Creating and Deploying Dashboards in Power BI

Lab Time: 60 minutes

Lab Folder: C:\Student\Modules\07_Dashboards\Lab

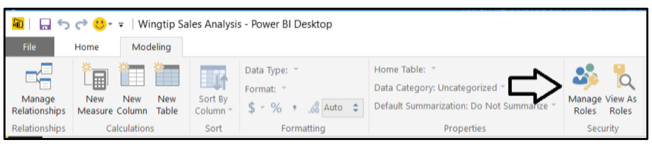
Lab Overview: In this lab you will continue to work with the report and dataset that you created in the Power BI Desktop project named **Wingtip Sales Analysis.pbix**. You will focus on the techniques required to create and deploy dashboards to an audience of business users in an Office 365 environment.

Lab Dependency: This lab assumes you have completed the lab titled **Designing Interactive Reports in Power BI Desktop** in which you created a multipage report in the **Wingtip Sales Analysis.pbix** project and then published this report and its underlying dataset to the Power BI Service. If you would like to begin work on this lab without completing the earlier lab, copy the lab solution file named **Wingtip Sales Analysis.pbix** which is located in the student folder at **C:\Student\Modules\06_Reports\Lab\Solution** into the folder at **C:\Student\Projects** using the Windows Explorer.

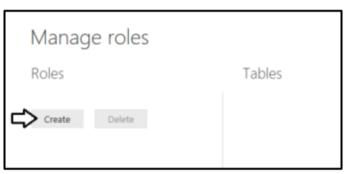
Exercise 1: Configure Project Roles to Enabled Row-level Security (RLS)

In this exercise you will complete your work by publishing the PBIX file to your personal workspace in the Power BI service.

1. Make sure you still have the **Wingtip Sales Analysis.pbix** file open that you created in the previous exercise.
2. Add three new roles to the project's data model.
   a) Navigate to Report View.
   b) Activate the **Modeling** tab in the ribbon.
   c) Click the **Manage Roles** button to open the **Manage roles** dialog.



   d) In the **Manage roles** dialog, click the **Create** button to create a new role.

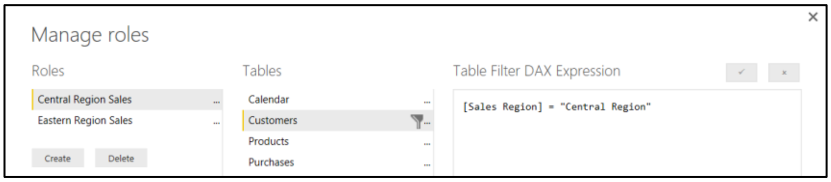


   e) Create a role named **Eastern Sales Region** which filters based on the **Customers** table using the following DAX expression.

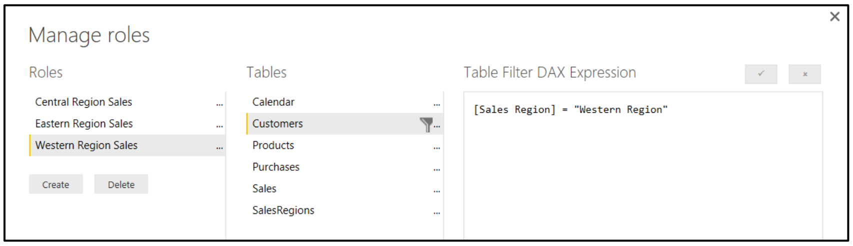
```
[Sales Region] = "Eastern Region"
```

   f) When the **Manage roles** dialog matches the following screenshot, click the **Save** button to save the new role.

   g) Create a role named **Central Sales Region** which filters the **Customers** table where **[Sales Region] = "Central Region"**.



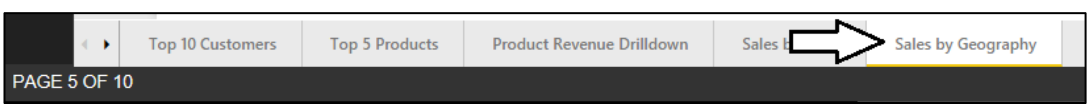
h) Create a role named **Western Sales Region** which filters the **Customers** table where **[Sales Region] = "Western Region"**.



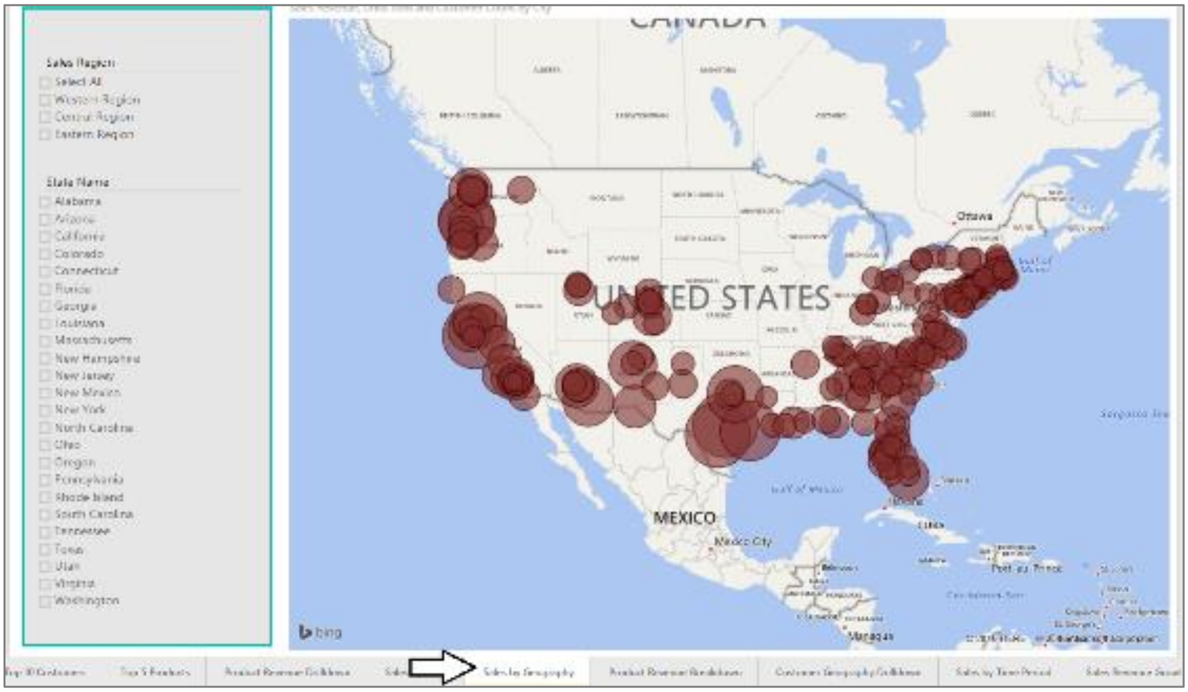
i) Create a manager role named **All Sales Regions** which has no filters.

Now that you have created a few security roles, you will test them using the **View As Roles** feature in Power BI Desktop.

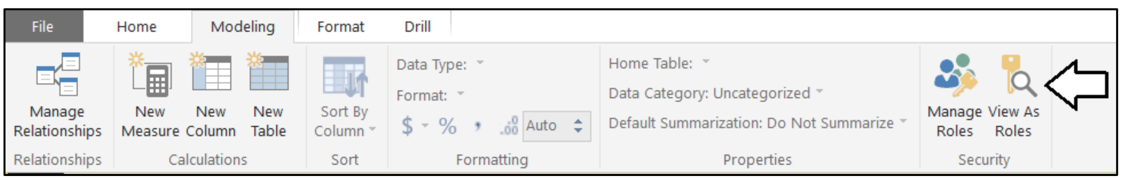
3. Use the **View as Roles** feature to experience the Wingtip Sales Analysis project from the perspective of a restricted user.
   a) Navigate to Report View if you are not already there.
   b) Select the **Sales by Geography** report page from the report page navigation menu,



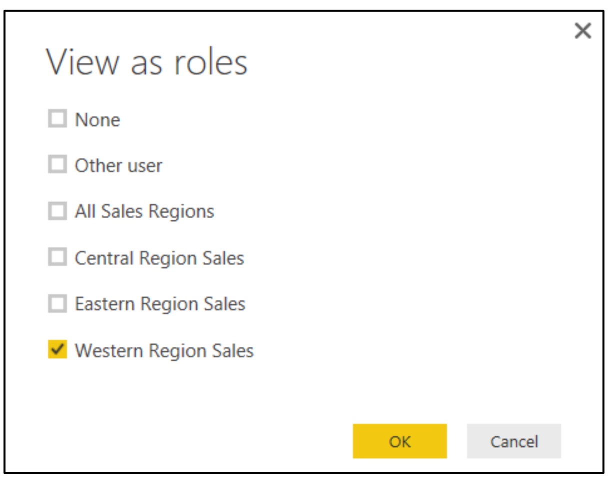
   c) Make sure no filters are selected on the page. You should see that the map visual shows cities through the United States.



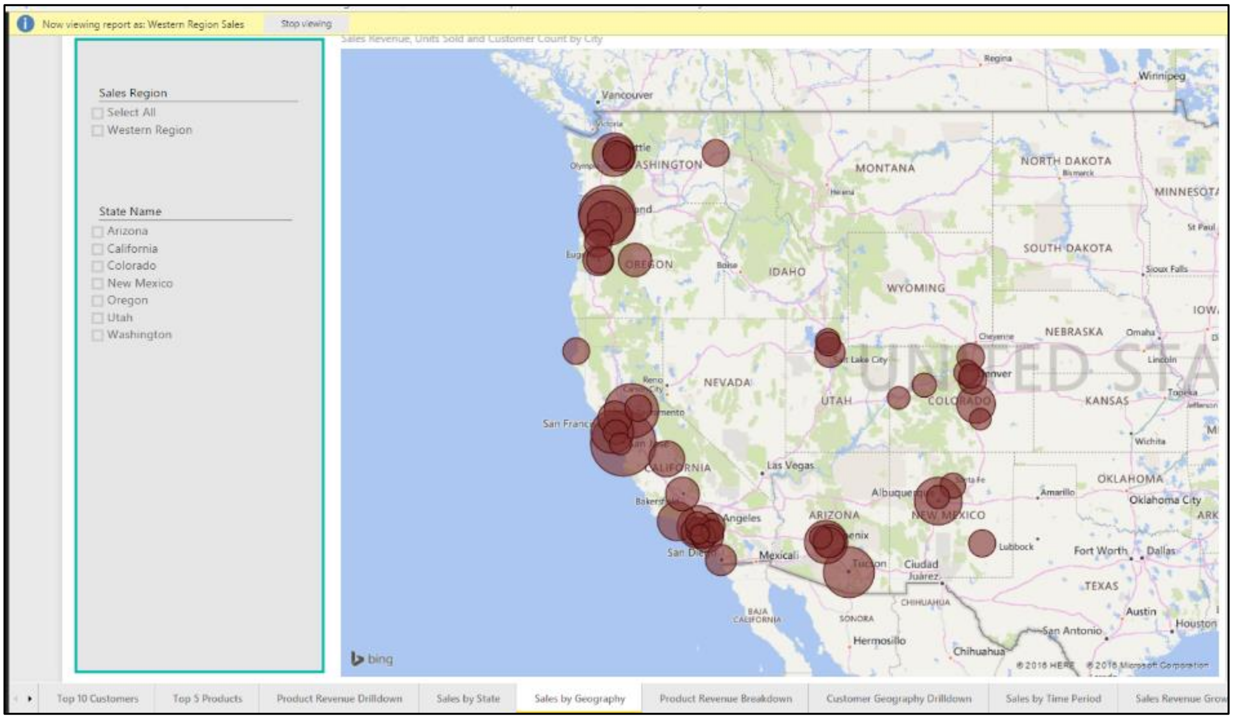
d) From the **Home** tab in the ribbon, click the **View As Roles** button to open the **View as roles** dialog.



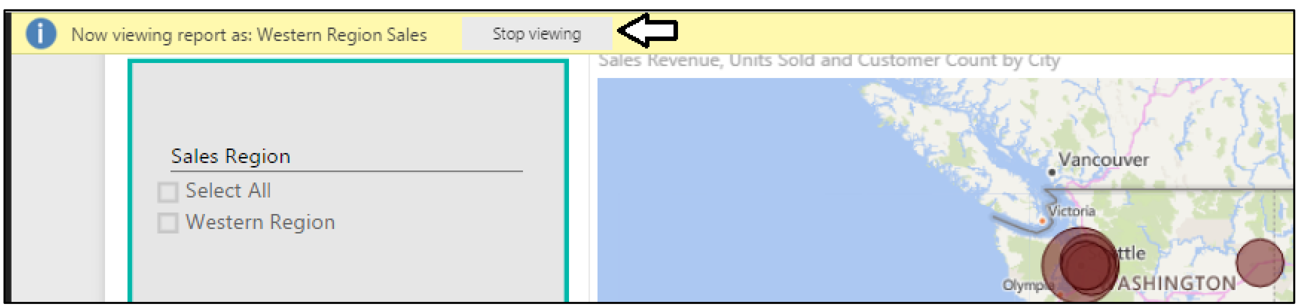
e) In the **View as roles** dialog, select **Western Region Sales** and click **OK**.



f) The map visual should now be filtered where it only shows cities in the Western Region.



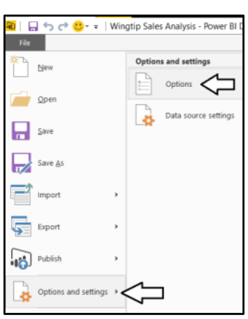
g) Disable the View As Roles feature by click the **Stop viewing** button.



There is an issue with the preview feature of role-based security. It doesn't work correctly in the Power BI service unless you enabled a special preview features in Power BI Desktop before saving the PBIX file. You will complete this exercise by enabling this feature and then saving the PBIX file.

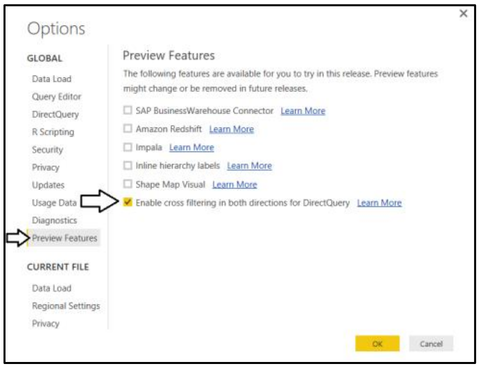
4. Configure a Preview Setting in Power BI Desktop to Make Roles Work Correctly in the Power BI Service.

a) In the Power BI Desktop window, drop down the **File** menu and select **Options and settings > Options**.



b) In the **Options** dialog, navigate to the **Preview Features** tab on the left.

c) Check the checkbox with the caption **Enable cross filtering in both directions for DirectQuery**.



d) Click **OK** to dismiss the **Options** dialog and to save your changes.

5. Save your work to the project by clicking the **Save** button in the ribbon.