

← Takaisin välilehdelle

Tee: Käy oppitunti läpi loppuun asti

Tasks

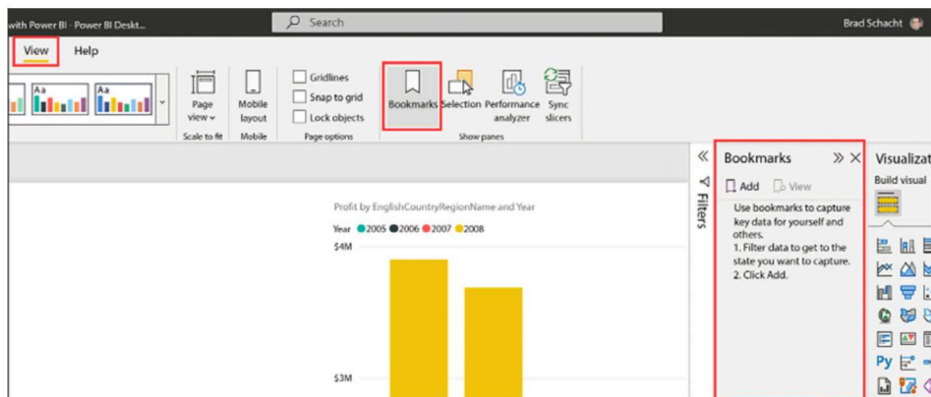
Note! You are still using **Lesson 7 Digital Storytelling** in this exercise.

Task 1 - Capturing report views with bookmarks

Cross-filtering, cross-highlighting, and drill through filters make a big impact on how users consume data in Power BI reports.

The **Bookmarks feature** allows report creators to capture the view of a **Report** page. Bookmarks will save the current state of all filters, slicers, in-focus items, sorting, and spotlight visuals (more on that feature later in this section) on a page at the time when the bookmark is created. This allows users to return to the captured state by simply selecting the bookmark in question.

To begin working with bookmarks navigate to the **View** ribbon and select **Bookmarks** from the **Show panes** section.



Because you have not created any bookmarks, the only option available is **Add**.

Step 1: Bring in a couple more visuals to the **Summary** page:

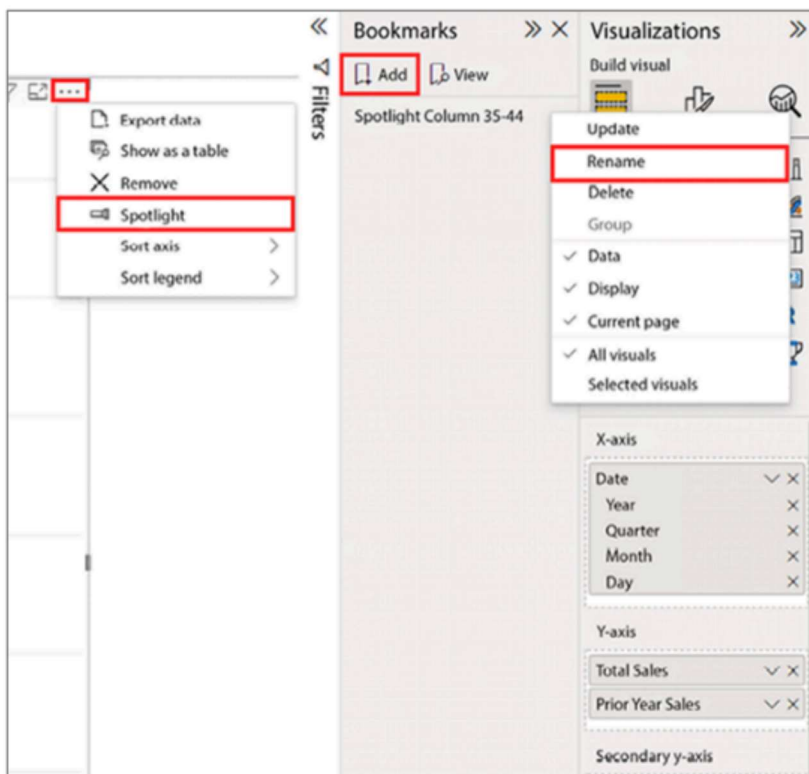
1. Copy an existing visual to the **Summary** page: Navigate to the **Trend Data** report page. Select **Line chart**, which shows **Total Sales and Prior Year Sales**. Press **Ctrl + C** on the keyboard or click the **Copy** button from the **Home** ribbon.
2. Navigate to the **Summary** page. Press **Ctrl + V** on the keyboard or click the **Paste** button from the **Home** ribbon. Move and resize the visual as you see fit, leaving a small amount of space to add a filter.
3. Add a **Slicer** to the **Summary** page using the **Age Breakdown** field from the **Customer** table.
4. Display the slicer as a series of buttons by navigating to the **Format** area for the slicer and changing the **Style** property to **Tile** within the **Slicer settings** on the **Visual** sub-pane section:



The slicer will filter both the **Bar** and **Line** chart without any additional work by leveraging Power BI's cross-filtering functionality. While it's not required, setting the filter to a series of buttons allows a consumer to more easily identify what filter context has been applied to this page of the report.

Step 2: Create bookmarks.

1. Select the **35-44** option from the slicer to filter the **Summary** page.
2. Select the ellipsis (...) in the upper right-hand corner of the **Stacked column chart** visual and choose the **Spotlight** option, which will fade all other visuals on the page. Spotlight is useful for drawing attention and focus to a single visual while keeping the remainder of the report page visible, so users can gather context for the data.
3. Select the **Add** option inside of the **Bookmarks** pane and rename the bookmark as *Spotlight Column 35-44*. To rename the bookmark, select the ellipsis to the right of the newly created bookmark.



Below is a short description of how each of the options on the options menu affects the bookmark:

- **Update:** Overwrite the bookmark settings with the current state of the page. To update a bookmark, do not click the name of the bookmark as Power BI will switch to that bookmark, resetting the state of the report. Set the report to the desired state and only then click the ellipsis next to the desired bookmark, and select **Update**.
- **Rename:** Change the name of the bookmark.

- **Delete:** Remove a bookmark.
- **Data:** When enabled, the bookmark retains the current state of the Filters pane and the selection of any visuals (slicer selection, visual highlighting, the selection of a section on a bar chart, and so on).
- **Display:** When enabled, the bookmark retains visual properties, such as the spotlight feature and the visibility.
- **Current page:** When enabled, selecting a bookmark automatically takes the user to the page where the bookmark was created and applies the data and display settings according to the bookmark. When disabled, a bookmark will only function when the user is already on the page from which the bookmark was created. This option effectively disables a bookmark unless you are on the page the bookmark references.
- **All visuals:** When selected, all visuals on the page, both visible and hidden, are part of the bookmark.
- **Selected visuals:** When selected, only the visuals that are selected, whether visible or hidden, when the bookmark is created or updated will be stored.

As you can see from these options, there are many different behaviors that can be controlled with bookmarks.

Step 2: Adding bookmarks

1. Click any area in the **Report** canvas or surrounding area where there are no visuals. This will deselect all visuals and the bookmark.
2. Switch the **Slicer visual** to **45-54** and once again use the **Spotlight** feature on the **Stacked column** chart, and create another bookmark called *Spotlight Column 45-54*.
3. Add a third bookmark following the same steps but pointing to the **55+** option within the Slicer. This one should be called *Spotlight Column 55+*.

Step 3: Using bookmarks

1. Open the **Bookmark** pane and choose to view whichever bookmark you would like very easily.
2. To view bookmarks in a **slideshow** style, click the **View** button to the right of the **Add** button in **Bookmark** pane. A forward and back arrow allows you to move through all the available bookmarks and tell a tailored story about the data. Also, while in this mode, all of the visuals are still completely available to be interacted with.
3. To exit, simply choose the **X** icon next to the arrows at the bottom or the **Exit** option within the **Bookmark** pane. The order of bookmarks can be very important when using the slideshow view. The order can be changed by simply dragging and dropping the bookmarks into the desired order.)

End-of-Exercise

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◀ Exercise 23 - Configuring drill through

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Exercise 25 - Combining object visibility with bookmarks ►

Olet kirjautunut nimellä Janne Bragge. (Kirjaudu ulos)
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