Power BI Mobile View

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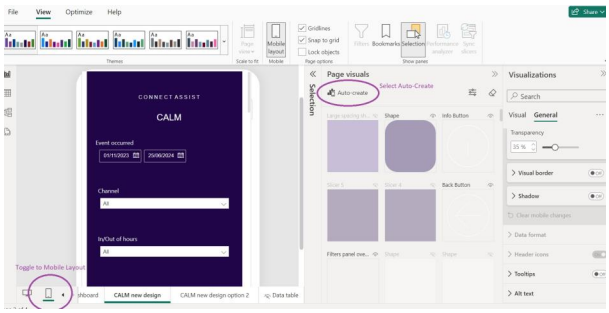
Summary:

The Power BI Mobile View refers to a customized, optimized version of Power BI reports specifically designed for mobile devices like smartphones and tablets. Currently, Power BI Desktop version allows our developers to create two separate layouts for their reports, one for larger screens like desktops or laptops and another for mobile screens, ensuring a better viewing experience for our clients, who's probably will access the reports on a smaller devices.

In developing dashboards, DnA BI developers can create a mobile view version of the report resulting to the following advantage for our clients;

- Responsive Design - The mobile view allows DnA BI developers to arrange visuals in a way that fits better on the narrow and vertical screens of mobile devices.
- Reorganizing Visuals - Report elements, such as charts, graphs, and tables, can be resized, repositioned, and arranged differently to suit mobile dimensions.
- Different Experience -This layout is separate from the desktop view, allowing full control over how the report appears on mobile devices.
- Access Anywhere, Anytime - Power BI Mobile View will allow our client and stakeholders to access reports and dashboards from virtually anywhere, providing real-time insights on the go, without needing to be at a desktop or laptop.
- Mobile App Integration - The Power BI mobile app which is available on iOS and Android, ensures that users can quickly access reports, receive alerts, and interact with visuals directly from their mobile devices, promoting flexibility in decision-making.



Creating a Mobile View:

Use the layout switcher at the bottom of the page to toggle between mobile and web layout.

We encourage to use the auto-create mobile layout feature, which enables our BI developers to automatically generate a mobile-optimized layout for any new or existing report page that is already following our standard Maximus format. The size and position settings aren't inherited from the desktop layout so we have to do some minor adjustment.

Also note that, when we choose the auto-create mobile layout option, a new complete layout with our report's visuals is created on the mobile layout canvas. If the canvas already has a layout, it will be removed and replaced with the new automatically generated layout.

The auto-create engine understands the desktop layout of the report and builds a mobile layout that considers the position, size, type, and order of the visuals that the report contains. It places both visible and hidden visuals, so if there is a bookmarks that change a visual's visibility, they'll work in the automatically created mobile layout as well.

Up to this time of writing, the auto-create mobile layout feature is in preview. It's enabled in the Power BI service. In Power BI Desktop the feature is controlled by the Auto-create mobile layout preview feature switch that can be accessed by navigating to File > Options and settings > Options > Preview features. The feature switch is enabled by default.

Considerations and limitations;

- Tooltips are disabled on the mobile layout canvas, they're available when viewing in the mobile app.
- Metric visuals aren't interactive on the mobile layout canvas.
- Slicer selections made on the mobile layout canvas don't carry over when you switch to web layout. Also, when you switch back from web layout to mobile layout, any slicer selections will come from the web layout. Likewise, when the report is published, any slicer selections will be those that were defined in web layout, regardless of whether the report is being viewed in the regular desktop-view or a mobile-optimized view.

Best Practices in Power BI Mobile View:

Again, the report created on a desktop view is automatically inherited into a mobile view, the colours and formats are consistent between the views. However, In case we will design a mobile report from scratch, there are things to consider.

On top of sticking to the Maximus standard format, such as theme and design, we need to have a thoughtful approach to ensure that reports are both functional and visually appealing on smaller devices. Below are some best practices and key approaches to help optimize the design of Power BI reports for mobile devices.

Prioritize Key Information

- Focus on Critical Data - Mobile reports should highlight the most important and actionable insights. Avoid cluttering the mobile view with too many visuals or excessive details.
- Simplify Visuals - Use fewer visuals and focus on high-level metrics. Visuals that work well on desktop might be too complex for mobile. Prioritize simplicity over detail in the mobile layout.

Optimize Visuals for Mobile Screens

- Use Compact and Mobile-Friendly Visuals - Certain visual types are better suited for mobile, such as KPIs, cards, and bar charts. Avoid visuals that are too intricate or require a lot of space (like large tables or detailed scatter plots).
- Adjust the Size of Visuals - Resize and reorganize visuals so they fit properly on mobile devices. Keep the mobile layout clean and avoid overloading the screen with too much information.
- Limit Scrolling - While scrolling is inevitable on mobile devices, excessive scrolling can be frustrating. Ensure that the most important visuals are visible without the need for much scrolling.

Design for Touch Interaction

- Larger Touch Targets - Buttons, filters, and interactive elements need to be easy to tap. Ensure that any clickable elements are large enough for touch interactions.
- Avoid Overlapping Visuals - Ensure sufficient spacing between visuals so that users can easily tap and interact with specific data points without accidentally selecting the wrong one.

Create a Responsive Layout

- Use Power BI's Mobile Layout Feature - Power BI Desktop allows you to design a separate mobile layout by switching to Mobile Layout under the View tab. Use this layout to arrange visuals on a mobile-specific canvas.
- Consider Orientation - While most users will view the report in portrait mode, it's good practice to test the report in landscape mode to ensure it remains functional and legible.

Optimize for Performance

- Limit the Number of Visuals - Mobile devices have limited processing power compared to desktops. Too many visuals can slow down the report's performance, especially when refreshing data. Use fewer, high-impact visuals.

- Use Summary Data - Where possible, avoid pulling in large datasets for mobile reports. Instead, focus on summarized or aggregated data to enhance performance.

Use Data Storytelling Techniques

- Focus on a Narrative - Use the mobile view to tell a focused, clear data story. Think about how each visual contributes to the overall insight you're trying to deliver.
- Use Contextual Information - Include labels, legends, or tooltips to provide users with additional context where necessary, but avoid overwhelming the screen with too much text.

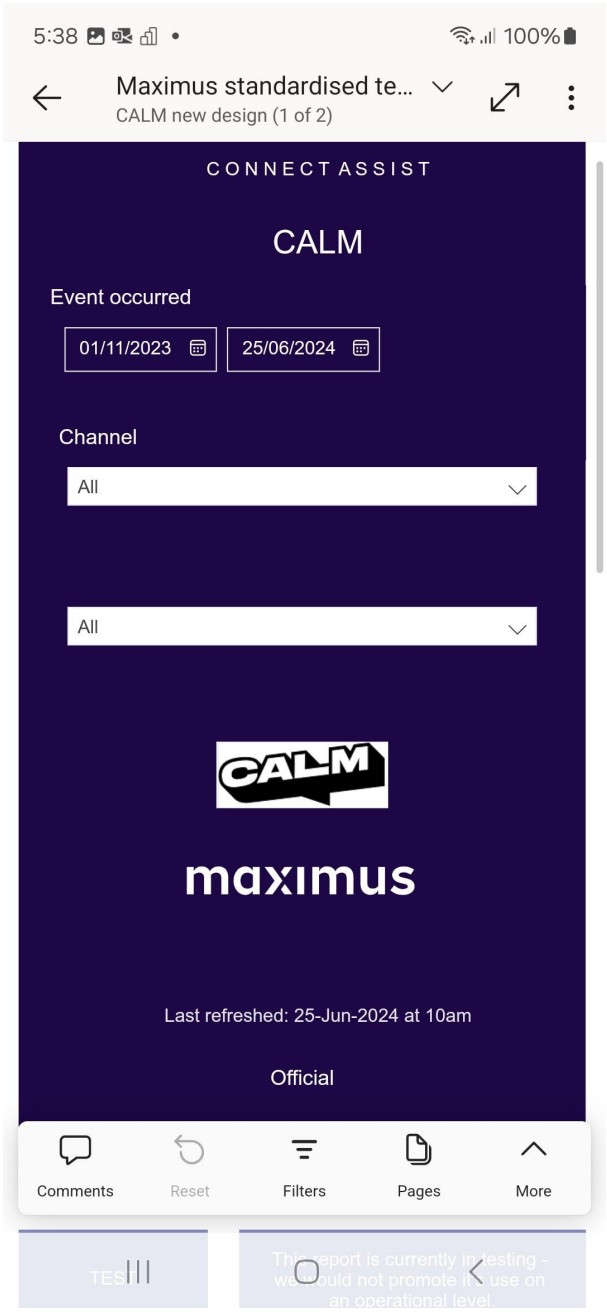
Emphasize Visual Hierarchy

- Design for a Visual Flow - Place key metrics at the top, as this is the first area users will see. Design the report to flow logically from the most critical information to more detailed, supplementary insights.
- Use Colour and Fonts Effectively - Use colour contrasts and font sizes to establish a clear hierarchy of importance. Larger fonts and brighter colours should emphasize key data points, while secondary information can be smaller or muted.

Utilize Dark Mode (Optional)

Consider Dark Mode - Some users may prefer dark mode when viewing reports on mobile, especially in low-light environments. Test how your report looks in dark mode to ensure readability.

Standardised template in Connect Assist



We need to ensure that the following standard format had been adjusted when converting into a mobile view;

Slicer bar

The slicer bar is on the top, it is best that the user will be able to execute filters at first. There are no bookmarks that will set it to disappear. The slicer is set to be 660 pixels in height and 324 pixels in width. Horizontally and vertically it sits at 0 with 5 pixels of padding around each side of the shape. Also, in mobile view there is no side bar needed.

Headings

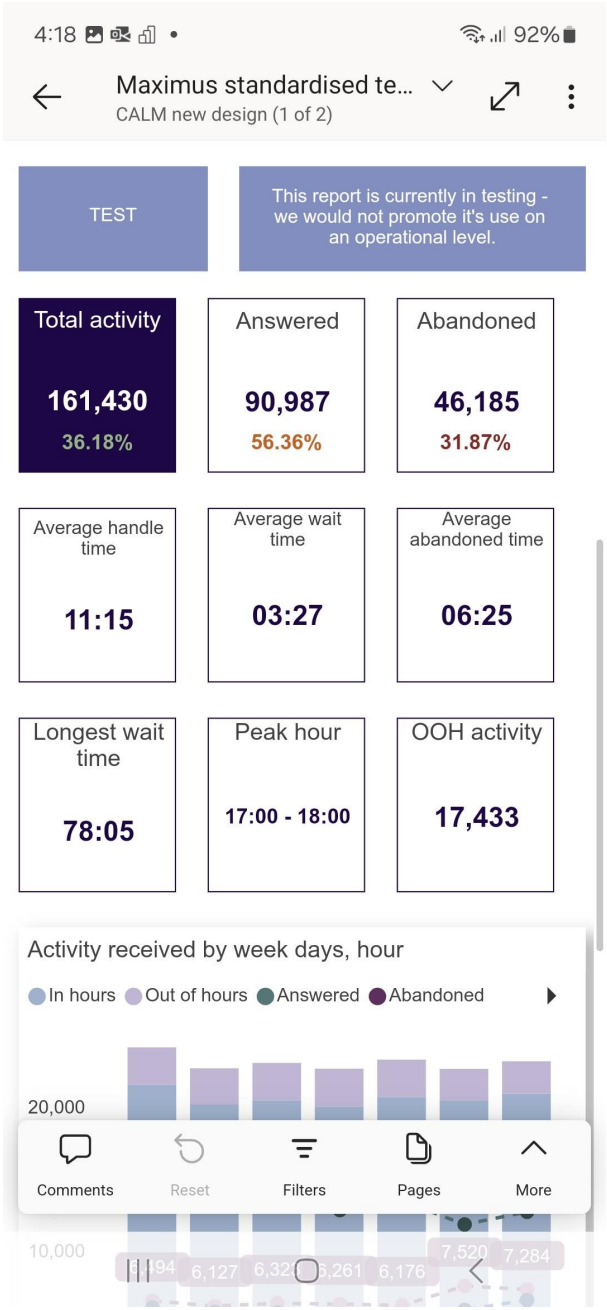
There are two headings: The first one which is the division we are undertaking the work for, in the example shown this is 'Connect Assist'. This is an Arial 8 font which uses capitals and spaces to make it look/feel like a different font header. This is sat at 100 height, 234 width, 54 horizontally and 40 vertically. The second one is the contract we are displaying, in the example shown this is 'CALM'. This is an Arial 14 font which uses capitals.

Slicers

There are 3 slicers on this report. The first slicer is the date range, this slicer sits differently to the following slicers as the 'between' view makes the slicer a bigger width with more text being shown in the initial slicer, therefore it is positioned slightly out of the horizontal grouping of the others. The text used is Arial font, size 8. The date slicer sits at 100 height, 306 width, 18 horizontally and 140 vertically with no padding. The second slicer and third slicers are both the same. The title of the slicer is Arial front, size 8 heading 2, with the text being aligned left. The text used in the slicer is Arial font, size 8 with 5 pixels of padding for the values. The second and subsequent slicers are a drop down style with a white (#FFFFFF) background for the values, and a background of #200649 to the outside of the slicer (same colour as the slicer header backdrop). The overall slicer group sits at 660 height, 324 width, 0 horizontally and 0 vertically.

Logos and last refreshed;

This template shows two logos, one of the company we are deriving the dashboard for and one for MaximusUK. You can replace the 'CALM' logo in this example with an appropriate logo for your dashboard. If there is not one, please delete or hide this as appropriate. This logo is intended to sit on top of the MaximusUK logo with a small amount of spacing between the two. The CALM logo sits at 160 height, 144 width, 90 horizontally and 460 vertically. This will change depending on the logo you have and how large the logo needs to be, ideally you will leave a gap on top of the MaximusUK logo and centre the logo to the best of your ability in the slicer side bar. The MaximusUK logo sits at 160 height, 144 width, 90 horizontally and 460 vertically. At the bottom is a text box with 'last refreshed', this is a DAX measure showing the latest date and time of the data. There is no background to this text box with the text being white (#FFFFFF), Arial font and size 8. There is no padding on this text box. This text box sits at 120 height, 198 width, 72 horizontally and 560 vertically.

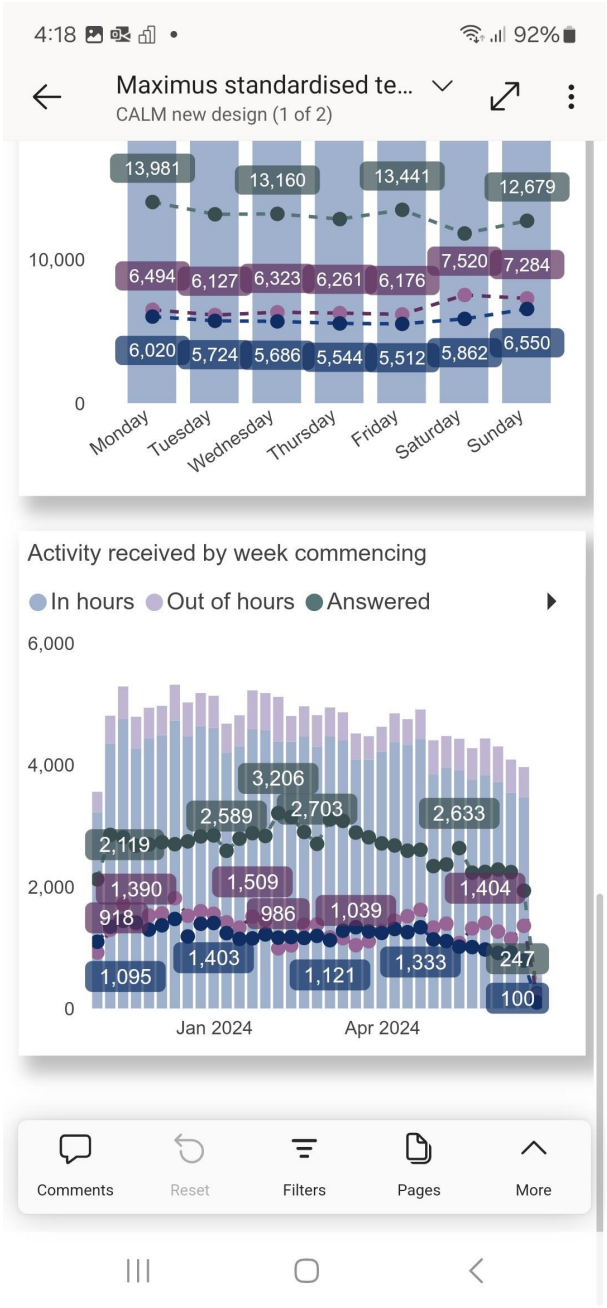


Pipeline banner;

The banner consists of two parts, the status 'card' and stage 'card', the data is automatically inherited from the desktop view. The status shows either Dev, test or prod in capitals depending on the value filtered in the desktop view (and later on what the parameter picks up from the deployment pipeline). The status 'card' sits at 60 height, 108 width, 0 horizontally and 680 vertically. The second part is the stage which shows slight variants of warning depending on the value filtered on (and later on what the parameter picks up from the deployment pipeline). The stage 'card' sits at 60 height, 198 width, 126 horizontally and 680 vertically. For Prod value, the banner will completely disappear as it is with the desktop view.

KPI's

Metric visuals aren't interactive on the mobile layout canvas, it would only be available in a static view, for the first KPI is the primary overall main headline, this slicer sits differently to the following slicers as it's made to stand out. The text for the title is Arial font, heading 2, size 9. This slicer has a dark background, copying the slicer colour #200649, and white text (#FFFFFF). The callout value is Arial font, size 12, bold. The first KPI sits at 100 height, 90 width, 0 horizontally and 760 vertically with 5 pixels of padding on the sides and bottom. The second slicer and subsequent KPIs follow a more consistent trend. The text for the title is Arial font, heading 2, size 9. This slicer has a white background (#FFFFFF), and dark text (#424242). The callout value is Arial font, size 12, bold. The visual border for the KPI is the same colour as the slicer colour #200649. The second KPI sits at 100 height, 90 width, 108 horizontally and 760 vertically with 5 pixels of padding on the sides and bottom. The third KPI sits at 100 height, 90 width, 216 horizontally and 760 vertically. The fourth KPI sits at 100 height, 90 width, 0 horizontally and 880 vertically. The fifth KPI sits at 100 height, 90 width, 108 horizontally and 880 vertically. The sixth KPI sits at 100 height, 90 width, 216 horizontally and 880 vertically. The seventh KPI sits at 100 height, 90 width, 0 horizontally and 1000 vertically. The eight KPI sits at 100 height, 90 width, 1048 horizontally and 1000 vertically. The ninth KPI sits at 100 height, 90 width, 216 horizontally and 1000 vertically.



Graphs

The graphs on the desktop view will be copied along in the mobile view, but the size and position settings aren't inherited from the desktop layout, so adjustments would be needed. On this standard template, the first graph is at at 320 height, 324 width, 0 horizontally and 1120 vertically. Please note that tooltips are disabled on the mobile layout canvas so you won't see any pop-outs on the graph.

In summary, Power BI Mobile View enhances user experience for Maximus clients, all reports and dashboards that was created preferably should had been optimized for mobile view, this improves decision-making speed, ensures accessibility, and boosts productivity by providing tailored, interactive, and real-time access to reports on mobile devices.