DAY 27 Creating and using bookmarks in Power BI

In Power BI, **bookmarks** are a feature that allows you to capture specific views of your report pages, including filters, slicers, visuals, and selections. Bookmarks make it easy to switch between different views, guide users through a report, create interactive presentations, and much more.

Here’s a step-by-step breakdown of how to create and use bookmarks in Power BI:

**1. Creating a Bookmark**

* Navigate to the **View** tab on the Power BI Desktop toolbar, then select **Bookmarks Pane** to open it.
* Set up your report page as you want it to appear in the bookmark. This might include setting filters, slicers, visibility of certain visuals, or even the current drill-down state.
* In the Bookmarks Pane, click **Add** to create a bookmark. Power BI saves the current state of the report, and you’ll see the new bookmark added to the list.
* **Rename the bookmark** if needed, to make it easier to identify.

**2. Types of Settings Captured by Bookmarks**

Bookmarks can capture and save different settings, including:

* **Data**: Filter and slicer selections.
* **Display**: Visibility of visuals, such as hiding or showing charts, tables, or images.
* **Current Page**: The specific report page being viewed.
* **Drill Position**: Drill-down or drill-up state of visuals.
* **Focus/Spotlight**: If a visual is in focus or spotlight mode, the bookmark will capture this.

When creating or updating a bookmark, you can choose which elements to include, allowing flexibility in how the bookmark behaves.

**3. Using Bookmarks for Navigation and Storytelling**

Bookmarks are especially useful for creating an interactive and guided experience within a report. Here are some key uses:

* **Guided Navigation**: Bookmarks can be used to create a menu or navigation experience by switching between views.
* **Presentations and Storytelling**: Create bookmarks for each view or point you want to highlight, then use **View** mode to present directly from Power BI.
* **Custom Scenarios**: You can use bookmarks to capture and highlight different data scenarios or perspectives, like different sales regions, time frames, or product categories.
* **Button-Triggered Bookmarks**: Add buttons to your report to enable users to interact with bookmarks. For example, clicking a button can switch views, change filter settings, or drill down into details.

**4. Updating Bookmarks**

* If you make changes to a report view (like changing filters) and want to update an existing bookmark to capture this new state, right-click the bookmark and select **Update**.

**5. Using the Bookmarks Pane in Power BI Service**

* When published to the Power BI Service, bookmarks are fully functional and can be used by end-users. They provide interactive capabilities in the web view just like in Power BI Desktop.

**6. Organizing Bookmarks with Bookmark Groups**

* You can organize multiple bookmarks into groups to make it easier to manage them, especially when you have a lot of bookmarks.
* Simply select multiple bookmarks, right-click, and choose **Group**. This helps in creating structured navigation or story sequences.

**Example Use Case of Bookmarks**

Imagine you’re creating a report for a company with multiple business units. You could create bookmarks for each unit, so when a user clicks the bookmark, the report filters down to that unit’s data and changes the visuals accordingly. This setup allows viewers to navigate between units seamlessly without needing to manually adjust filters.

**Benefits of Using Bookmarks**

* **Enhanced User Experience**: Bookmarks create a guided, interactive experience.
* **Efficiency in Presentations**: They make Power BI reports easy to present, switching views and highlighting key insights quickly.
* **Customizable and Flexible**: Users can tailor bookmarks to specific needs, giving control over what they want to display.

**Important Considerations**

* **Publish Settings**: Make sure to check how bookmarks behave when published, as some interactions may work differently in Power BI Service.
* **Bookmark Names and Organization**: Clear naming and grouping improve user navigation and make it easier to manage complex reports.

Power BI bookmarks are a versatile tool for improving interactivity, guiding report users, and making reports more intuitive to navigate, ultimately enhancing the report experience for both creators and viewers.

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