The Information Lab

PBI Bookmarks
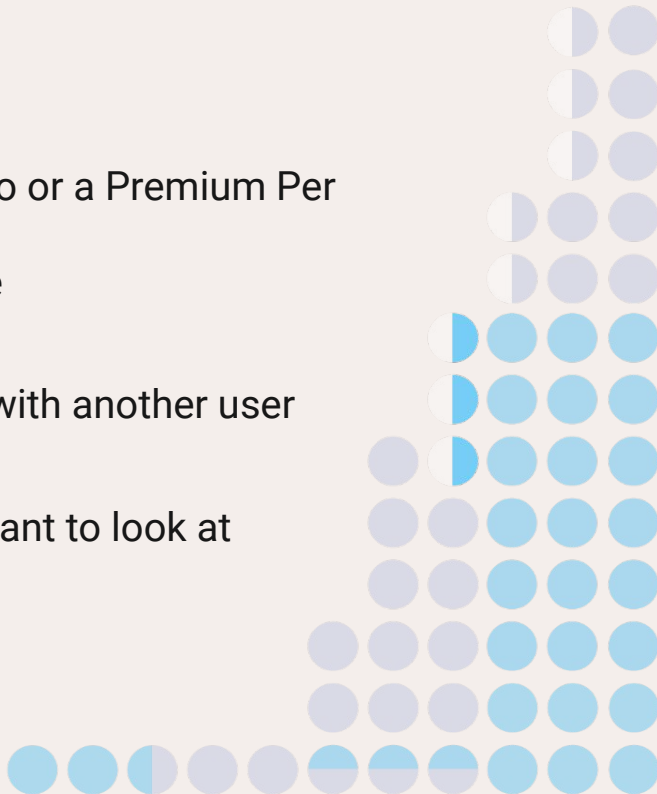## Stephen Moyse & Ed Hayter

What are Bookmarks?

- 'Screenshot' a PowerBI Report

- Use Cases; creating a preset of filters, changing individual slicers, updating/replacing visuals

- They have their own specific pane which can be shown or hidden under the View tab.
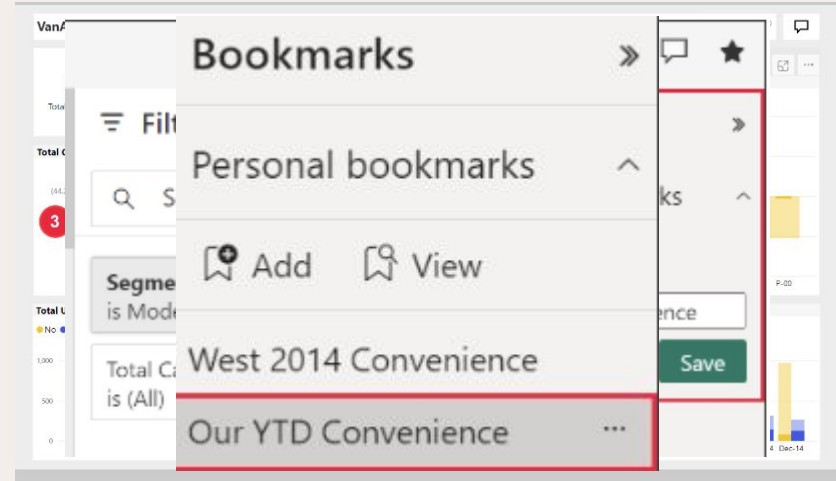
- Two Types; Personal and Report Bookmarks

Personal Bookmarks

- Limited Availability: They can only be used for Power BI Pro or a Premium Per Users (PPU), or if they are shared in a premium workspace

- User-Specific: Cannot be shared and will be lost if shared with another user

- 'Shortcut' to key information: Useful for individuals who want to look at relevant/specific information to them

Creating a Personal Bookmark

- Arrange the report how you want it

- Select the bookmarks icon and choose "Show more bookmarks" to open the pane

- Rename the bookmark to what you want, and select the "Make default" checkmark if you want the report to open like this

- Save the bookmark. If you need to edit or update, select the ellipses.

Report Bookmarks

- Functionality built into a report by the developer, they can be accessed by anyone who views the report.

- They can be selected manually or with the aid of buttons/selections

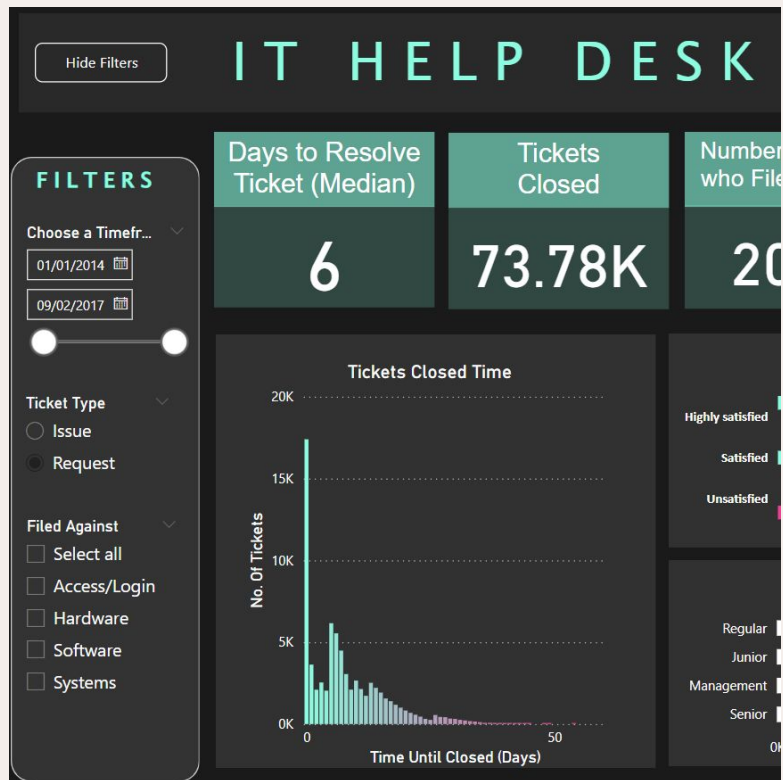- They remain in the report after being sent to another person

Why and when should you use report bookmarks?

- Added functionality and visual improvements
- More tailored to the end user experience
- Accessible to non-technical viewers
- Quick way to elevate a dashboard

- Best for switching to a different view altogether
- Temporary hiding of unnecessary/overwhelming info
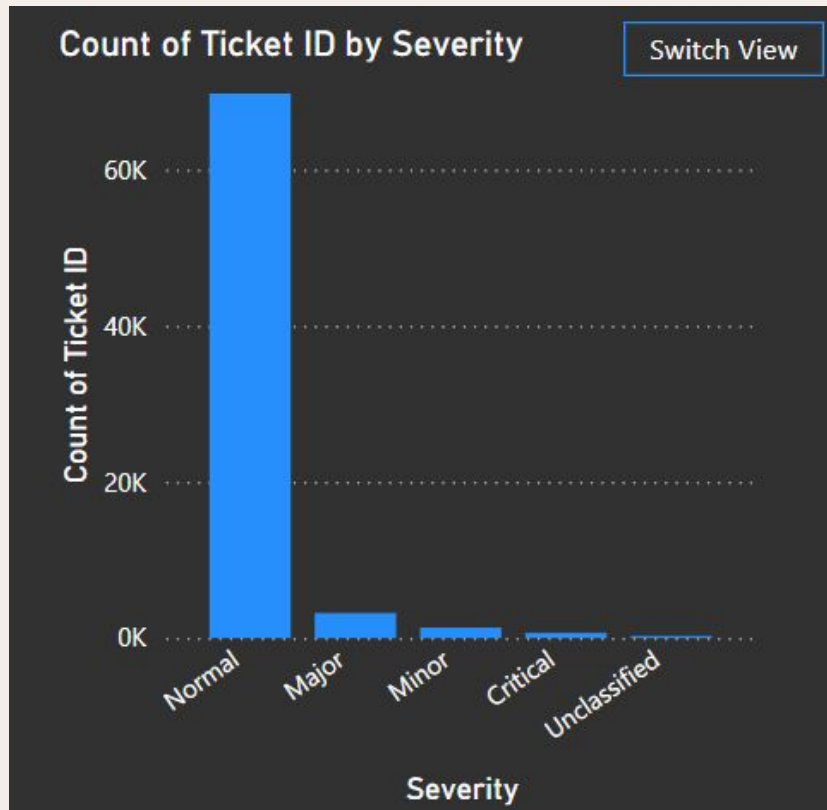- For presentation purposes

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Examples

Allows the hiding and showing of certain dashboard elements like a filter pane

Examples

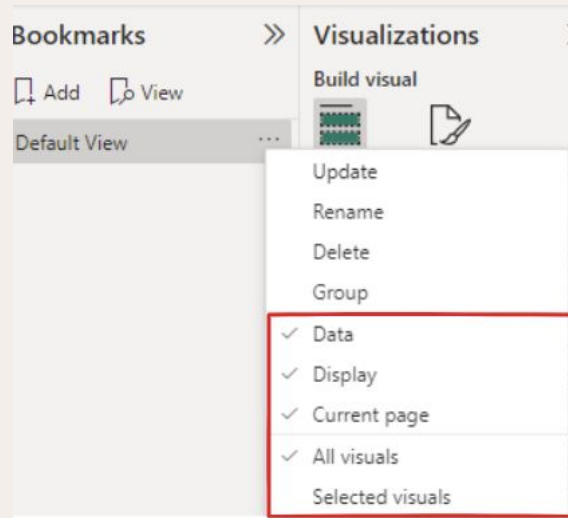Allows the user to switch

between different visuals

Considerations/Limitations

- Some custom visuals do not work well with bookmarks
- Seems to be a limit of 20 personal bookmarks mentioned by the community (At least on PBI service)
- After a lot of bookmarks are used, maintaining them after adding in new visuals is very hard to keep up with
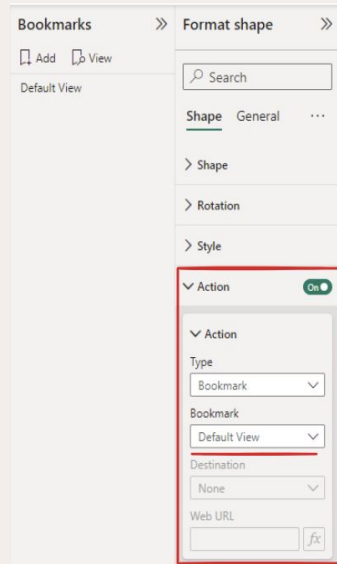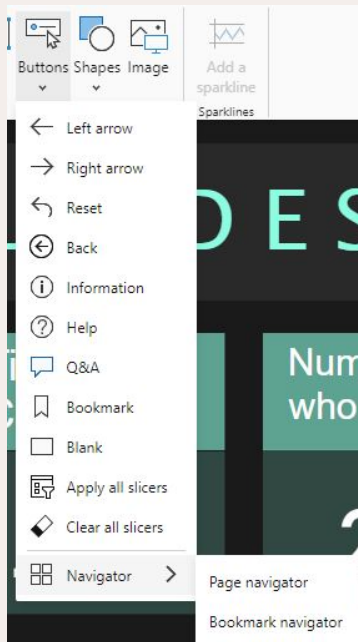- There are performance issues with more than ~20 report bookmarks

Additional Settings

- Data: Applies data properties like filters and slicers.
- Display: Carries over visual properties, such as spotlighted visuals.
- Current Page: Activates the bookmark on the page it was set, enabling page navigation.
- All Visuals/Selected Visuals: Choose which visuals are affected, i.e. for if the user makes changes to unrelated visuals
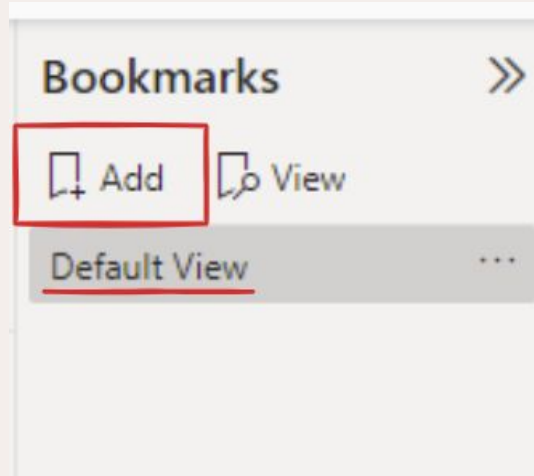
Incorporation into dashboard

- Either by a navigator button or by a shape are the best methods

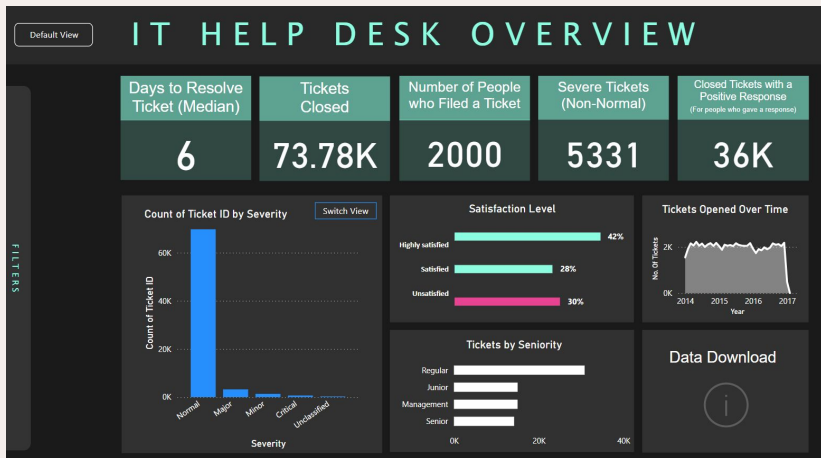# How to set up a report bookmark
Step by step

- First, ensure the bookmark and selection panes are open, and then create a bookmark and name it

How to set up a report bookmark
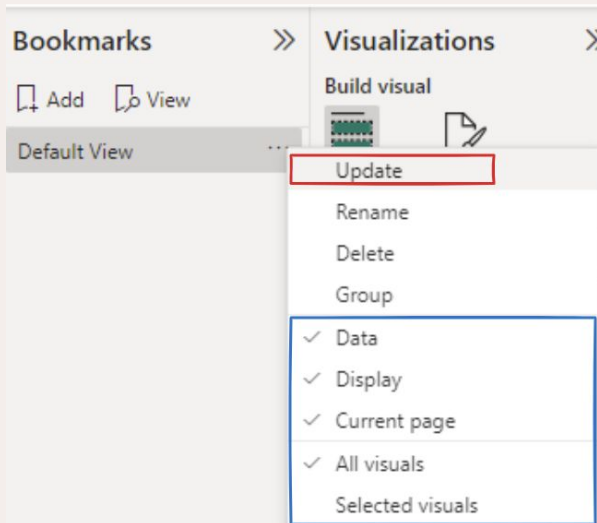*Step by step*

- Then, set the workbook to the state you want, and select which report objects you want hidden/visible in the selection pane

How to set up a report bookmark
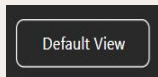## *Step by step*

● Update the bookmark, and change settings accordingly

How to set up a report bookmark

Step by step

- The bookmark is now setup. Create a button as shown earlier or use a shape to be able to access the bookmark from the dashboard
- Now when the shape is clicked, the bookmark is selected

How to set up a report bookmark
Step by step

- To switch between two bookmarks for example, repeat previous steps with a different state of the dashboard and a 2nd bookmark, and hide the non relevant button where appropriate.

  I.e. show/hide

Additional Practice

- Link to Ed's WoW

Questions?