Microsoft

Business Analytics with Power BI

Microsoft Services

Module 2: Power BI Service

Lesson 2: Pinning and Navigation

Pinning and Navigation

Power BI Interface

Pinning and Navigation

Dataset

- A dataset is something you **import** or **connect to**
- Each dataset represents **a source of data**
- That dataset can be an intricate data model created by you on the PBI Desktop or a connection to a database
- A dataset **can feed many reports and dashboards**

Pinning and Navigation

Report

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

Power BI   PE Personal_FEMAR

+ Create   Publish app

Favorites
Recent
Apps
Shared with me
Workspaces
PE Personal_FEMAR

Search content…

Dashboards **Reports** Workbooks Datasets

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

NAME   ACTIONS   OWNER

- 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

Get Data

Microsoft Confidential

Pinning and Navigation

Microsoft Confidential

Pinning and Navigation

Report

Pinning and Navigation

Report

Microsoft Confidential

Pinning and Navigation

Report

Pinning and Navigation

Report

Microsoft Confidential

Pinning and Navigation

Report – Editing View

Pinning and Navigation
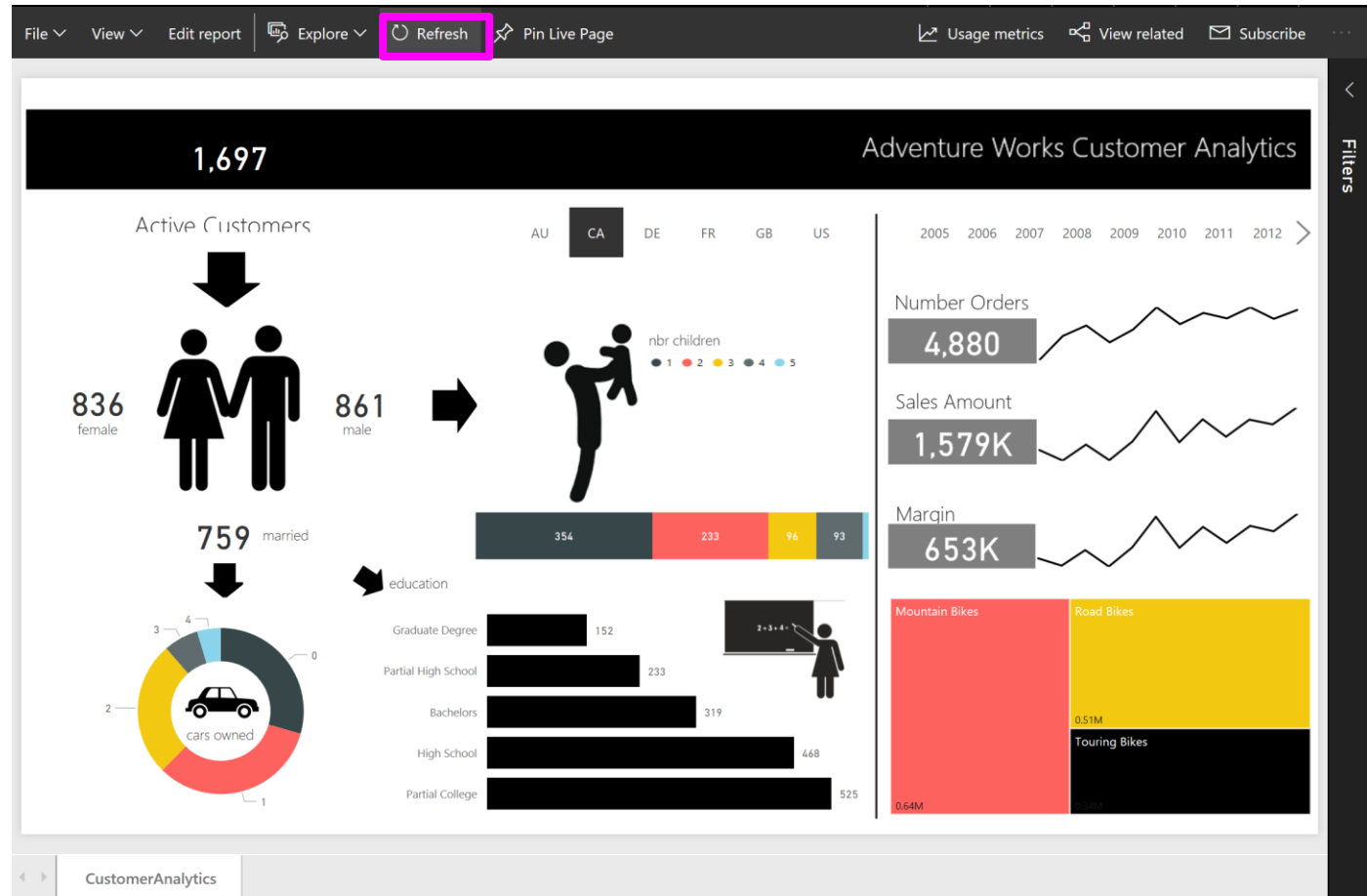

Get Data

Pinning and Navigation

Keeping Data Current

Q&A and Quick Insights

Sharing

Connect from Excel

Mobile Reports

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**
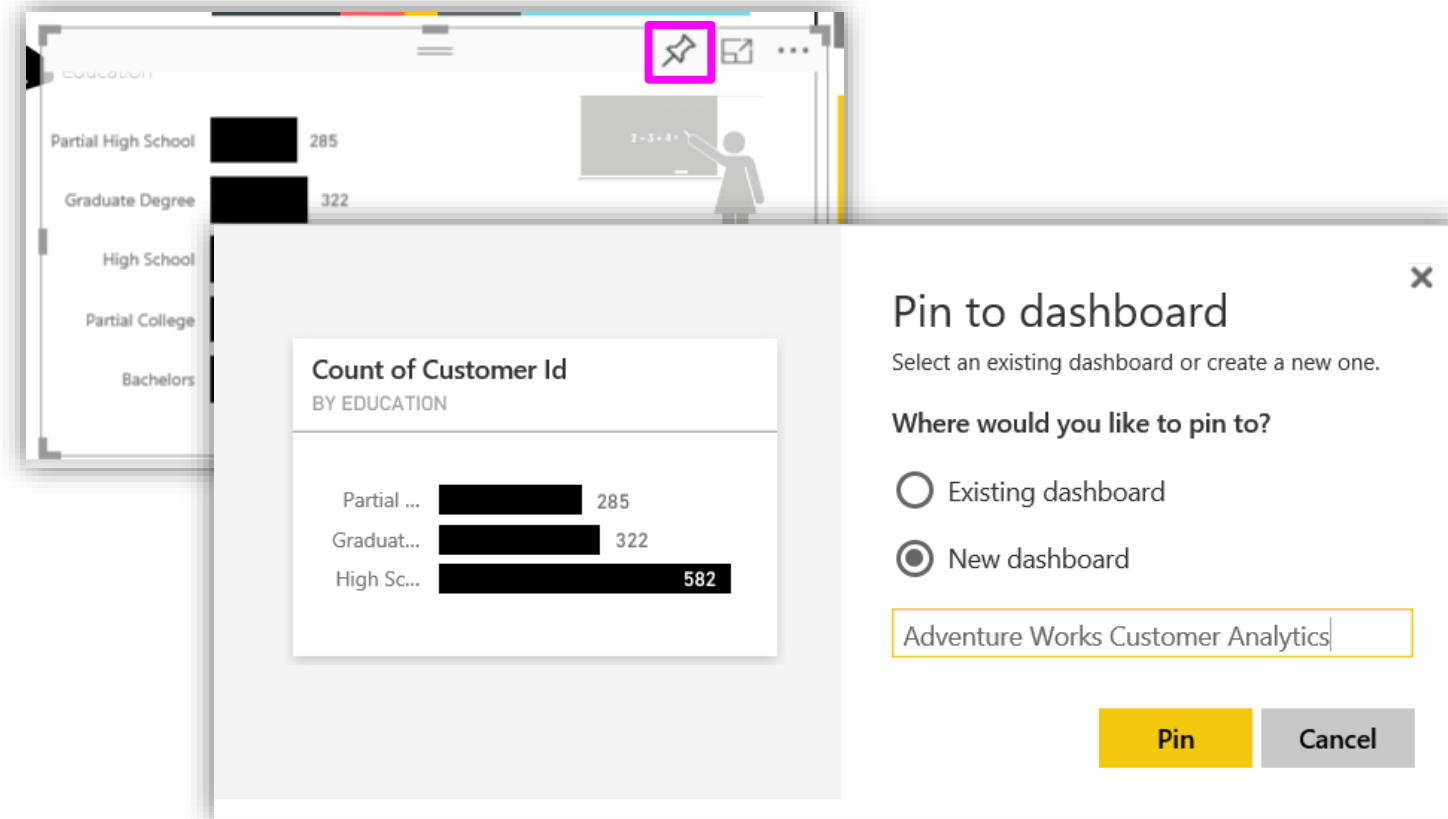
Pinning and Navigation

Report - Pinning

- **An entire page** can be pinned to a dashboard

File ∨	View ∨	Edit report	↻ Refresh	✦ Pin Live Page

- 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**
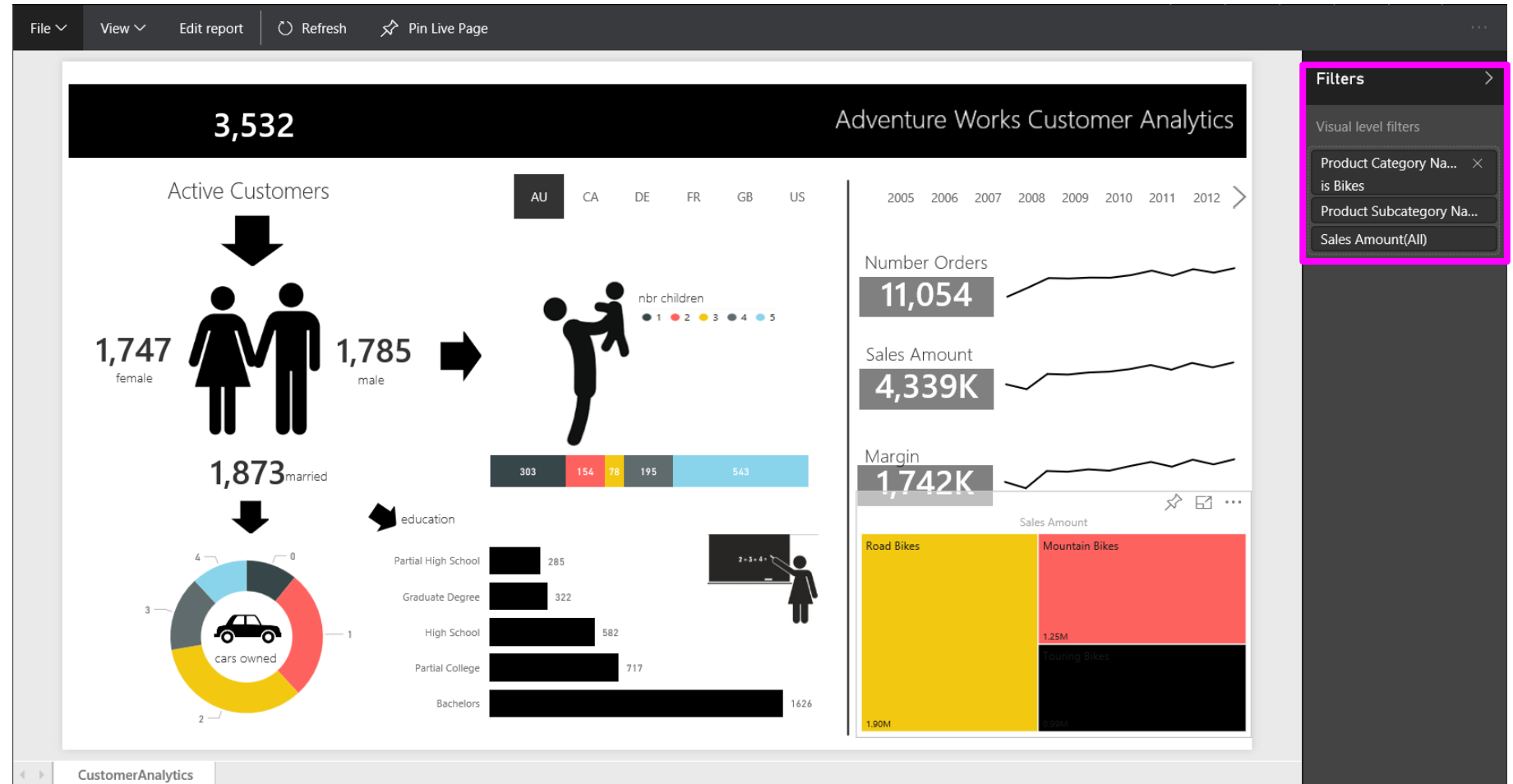
Pinning and Navigation

Get Data

Pinning and Navigation

Keeping Data Current

Q&A and Quick Insights

Sharing

Connect from Excel

Mobile Reports

Dashboard

- 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**

Pinning and Navigation

Dashboard - Tiles

Pinning and Navigation

Get Data

Pinning and Navigation

Keeping Data Current

Q&A and Quick Insights

Sharing

Connect from Excel

Mobile Reports
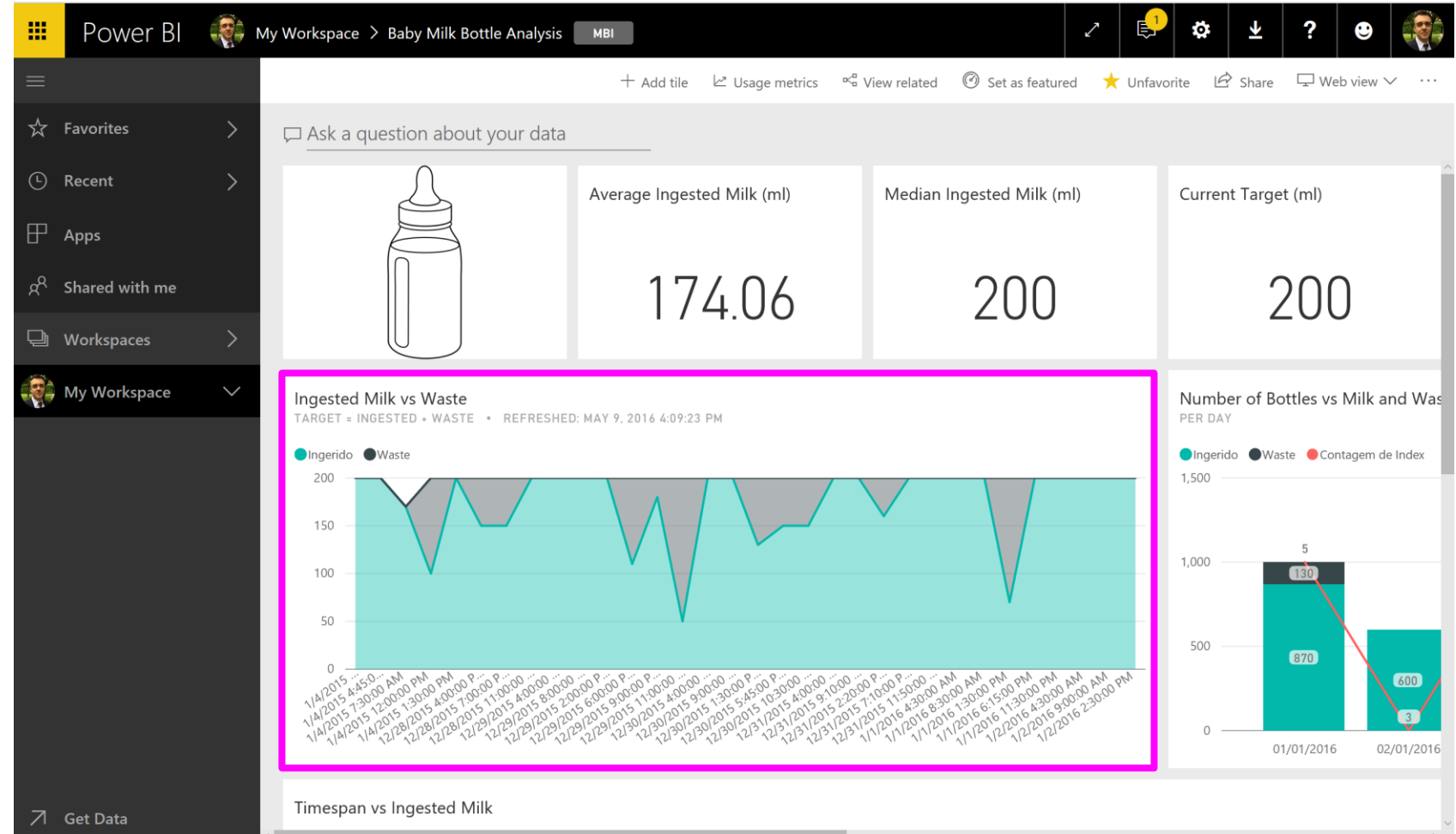
Dashboard - Tiles

- 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

Ⓐ Pin the tile to another dashboard

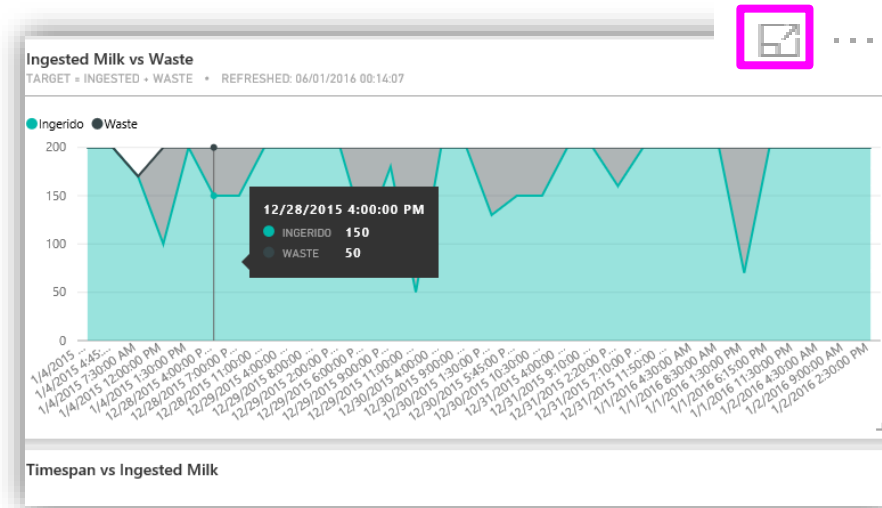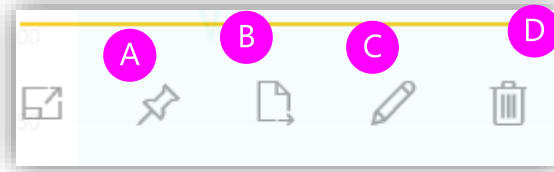Ⓑ Export its data as a .csv file

Ⓒ Edit the tile details

Ⓓ Delete tile

Ⓒ 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

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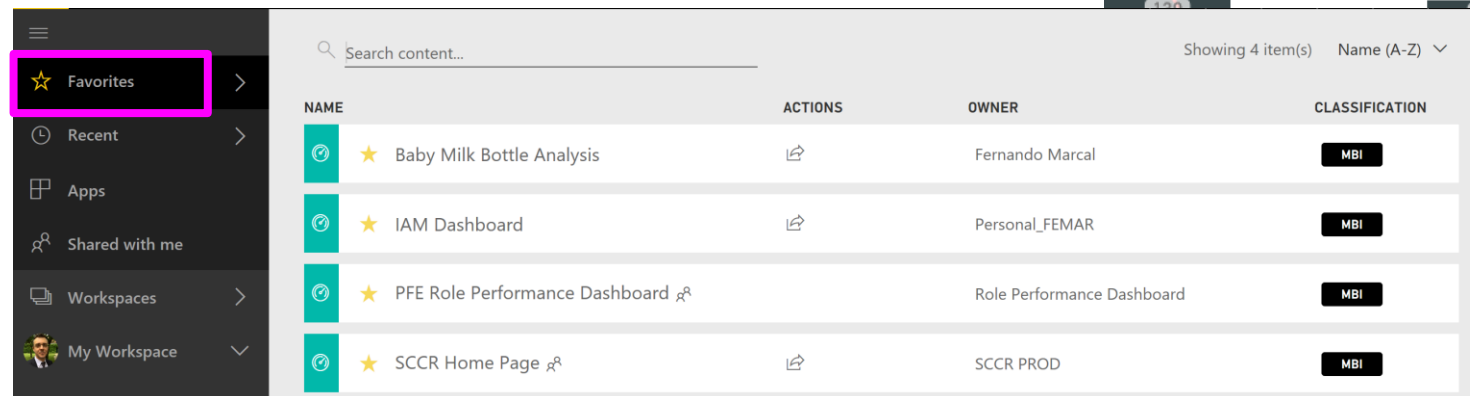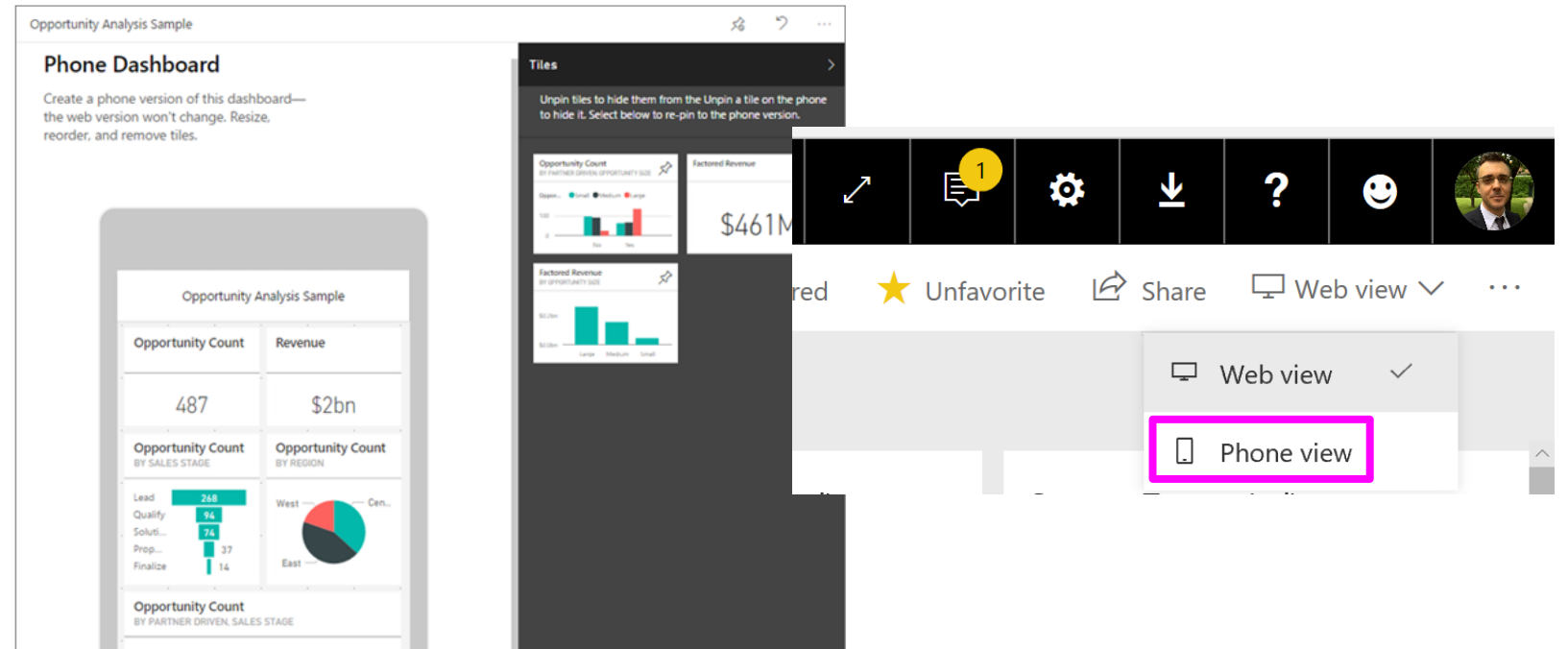
```
<reportURL>?filter=<Table>/<Field1> eq 'value' and <Table>/<Field2> eq 'value2'
```

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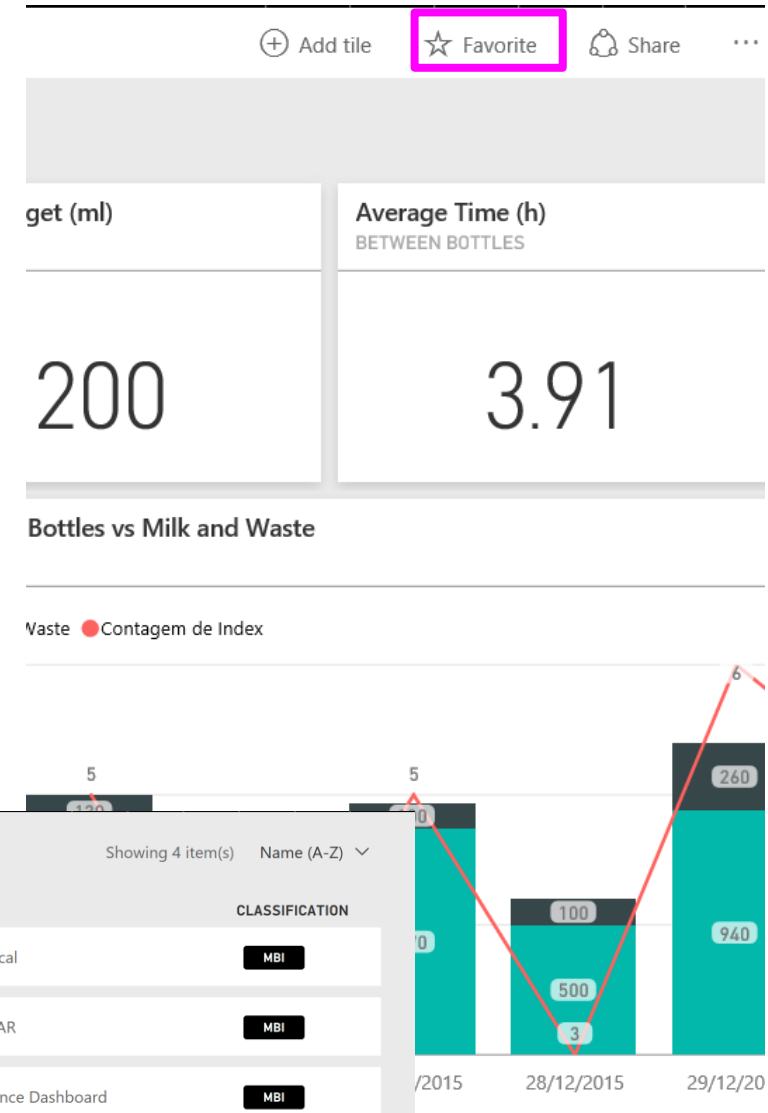
Pinning and Navigation

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

Pinning and Navigation

Get Data

Pinning and Navigation

Keeping Data Current

Q&A and Quick Insights

Sharing

Connect from Excel

Mobile Reports

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

Get Data

Pinning and Navigation

Keeping Data Current

Q&A and Quick Insights

Sharing

Connect from Excel

Mobile Reports

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**
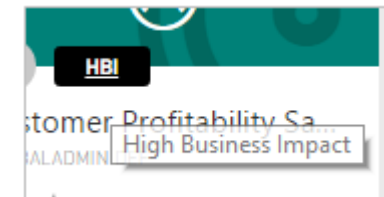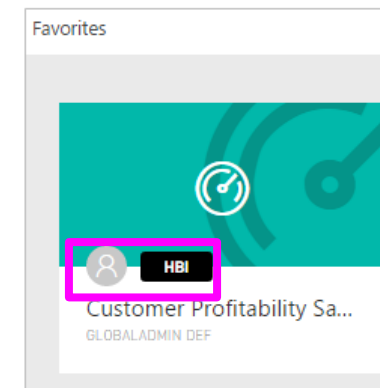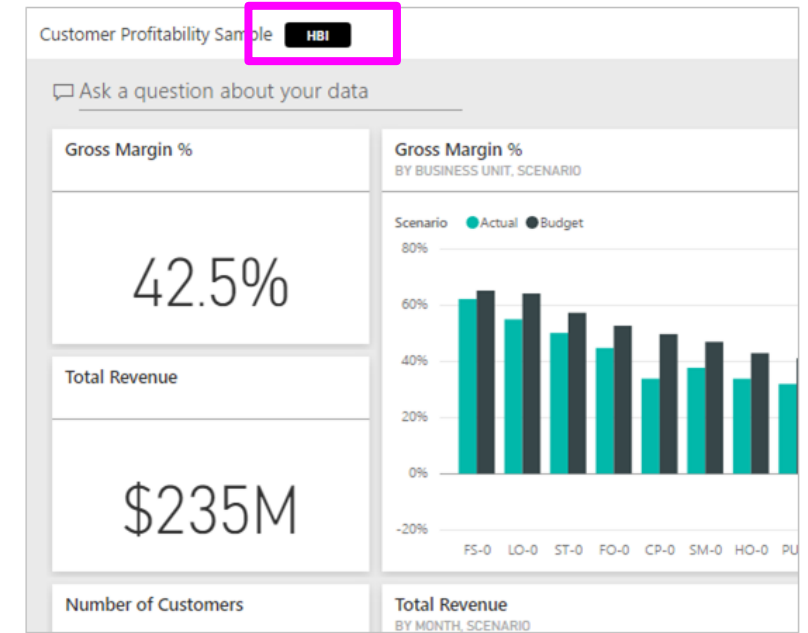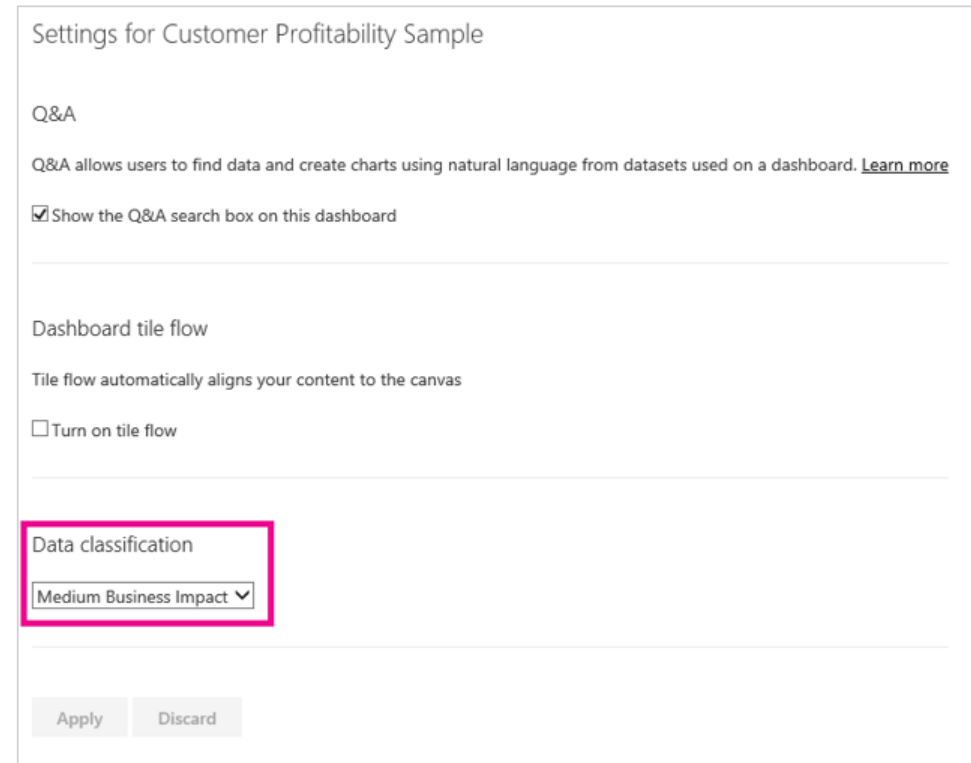- Dashboard **owner can change** the classification

Pinning and Navigation

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

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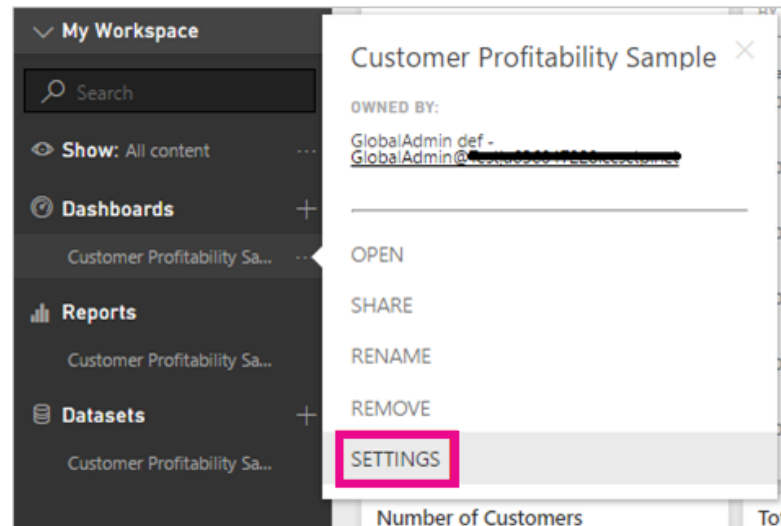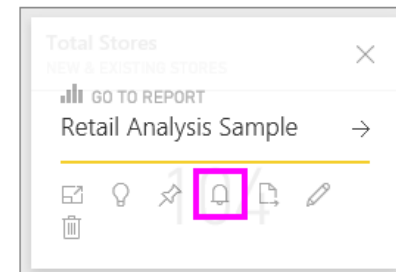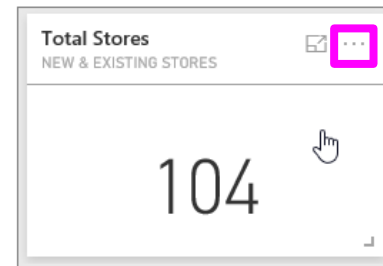
- **Get notifications** when a metric on your dashboard exceeds a set threshold
- Alerts work for **numeric tiles** featuring cards and gauges
- **Fully synchronized** across platforms – set and view alerts in mobile app and Power BI Service.

Pinning and Navigation

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
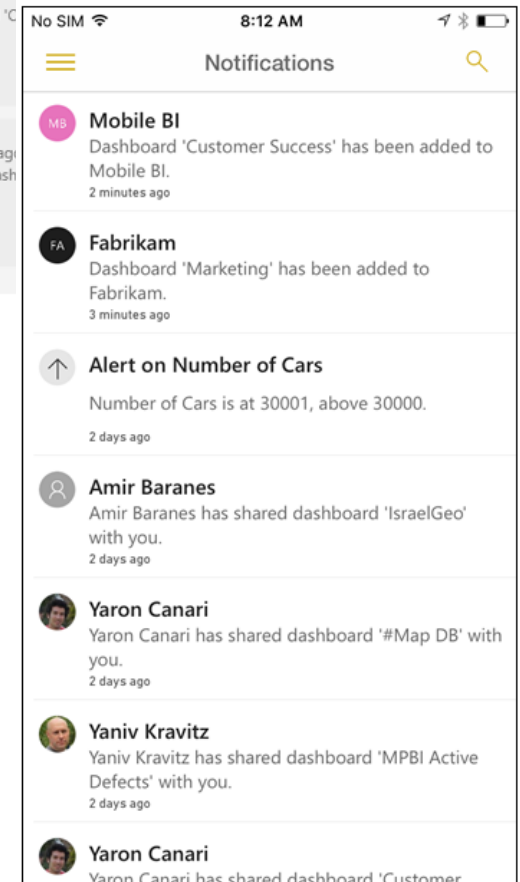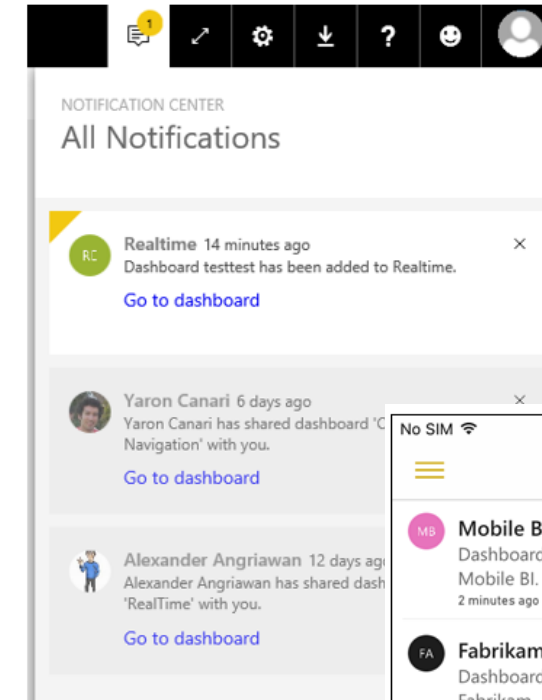
Pinning and Navigation

Get Data

Pinning and Navigation

Keeping Data Current

Q&A and Quick Insights

Sharing
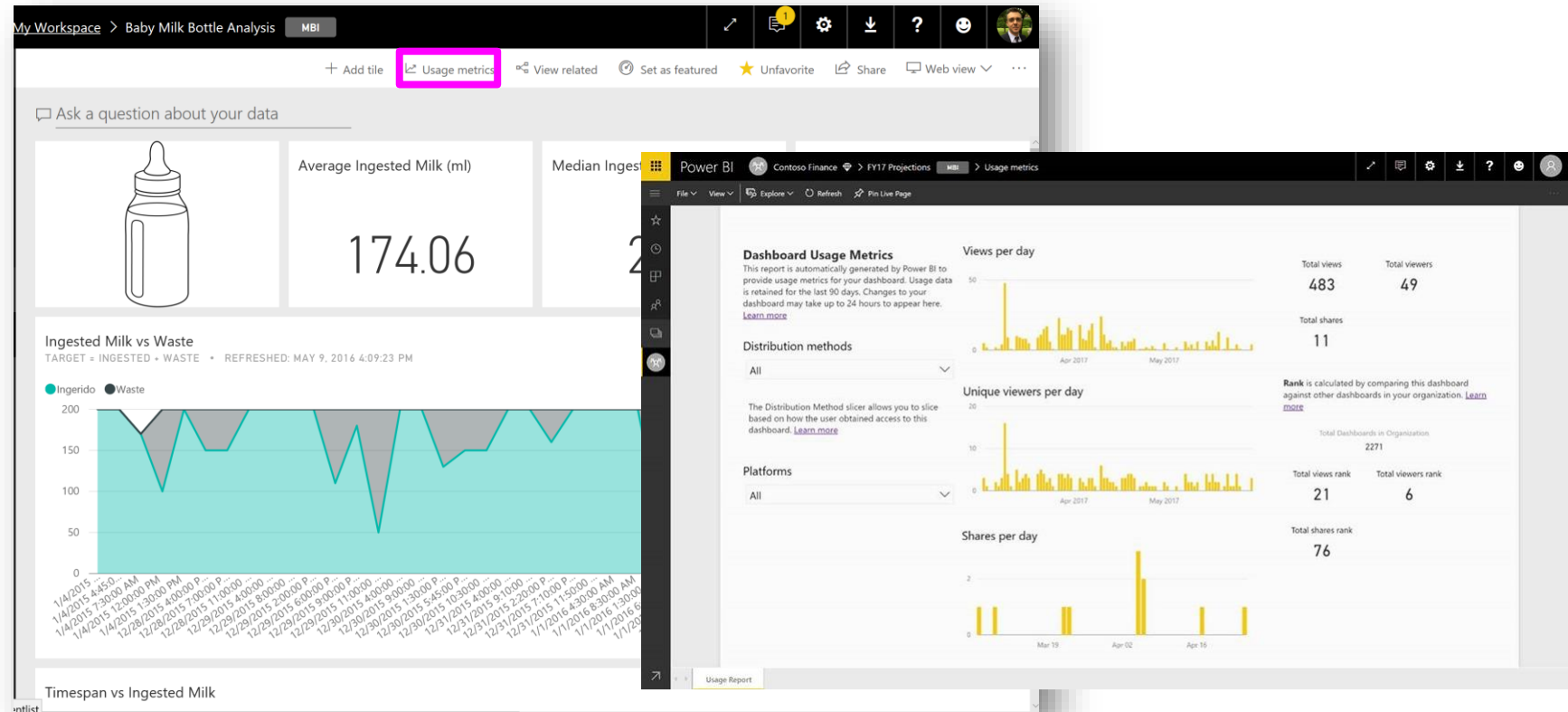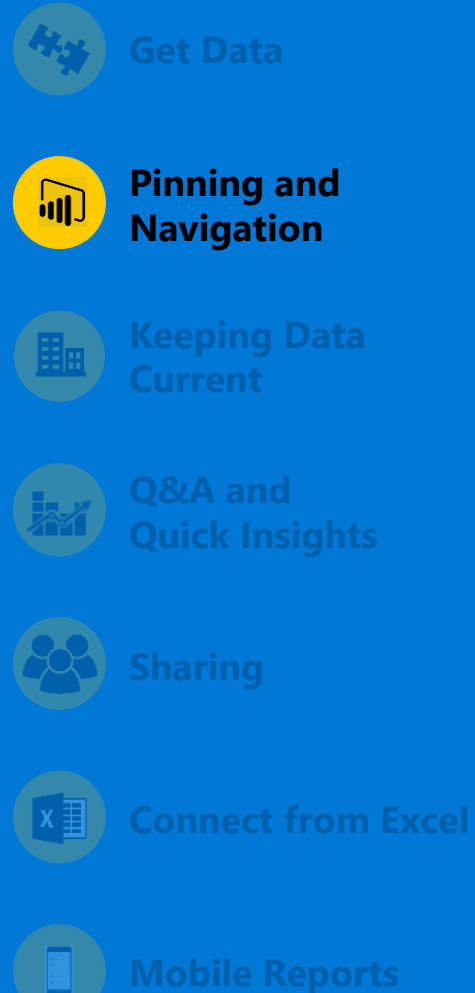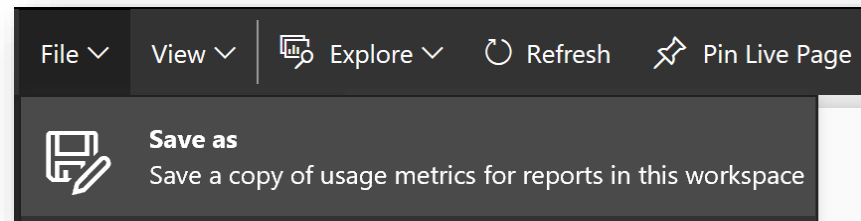
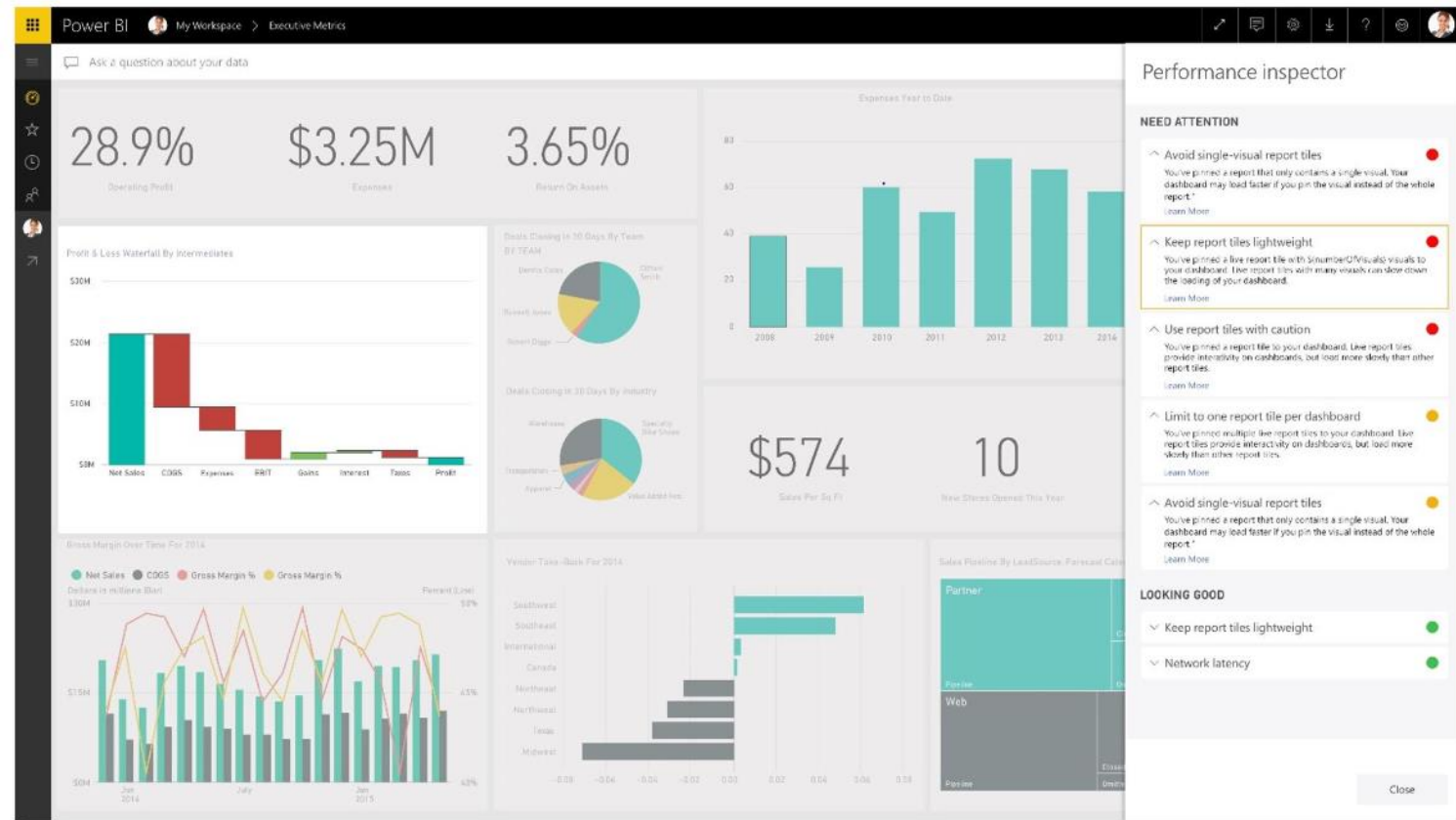### Connect from Excel

Mobile Reports

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!**

File ∨   View ∨   ⊡ Explore ∨   ↻ Refresh   📌 Pin Live Page

Save as
Save a copy of usage metrics for reports in this workspace

Pinning and Navigation

Get Data

Pinning and Navigation

Keeping Data Current

Q&A and Quick Insights

Sharing

Connect from Excel

Mobile Reports

Dashboard Performance Inspector

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

Demonstration:
Power BI Service