

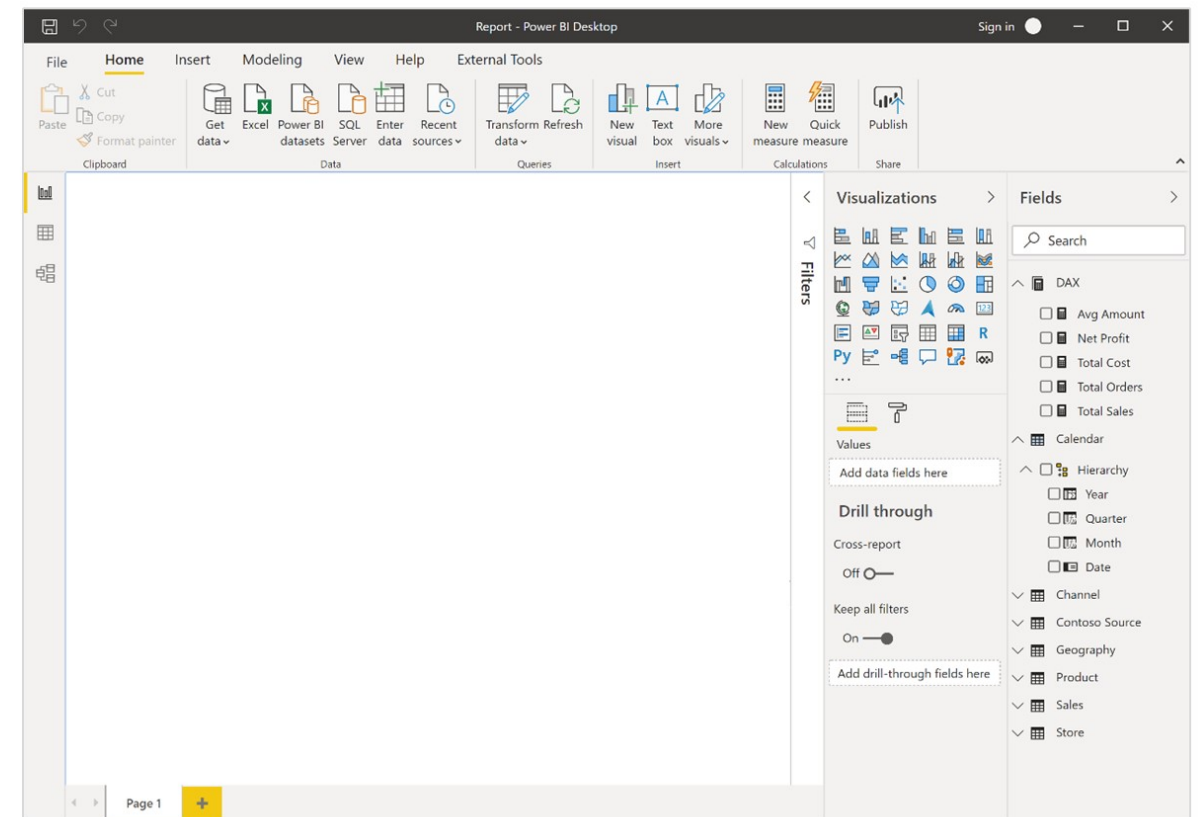
Creating Reports

- Introducing Power BI Desktop
- Connecting to Datasets
- Understanding the Fields Pane
- Developing Reports
- Interacting with Reports
- Power BI Service Features
- Recommended Practices

Introducing Power BI Desktop

- **Power BI Desktop:**

- Creates a new PBIX file when opened
- Contains a collection of commands for model and report development
- Allows multiple report pages to be included in a single report file
- Delivers a near-identical report development experience to the Power BI Service

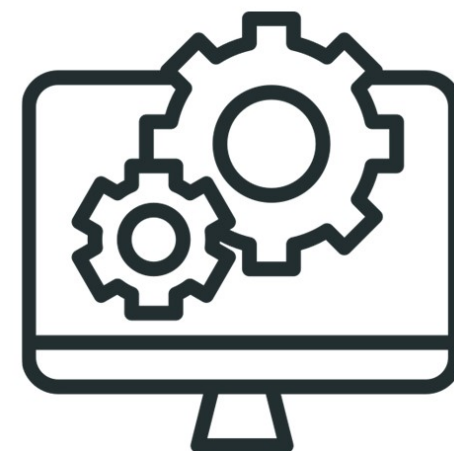


Report design is the focus of this course – so modeling topics will not be discussed

Introducing Power BI Desktop

Desktop Only Report Development Features

- Power BI Desktop contains certain features that are not available when developing reports in the service
- **Features include:**
 - Importing *images* from a file
 - Importing *custom KPI icon* sets for tables
 - Applying *custom color themes*
 - Copying and pasting visuals and formatting *between reports*
 - *Show values as* (e.g. percentage of grand total)
 - Adding report-level *measures*¹

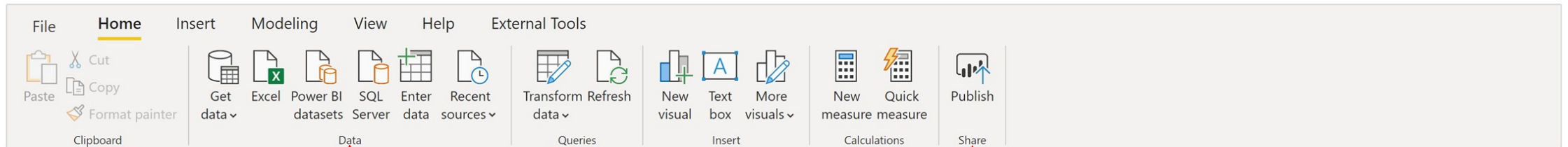


1: Report-level measures are applicable when developing **Live Connection** mode reports on tabular models

Introducing Power BI Desktop

Interface Ribbons

Home



Each ribbon contains a
series of commands
grouped by *category*

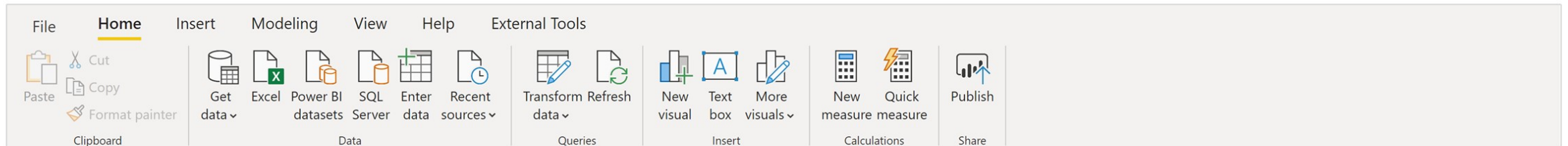
Publishes the report to
the **Power BI Service**

The **Home** ribbon contains the most
common development commands

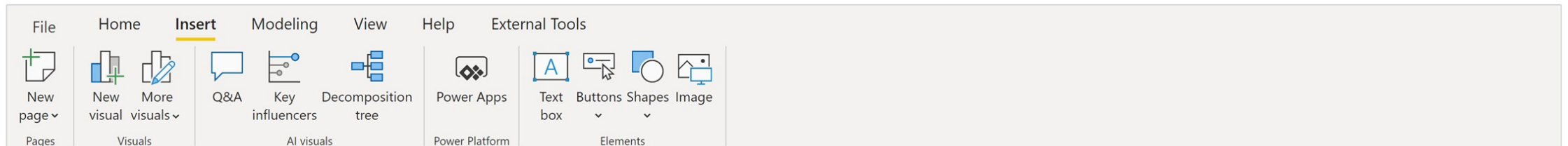
Introducing Power BI Desktop

Interface Ribbons

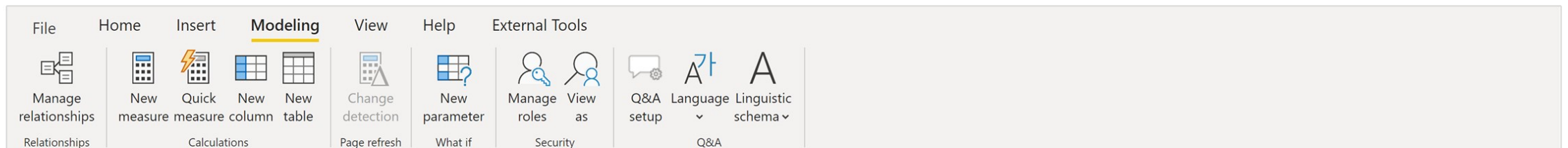
Home



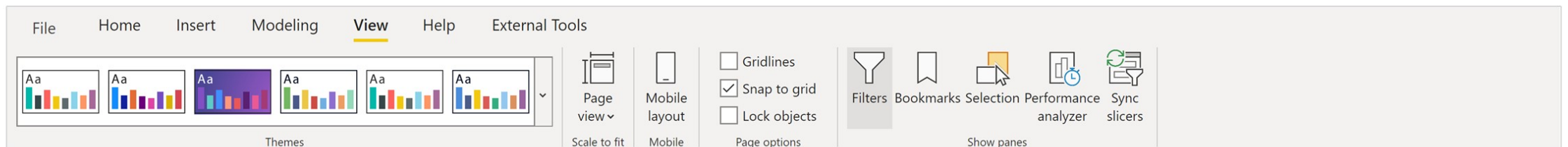
Insert



Modeling



View



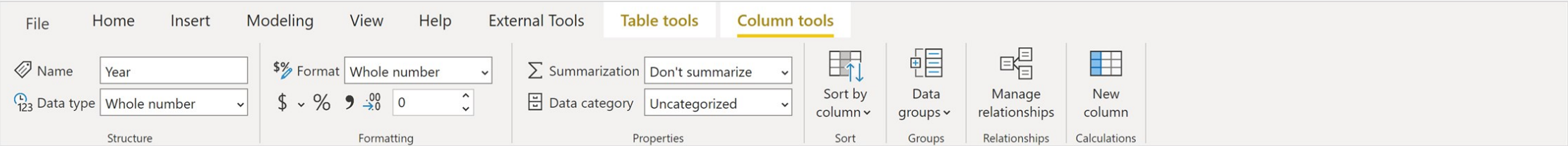
Introducing Power BI Desktop

Interface Ribbons

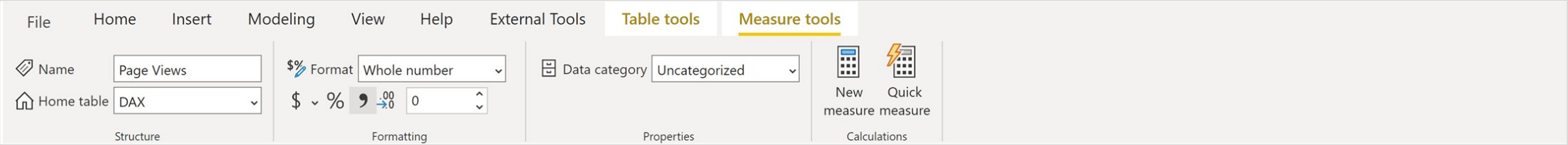
Table tools



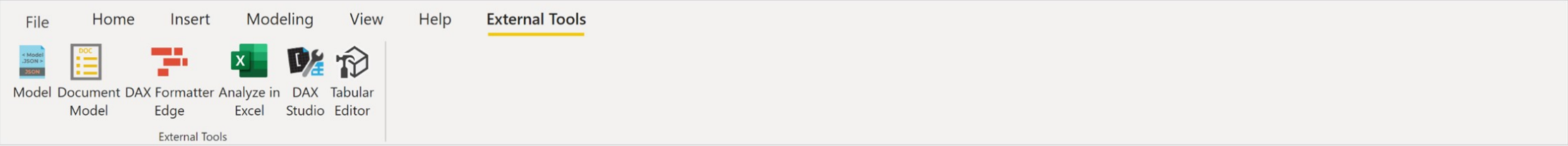
Column tools



Measure tools



External Tools



Introducing Power BI Desktop

Power BI Desktop Views

- Power BI Desktop has three views for developing PBIX files



- **Report view:**

- Used to design the report layout with *visualizations*
- Provides almost the same design experience as the *Power BI Service*



- **Data view:**

- Used to explore (*filter/sort*) the model data
- Displays *imported rows* and *statistics* of a selected model table



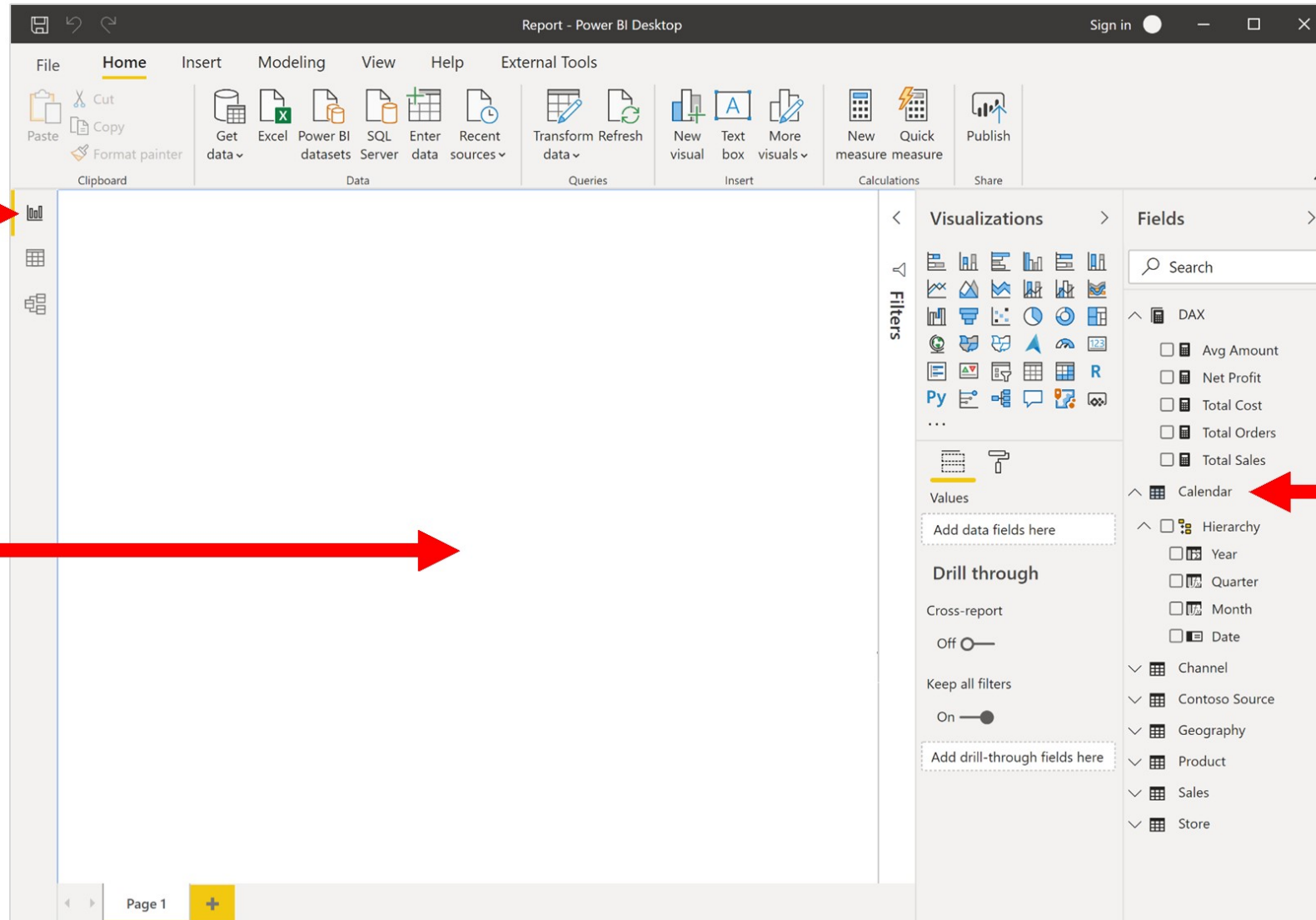
- **Model view:**

- Used to view the entire model as a *diagram*
- Allows *configuration* of all model object properties

Report view



Development
experience is
almost identical to
Power BI Service



Many model
object
properties can
be *configured* in
the **Fields** pane



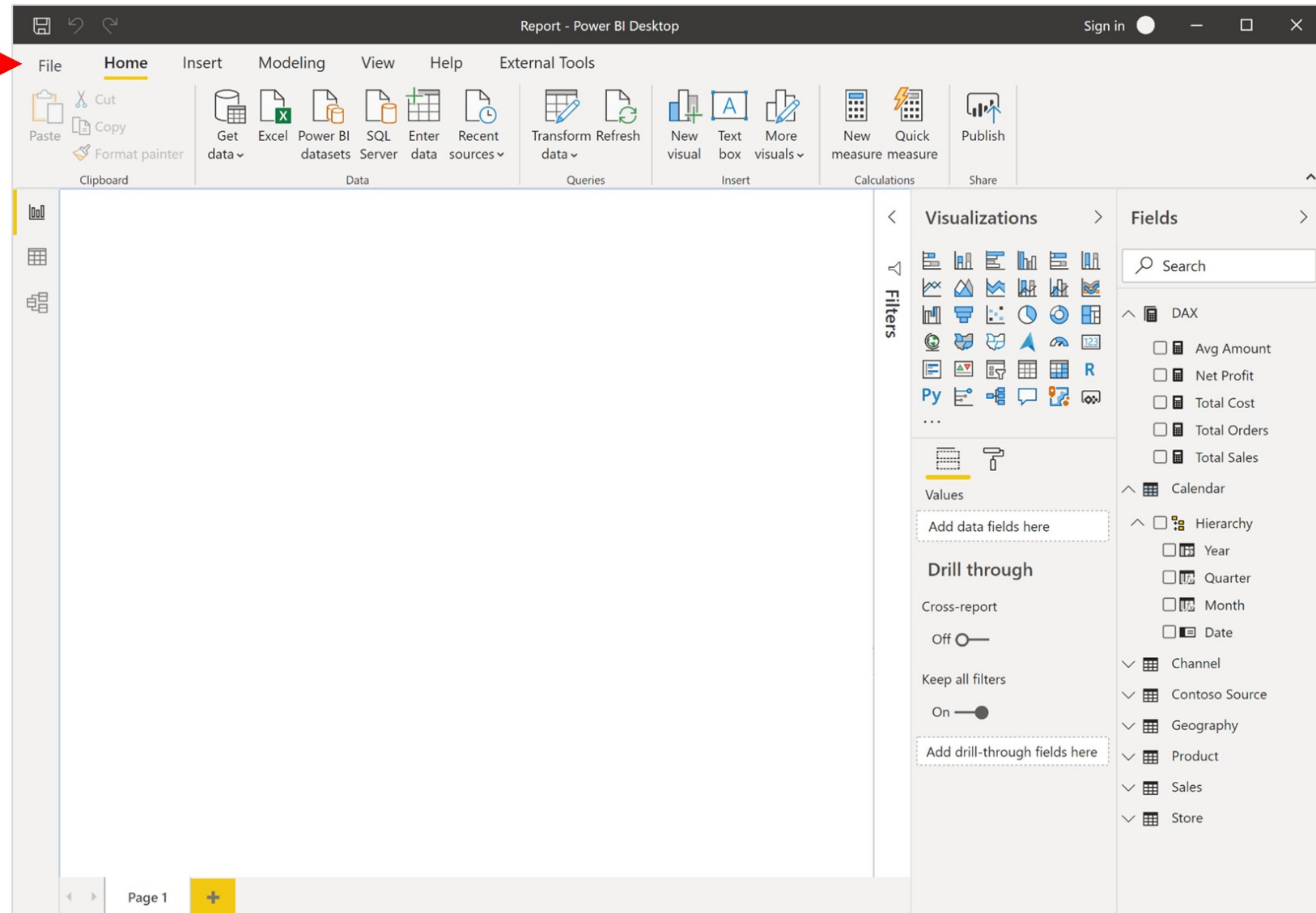
Introducing Power BI Desktop



File Menu

- Use the **File Menu** to:
 - **Save**
 - The file
 - The file as a template (**PBIT** extension)
 - The file as a PDF
 - **Import**
 - Data
 - A *PowerPivot* model from an Excel workbook
 - Configure options and settings

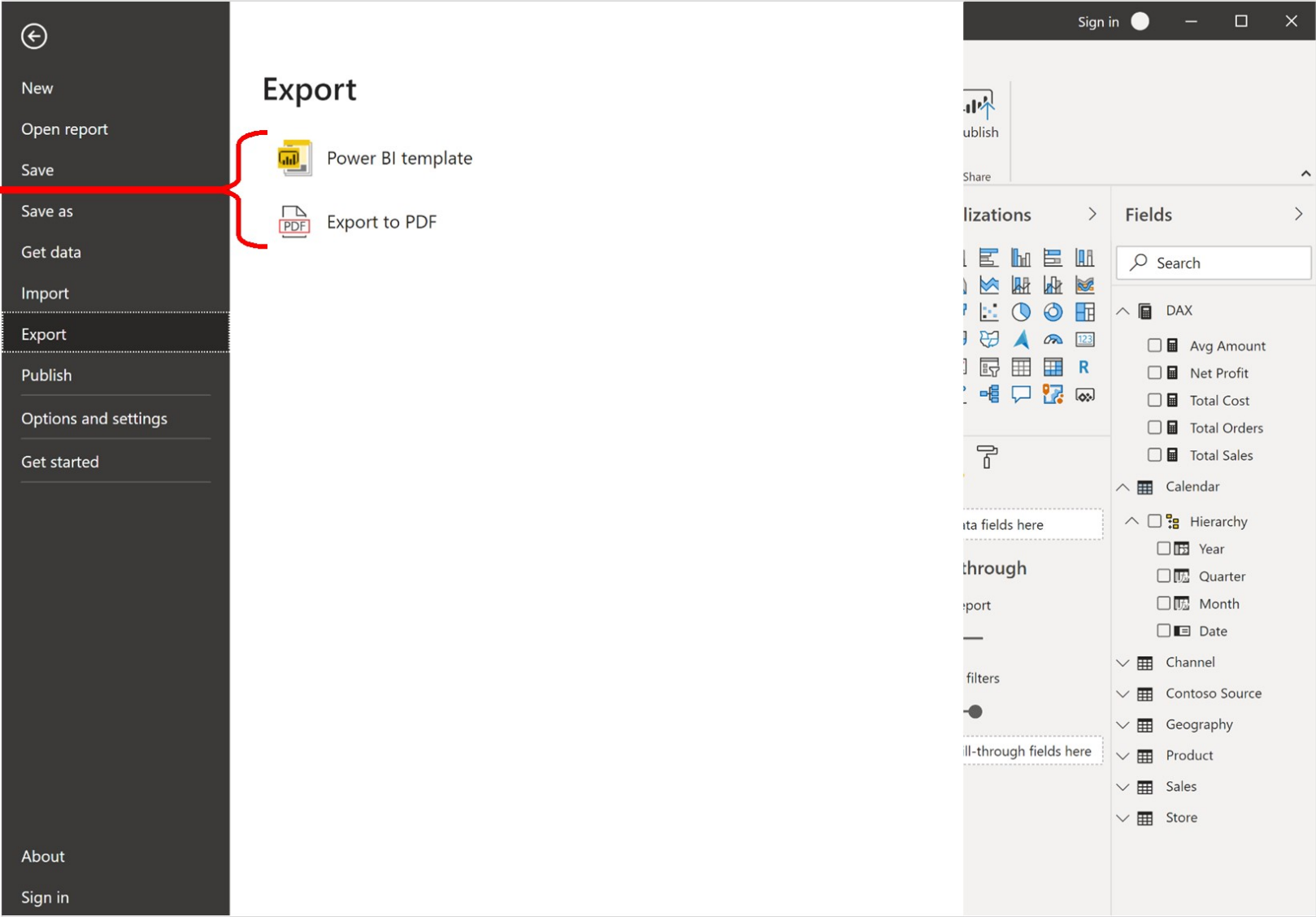


File and
settings menu

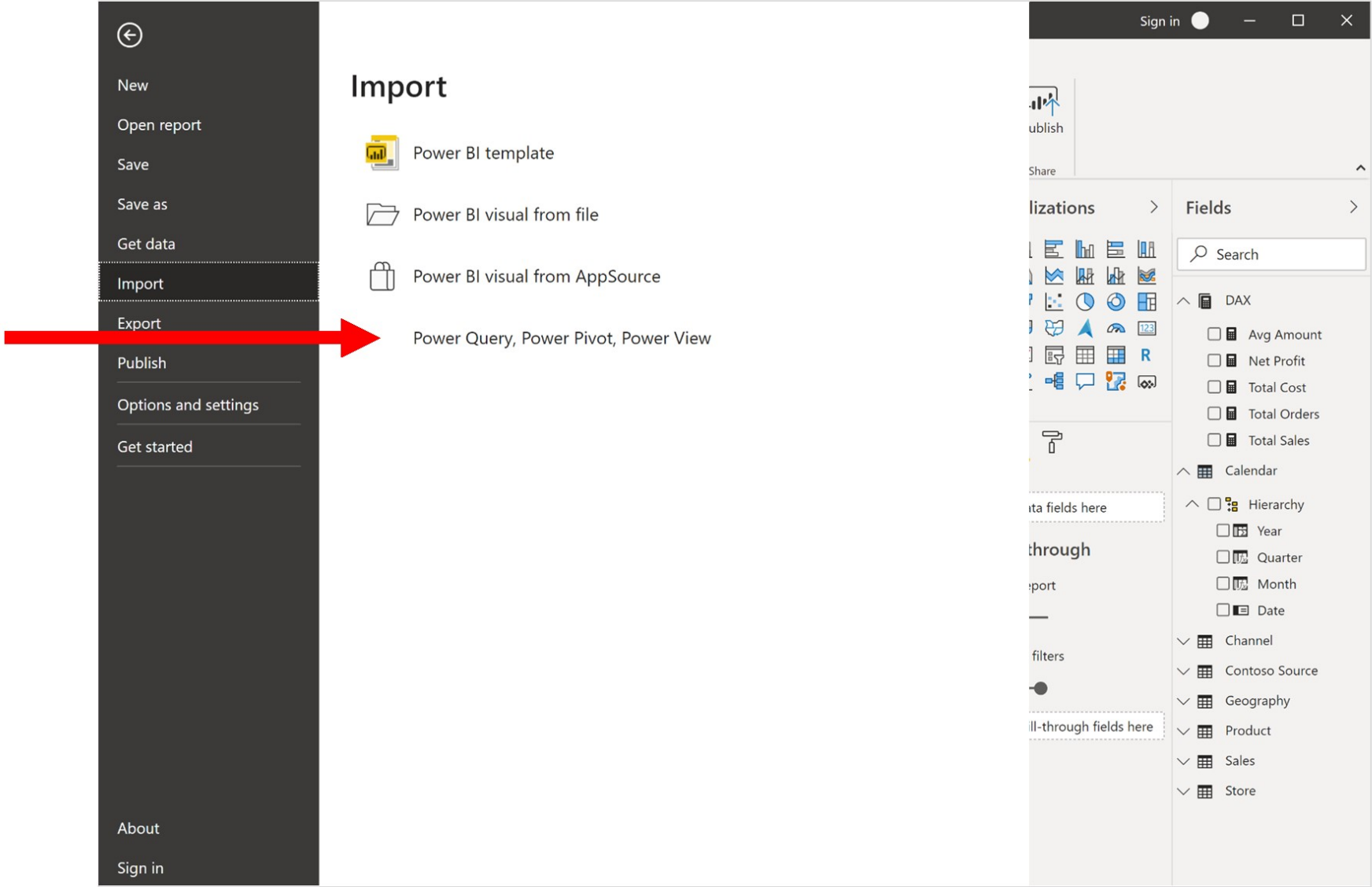




Power BI reports can also be saved as **PBIT templates** or **PDF's**

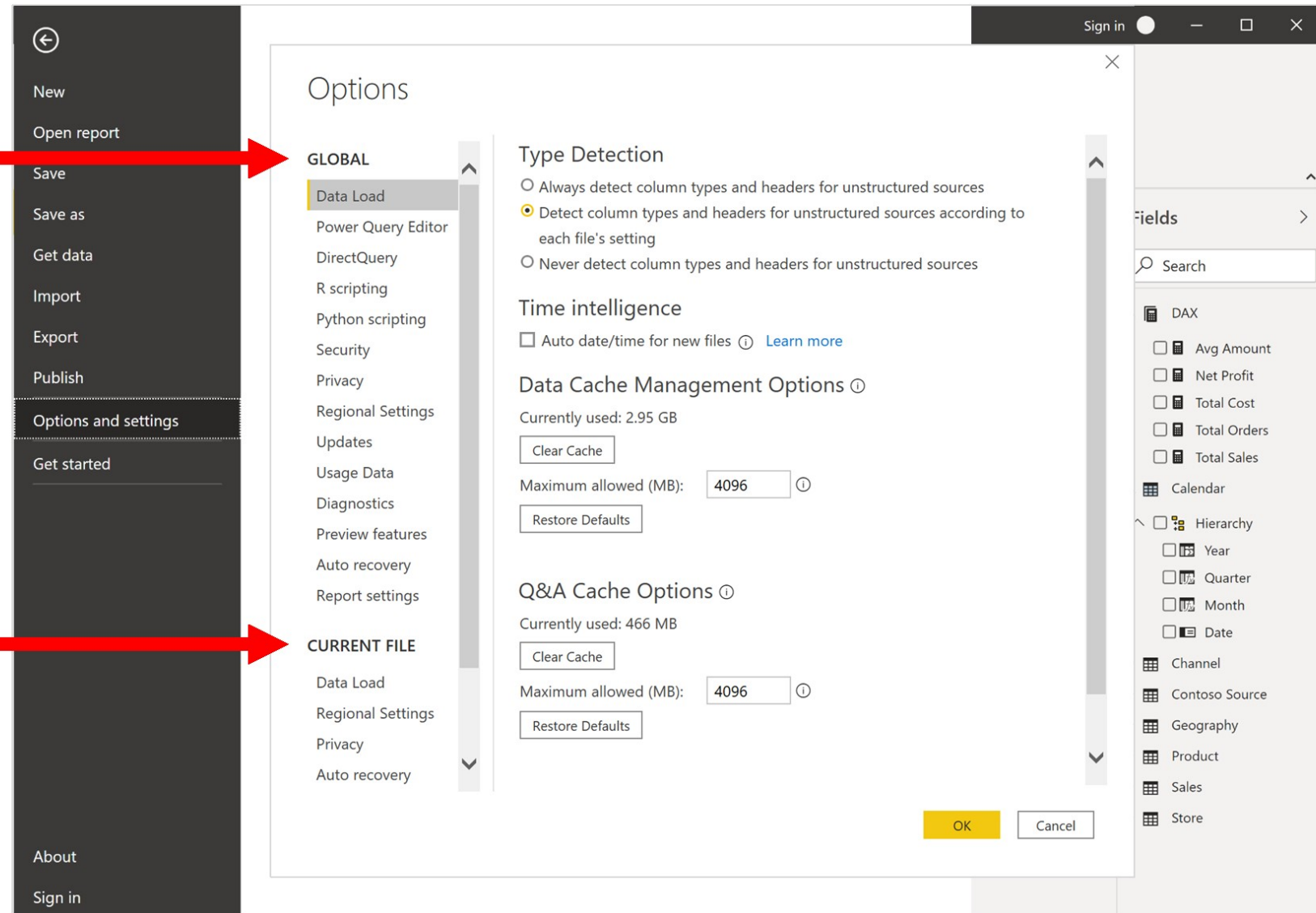


PowerPivot models can be imported into a new Power BI report file



Global options are applied to all files

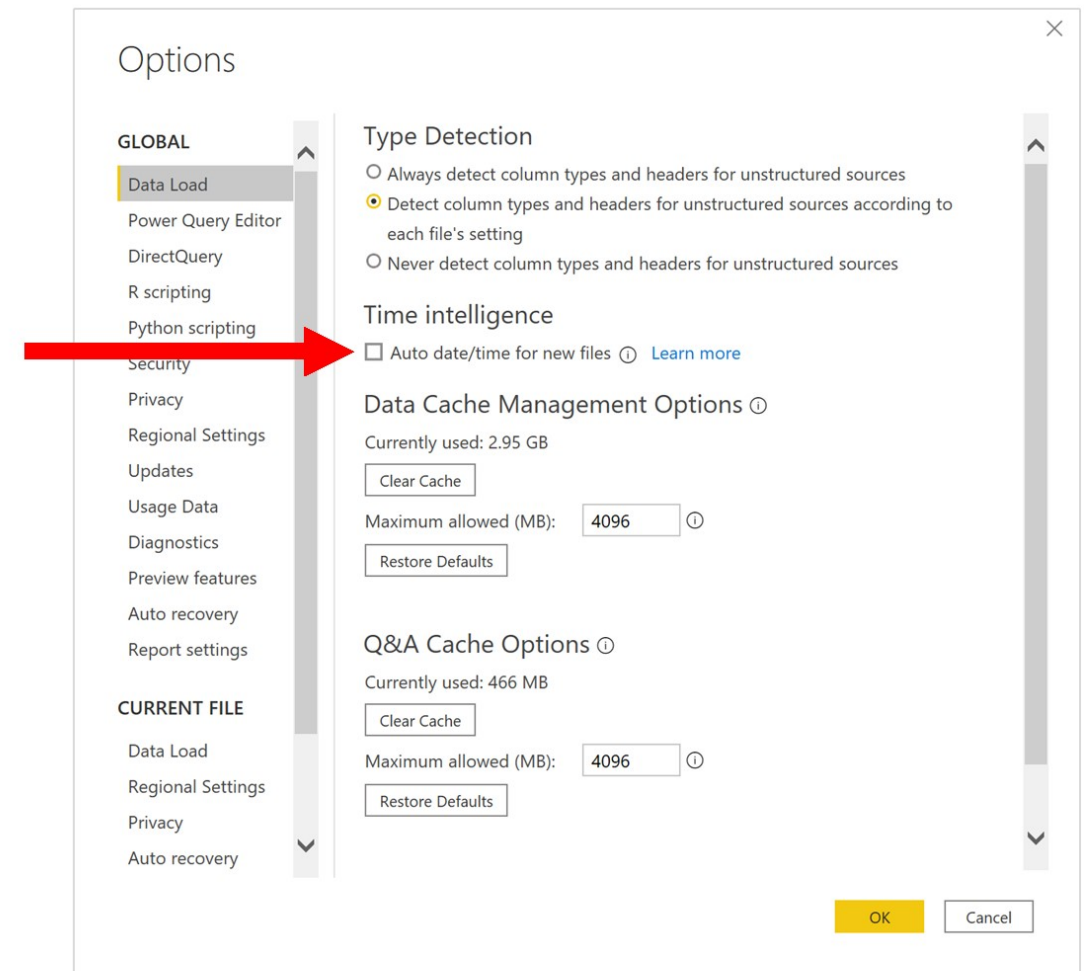
Current File options apply only to this file



Introducing the User Interface

File Menu ► Options and Settings

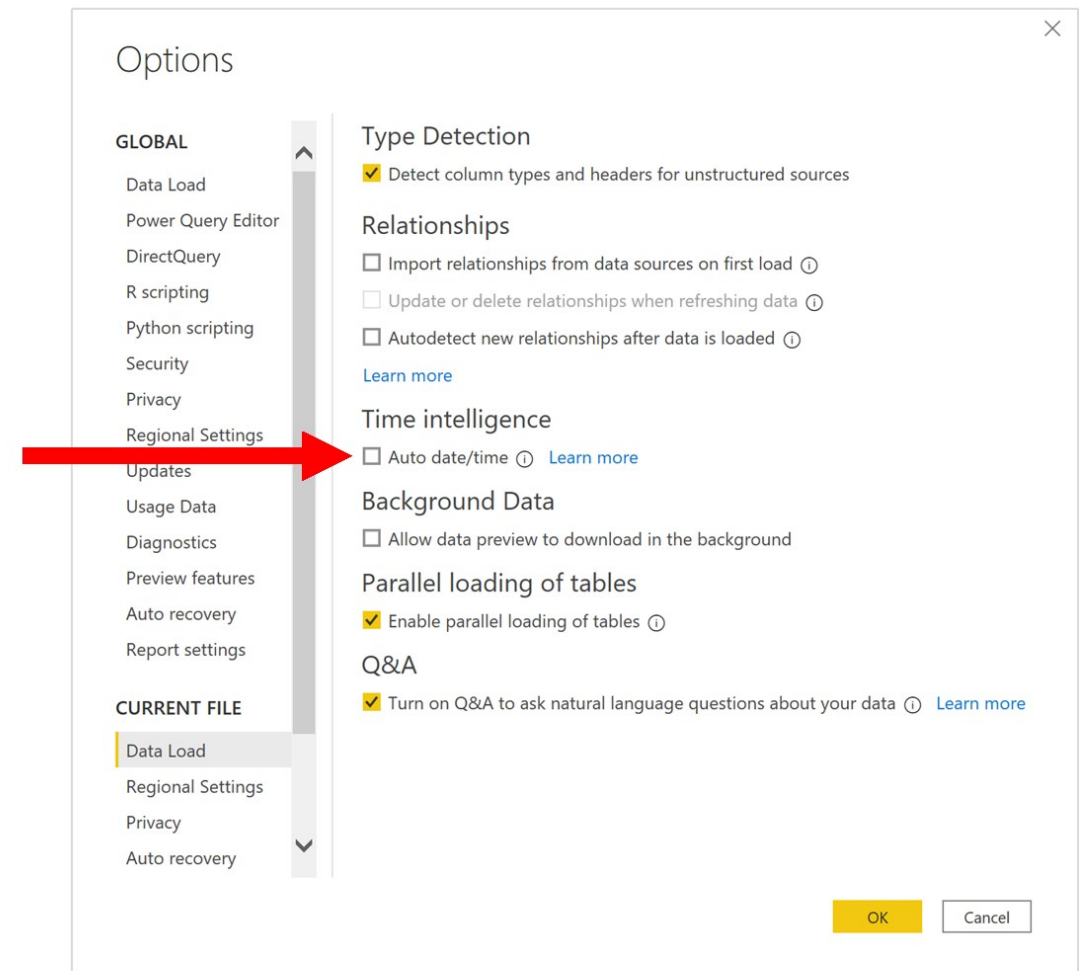
- Recommended settings to configure:
 - **Disable:** Auto date/time for new files
 - **Benefits include:**
 - *More control* over the model and its configuration
 - Reduces *file size* by eliminating hidden calendar tables
 - Allows for *custom calendar tables and columns*



Introducing the User Interface

File Menu ► Options and Settings

- Recommended settings to configure:
 - **Disable:** Auto date/time for new files
 - **Benefits include:**
 - *More control* over the model and its configuration
 - Reduces *file size* by eliminating hidden calendar tables
 - Allows for *custom calendar tables* and *columns*
- Existing report files will need to have auto date/time disabled *separately* in the **Current File** options

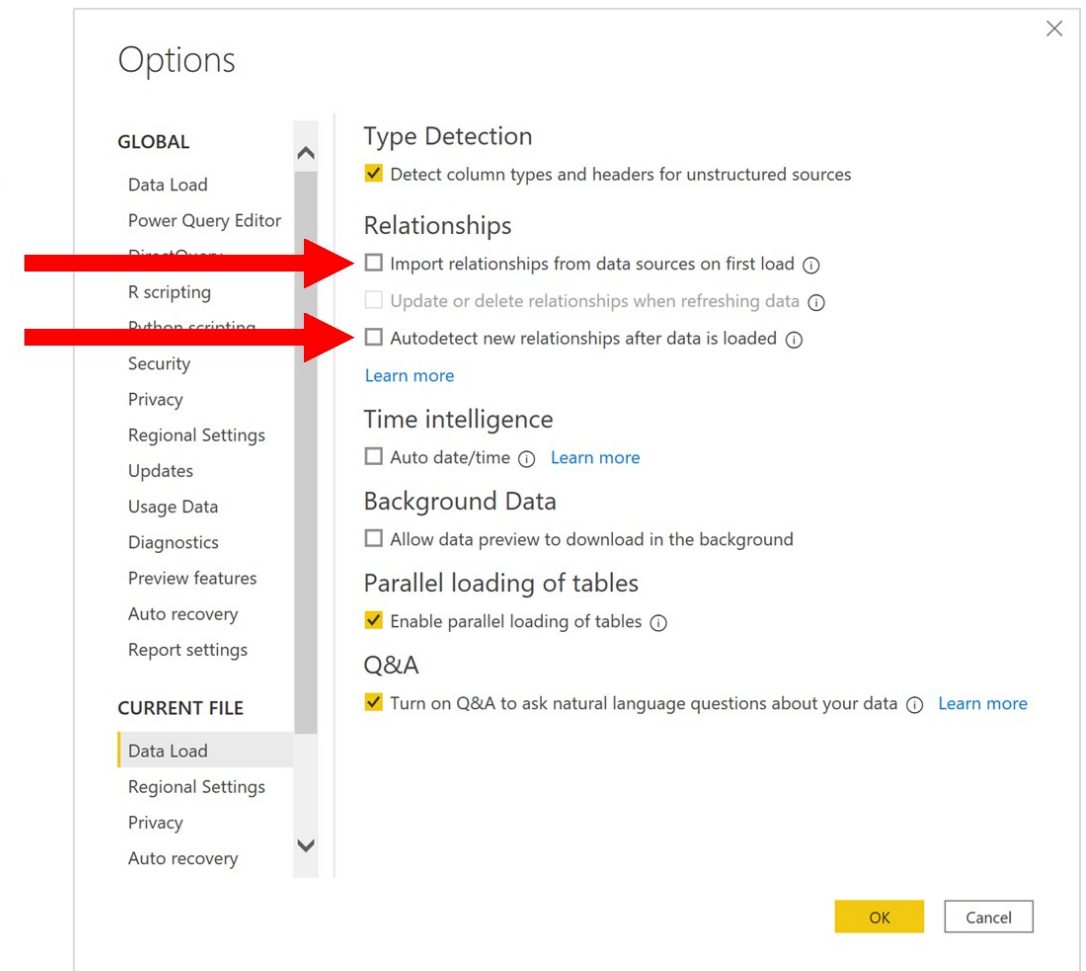


Introducing the User Interface

File Menu ► Options and Settings

- Recommended settings to configure:
 - **Disable:**
 - Import relationships from data sources on first load
 - Autodetect new relationships after data is loaded
 - **Benefits include:**
 - More control over the model and its configuration
 - Prevents unwanted relationships from getting created and requiring deletion

There are currently no **Global** options for disabling automatic relationship detection



Introducing the User Interface

File Menu ► Options and Settings

- **Preview features:**
 - Are a series of *in-development settings and features* that can be *toggled on/off* for Power BI Desktop and Service
 - Change with each *monthly update*
 - Are still under-development – beware there may be bugs or breaking changes

Some preview features will only work in Power BI Desktop and not the Service

