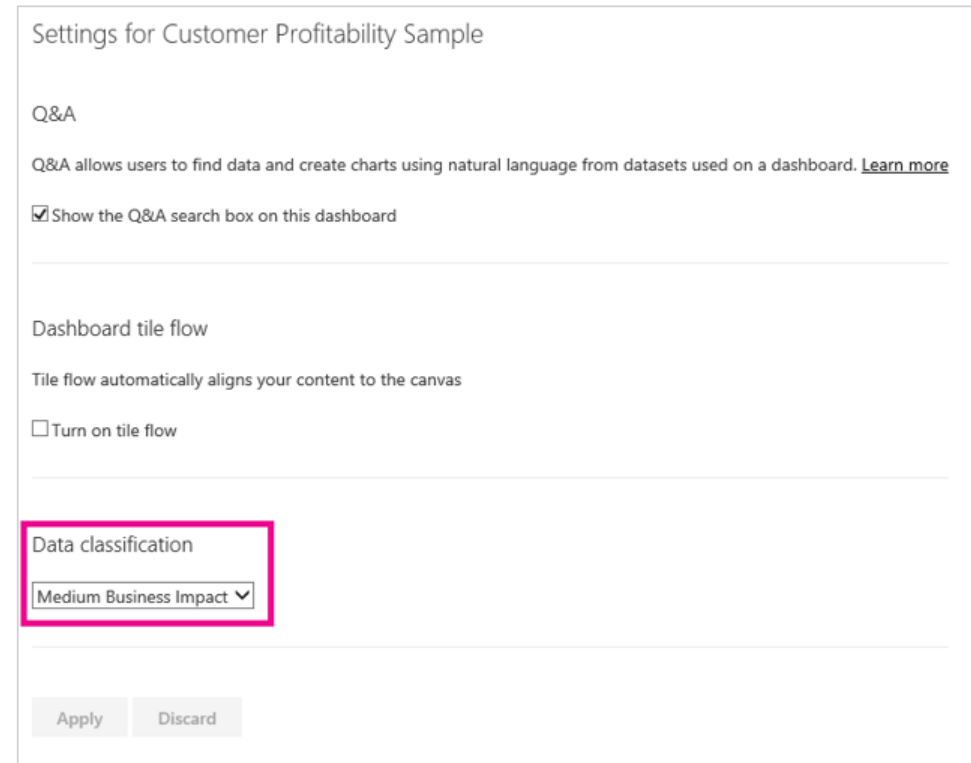
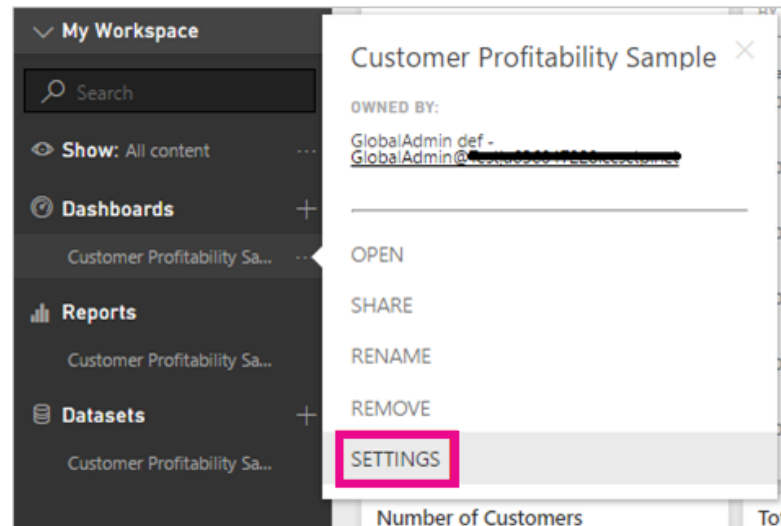
- Raise awareness of those viewing your dashboards about the **level of security** that should be used
- Tag your dashboards with classifications defined by your company's IT
- Tags show up next to the dashboard name
- Hover over tag to view full name of classification



# Pinning and Navigation

## Dashboard – Data Classification

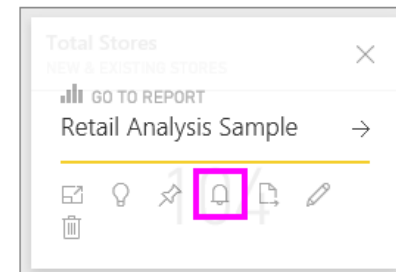
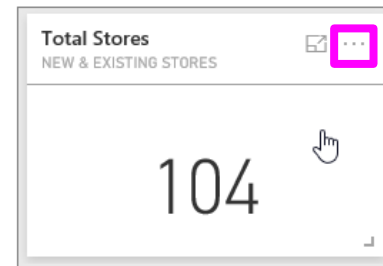
- All dashboards start out with a **default classification type**
- Dashboard **owner** can **change** the classification



# Pinning and Navigation

## Dashboard – Data driven alerts

- **Get notifications** when a metric on your dashboard exceeds a set threshold
- Alerts work for **numeric tiles** featuring cards and gauges
- **Fully synchronized** across platforms – set and view alerts in mobile app and Power BI Service.



TOTAL STORES  
Manage alerts

+ Add alert rule

^ Alerts for Total Stores

Active  
☒ On

Alert title  
Alerts for Total Stores

TOTAL STORES  
Manage alerts

Condition	Threshold
Above	100

Notification frequency  
☒ Once every 24 hours  
☐ Once an hour

By default, you'll receive notifications on the service in the notification center.

☒ Send me email, too

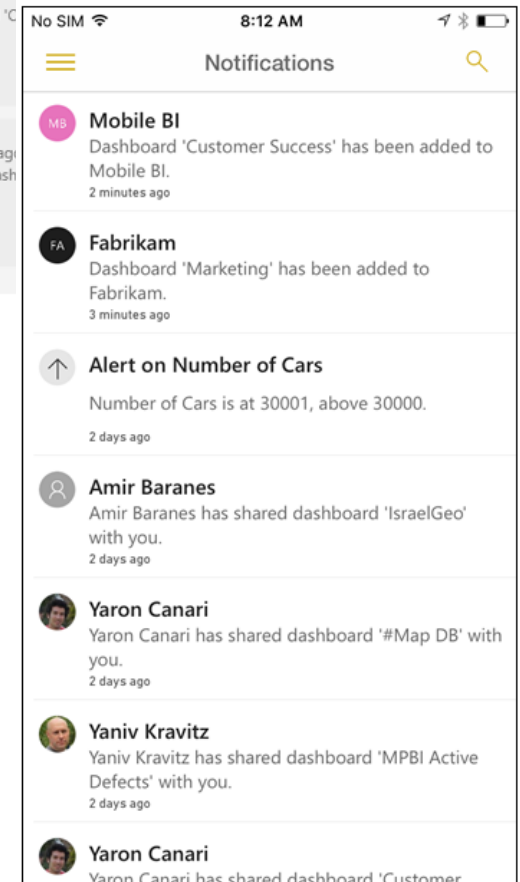
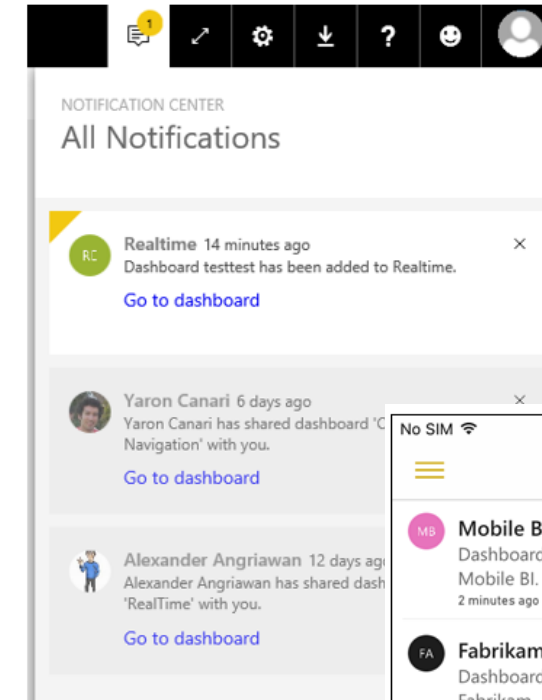


# Pinning and Navigation

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## Power BI Notification Center

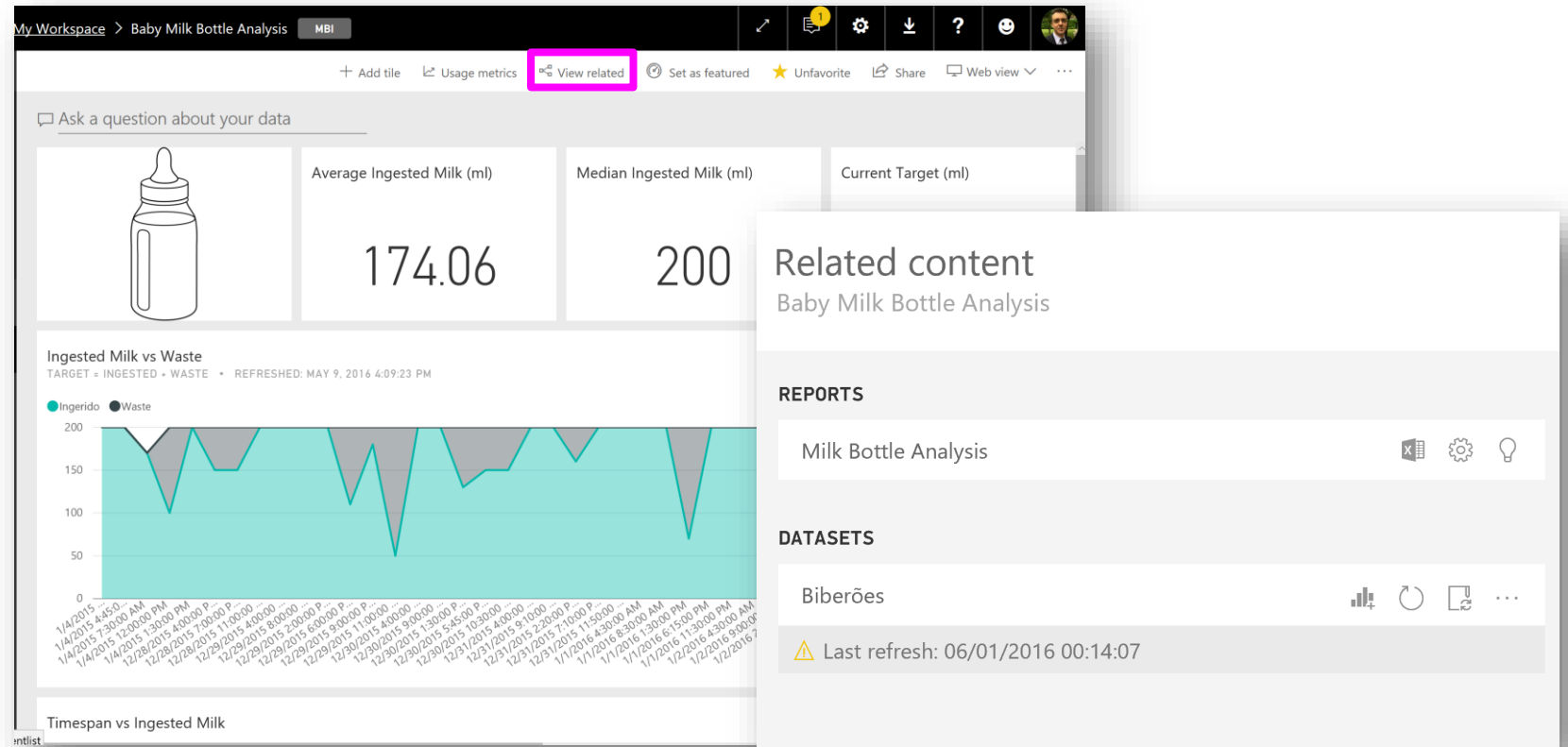
- Important information related to your Power BI experience in **one place**
- Notification on **all platforms** – web (Power BI Service) and mobile app
- Includes **data driven alerts**



# Pinning and Navigation

## View Related

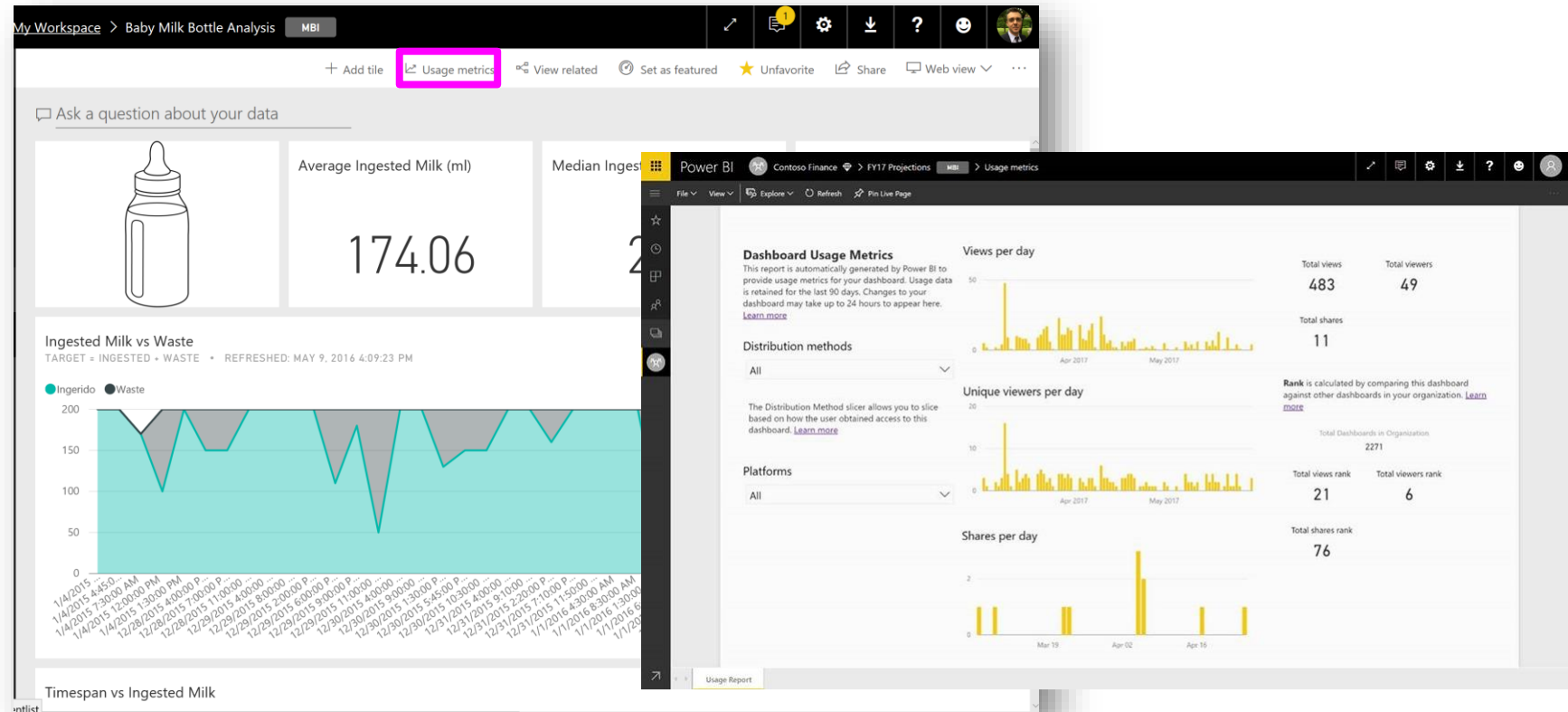
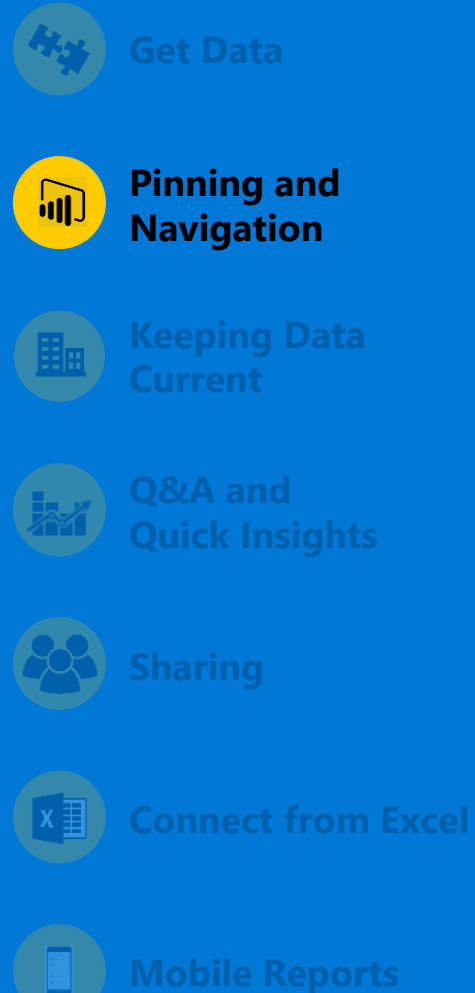
- Quickly understand what are the **related objects** to either your dataset, report or dashboard.



# Pinning and Navigation

## Usage Metrics

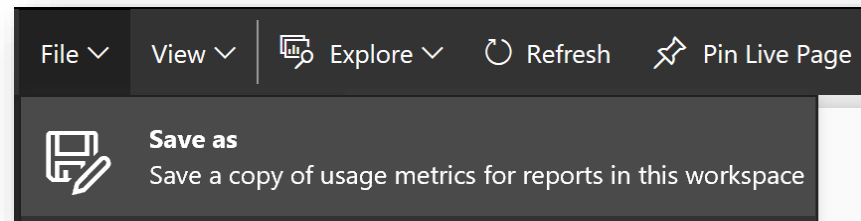
- Quickly understand how your reports and dashboards are being used



# Pinning and Navigation

## Usage Metrics

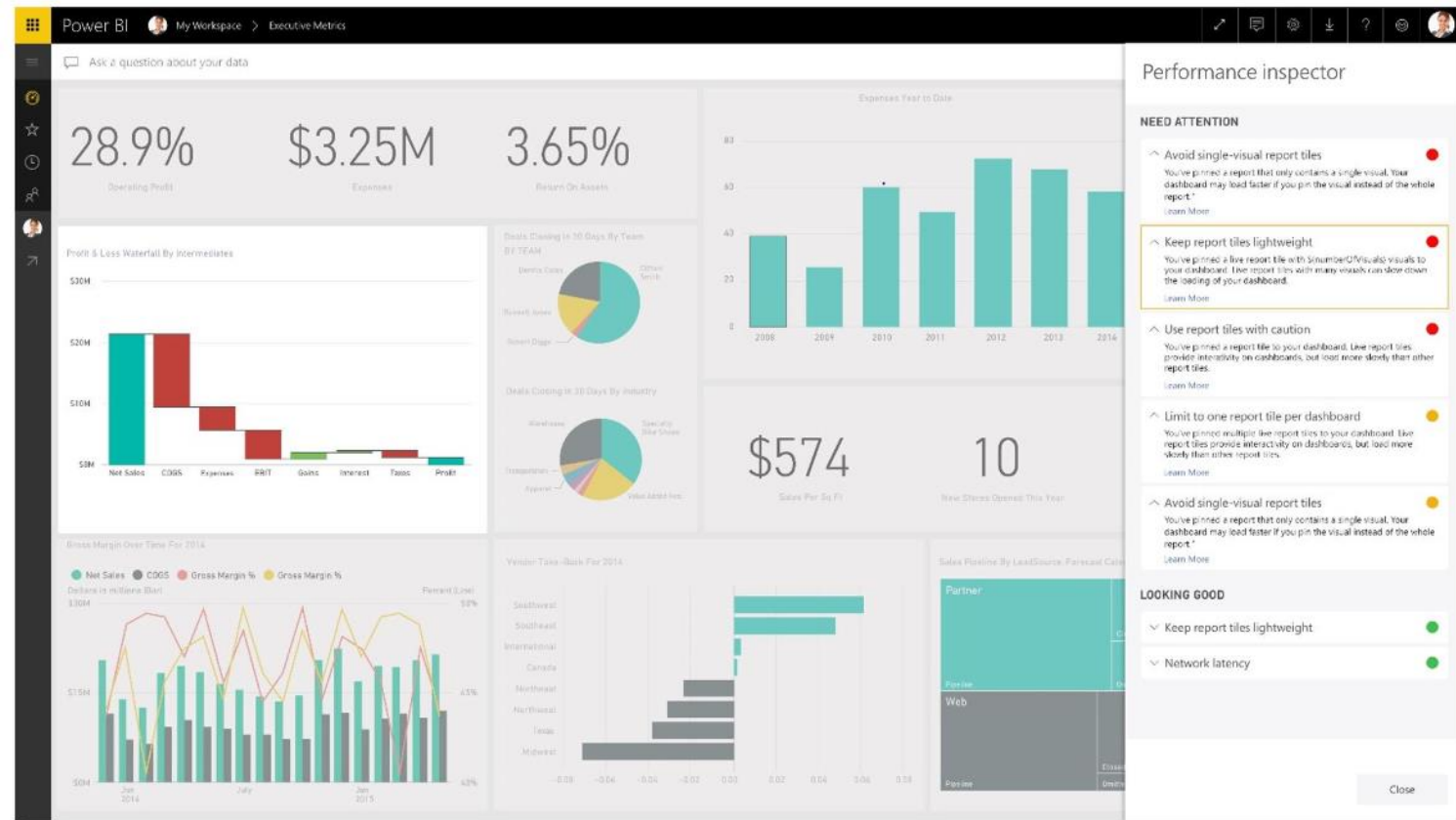
- It is an out-of-the box report with usage for the last 90 days
- Understand if content is being accessed via web or phone – good to indicate if a phone layout is needed
- Breakdown of report views by users – helps identify the top users.
- Identify which dashboards and reports are important and which should be phased out
- You can create a copy of the report and access the dataset!



# Pinning and Navigation

## Dashboard Performance Inspector

- Inspect and diagnose dashboard **performance** (edit permissions required)



# Demonstration: Power BI Service