

Introduction to use of “Buttons and Bookmarks” for component Selection

Version 1.0

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Purpose

This document covers how to select components in Power BI by using “Buttons and Bookmarks”. This is high level document and assume resource has basic knowledge of Power BI Concepts.

Introduction

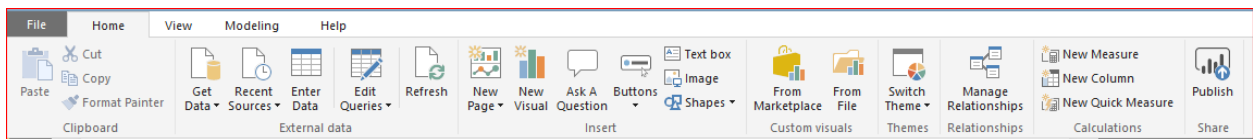
- ❖ By using the “Buttons” and “Bookmarks”, we can hide or show the components. Buttons that we create in Power BI Desktop are available to use in reports or dashboards that are published in the Power BI service.
- ❖ A bookmark is a saved shortcut that directs our browser to a specific component in Power BI.
- ❖ In Power BI we can use Button and Bookmark for their separate uses. By combining them we can do selection of component.

Where “Selection” is required?

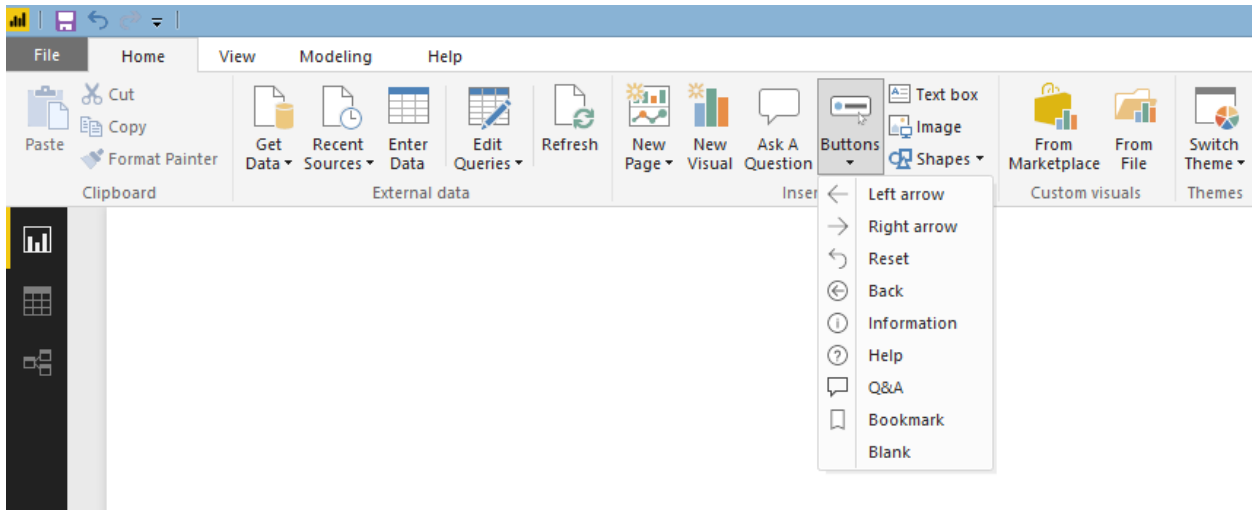
For example, we have a requirement to show the graphical and tabular view on a single page with full page view for each component. To fulfill this requirement, we have several options. But there is a new feature introduced in Power BI. By combining “Button” and “Bookmark” we can show the graphical and table view on a single page with full page of view for each component. Below are the steps to achieve this.

Let’s create a Button: -

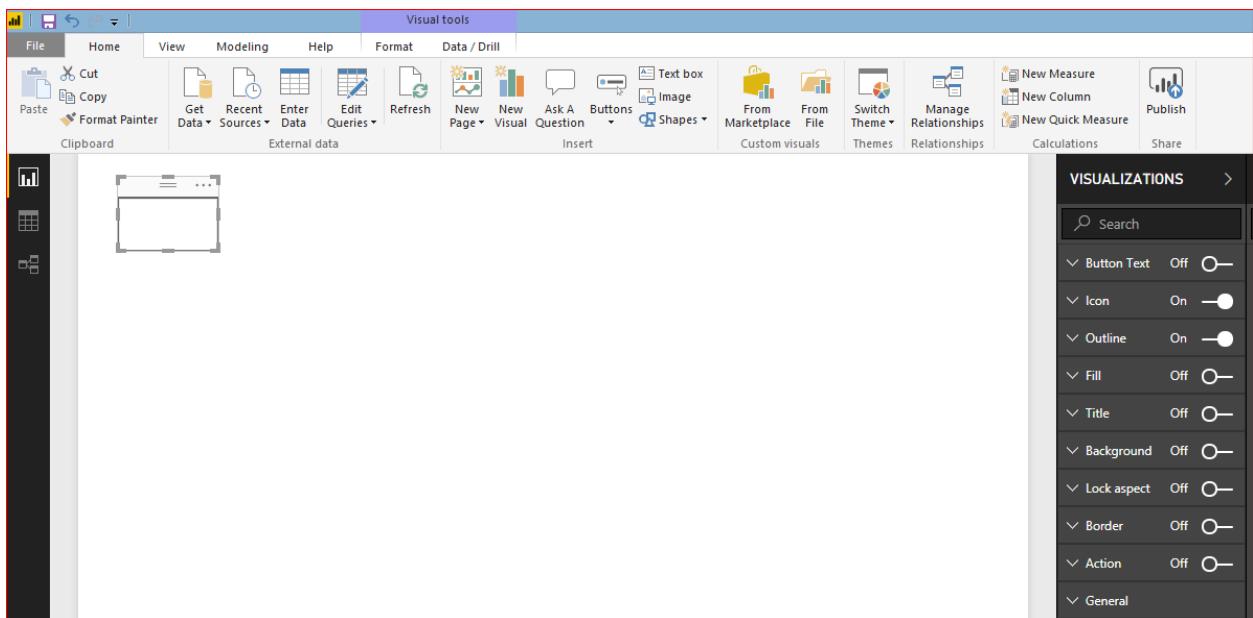
1. Open the report in Power BI and click on “Home” ribbon from the top menu.



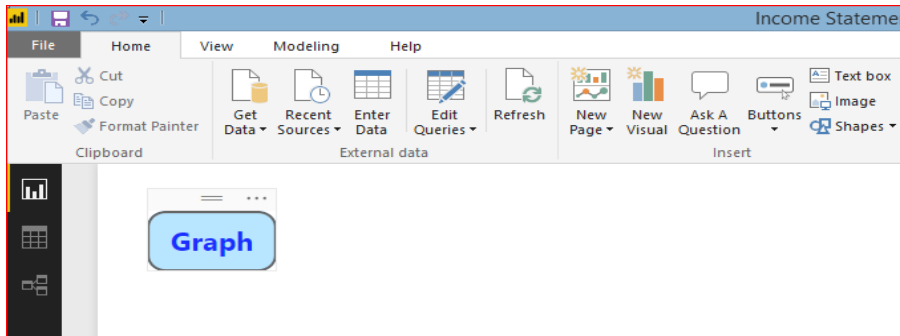
2. Select the “Buttons” option and a drop-down menu will appear. Select the button from the available list of buttons as per requirement.



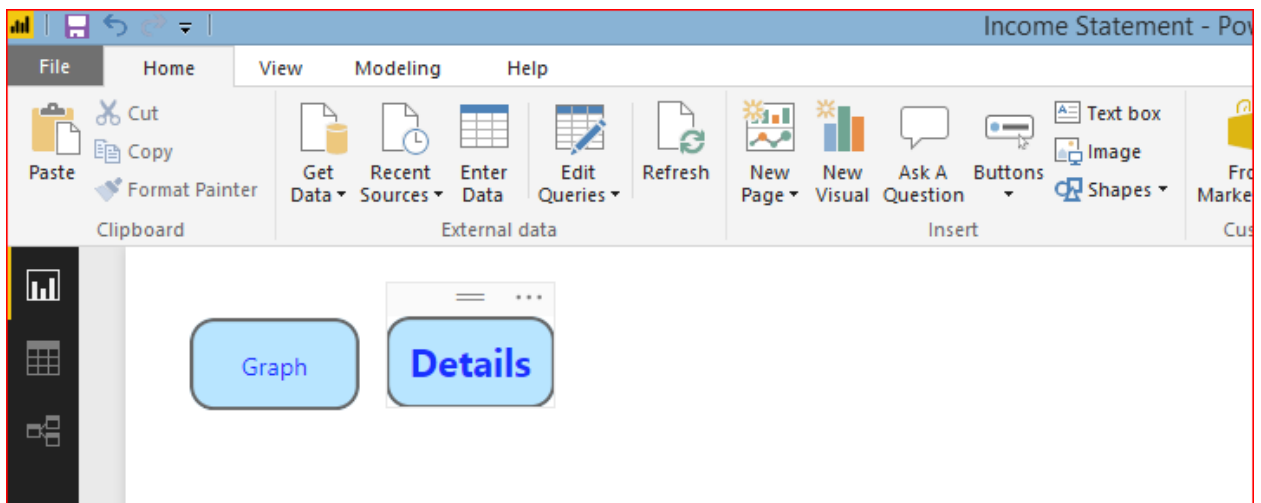
3. In this case we have selected the ‘Blank’ button option. Other buttons can also be selected based on the requirement.



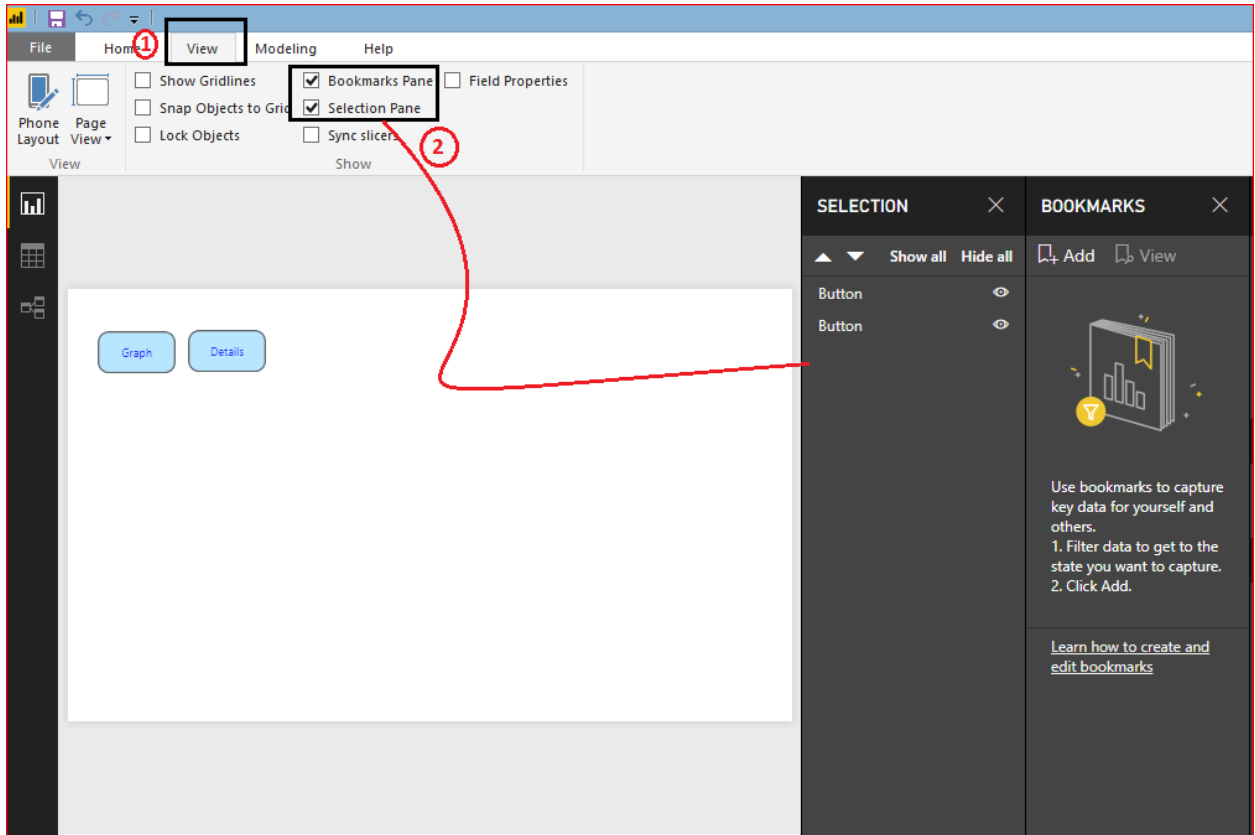
4. Make changes to the button text and properties as per requirement. Change the text to show 'Graph' as text.



5. Copy the same Button and paste it beside the same button. Change the text to 'Details' for the copied button.

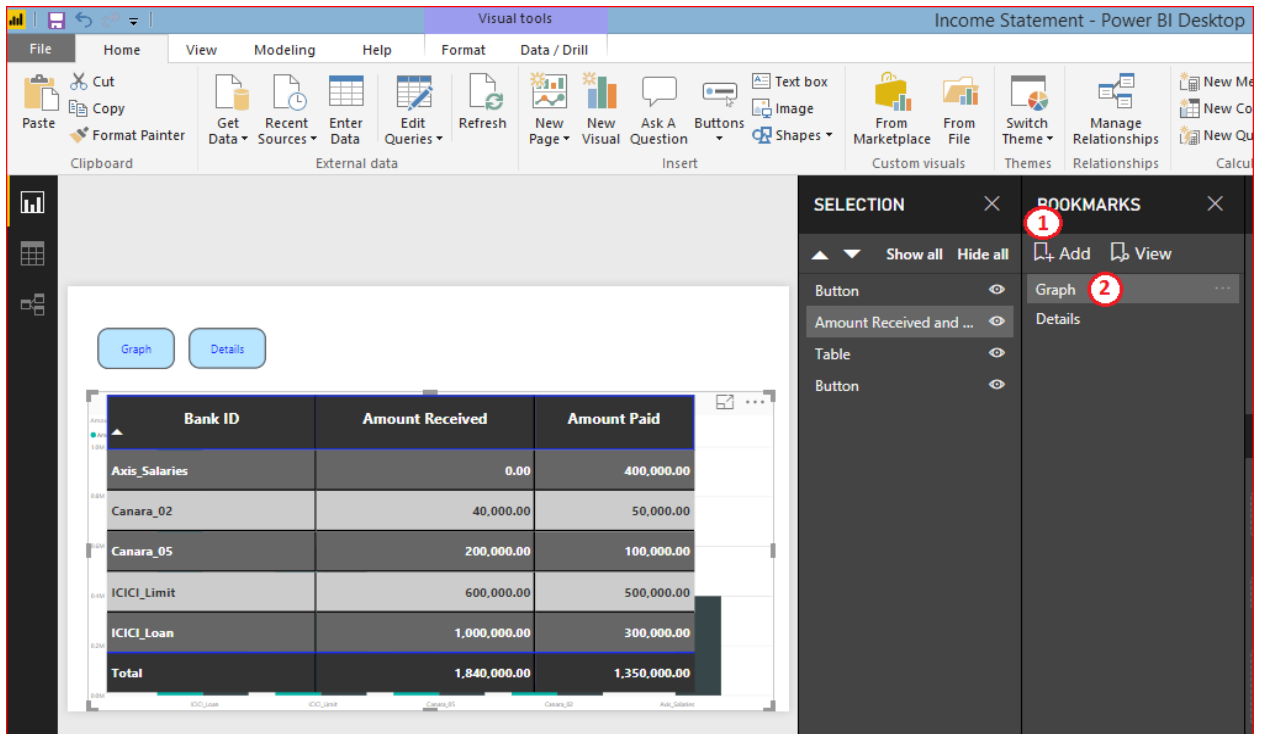


- Now click on the “View” ribbon on the top menu and tick the “Bookmark” Pane and “Selection” Pane checkbox as shown in below image.

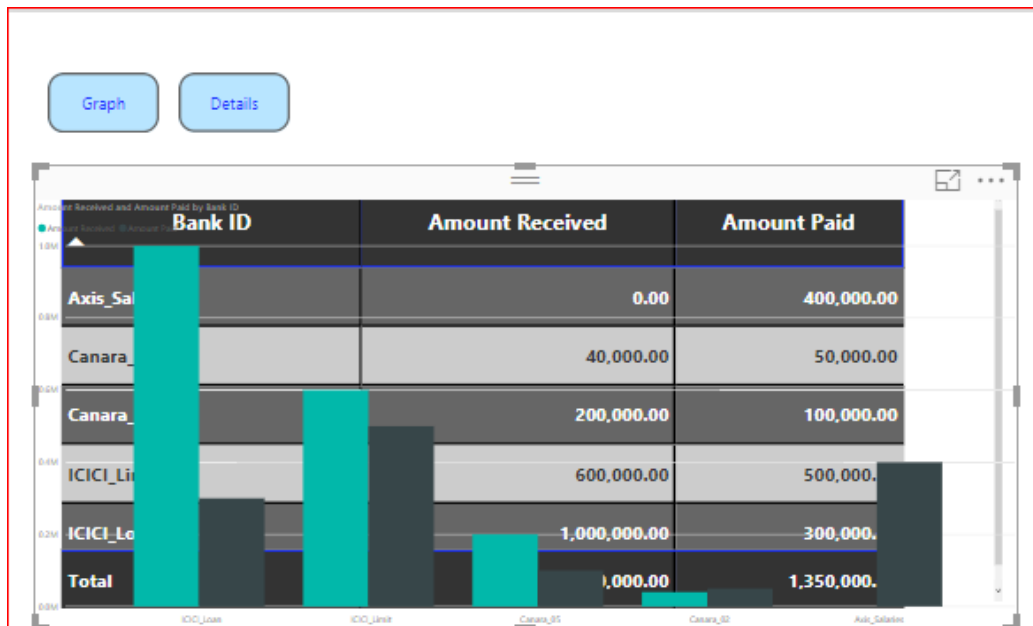


Let's Create the Bookmark:

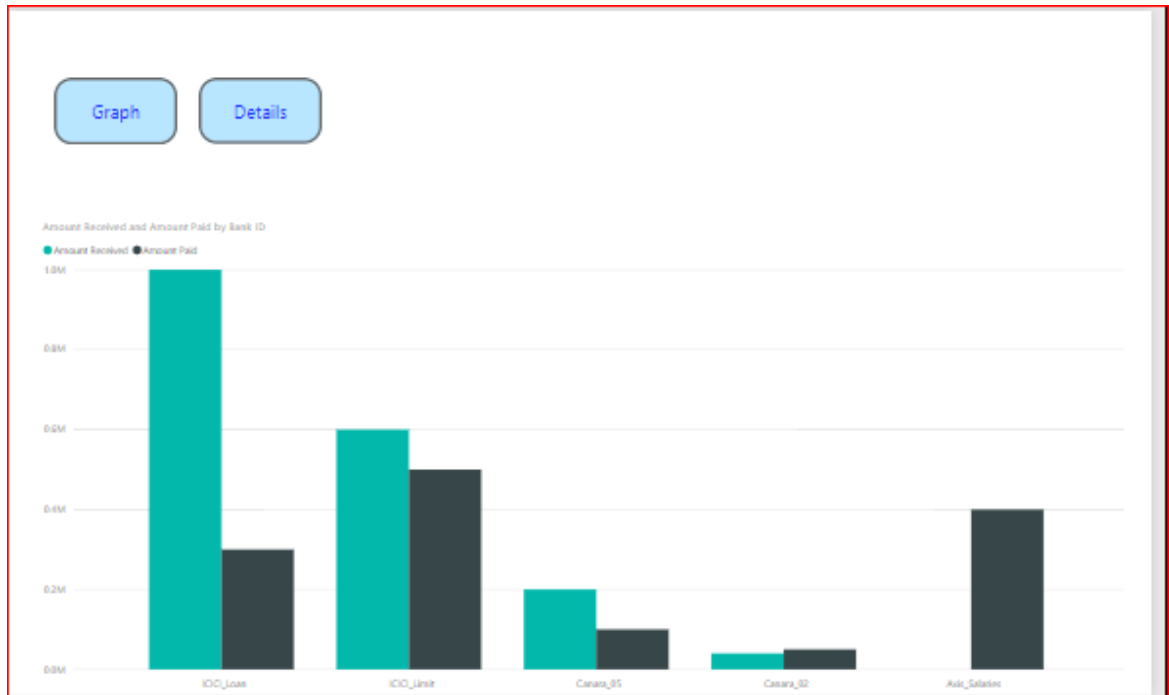
- Now, we will create the bookmarks for the 'Graph' and 'Details' button. To create the bookmark, click on “Add Button” and double click on the added bookmark to change the default name “Bookmark1” to as per button name or as per requirement. Create two bookmarks as we have two buttons. Below image shows the same.



8. Now, we have a requirement that we need to toggle the Table and Graph. Here they both are overlapping each other and we need to show them separately as shown in below points 9 and 10.



9. When we click on the “Graph” button it will show only graph.

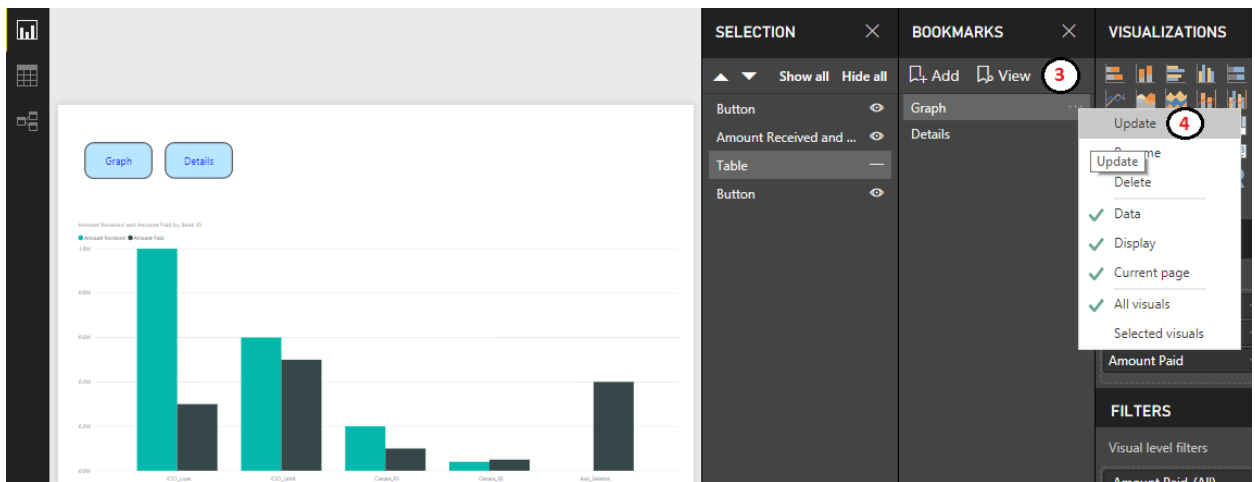
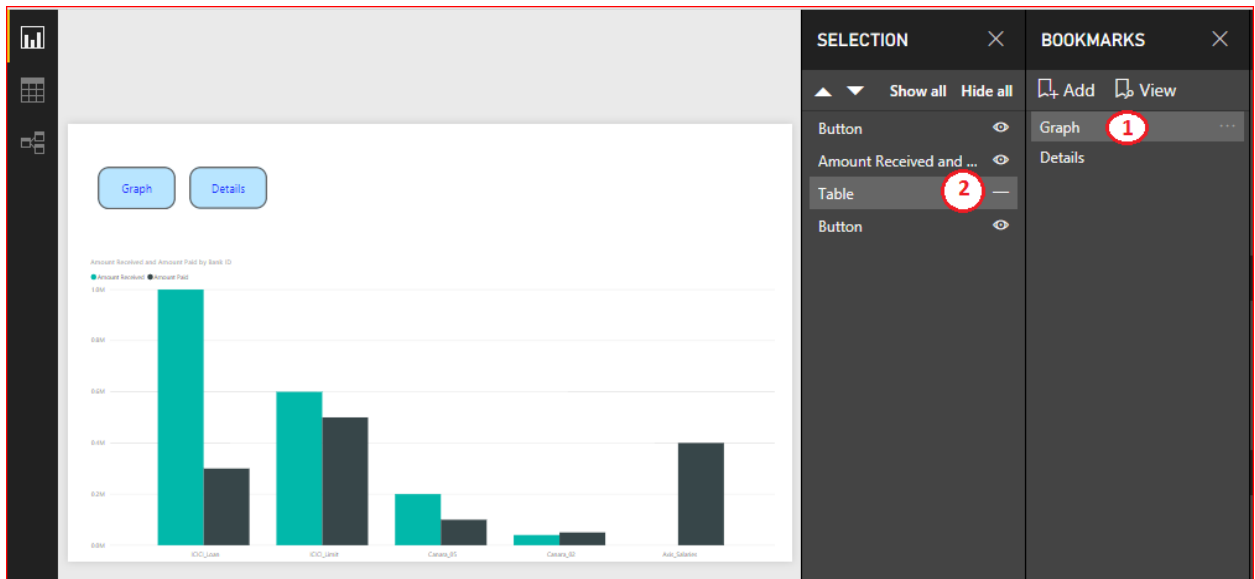


10. When we click on “Details” button it will show only “Table” which will have all the detail information regarding the same graph.

A table titled "Amount Received and Amount Paid by Bank ID" showing the details of the data from the graph. The table has three columns: Bank ID, Amount Received, and Amount Paid. The data is as follows:

Bank ID	Amount Received	Amount Paid
Axis_Salaries	0.00	400,000.00
Canara_02	40,000.00	50,000.00
Canara_05	200,000.00	100,000.00
ICICI_Limit	600,000.00	500,000.00
ICICI_Loan	1,000,000.00	300,000.00
Total	1,840,000.00	1,350,000.00

11. After that, click on the “Graph” Bookmark and select on the “eye” icon for Table. By doing this, the Table will be hidden and only graph will be shown. Then click on the update option in bookmark as shown in below images.



12. Now click on the “Details” bookmark and click on the “eye” icon for “Graph”.It will hide the “Graph” and show only Table. Then click on the update option in bookmark.

The screenshot shows the Power BI interface with a table visualization. The table has three columns: Bank ID, Amount Received, and Amount Paid. The data is as follows:

Bank ID	Amount Received	Amount Paid
Axis_Salaries	0.00	400,000.00
Canara_02	40,000.00	50,000.00
Canara_05	200,000.00	100,000.00
ICICI_Limit	600,000.00	500,000.00
ICICI_Loan	1,000,000.00	300,000.00
Total	1,840,000.00	1,350,000.00

The right-hand pane shows the 'SELECTION' and 'BOOKMARKS' tabs. In the 'BOOKMARKS' tab, the 'Details' bookmark is selected (1). The 'Graph' bookmark is visible but its eye icon is disabled (2). The 'Update' button is highlighted (3). A dropdown menu is open for the 'Update' button, showing options: 'Update', 'Create', 'Data', 'Display', 'Current page', 'All visuals', and 'Selected visuals' (4).

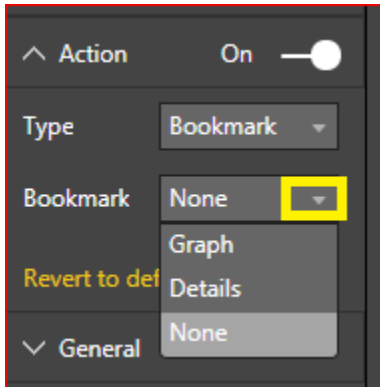
13. Now click on “Graph” button and go to Visualization pane. We can see at bottom “Action” option click it and get it ON.

The screenshot shows the Power BI interface with a bar chart visualization. The chart displays 'Amount Received' and 'Amount Paid' for different bank IDs. The 'Graph' button is highlighted (1). The right-hand pane shows the 'SELECTION', 'BOOKMARKS', and 'VISUALIZATIONS' tabs. In the 'VISUALIZATIONS' tab, the 'Action' option is highlighted (2). The 'Action' toggle is turned on (3). The 'Type' dropdown is set to 'Back' (4).

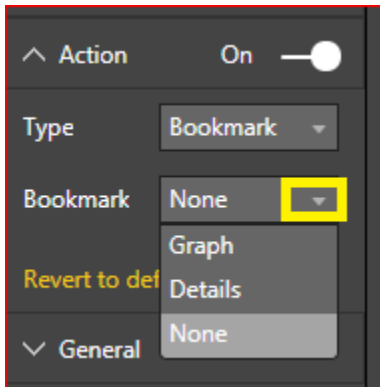
14. Now click on the “Type” and select Bookmark from the drop-down list.

The screenshot shows the 'Action' pane with the 'Type' dropdown menu open. The options are 'Back', 'Bookmark', and 'Q&A'. The 'Bookmark' option is selected.

15. After clicking on Bookmark. Click on down arrow (highlighted in below image). Select “Graph” from the drop-down list for “Graph” button.

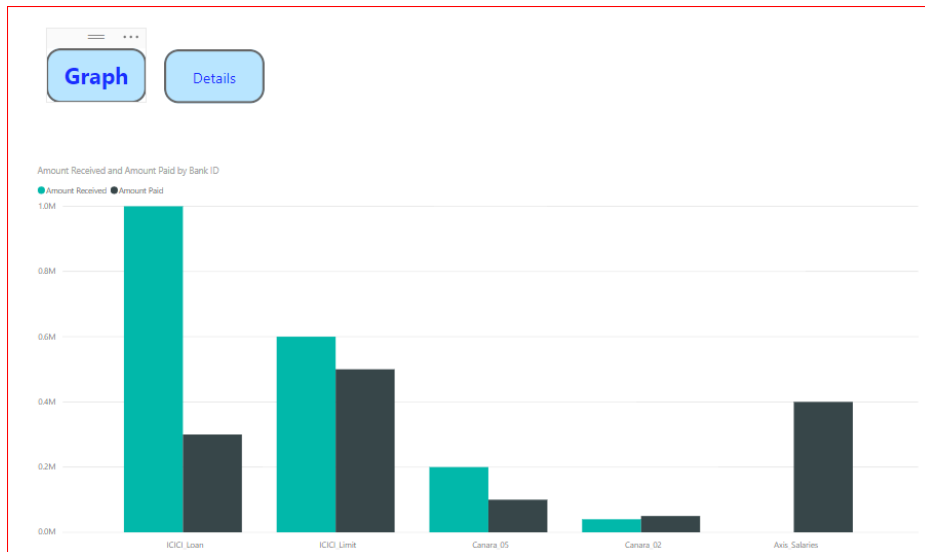


16. Report the same steps for “Details”. Click on down arrow (highlighted in below image). Select “Details” from the drop-down list for “Details” button.



17. Linking for the button and bookmark has been done. Now we are at the last stage.
18. Now press the “Ctrl” button from keyboard and Click on any Button.

When we click “Ctrl + Graph” button then it shows only graph.



When we click “Ctrl + Details” button then it shows only Table.

Graph

Details

Bank ID	Amount Received	Amount Paid
Axis_Salaries	0.00	400,000.00
Canara_02	40,000.00	50,000.00
Canara_05	200,000.00	100,000.00
ICICI_Limit	600,000.00	500,000.00
ICICI_Loan	1,000,000.00	300,000.00
Total	1,840,000.00	1,350,000.00