

Optimize KPI reporting using Power BI Metrics

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twoday capacity

Fellowwind



INSPARI



Agenda

- Power BI Metrics – what and how?
- Creating Scorecards
- Creating Metrics
- Organize, View and Follow up on Metrics
- Metrics and Integrations
- Metrics and licensing requirements

Power BI Metrics – what and how?



What is Power BI Metrics?

Metrics is a data-driven, collaborative, and adaptable way to measure key business metrics and goals



Driven by data



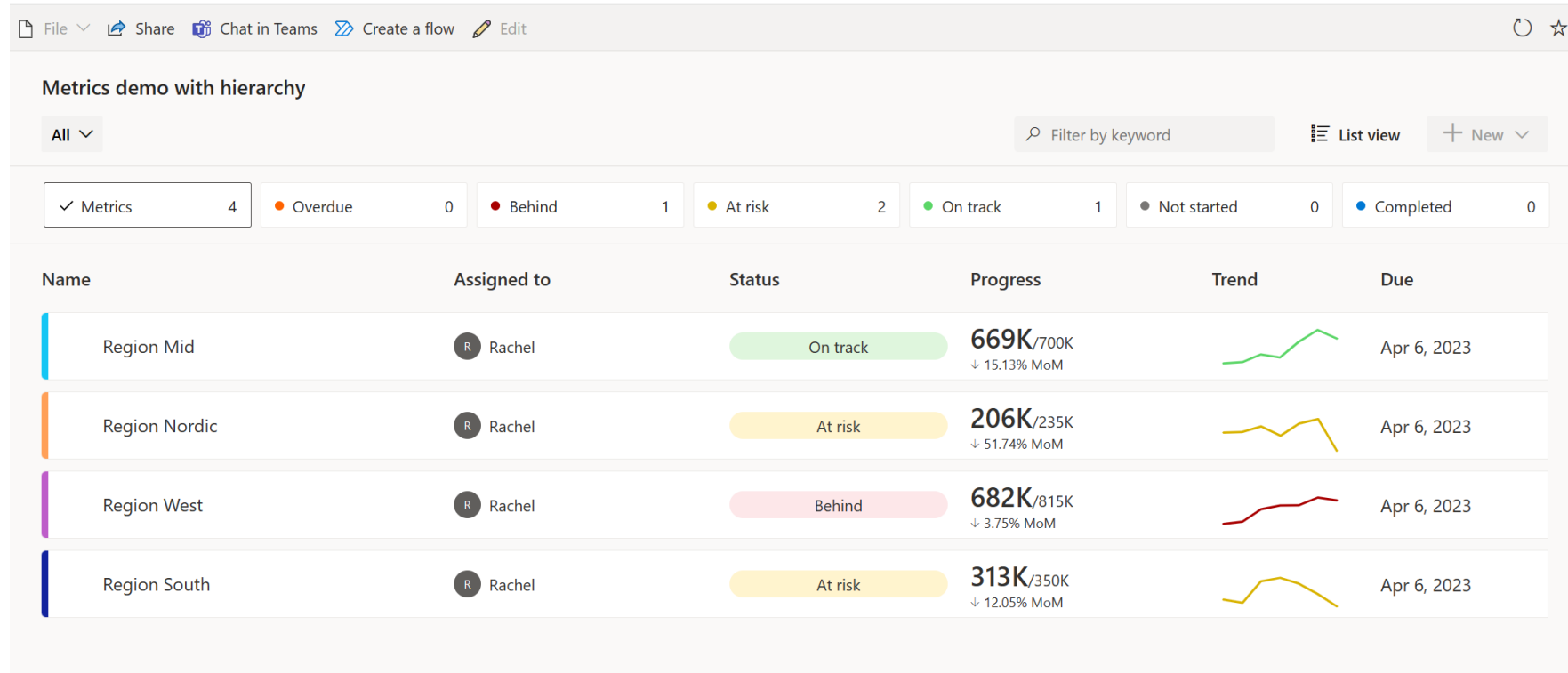
Built for teams



Automated
action

What is Power BI Metrics?

- Easy to create scorecards for KPIs
- Utilize data that already exist in Power BI reports
- Track progress for KPIs and optionally add check-in comments



How to use Power BI Metrics?

- Create Scorecard
- Create metrics
- Check-ins/Status/Update
- Automate

How to use Power BI Metrics?



Define Metrics

Draft

Review

Publish



Check-in

Collect notes

Review

Improve, adjust

ROB (Rhythm of Business)
MBR (Monthly Business Review)
WSR (Weekly Service Review)

Methodologies

Measurable

Achievable

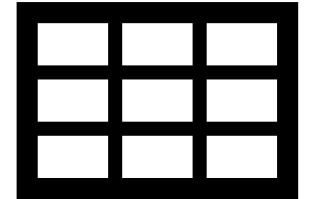
Deadline

A methodology defines an approach to goal setting, tracking, initiatives, review and improvements

- MBO: Management by Objectives
- MAD: Measurable, Attainable, and have a Deadline
- SMART: Specific, Measurable, Achievable, Relevant, Time bound
- FAST: Frequently discussed, Ambitious, Specific, and Transparent
- OKR: Objectives and Key Results

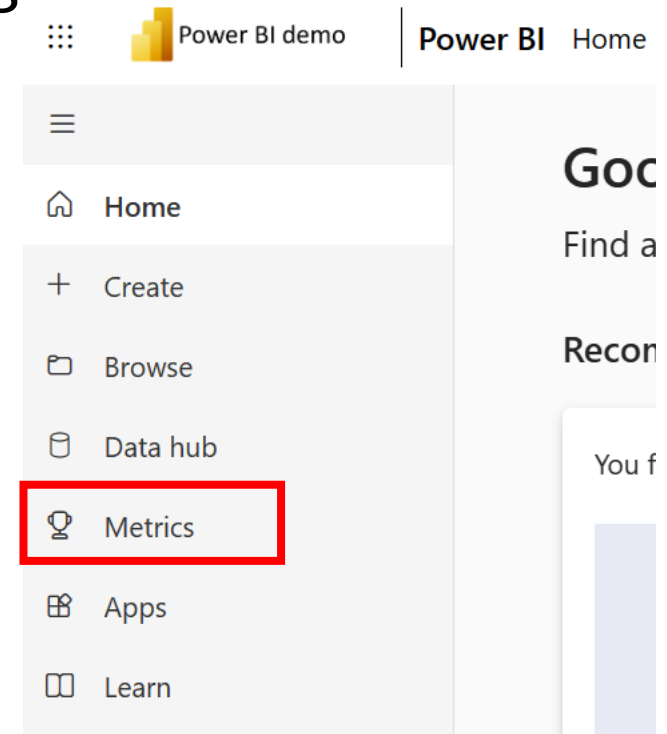
Demo

Creating Scorecards



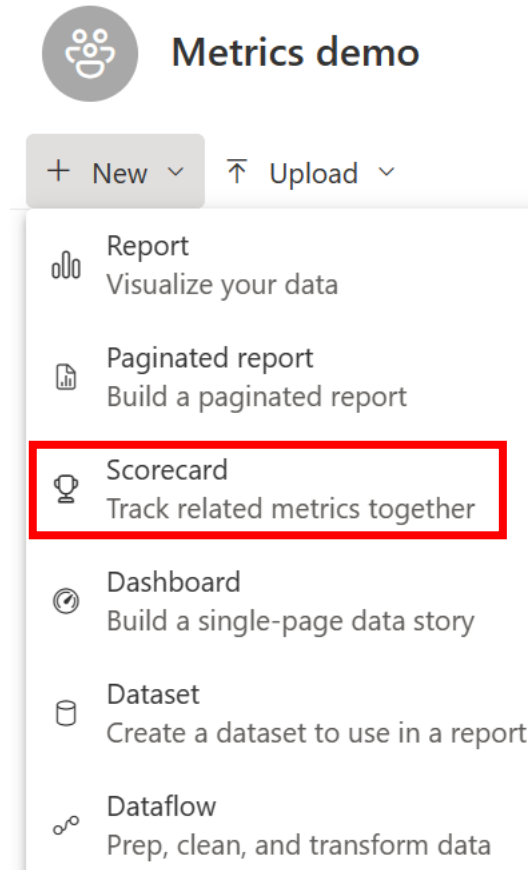
Create Scorecard

- Always created in Power BI Service (or using Metrics Visual)
- Use the left navigation menu
(saves the scorecard in My Workspace and it can be moved)



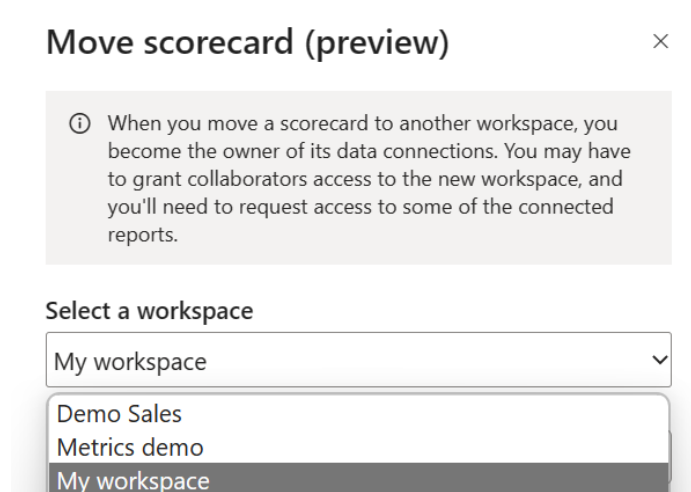
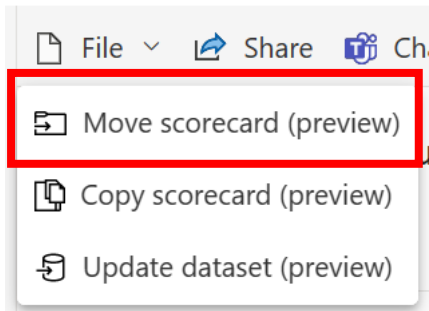
Create Scorecard

- Always created in Power BI Service
- Use the left navigation menu
(saves the scorecard in My Workspace and it can be moved)
- “New” in a Workspace
(saves the scorecard in the Workspace)



Create Scorecard

- Always created in Power BI Service
- Use the left navigation menu
(saves the scorecard in My Workspace and it can be moved)
- “New” in a Workspace
(saves the scorecard in the Workspace)
- Scorecard can be moved to another Workspace in File menu



Create Scorecard

- Always created in Power BI Service
- Use the left navigation menu
(saves the scorecard in My Workspace and it can be moved)
- “New” in a Workspace
(saves the scorecard in the Workspace)
- Scorecard can be moved
- Scorecard can be copied

Copy scorecard (preview) ×

ⓘ When you move a scorecard to another workspace, you become the owner of its data connections. You may have to grant collaborators access to the new workspace, and you'll need to request access to some of the connected reports.

Select a workspace

Metrics demo ▼

☐ Include check-in history

Continue Cancel

e in File menu
Workspace

Create Scorecard

- Always created in Power BI Service
- Use the left navigation menu
(saves the scorecard in My Workspace and it can be moved)
- “New” in a Workspace
(saves the scorecard in the Workspace)
- Scorecard can be moved to another Workspace in File menu
- Scorecard can be copied to existing or another Workspace
- Each Scorecard has a **dataset** with details about the scorecard
The dataset includes details about KPIs including values, targets, check-in notes and more

Settings for scorecard

- Details, e.g., name, description, contact and time zone

Edit scorecard settings



Details

Permissions


Statuses

Name

Metrics Demo

Description

Contact

 Rachel 

Time zone

(UTC+01:00) Brussels, Copenhagen, Madrid, Paris



Notifications

Turn Teams notifications on or off for all scorecard collaborators.



Enable scorecard notifications

Settings for scorecard

- Details, e.g., name, description, contact and time zone
- Permissions, configure access to metrics
- *more about this later*

Edit scorecard settings



Details Permissions Statuses

Give people access to this scorecard, or just specific metrics.

Permission roles

Add members to an existing role, or create a new role with custom permission settings.

+ Add role

View all

- 👁 Can view all metrics
- 📝 Can update 0 metrics

Default



View and update all

- 👁 Can view all metrics
- 📝 Can update all metrics



Settings for scorecard

- Details, e.g., name, description, contact and time zone
- Permissions, configure access to metrics
- *more about this later*
- Statuses
- *more about this later*













Edit scorecard settings



Details Permissions Statuses

+ Add status

↺ Reset statuses

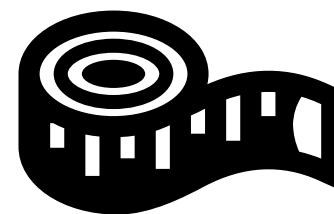
Not started	 ▼	↑	↓	
On track	 ▼	↑	↓	
At risk	 ▼	↑	↓	
Behind	 ▼	↑	↓	
Overdue	 ▼	↑	↓	
Completed	 ▼	↑	↓	

Sharing Scorecard

- Similar to sharing other content in Power BI
- Admin, Member and Contributors on Workspace can edit Scorecards
- Viewers on Workspace will see all Scorecards in Workspace
- Scorecards can also be shared using *Share* function

Demo

Creating Metrics



Creating Metrics

- Each metric has
 - A name
 - One or more owners (optional, but recommended)
 - Value
 - Target (optional)
 - Status
 - Start date
 - End date

Metric name <input type="text" value="Name your metric"/>	Owners <div><div>R</div> Rachel <div>×</div></div> <div>Enter name</div>	Current value <div>Enter value</div>	Final target <div>Enter a value</div>	Status <div>Not started</div> <div>Or set up rules</div>	Start date <div>06/03/2023</div>	Due date <div>06/04/2023</div>
<div>Save</div> <div>Cancel</div>						

Creating Metrics

- Different types of metrics
 - Manual metrics
 - Connected metrics
 - Submetrics
 - Linked metrics

Manual metrics

- Current value and Target are manually entered
- History is automatically created based on entered values

Current value		Final target	
<input type="text" value="123"/>	<input type="text" value="Manual"/>	<input type="text" value="456"/>	<input type="text" value="Manual"/>

- [Create scorecards and manual metrics - Power BI](#)

Connected metrics

- Values are connected to data in a report
- Not all values must be connected – you can connect to Current value and manually enter Target or vice versa
- Values are automatically updated when datasets are refreshed
- If applicable, history is automatically created

Current value Final target

Enter value Set up ▾ Enter a value Set up ▾

Manual metric

Use submetrics >

Connect to data...

- [Create connected metrics in Power BI](#)

Submetrics

- Require a *parent metric*
- Each *parent metric* can have none or more submetrics

The screenshot displays a user interface for managing metrics. At the top, a 'Parent metric' card is shown with a dropdown menu open. The menu options are: 'See details', 'New submetric' (highlighted with a red box), 'Follow metric', and 'Delete this metric'. Below this, a table lists the metrics and their status.

Metric Name	Owner	Status	Progress
Parent metric	Rachel	Not started	
Submetric1	Rachel	Completed	100/100
Submetric2	Rachel	On track	200/250

Submetrics

- Require a *parent metric*
- Each *parent metric* can have none or more submetrics
- A submetric can be either connected or manual
- Submetrics can **rollup** to *parent metric*, based on SUM, AVG, MAX or MIN

The screenshot displays a dashboard interface for metrics. On the left, a 'Current value' section includes an 'Enter value' input field, a 'Manual' dropdown menu, and a list of options: 'Manual metric' (checked), 'Use submetrics' (highlighted), 'Connect to data...', and 'Edit multiple values...'. A secondary dropdown menu is open, showing aggregation functions: 'SUM', 'AVG', 'MAX', and 'MIN'. Below this is a 'Not start' button. The main dashboard area shows a hierarchy of metrics:

Metric Name	Owner	Status	Value
Parent metric	Rachel	On track	300/350
Submetric1	Rachel	Completed	100/100
Submetric2	Rachel	On track	200/250

Submetrics

- Require a *parent metric*
- Each *parent metric* can have none or more submetrics
- A submetric can be either connected or manual
- Submetrics can rollup to *parent metric*, based on SUM, AVG, MAX or MIN
- Rollups always show the same aggregation value of all submetrics, regardless of metric level permissions
- Support up to 5 levels
- [Create submetrics in the Power BI service](#)

Linked metrics (preview)

- Use same metric on multiple scorecards

List view + New

New metric

Link to existing metric (preview)

Add submetric





Manage hierarchies (preview)

Select a scorecard, then connect a metric

Add copies of metrics from other scorecards, and edits and check-ins will sync.

Recent Favorites Shared with me All scorecards

Q Search

Name	Owner	Opened	Endorsement	Sensitivity
 Metrics demo with categorical values	Metrics demo		—	—
 Metrics demo with hierarchy	Metrics demo	4 hours ago	—	—
 Metrics demo with Milestones	Metrics demo		—	—
 Metrics Demo Workspace	Metrics demo	now	—	—

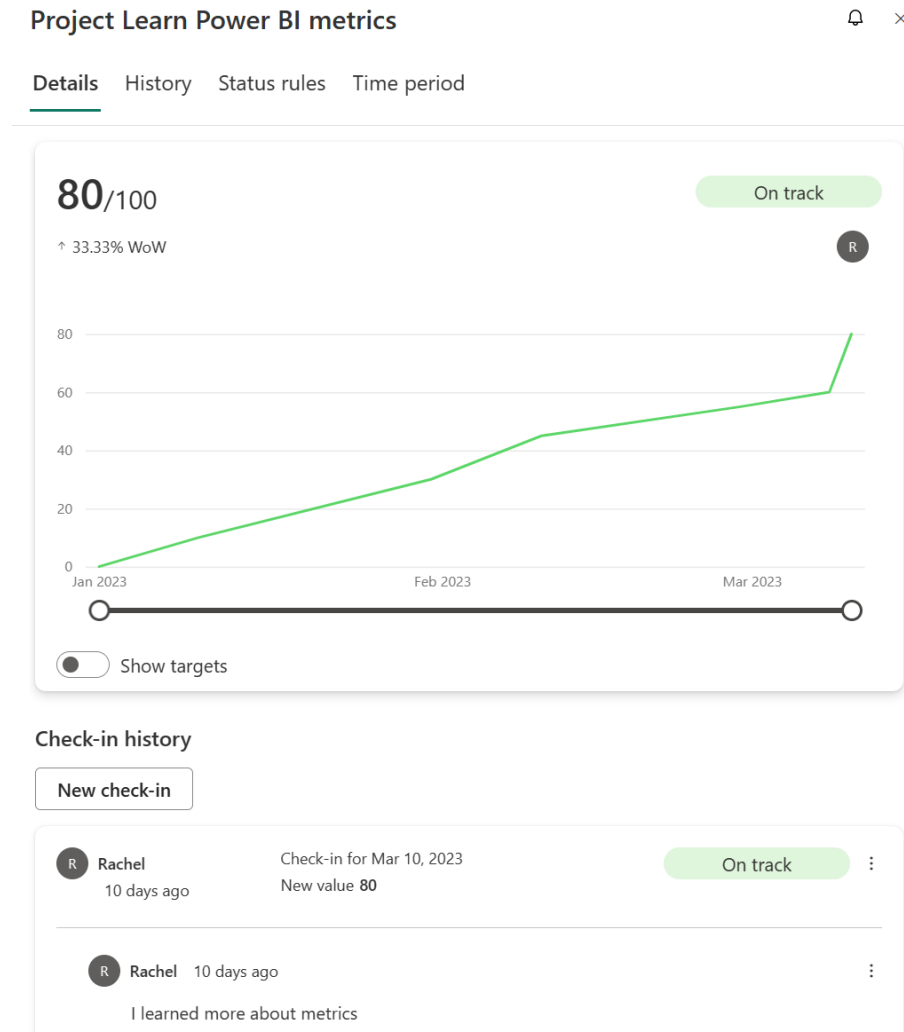
Cancel

Linked metrics (preview)

- Use same metric on multiple scorecards
- Check-ins are reflected in all scorecards
- Only users who have view access to the source metric can see the linked metric
- Metric can only be edited in source scorecard
- Check-in can happen in all scorecards, if user has permission
- Linked metrics are not filtered by hierarchies
- Rollups are based on source scorecard
- [Create linked metrics in the Power BI service](#)

Options on metrics

- Details: including check-in option and history



Options on metrics

- Details: including check-in option and history
- History: check-in date, value, status etc.

Project Learn Power BI metrics

Details

History

Status rules

Time period

Keep track of the most recent change made to a check-in.

Check-in date	Value	Status	Changed by	Last modified
Apr 15, 2023	—	—	<div><div>R</div><div>Rachel</div></div>	10 days ago
Mar 31, 2023	—	—	<div><div>R</div><div>Rachel</div></div>	10 days ago
Mar 10, 2023	80	On track	<div><div>R</div><div>Rachel</div></div>	10 days ago
Mar 8, 2023	60	At risk	<div><div>R</div><div>Rachel</div></div>	12 days ago
Feb 28, 2023	55	On track	<div><div>R</div><div>Rachel</div></div>	11 days ago
Feb 15, 2023	—	—	<div><div>R</div><div>Rachel</div></div>	12 days ago
Feb 10, 2023	45	On track	<div><div>R</div><div>Rachel</div></div>	11 days ago

Options on metrics

- Details: including check-in option and history
- History: check-in date, value, status etc.
- Status rules: configure automated status rules

Project Learn Power BI metrics

Details

History

Status rules

Time period

If

Value

equals

100

% of target

Change status to

Completed

If

Value

is greater than

70

% of target

Change status to

On track

If

Value

is less than or equal to

70

% of target

Change status to

At risk

Otherwise, change status to

Not started

Options on metrics

- Details: including check-in option and history
- History: check-in date, value, status etc.
- Status rules: configure automated status rules
- Time period: configure change in percentage c

Project Learn Power BI metrics

Details History Status rules Time period

Set tracking preferences for this metric

Display change on this metric

☒ On

☐ Cycle over cycle
Show the change every set number of days, like Month over Month.

☐ Cycle to date
Show Month to Date, Year to Date, or any date to present.

☒ No cycle
Just show the change between this metric's last 2 data points.

Label

Display as

☒ Percentage ☐ Absolute value

80/100

↑ 33.33% WoW



Options on metrics

- Details: including check-in option and history
- History: check-in date, value, status etc.
- Status rules: configure automated status rules
- Time period: configure change in percentage c
- Connections: exist for connected metrics, show


Revenue

[Details](#) [History](#) [Status rules](#) [Time period](#) [Connections](#)

View and manage connection settings

Current value

Connected report: [Northwind report](#)

Connected by:  [Rachel](#)

Refreshed Mar 9, 2023, 8:55:17 AM

[Refresh](#)


[Disconnect](#)

[Take over connection](#)

☒ Clear metric values when connecting to new report

Target value

Connected report: [Northwind report](#)

Connected by:  [Rachel](#)

Refreshed Mar 9, 2023, 8:55:18 AM

[Refresh](#)

[Disconnect](#)

[Take over connection](#)

☒ Clear metric values when connecting to new report

Milestone on metrics

- Relevant for metrics where targets change over time
- Setup target and due date manually

Add or edit multiple milestones (preview)

Add (or copy and paste) the metrics and due dates you'd like to set as milestones.

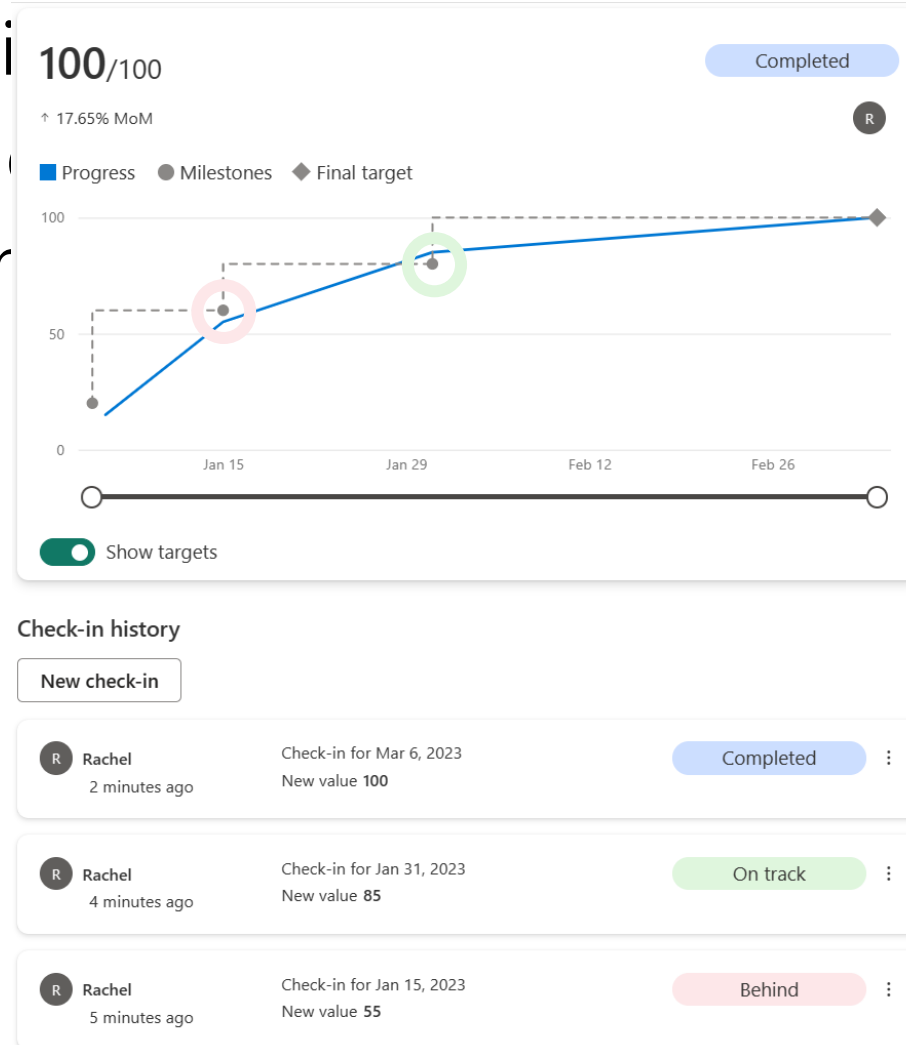
\$% \$ % ‰ .00

	Target	Due date
0	10	3/15/23
1	40	4/30/23
2	80	6/30/23
3	100	7/31/23
+		

Milestone on metrics

- Relevant for metrics
- Setup target and
- Track development

per time









Status on Metrics

- Easy way to see status on individual metrics
- Each scorecard can have different statuses
 - Configured under Settings for scorecard

Edit scorecard settings ×

Details Permissions Statuses

+ Add status ↺ Reset statuses

Overdue	 ▼	↑	↓	🗑️
Behind	 ▼	↑	↓	🗑️
At risk	 ▼	↑	↓	🗑️
On track	 ▼	↑	↓	🗑️
Not started	 ▼	↑	↓	🗑️
Completed	 ▼	↑	↓	🗑️

Status on Metrics

- Easy way to see status on individual metrics
- Each scorecard can have different statuses
 - Configured under Settings for scorecard

Edit scorecard settings

Details

Edit scorecard settings

DetailsPermissionsStatuses

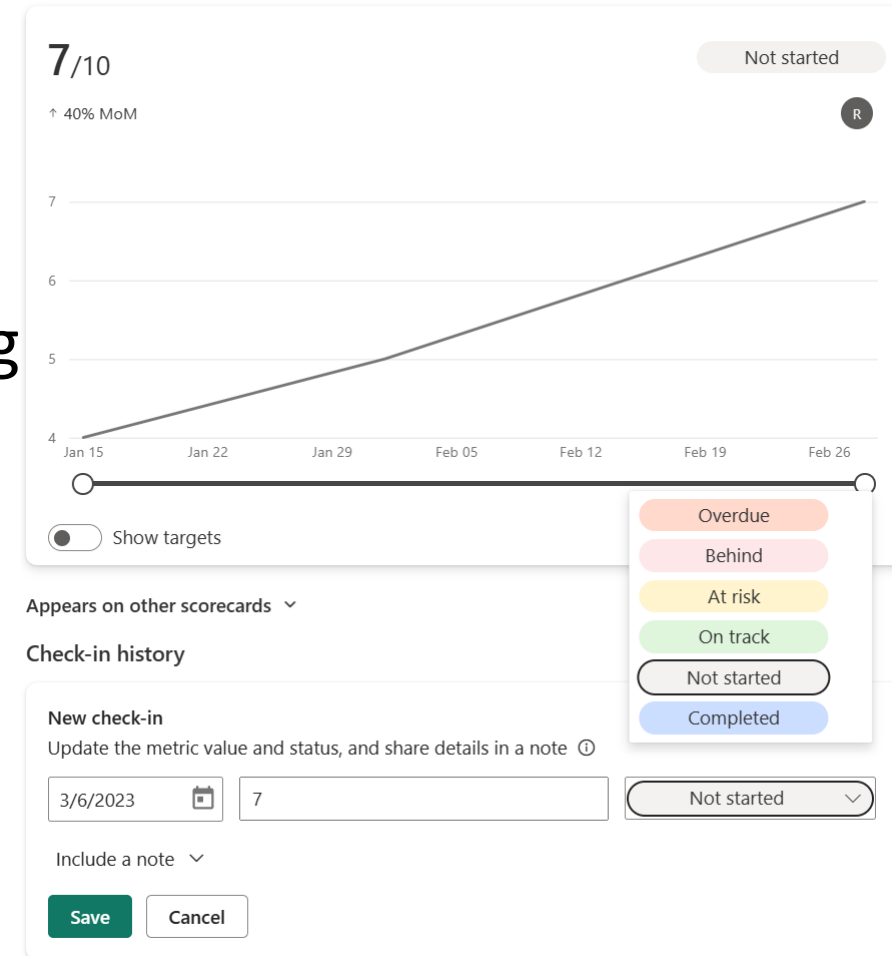
+ Add

+ Add statusReset statuses

Over	Stage 1	<div></div>	↑	↓	🗑
Behir	Stage 2	<div></div>	↑	↓	🗑
At ris	Stage 3	<div></div>	↑	↓	🗑
On tr	Stage 4	<div></div>	↑	↓	🗑
Not s	Completed	<div></div>	↑	↓	🗑

Status on Metrics

- Easy way to see status on individual metrics
- Each scorecard can have different statuses
 - Configured under Settings for scorecard
- Status can be adjusted manually when creating metrics and performing check-in



Status on Metrics

- Easy way to see status on individual metrics
- Each scorecard can have different statuses
 - Configured under Settings for scorecard
- Status can be adjusted manually when creating metrics and performing check-in
- Status can be automated by configuring rules

The screenshot shows the 'Status rules' configuration interface. At the top, there are tabs for 'Details', 'History', 'Status rules' (which is selected), and 'Time period'. Below the tabs is a '+ New rule' button. The main configuration area has a rule structure: 'If' followed by a dropdown menu showing 'Value', then a comparison operator 'is greater than', followed by another dropdown menu showing 'Value'. Below this, there is a 'Change status to' label and a dropdown menu showing 'Not started'. At the bottom, there is an 'Otherwise, change status to' label and another dropdown menu showing 'Not started'. On the right side of the rule configuration, there are three icons: an up arrow, a down arrow, and a trash can icon.

- [Customize statuses on your scorecard](#)
- [Create automated status rules for metrics in the Power BI service](#)

Permission on Metrics

- Scorecard setting, you can configure roles with permission on metric level

Permission

Search

	View	Update		Status	Notes	Set for all ⓘ
		Current				
Select all	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Region North	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Region South	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NPS	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee satisfactory	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permission on Metrics

- Scorecard setting, you can configure roles with permission on metric level
- **View** permission: user can view metric
- **Update** permission: allow users to update & check-in, control on
 - **Note**: permission to add notes
 - **Status**: permission to update status
 - **Current**: permission to update current value
- **Set for all** permission: all submetrics will inherit configured permissions
- **Default** permission: applicable if no other roles are assigned

Permission: View

Metrics demo Permissions

✓ Metrics6

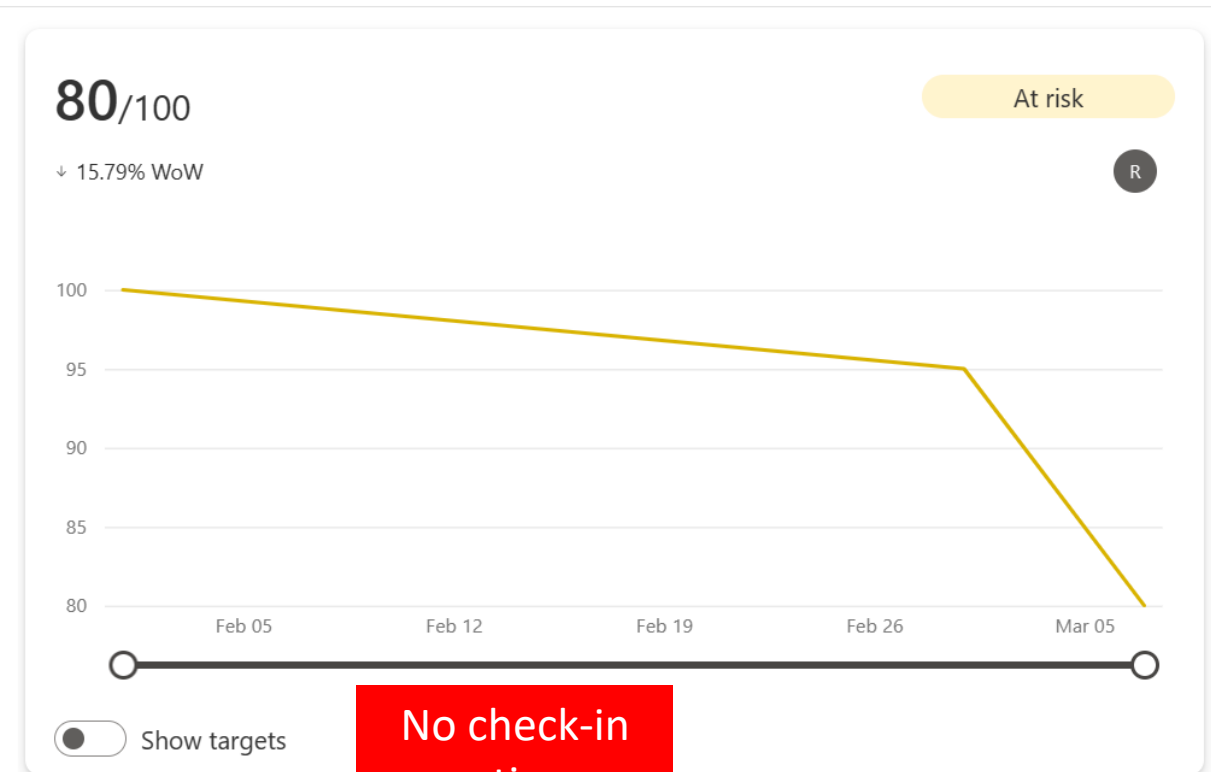
● Overdue0

● Behind

≡ Name	Assigned to
✓ Sales	<div>R Rachel</div>
Region North	<div>R Rachel</div>
Region South	<div>R Rachel</div>
NPS	<div>R Rachel</div>
Cost	<div>R Rachel</div>
Employee satisfactory	<div><div>🔔</div><div>💬</div><div>R Rachel</div></div>

Employee satisfactory

Details History Time period



No check-in options

Check-in history

R Rachel Check-in for Mar 7, 2023 **At risk**
New value 80

Permission: Update, Current

Metrics demo Permissions

✓ Metrics6

● Overdue0

● Behind

≡ NameAssigned to

✓ Sales

Region North

Region South

NPS

Cost

Employee satisfactory

R Rachel

R Rachel

R Rachel

R Rachel

R Rachel

R Rachel

Region North

Details

History

Time period

110

105

100

95

90

Feb 05

Feb 12

Feb 19

Feb 26

Mar 05

○

○

Show targets

Check-in history

New check-in

Update the metric value and status and share details in a note

3/7/2023

📅

100

At risk

Save

Cancel

Current value editable

Status is locked

Permission: Update, Status

Metrics demo Permissions

✓ Metrics 6

● Overdue 0

● Behind

Name	Assigned to
Sales	R Rachel
Region North	R Rachel
Region South	R Rachel
NPS	R Rachel
Cost	R Rachel
Employee satisfactory	R Rachel

NPS

Details History Time period

85/120

↓ 10.53% WoW

Behind

R

110

100

90

Feb 05

Feb 12

Feb 19

Show targets

Overdue

Behind

At risk

On track

Not started

Completed

Behind

Check-in history

New check-in

Update the metric value and status, and share details in a note

3/7/2023

85

Save Cancel

Status is editable

Current value is locked

Permission: Update, Notes

Metrics demo Permissions

✓ Metrics 6

● Overdue 0

● Behind

≡ Name

Assigned to

✓ Sales

R Rachel

Region North

R Rachel

Region South

R Rachel

NPS

R Rachel

Cost

R Rachel

Employee satisfactory

R Rachel

Cost

Details History Time period

120

100

Feb 05 Feb 12 Feb 19 Feb 26 Mar 05

○

○

Show targets

Check-in history

New check-in

Update the metric value and status, and share details in a note

3/7/2023

115

On track

Hide note ^

A B I U

Type @ to mention people

Save

Cancel

Current value is locked

Status is locked

Note is editable

Permission on Metrics

- Permissions apply to underlying dataset for scorecard, except default role
- Admin, Member or Contributor will always see all metrics in scorecards

- [Protect your scorecards with metric-level permissions](#)

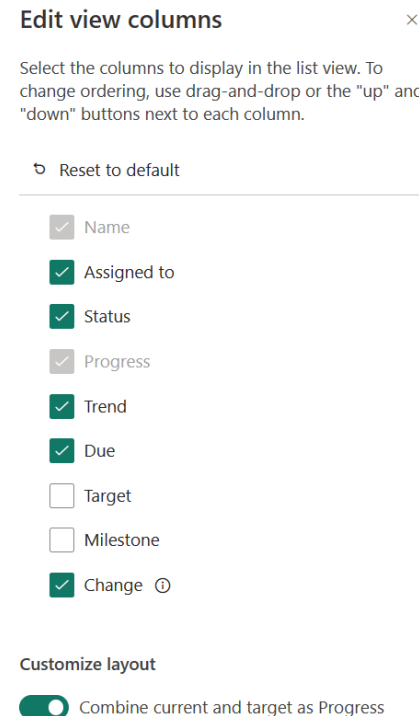
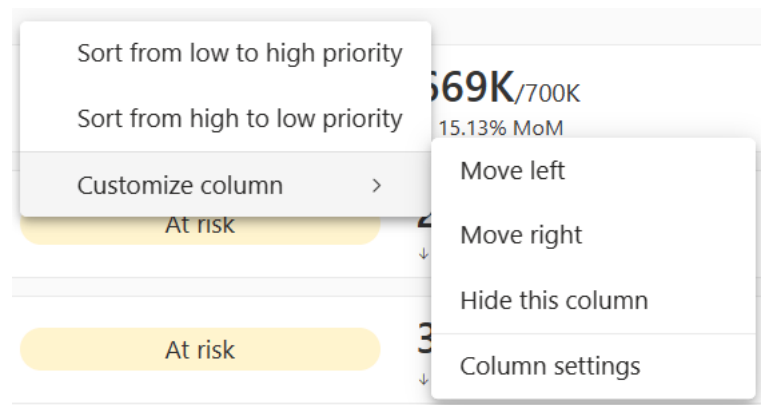
Demo

Organize, View
and Follow up on Metrics



Organizing content in scorecard

- You can reorder metrics, including creating/removing submetrics
- Rearrange order of columns
- Hide/unhide columns, name and progress/current cannot be hidden

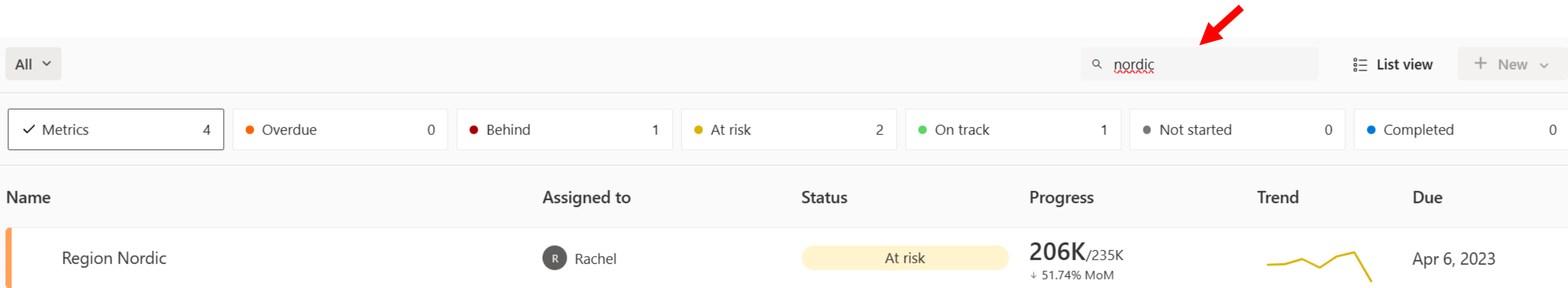


Organizing content in scorecard

- You can reorder metrics, including creating/removing submetrics
- Rearrange order of columns
- Hide/unhide columns, name and progress/current cannot be hidden
- Move scorecard – to another workspace
- Copy scorecard – this can be used to create scorecard templates



Viewing Metrics

- On a scorecard, you can see all metrics
- You can filter on
 - Name of metric



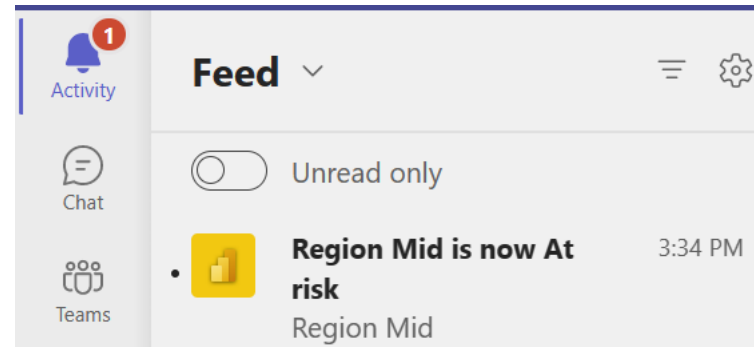
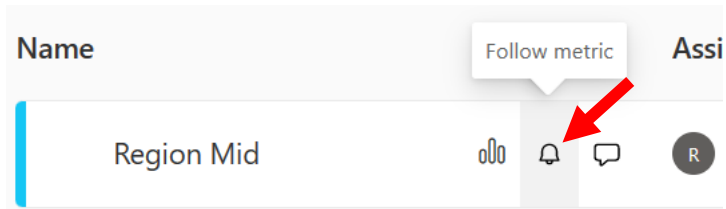
Viewing Metrics

- On a scorecard, you can see all metrics
- You can filter on
 - Name of metric
 - Status

<div><div>● Metrics4</div><div>● Overdue0</div><div>● Behind1</div><div>✓ At risk2</div><div>● On track1</div><div>● Not started0</div><div>● Completed0</div></div>						
Name	Assigned to	Status	Progress	Trend	Due	
Region Nordic	<div>R</div> Rachel	At risk	206K/235K ↓ 51.74% MoM		Apr 6, 2023	
Region South	<div>R</div> Rachel	At risk	313K/350K ↓ 12.05% MoM		Apr 6, 2023	

Viewing Metrics

- On a scorecard, you can see all metrics
- You can filter on
 - Name of metric
 - Status
- It is possible to *follow* individual metrics and be notified in Teams when a metric is updated

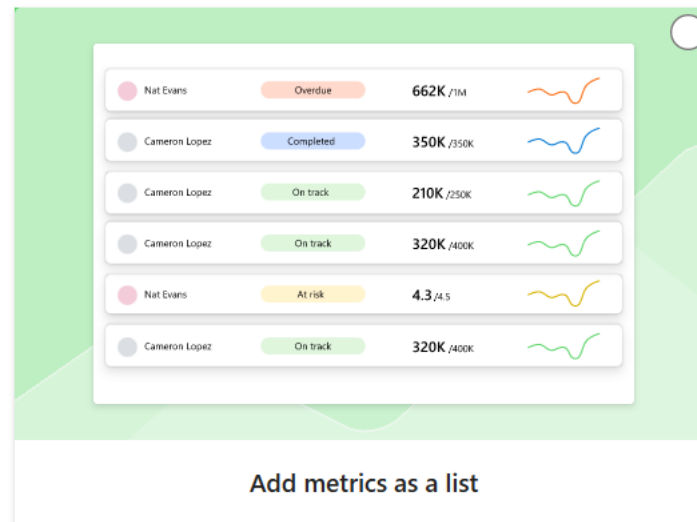
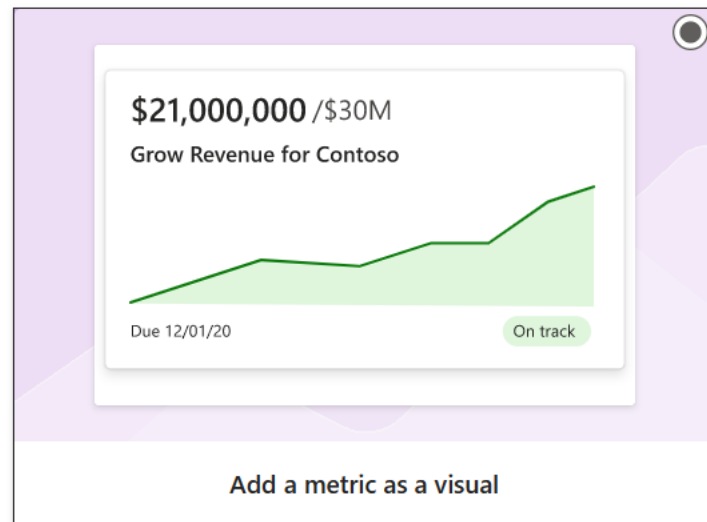


Metrics visual (preview)

- Add scorecards or individual metrics directly in your report

Add a metric to this report

Choose from (or add to) existing scorecards, or create a brand new metric and scorecard. [What's a scorecard?](#)



Browse metrics

Create new

Cancel

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report
- Create scorecards

Create scorecard

Track progress against metrics and submetrics

Scorecard name *


Give your scorecard a concise name

Description

Describe why you're tracking these metrics

Sensitivity label

▼

 Some sensitivity label settings, such as file encryption settings and content marking, are not enforced in Power BI. [Learn more](#)

Workspace

My workspace ▼

☐ Create a workspace

Create

Cancel

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report
- Create scorecards
- Create metrics

Create a new metric to add as a visual in this report

Create here, edit anywhere. Edit your scorecards (and metrics) anytime from the service.

Metric name *

Current value

[Edit](#)

Final target

[Edit](#)

Or [connect to data](#)

Or [connect to data](#)

Start date

Due date



Owners

Status

Not started



Or [set up rules](#)

Add to report

Cancel

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report
- Create scorecards
- Create metrics
- Connect to existing scorecard

Choose from one of your existing scorecards

Then find (or add) the metric you want displayed in this report.

Recent

Favorites

Shared with me

All scorecards



+ New scorecard



Name

Owner



Metrics demo with categorical values

Metrics demo



Metrics demo with hierarchy

Metrics demo



Metrics demo with Milestones

Metrics demo



Metrics Demo Workspace

Metrics demo

Cancel

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report
- Create scorecards
- Create metrics
- Connect to existing scorecard
- Format scorecards and metrics, e.g., font, colors, and backgrounds

Metrics visual (preview)

Metrics demo with hierarchy

All Filter by keyword List view + New

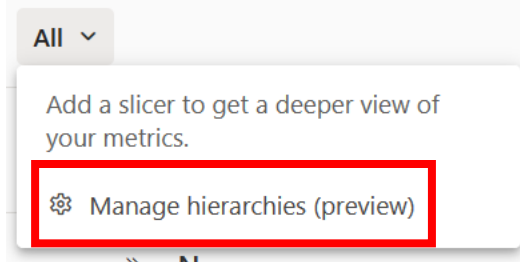
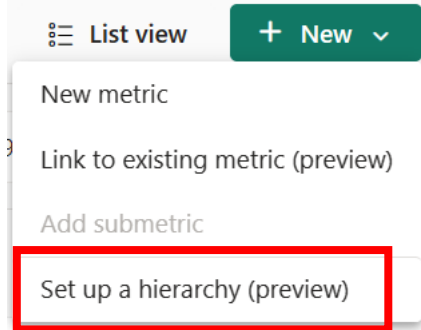
✓ Metrics	4	Overdue0	Behind1	At risk2	On track1	Show 2 more
Name	Assigned to	Status	Progress	Trend	Due	
Region Mid	<div>R</div> Rachel	On track	669K/700K ↓ 15.13% MoM	<div></div>	Apr 6, 2023	
Region Nordic	<div>R</div> Rachel	At risk	206K/235K ↓ 51.74% MoM	<div></div>	Apr 6, 2023	
Region West	<div>R</div> Rachel	Behind	682K/815K ↓ 3.75% MoM	<div></div>	Apr 6, 2023	
Region South	<div>R</div> Rachel	At risk	313K/350K ↓ 12.05% MoM	<div></div>	Apr 6, 2023	

Metrics visual (preview)

- Add scorecards or individual metrics directly in your report
 - Create scorecards
 - Create metrics
 - Connect to existing scorecard
 - Format scorecards and metrics, e.g., font, colors, and backgrounds
 - Cross-filtering or highlighting are not supported
-
- [Create a metrics visual in a Power BI report](#)

Hierarchies (preview)

- Feature to automatically roll up metrics
- Require Premium Per User or Capacity
- Created at scorecard level based on datasets using in connected metric(s)



Hierarchies (preview)

- Feature to automatically roll up metrics
- Require Premium Per User or Capacity
- Created at scorecard level based on datasets using in connected metric(s)
- A hierarchy belong to one scorecard
- Metric must be connected to data
- Scorecard list view: slice metrics by one or more hierarchy level

Hierarchies (preview)

The screenshot displays a dashboard interface with a sidebar on the left and a main content area on the right. The sidebar contains a hierarchy menu with categories like 'All', 'Accessories', 'Socks', 'Bags', 'Belts', 'Jewelry', 'Other', 'Scarves', 'Socks', 'Sun classes', 'Watches', 'Clothing', and 'Furniture'. A red arrow points to the 'Socks' item, which is highlighted. The main content area shows a table with columns: 'Assigned to', 'Status', 'Progress', 'Trend', and 'Due'. The table contains five rows of data, each representing a task assigned to 'Rachel'. The status of each task is indicated by a colored pill (green for 'On track', red for 'Behind', yellow for 'At risk'). The progress is shown as a percentage and a trend line. The due date is 'Apr 3, 2023' for all tasks.

Left Sidebar:

- All
- Accessories
- Socks
- Bags
- Belts
- Jewelry
- Other
- Scarves
- Socks
- Sun classes
- Watches
- Clothing
- Furniture

Main Content Area:

Filter by keyword

List view

+ New

0 Behind 2 At risk 0 On track 2 Show 2 more

Assigned to	Status	Progress	Trend	Due
R Rachel	On track	318/334 ↓ 50%		Apr 3, 2023
R Rachel	Behind	159/189 ↓ 75%		Apr 3, 2023
R Rachel	On track	477/520 ↓ 40%		Apr 3, 2023
R Rachel	Behind	180/188 ↓ 67.25%		Apr 3, 2023

Hierarchies (preview)

- Feature to automatically roll up metrics
- Require Premium Per User or Capacity
- Created at scorecard level based on datasets using in connected metric(s)
- A hierarchy belong to one scorecard
- Metric must be connected to data
- Scorecard list view: slice metrics by one or more hierarchy level
- Heatmap view: side by side comparison of different hierarchy levels

Hierarchies (preview)

Add columns

Filter by keyword

Heatmap (preview)

+ New

Name

Comparing 3 items against totals

Filter by keyword

Heatmap (preview)

X

Mid

Name

Comparing 9 items against totals

Filter by keyword

Heatmap (preview)

+ New

Nordic

Mid

Name

Totals

Bags

Belts

Jewelry

Other

Scarves

Socks

West

Nordic

Mid

669K/803K
Behind

87/102
At risk

736/743
On track

3K/3K
At risk

240/257
On track

308/342
On track

318/334
On track

East

West

Nordic

206K/230K
At risk

72/78
On track

566/617
On track

3K/3K
On track

600/612
On track

528/564
On track

159/189
Behind

East

West

682K/764K
At risk

143/155
On track

910/983
On track

3K/3K
On track

240/281
At risk

462/466
On track

477/520
On track

East

366K/366K
Behind

104/115
Behind

614/535
On track

2K/2K
Behind

533/485
On track

537/575
Behind

188/188
Behind

Hierarchies (preview)

- Feature to automatically roll up metrics
 - Require Premium Per User or Capacity
 - Created at scorecard level based on datasets using in connected metric(s)
 - A hierarchy belong to one scorecard
 - Scorecard list view: slice metrics by one or more hierarchy level
 - Heatmap view: side by side comparison of different hierarchy levels
-
- [Get started with hierarchies in Power BI metrics](#)

Follow up on Metrics

- Manual metrics must always be updated manually with new values

New check-in

Update the metric value and status, and share details in a note

3/6/2023

1234

At risk

Hide note ^

A

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Adding a not to check-in of manual metric. Setting the status to At risk


Save

Cancel

Follow up on Metrics

- Manual metrics must always be updated manually with new values
- Connected metrics will automatically get values updated

New check-in
Update the metric value and status, and share details in a note

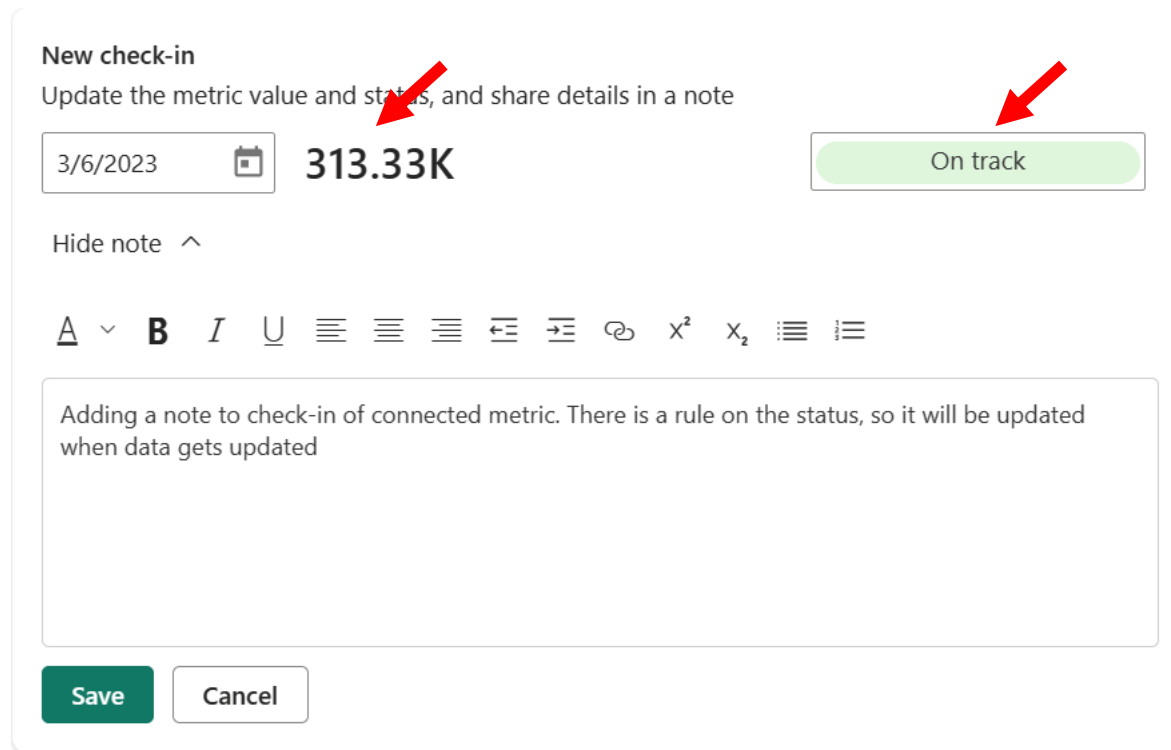
3/6/2023  **313.33K** On track

Hide note ^

A ∨ **B** *I* U ≡ ≡ ≡ ⇐ ⇨ 🔗 x² x₂ ≡ ≡

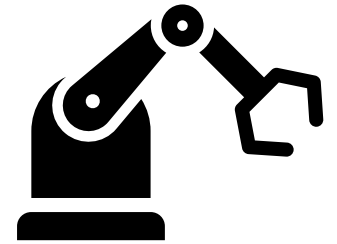
Adding a note to check-in of connected metric. There is a rule on the status, so it will be updated when data gets updated

Save Cancel



Follow up on Metrics

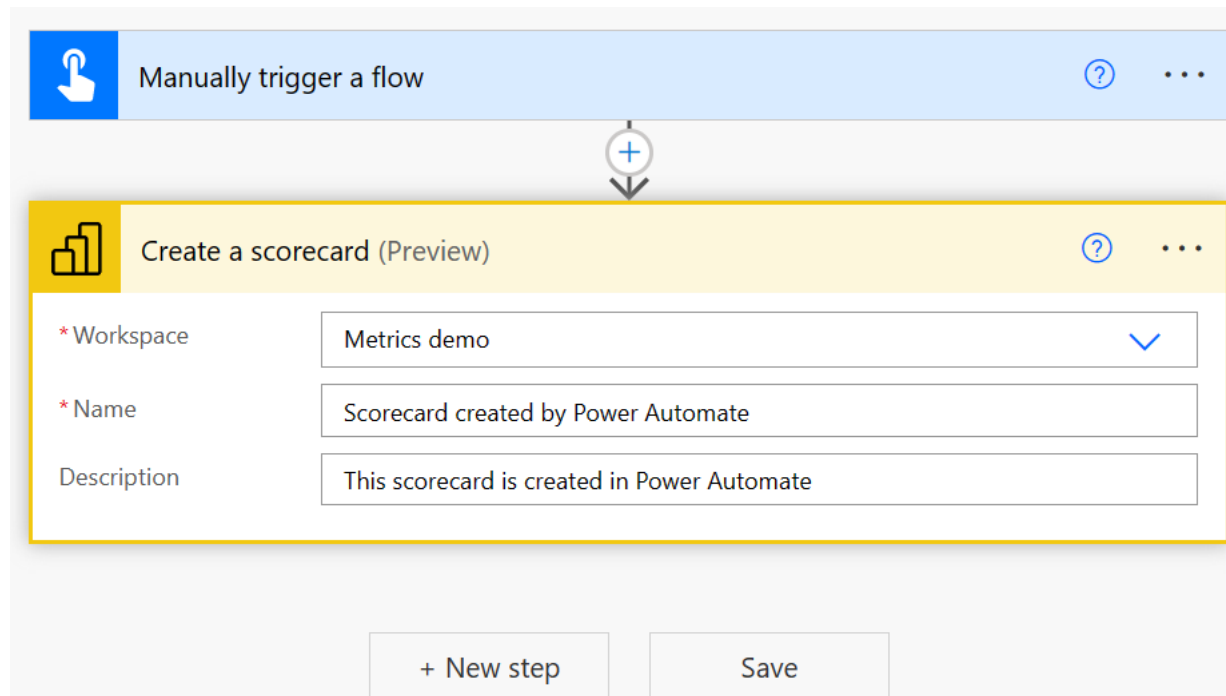
- Manual metrics must always be updated manually with new values
- Connected metrics will automatically get values updated
- In summary with Check-in you can
 - Add a note
 - Update value (for manual metrics)
 - Set status, if status rules have not been configured



Metrics and Integrations

Metrics and Power Automate (preview)

- Automate monitoring and creation of scorecard/metrics
- Actions:
 - Create a scorecard



The screenshot displays the configuration interface for the 'Create a scorecard (Preview)' action in Power Automate. The interface is divided into two main sections: a trigger and an action. The trigger section, 'Manually trigger a flow', is highlighted in blue. Below it, the action section, 'Create a scorecard (Preview)', is highlighted in yellow. The action section contains three input fields: 'Workspace' (set to 'Metrics demo'), 'Name' (set to 'Scorecard created by Power Automate'), and 'Description' (set to 'This scorecard is created in Power Automate'). At the bottom of the interface, there are two buttons: '+ New step' and 'Save'.

Manually trigger a flow

Create a scorecard (Preview)

* Workspace: Metrics demo

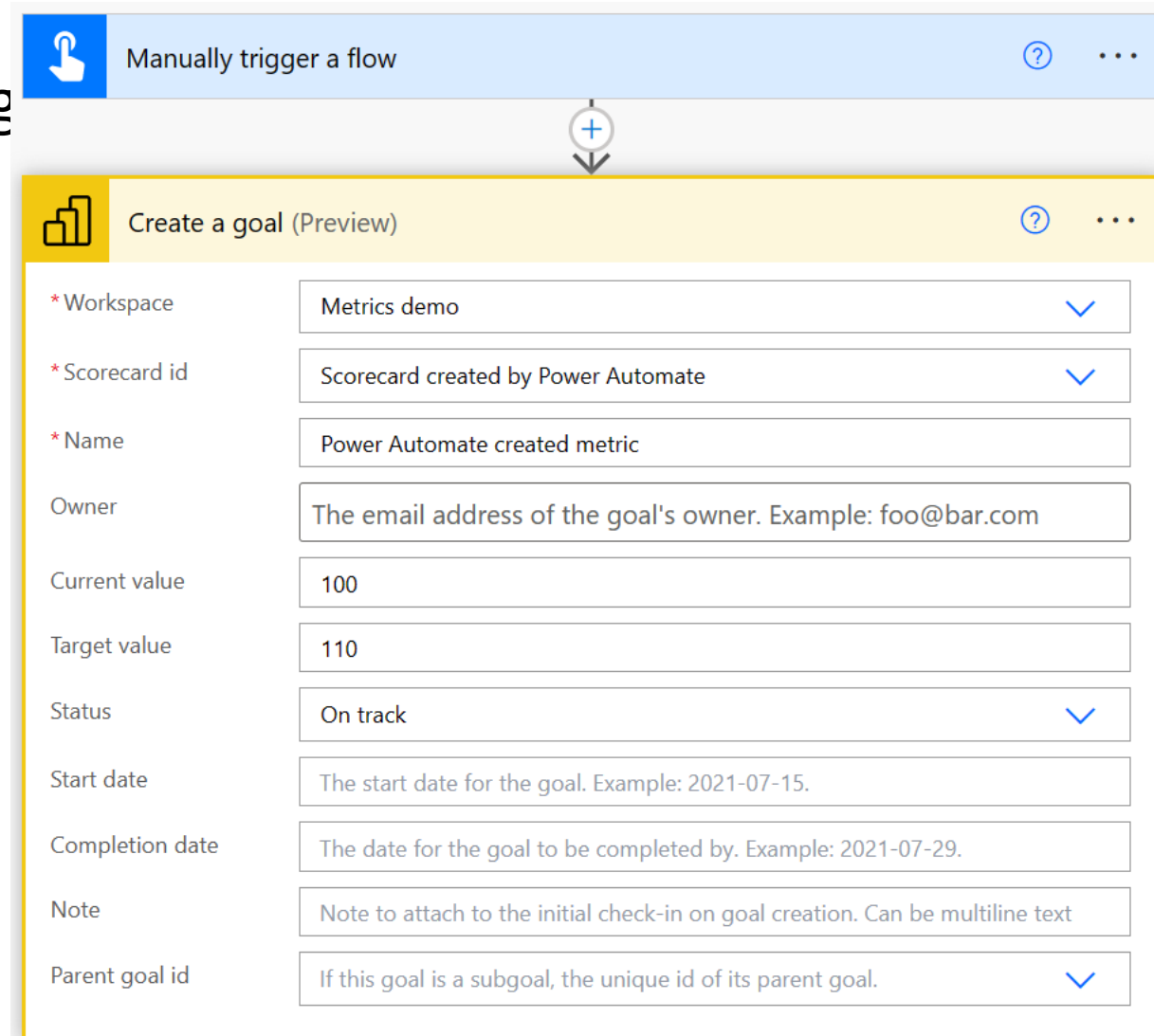
* Name: Scorecard created by Power Automate

Description: This scorecard is created in Power Automate

+ New step Save

Metrics and Power Automate (preview)

- Automate monitoring
- Actions:
 - Create a scorecard
 - Create a metric



Manually trigger a flow

Create a goal (Preview)

* Workspace	Metrics demo
* Scorecard id	Scorecard created by Power Automate
* Name	Power Automate created metric
Owner	The email address of the goal's owner. Example: foo@bar.com
Current value	100
Target value	110
Status	On track
Start date	The start date for the goal. Example: 2021-07-15.
Completion date	The date for the goal to be completed by. Example: 2021-07-29.
Note	Note to attach to the initial check-in on goal creation. Can be multiline text
Parent goal id	If this goal is a subgoal, the unique id of its parent goal.

Metrics and Power Automate (preview)

- Automate monitoring and creation of scorecard/metrics
- Actions:
 - Create a scorecard
 - Create a metric
 - Create a check-in
 - Add a note to a check-in
 - Update a check-in
 - Update a metric
 - Get metric(s)
 - Get metric check-in(s)

Metrics and Power Automate (preview)

- Triggers:
 - When a metri

The screenshot displays a Power Automate flow titled "When a metric change status". The flow begins with a trigger action, "When a goal changes (Preview)", which is configured with the following settings:

- Workspace:** Metrics demo
- Scorecard id:** Scorecard created by Power Automate
- Goal id:** Power Automate created metric
- Polling interval (sec):** 300

An arrow indicates the flow proceeds to a "Condition" action. The condition is set to check if the "Changed..." field "contains" the "status".

The flow then branches into two paths:

- If yes (green path):** This path leads to an action titled "Send an email (V2)". The email configuration is as follows:
 - To:** Rachel@M365x26299913.onmicrosoft.com
 - Subject:** Status change for metric " Changed goal ... "
 - Body:** The body contains a rich text editor with the following content:
 - Old status: Changed goal Old status
 - New status: Changed goal New status
- If no (red path):** This path leads to a box labeled "Add an action".

Metrics and Power Automate (preview)



- Triggers:
 - When a metric changes, for example, status, owner, and so on
 - When someone adds or edits a check-in
 - When an owner is assigned to a metric
 - When a data refresh for a metric fails
- [Use Power Automate to update metrics automatically](#)
- [Power BI metrics - Connectors](#)

Metrics REST APIs (preview)

- Add/update/delete notes
 - [GoalNotes \(Preview\) - REST API \(Power BI Power BI REST APIs\)](#)
- Add/update/delete/get values
 - [GoalValues \(Preview\) - REST API \(Power BI Power BI REST APIs\)](#)
- Scorecard actions, like add/get/update/delete metric
 - [Goals \(Preview\) - REST API \(Power BI Power BI REST APIs\)](#)
- Create/update/get/remove status rules
 - [GoalsStatusRules \(Preview\) - REST API \(Power BI Power BI REST APIs\)](#)

Power BI and Viva Goals

- In Viva Goals you can point a Key Result (KR) to a data in Power BI
- Similar experience to how you connect data to metrics in Power BI


 **Edit Key Result** 


*Key result title

Goal: Measure as a metric [Remove Metric](#)

*Metric name


*Target is to



Reach 


Number 

[Add Phased Targets](#) ⓘ

✓ **Progress**

 Power BI

 Automatically from a data source 

 Check-in owner: Megan Bowen

Power BI and Viva Goals

- In Viva Goals you can point a Key Result (KR) to a data in Power BI
- Similar experience to how you connect data to metrics in Power BI

The screenshot displays the 'Edit Key Result' interface in Viva Goals. The main heading is 'Consumer Website traffic'. On the left, there are input fields for 'Key result title' (200 daily website visitors fr), 'Goal: Measure as a metric', 'Metric name' (NA Unique Visitors), and 'Add Phased Targets'. Below these is a 'Progress' section with a search bar containing 'power' and a 'Power BI' icon. At the bottom left, there is a 'Check-in owner: Megan Bowen' section. The central area shows a preview of a Power BI dashboard titled 'Website traffic' with various charts and KPIs. On the right, a 'Choose a measure to connect' dialog box is open, showing 'Average of Unique Visitors' as the selected measure, with a 'Current value' of 131.00. Below this, filters and slicers are listed: 'Product Category is not blank' and 'Region is North & Central America'. At the bottom, there are 'Connect' and 'Cancel' buttons.

Edit Key Result Select a visual, then choose data to connect to your key result.

Key result title
200 daily website visitors fr

Goal: Measure as a metric

Metric name
NA Unique Visitors

Add Phased Targets

Progress
power
Power BI

Automatically from a

Check-in owner: Megan Bowen

Consumer Website traffic

Pages
Operations Analytics
Location Analytics
Website Analytics

Website traffic
22K
360
131.00
Average of Daily Users
Average of Unique Visitors

Choose a measure to connect

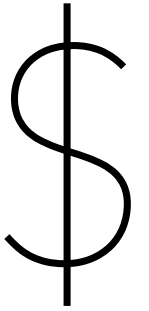
Measure
Average of Unique Visitors

Current value
131.00

Filters and slicers affecting this value
Product Category is not blank
Region is North & Central America

Connect **Cancel**

Metrics and licensing
requirements



Metrics and licensing requirements

- Metrics is a Pro feature*
 - Pro or Premium Per User is required to
 - Author/share scorecards/metrics
 - Perform check-ins, including updating manual metrics
 - Free users can view scorecards/metrics when hosted on Premium Per Capacity
-
- [Get started with metrics in Power BI – licensing requirements](#)

* Hierarchy is a Premium feature

Thank you

