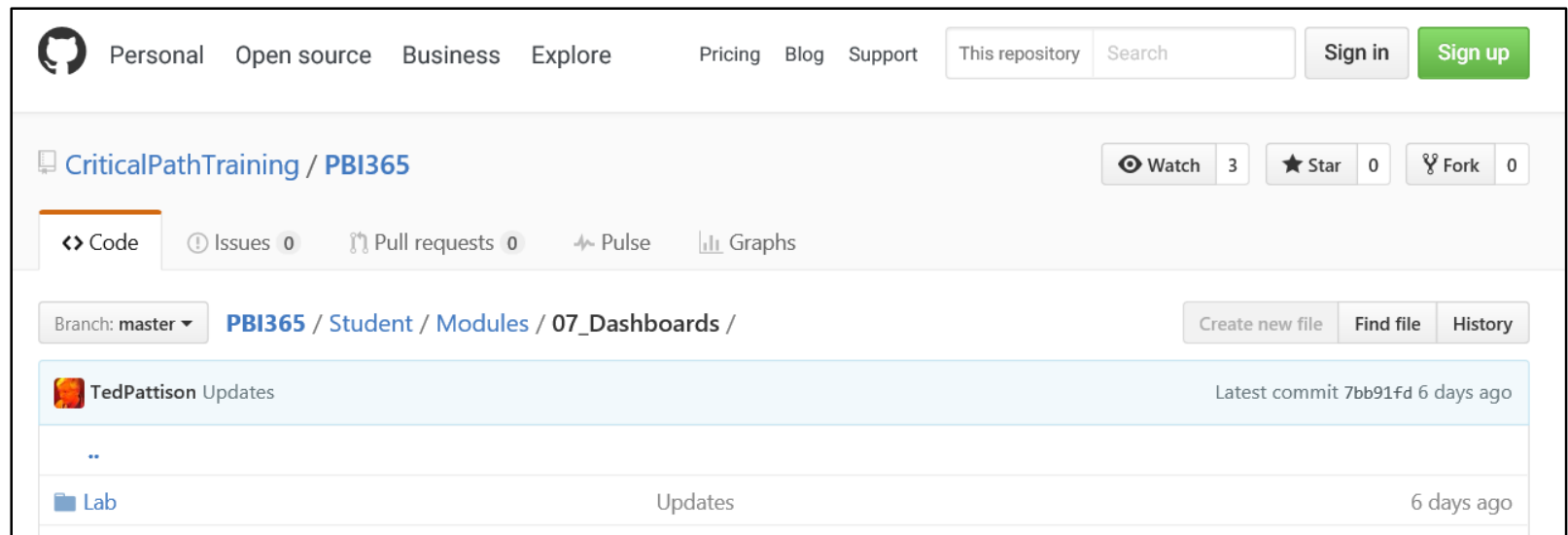


# Introducing the Power BI Platform



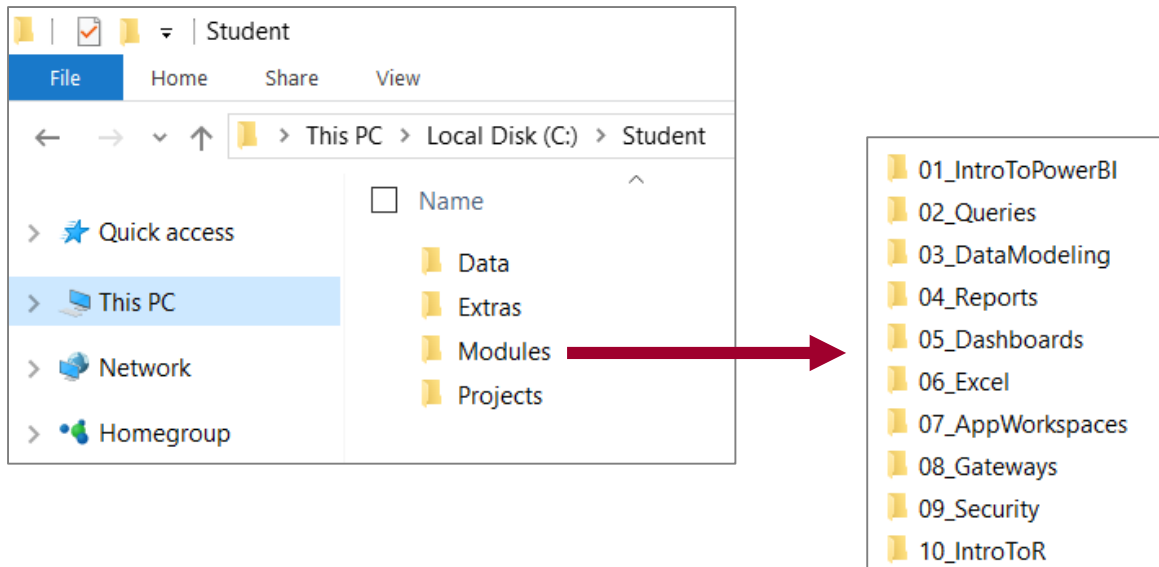
# Live Labs for PBI365

- Student files for this course maintained in GitHub
  - Students files updated frequently
  - Go to <https://github.com/CriticalPathTraining/PBI365>



# Student Files for This Course

- Copy the **Student** folder from the master zip archive
  - Create a new local folder at **C:\Student**
- Each module has folder inside **Student\Modules** folder
  - Slides and lab writeup available through student manual (not in GitHub repository)



# Student Background

- What is your name?
- What are you doing with Power BI?
- Which products/services have you used
  - Excel
  - Access
  - SQL Server, SSRS, SSAS
  - SharePoint and Office 365
  - Tableau
  - Dynamics 365
  - Salesforce
  - Others



# Agenda

- Understanding the Power BI Platform
  - Creating a Trial Office 365 Tenant for Testing
  - Creating Datasets, Reports and Dashboards
  - Getting Started with Power BI Desktop
  - Staying in Sync with Monthly Updates



# What is Business Intelligence?

- BI focuses on business health and performance
  - Gather insights into health of business processes
  - Take corrective actions in a timely fashion
- BI projects typically involve the following...
  - Integrate data from multiple sources
  - Perform data transformation and complex calculations
  - Analyze large data sets with rapid query response
  - Create insightful reports and visualizations
  - Provide insights that are “actionable”



# How is the BI Software Industry Changing?

- Software industry is experiencing new proliferation of data
  - Number of telemetry devices is increasing exponentially
  - Device-generated data is providing new business opportunities
  - Example: Uber has used geolocation data to disrupt taxi industry
- Traditional BI and analytics models are being disrupted
  - New analytics capabilities available with new types of data sources
  - Data discovery and unstructured data analytics are new frontiers
  - Demand for self-service BI tools are on the rise
  - Balance of power shifting from IT to business divisions





# What is Power BI?

- What is Power BI?
  - Cloud-based subscription service
  - Environment which promotes self-service BI *to the end user*
  - BI Platform to assists with data import, analysis and visualization
- Power BI benefits from being a cloud-based service
  - It takes only 5 seconds to subscribe to the Power BI service
  - New users can create something significant in 5 minutes or less





# Power BI Benefits from Microsoft Azure

- Power BI is built on top of Microsoft Azure
  - Power BI solutions can be scaled as required
  - Power BI solutions have global reach



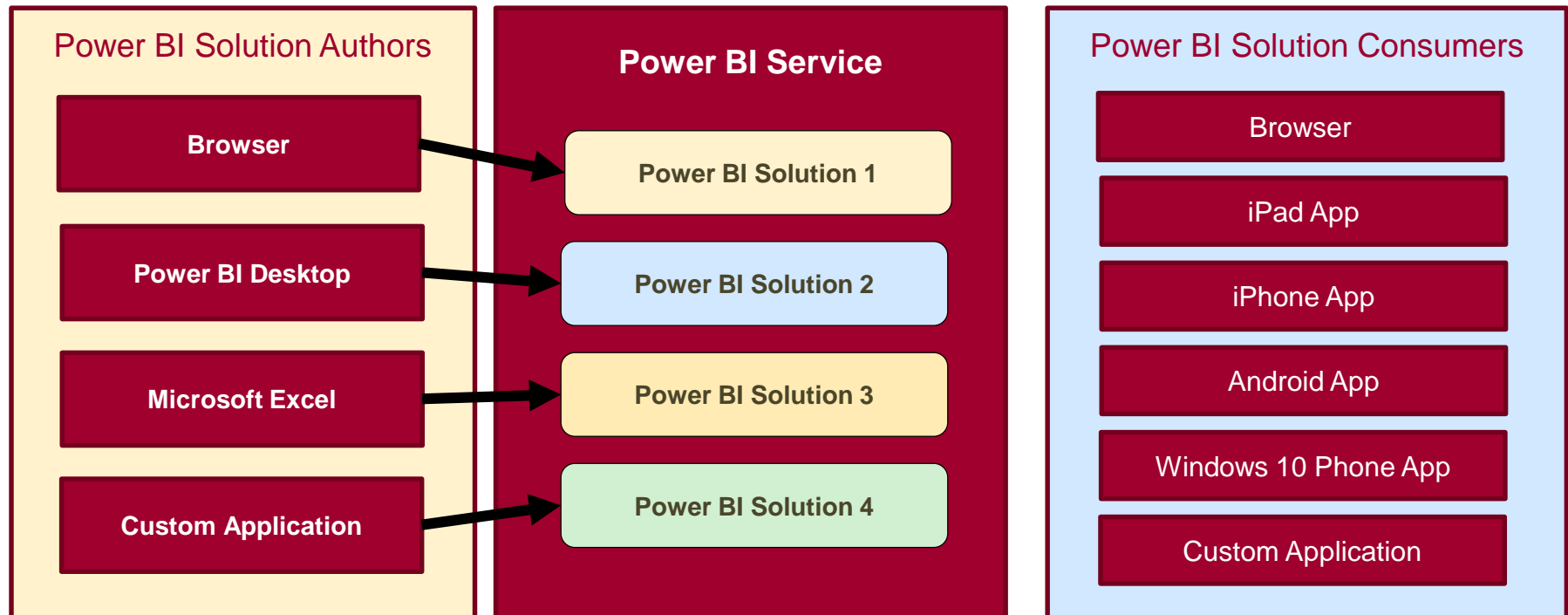
# The Power BI Service

- The Power BI Service
  - Provides cloud-based foundation for Power BI platform
  - Accessible through browser at <https://app.powerbi.com>







# Power BI Service Architecture

- Power BI support for authors and consumers
  - BI solution authors have a choice in authoring tools
  - BI solutions consumers can use wide range of devices







# Power BI Licensing

- User-based licensing

<p>Power BI (free)</p> <p>\$0.00 user/month</p> <p>A cloud-based business analytics service that enables anyone to visualize and analyze data with greater speed, efficiency, and understanding. It ...</p> <p>Office 2016 desktop &amp; mobile apps Not included</p> <p>Office 365 services </p> <p>...</p>	<p>Power BI Pro</p> <p>\$9.99 user/month</p> <p>A cloud-based business analytics service that enables anyone to visualize and analyze data with greater speed, efficiency, and understanding. Power ...</p> <p>Office 2016 desktop &amp; mobile apps Not included</p> <p>Office 365 services </p> <p>...</p>	<p>Office 365 Enterprise E5</p> <p>\$35.00 user/month</p> <p>The Office suite, plus email, instant messaging, HD video conferencing, 1 TB personal file storage and sharing, and advanced security, analytics and PSTN ...</p> <p>Office 2016 desktop &amp; mobile apps </p> <p>Office 365 services </p> <p>...</p>
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- Capacity-based Licensing

<p>Power BI Premium P1</p> <p>\$4,995.00 instance/month</p> <p>Power BI capacity dedicated to your organization, unlocking unlimited content distribution and dependable performance. P1 offers 8 virtual cores ...</p> <p>Office 2016 desktop &amp; mobile apps Not included</p> <p>Office 365 services </p> <p>...</p>	<p>Power BI Premium P2</p> <p>\$9,995.00 instance/month</p> <p>Power BI capacity dedicated to your organization, unlocking unlimited content distribution and dependable performance. P1 offers 16 virtual cores ...</p> <p>Office 2016 desktop &amp; mobile apps Not included</p> <p>Office 365 services </p> <p>...</p>	<p>Power BI Premium P3</p> <p>\$19,995.00 instance/month</p> <p>Power BI capacity dedicated to your organization, unlocking unlimited content distribution and dependable performance. P1 offers 32 virtual cores ...</p> <p>Office 2016 desktop &amp; mobile apps Not included</p> <p>Office 365 services </p> <p>...</p>	<p>Power BI Premium EM3 (Month to Month)</p> <p>\$2,495.00 instance/month</p> <p>Embed Power BI content in your custom application, powered by 4 virtual cores of dedicated capacity. Some Premium features are disabled ...</p> <p>Office 2016 desktop &amp; mobile apps Not included</p> <p>Office 365 services </p> <p>...</p>
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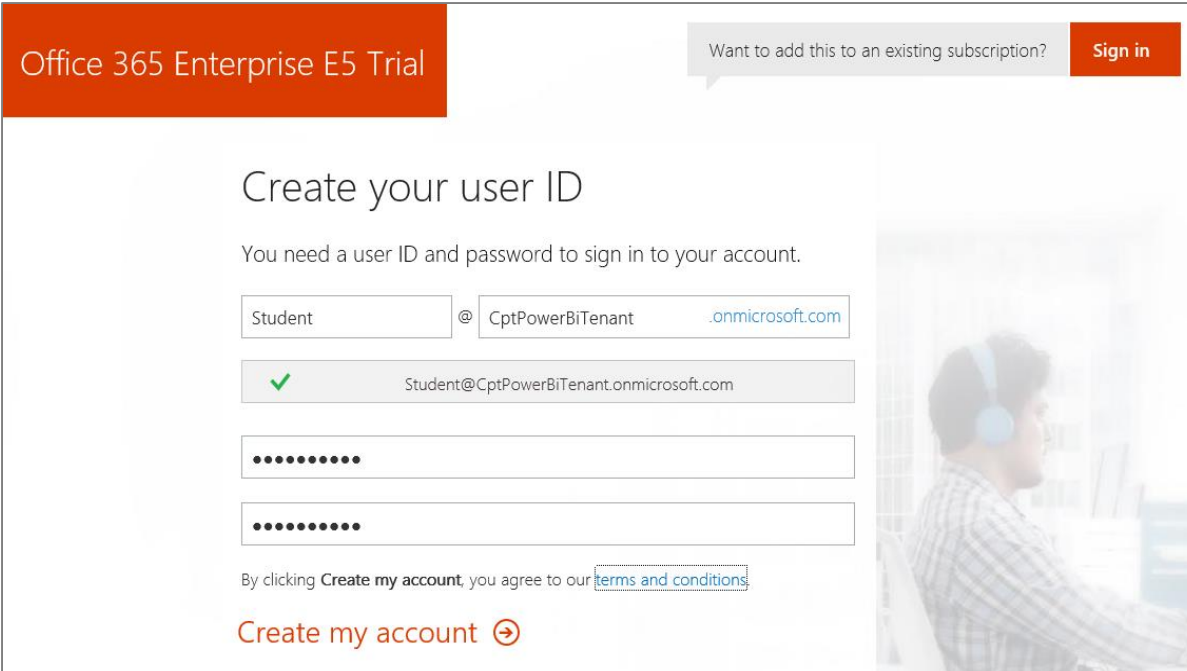
# Agenda

- ✓ Understanding the Power BI Platform
- Creating a Trial Office 365 Tenant for Testing
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# Creating a Power BI Testing Environment

- Sign up for an Office 365 Enterprise E5 trial account
  - Creates a new Office 365 tenant
  - Creates an account which is tenant administrator
  - You can create 25 user accounts for testing purposes
  - You can create and test Office 365 unified groups



The screenshot shows the Microsoft Office 365 Enterprise E5 Trial sign-up page. At the top left, there is an orange banner with the text "Office 365 Enterprise E5 Trial". To the right of this banner, there is a grey box with the text "Want to add this to an existing subscription?" and an orange "Sign in" button. Below the banner, the main heading is "Create your user ID". Underneath this heading, it says "You need a user ID and password to sign in to your account." There are two input fields: the first contains "Student" and the second contains "CptPowerBiTenant.onmicrosoft.com". Below these fields, there is a green checkmark icon and the text "Student@CptPowerBiTenant.onmicrosoft.com". There are two more input fields, both containing dots, representing password fields. At the bottom, there is a link to "terms and conditions" and a "Create my account" button with a right arrow icon. On the right side of the page, there is a blurred image of a person wearing a headset, likely a customer support agent.



# Office 365 admin center

- Chores to accomplish in Office 365 admin center
  - Learn how to add secondary user accounts for testing
  - Learn how to view and manage groups

Office 365 | Admin center preview

Home > Active users

Power BI Bootcamp Labs

[+ Add a user](#) [More](#) Filters All users  [Export](#)

<input type="checkbox"/>	Display name ^	User name	Status
<input type="checkbox"/>	James Bond	JamesB@PowerBiBootcamp.onmicrosoft.com	Office 365 Enterprise E5
<input type="checkbox"/>	Ted Pattison	Student@PowerBiBootcamp.onmicrosoft.com	Office 365 Enterprise E5

[+ User](#) [Types of users](#) [Filters](#)

Users are people in your organization who can access Office 365.

Different types of users and accounts can use Office 365 in distinct ways.

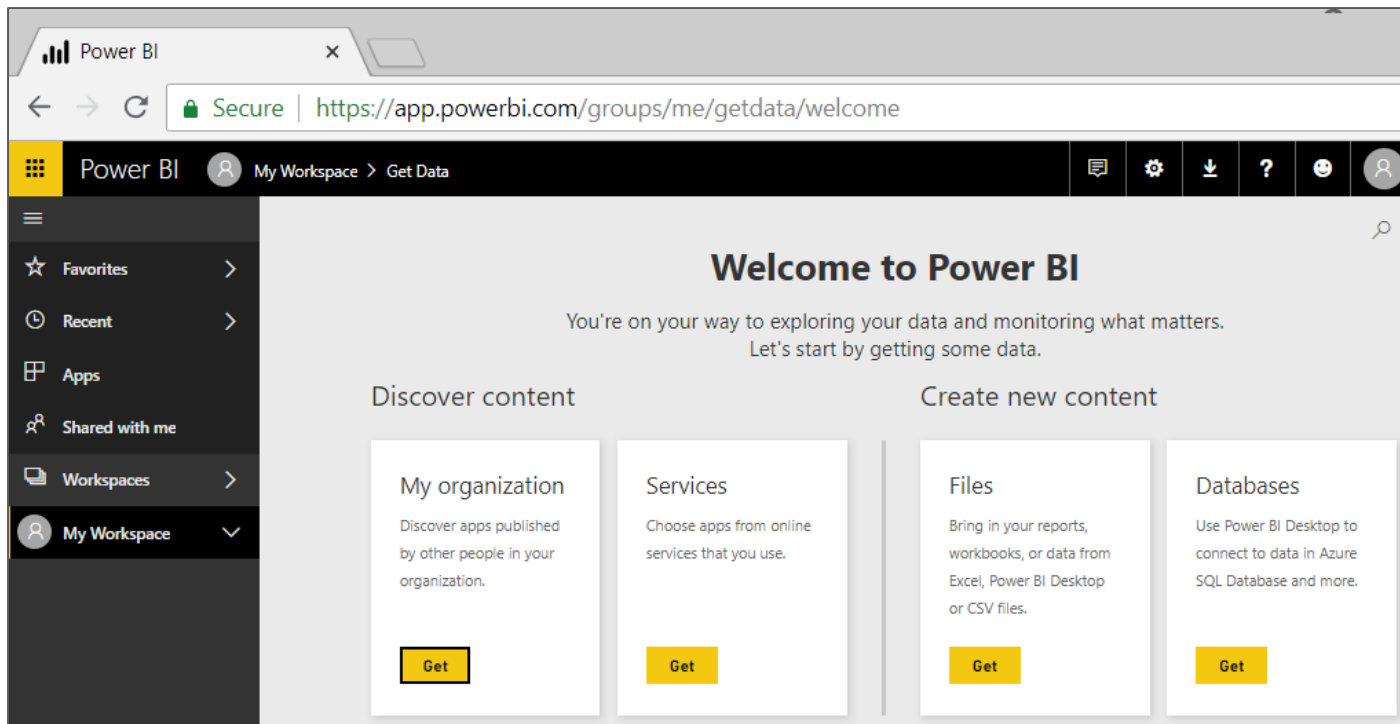
Learn how filtering will help you keep this list under control – before it gets too long.



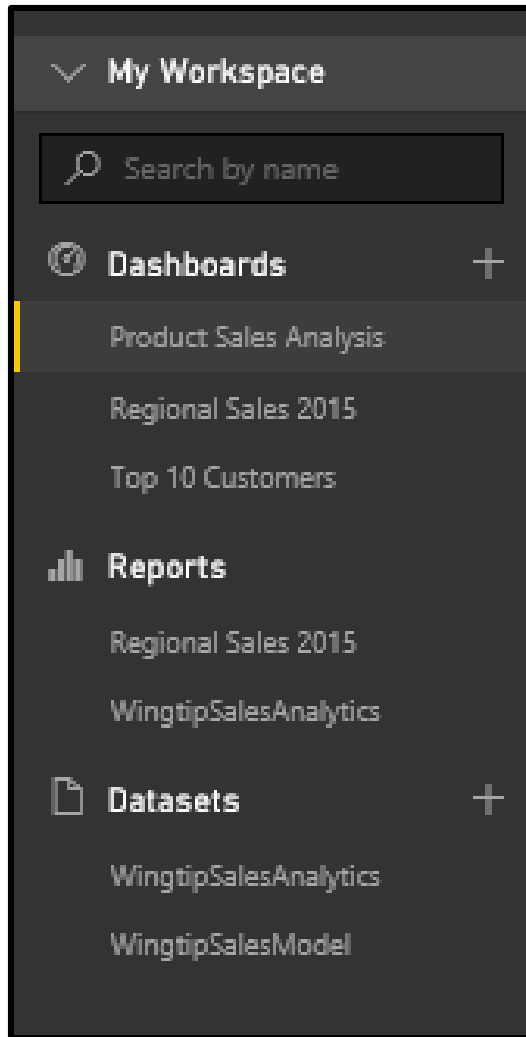


# Accessing the Power BI Service

- Power BI Service is accessible using a browser
  - Access provided through base URL of <https://app.powerbi.com>
  - Power BI Service supports all modern browsers
  - Every licensed user gets their own personal workspace



# Central Power BI Concepts

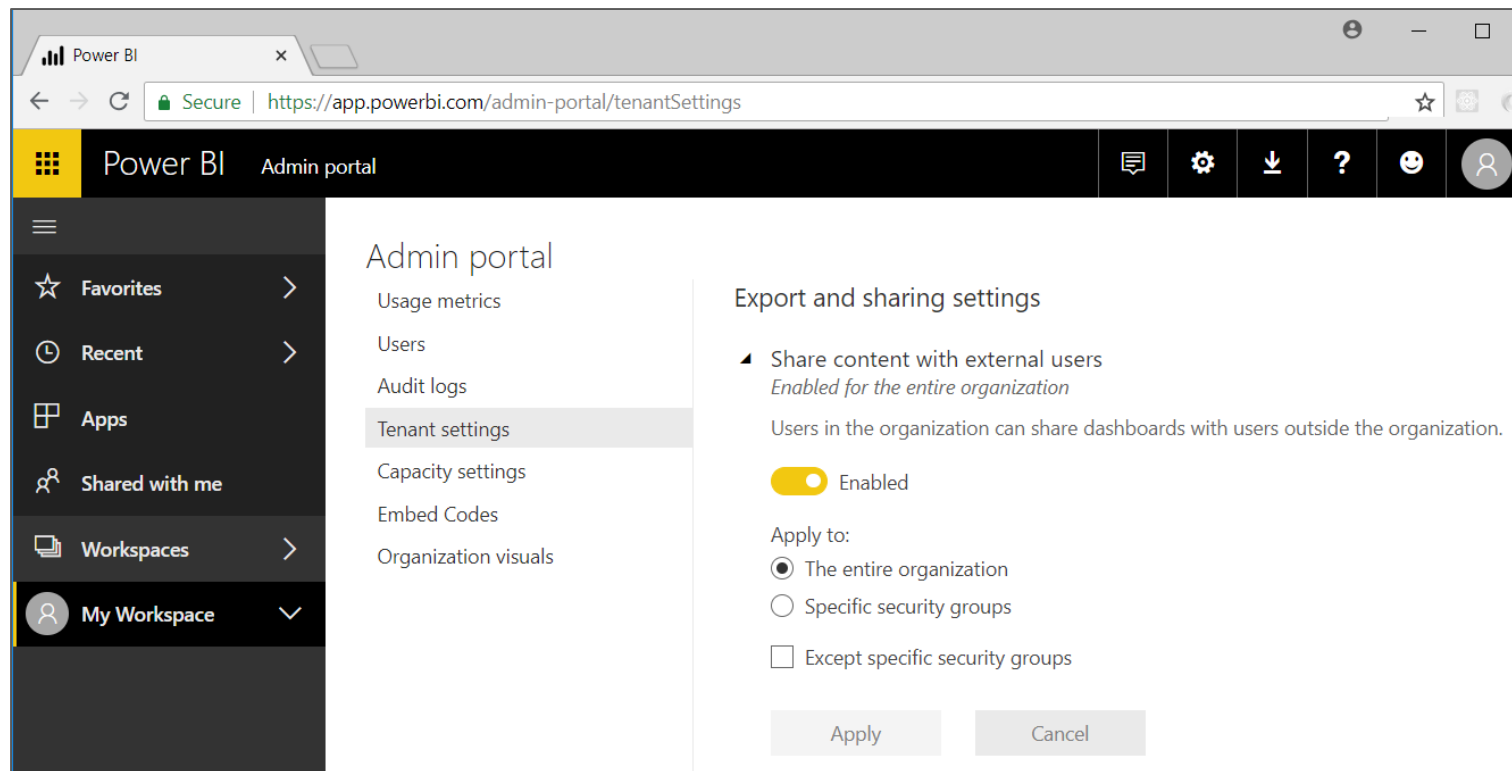


- **Workspace**
  - Provides user context and asset container
  - Every user has personal workspace
  - Team development requires group workspaces
- **Dashboard**
  - Consolidated view into reports and datasets
  - Custom solution entry point for mobile users
- **Report**
  - Collection of pages with tables & visualizations
  - Provides interactive control of filtering
- **Dataset**
  - Data model containing one or more tables
  - Can be very simple or very complex



# The Power BI Admin Portal

- Admin portal used to configure tenant-level settings
  - Accessible at <https://app.powerbi.com/admin-portal>
  - Accessible by global tenant admins and Power BI Service admins







**DEMO**

# Getting Around in the Power BI Environment

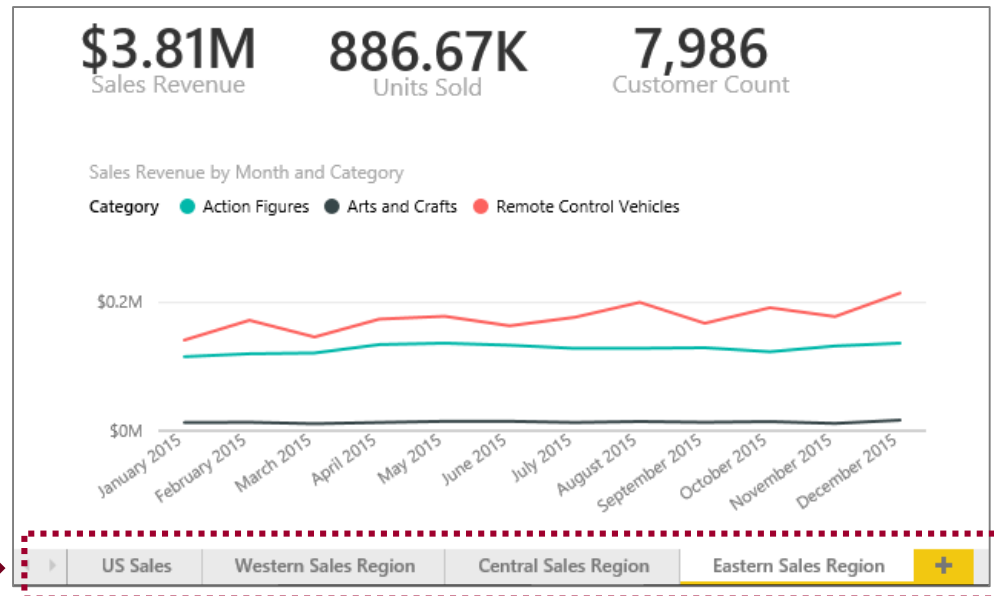
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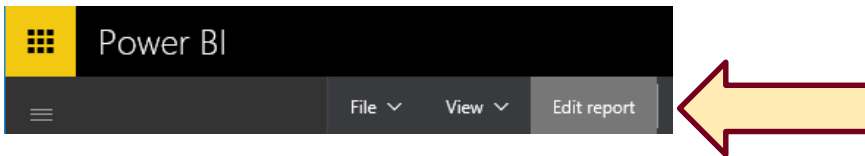
# Reports and Pages

- Reports contain one or more pages
  - A report can be designed with a single page
  - A report can be designed with many pages
  - Tabbed navigation located at bottom of report view
  - Each report is associated with exactly one dataset








# Report Authoring

- Report initially opens in reading view
  - Click Edit report to switch to edit mode



- Report design tools appear on right side of page

The image shows the Power BI report authoring interface in edit mode. The main area displays a table of product sales data. On the right side, there are panels for 'Visualizations' and 'Fields'.

Product Rank	Product	Product Image	Sales Revenue
1	Godzilla Action Figure		\$1,379,383
2	Twitter Follower Action Figure		\$920,244
3	Captain America Action Figure		\$408,883
4	Perry the Platypus Action Figure		\$313,270
5	Spiderman Action Figure		\$287,516

The 'Visualizations' panel on the right shows a list of visual types (Bar, Line, Pie, etc.) and a 'Values' section with a list of fields (Product Rank, Product, Product Image, Sales Revenue). The 'Fields' panel on the right shows a list of fields (Category, Product, Product Rank, Subcategory) and a 'Filters' section with a list of filters (Product(All), Product Image(All), Product Rank is less than or equal to 5, Sales Revenue(All)).



# Visuals (aka Visualizations)

- Reports are designed using visual (aka visualizations)
  - Each visual is based on an underlying visualization type
  - Visualization type can be changed using **Visualizations** pane

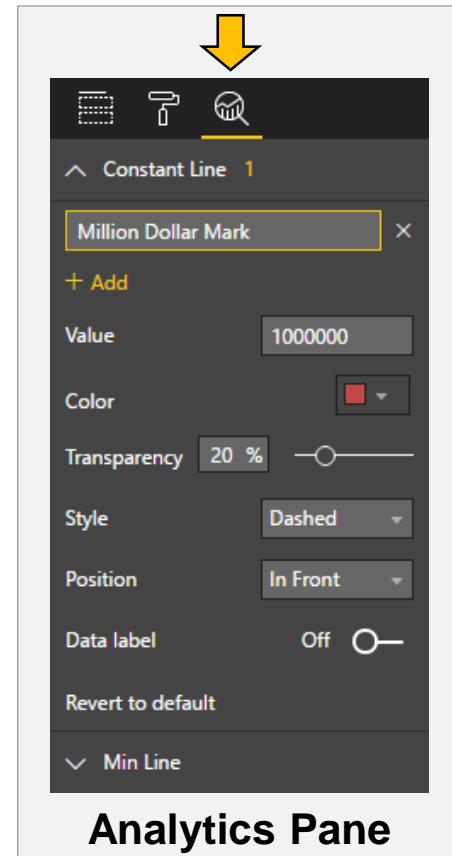
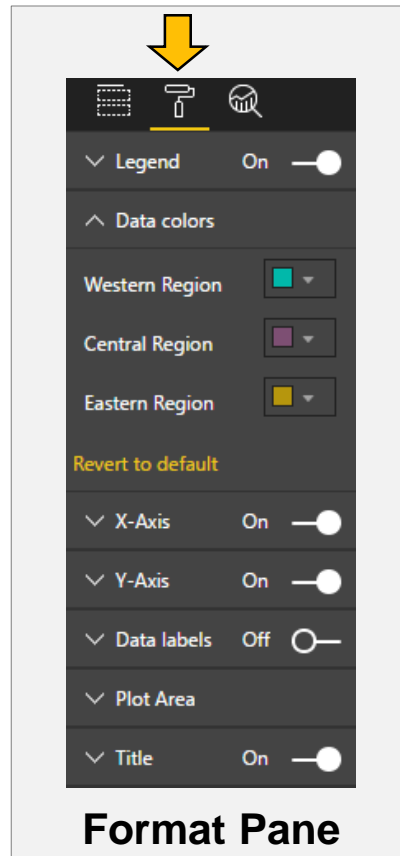
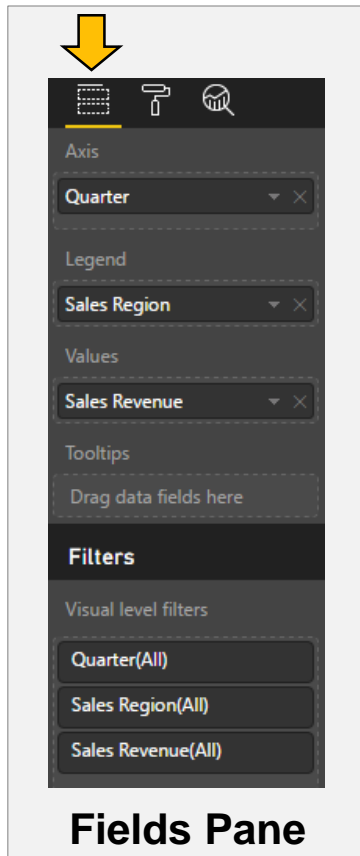


- Visuals creating by using fields from tables inside **Fields** list



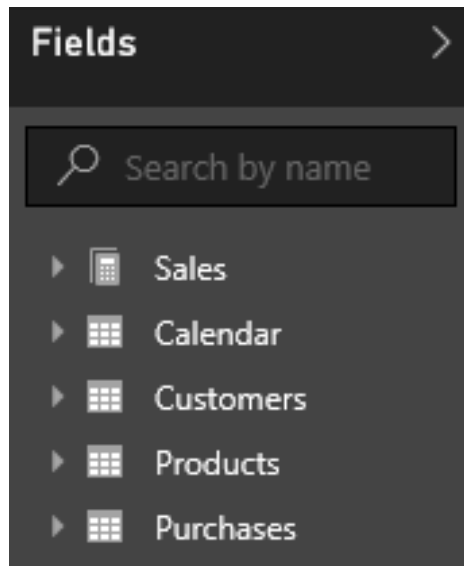
# Editing Visual Properties

- Visual properties modified using three property panes
  - Visual properties vary greatly depending on type of visualization



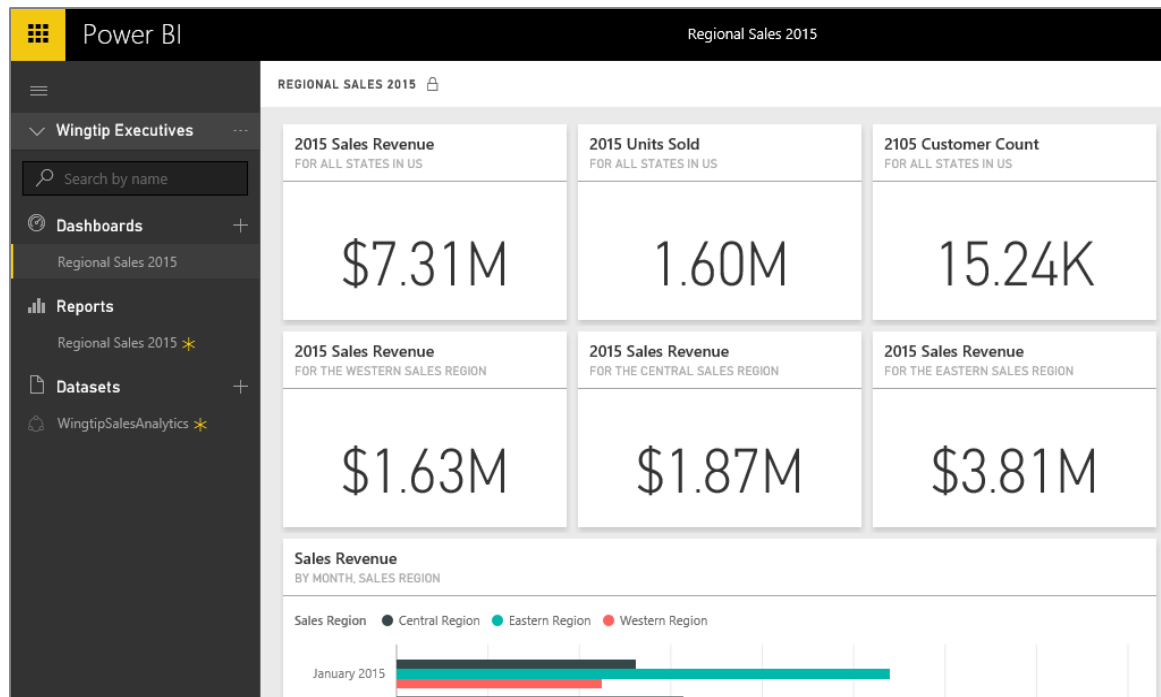
# Report and Datasets

- Each report is based on an underlying dataset
  - **Fields** list in report designer shows tables and fields
  - Report author sees tables & fields as dataset consumer



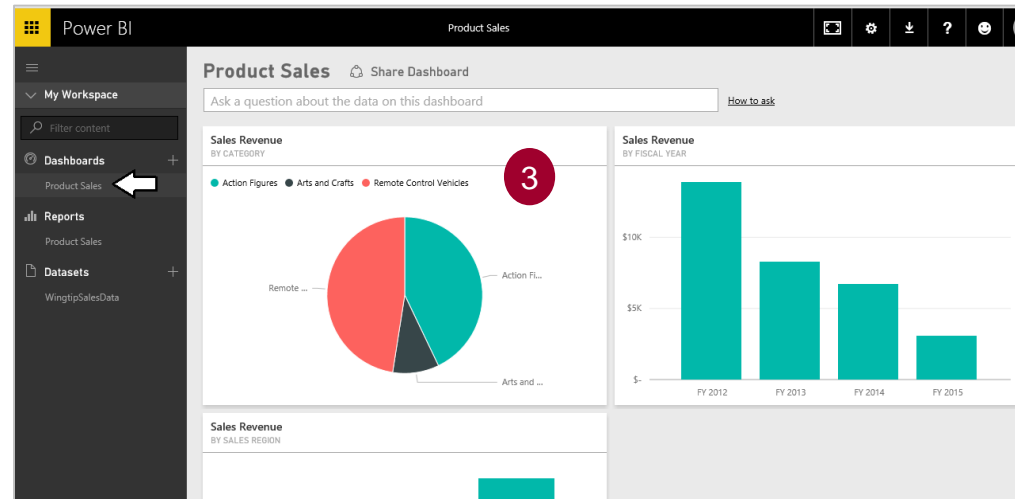
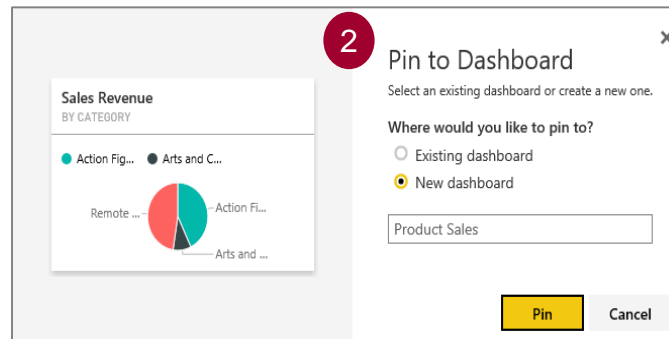
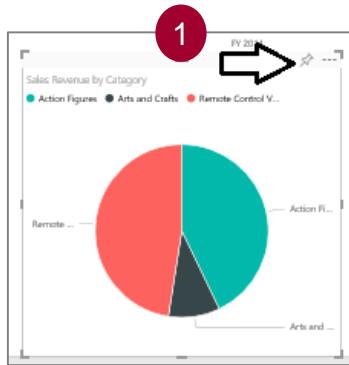
# Dashboards and Tiles

- Dashboard is a collection of tiles
  - Tile can be created by pinning visual from a report
  - Tile can be created by pinning Q&A result from dataset



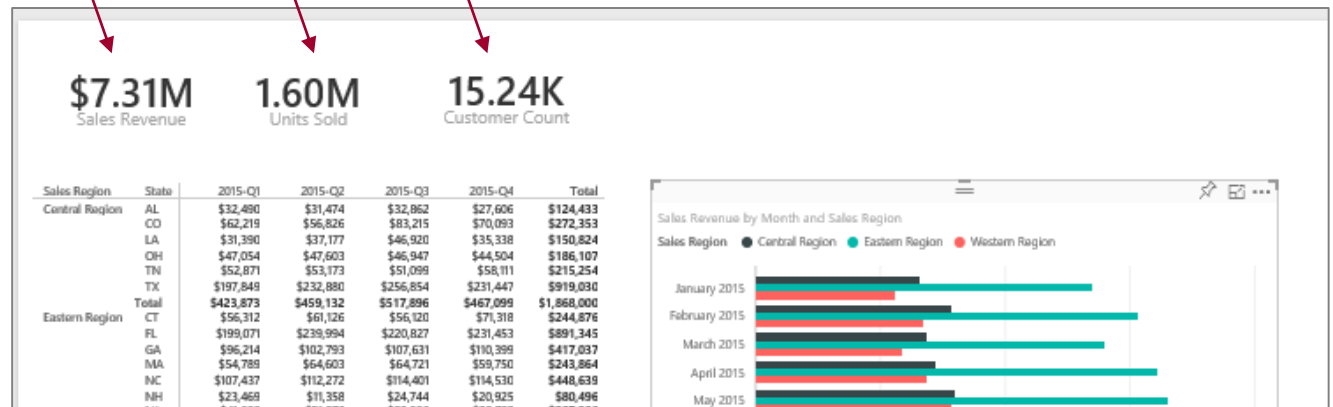
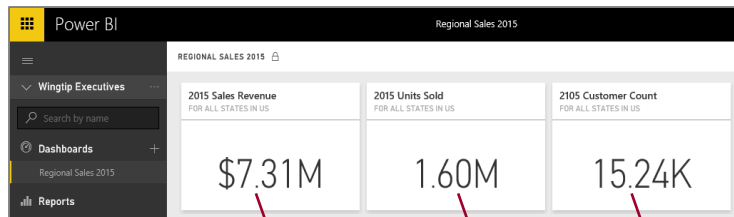
# Creating Dashboards

- Dashboards contain tiles
- Tiles created from visuals on report pages



# Dashboards and Reports

- Dashboards link users to reports
  - Dashboard tiles designed to provide high-level view
  - Clicking tiles drills down into report to see more detail







**DEMO**

# **Creating Reports and Dashboards using the Power BI Service**



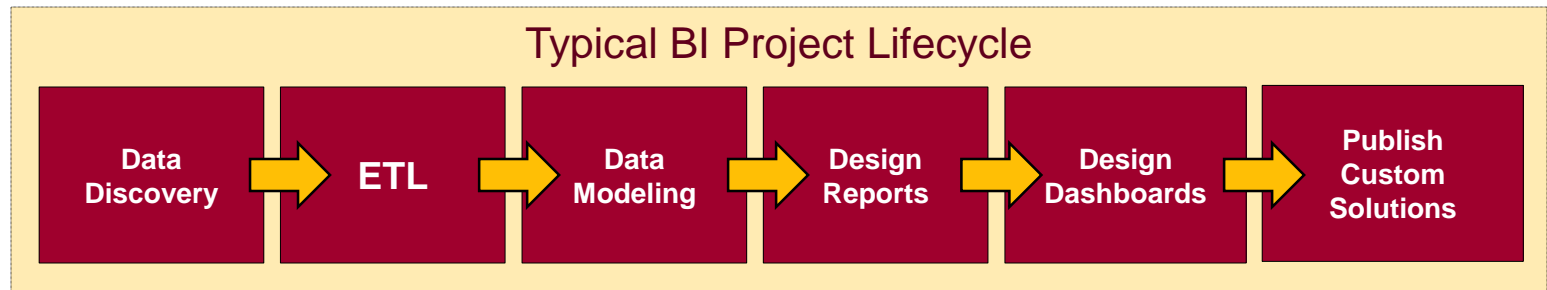
# Agenda

- ✓ Understanding the Power BI Platform
- ✓ Creating a Trial Office 365 Tenant for Testing
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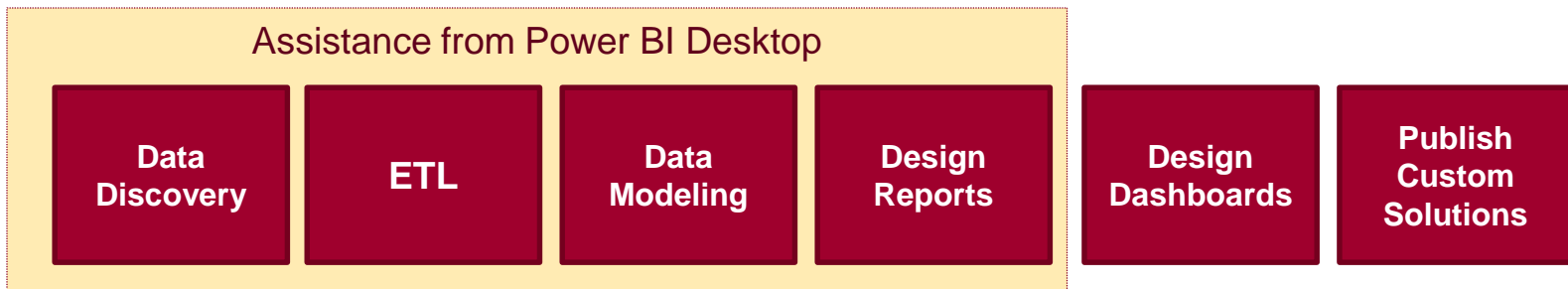
# Project Lifecycle for a Custom BI Solution

- Lifecycle of a typical BI project includes...
  - Discover where the data lives
  - Extract, transform and load (ETL) data
  - Model data to create dataset for analytics and reporting
  - Design and implement reports on top of dataset
  - Consolidate reports into one or more dashboards
  - Package custom solution artifacts for deployment
  - Deploy custom solution to production environment



# Working with Power BI Desktop

- Power BI Desktop focuses on first four phases
  - Query features for Data Discovery
  - Query features for ETL
  - Design features and DAX language for data modeling
  - Report design using a visual report designer
  - No support for designing dashboards
  - Not used to package custom solutions with dashboards



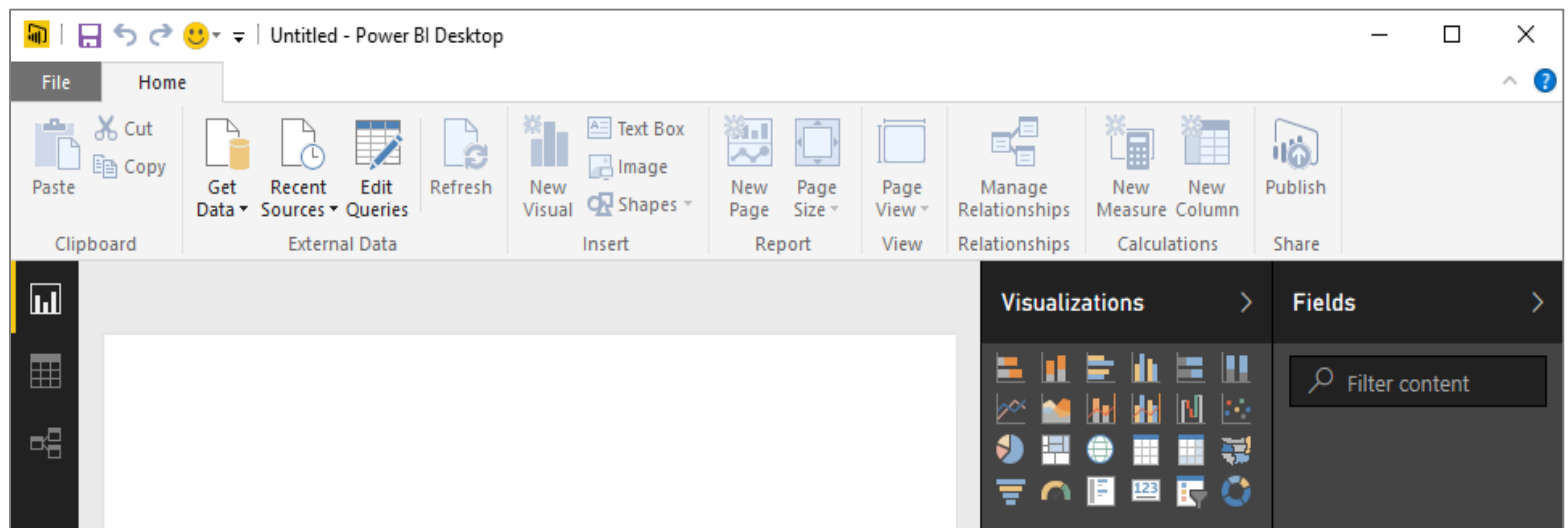
# Installing Power BI Desktop

- Power BI Desktop quick & easy to install over the Internet
  - Select Power BI Desktop option from Power BI Download menu
  - Power BI Desktop downloads & installs in less than a minute



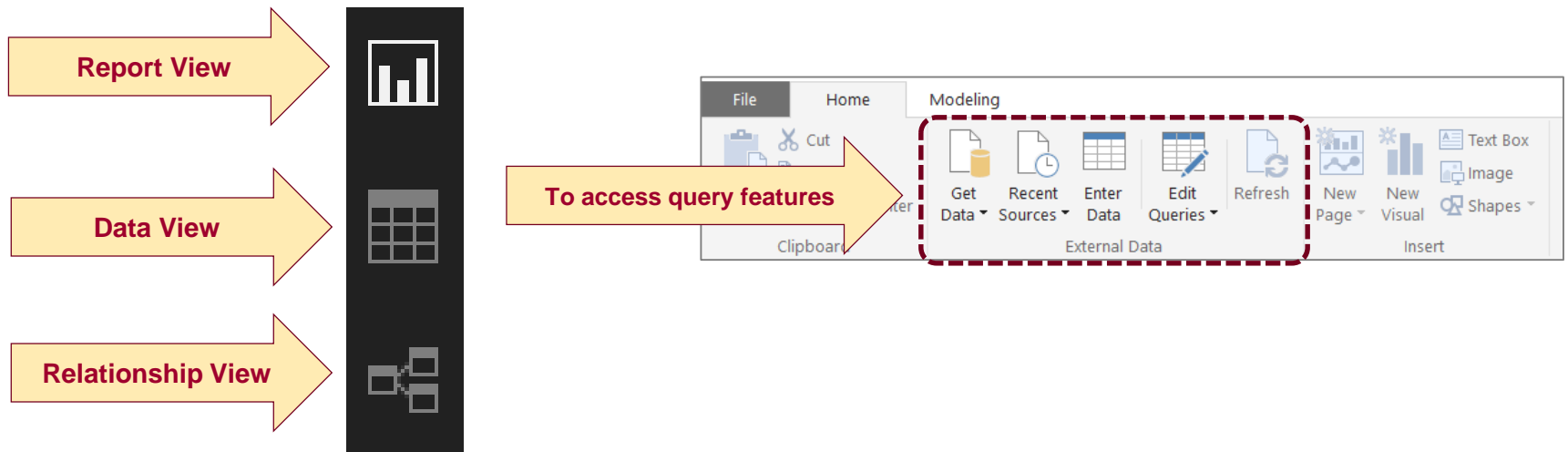
# Working with Power BI Desktop

- Power BI Desktop is a Windows application
  - Work is saved and published in terms of projects
  - You can work on multiple projects at once
  - Each project runs in its own Power BI Desktop instance
  - Power BI Desktop can freeze up or act buggy
  - Quit & restart Power BI Desktop if it acts strangely



# Getting Around in Power BI Desktop

- What do you need to learn to use Power BI Desktop?
  - Query features for importing data
  - Design features for modeling data
  - Report designer for creating reports
- Navigating between view modes







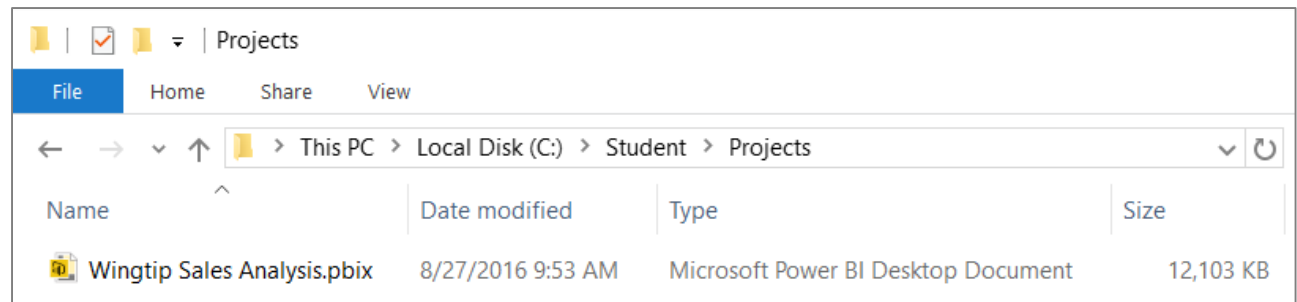
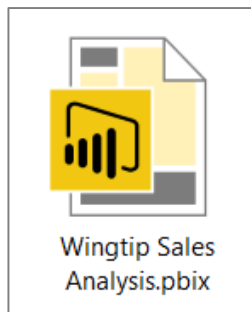
**DEMO**

# Getting Up and Running with Power BI Desktop



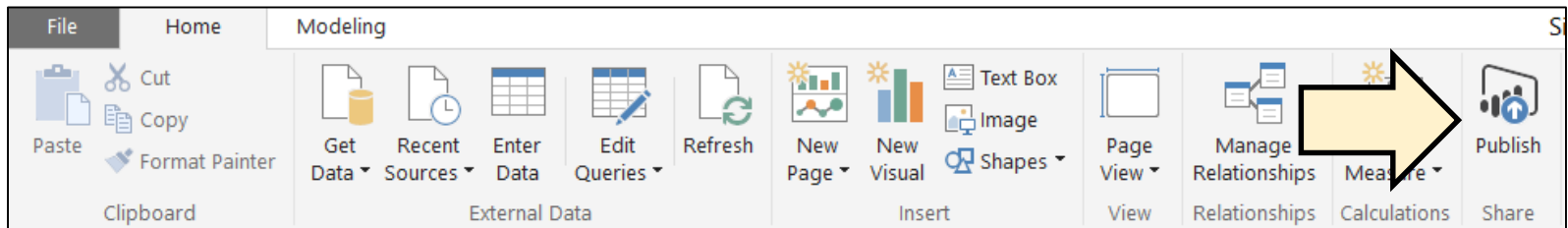
# Projects and PBIX Files

- Power BI Desktop projects saved using PBIX files
  - PBIX file contains data source definitions
  - PBIX file contains query definitions
  - PBIX file contains data imported from queries
  - PBIX file contains exactly one data model definition
  - PBIX file contains exactly one report
  - PBIX file never contains data source credentials

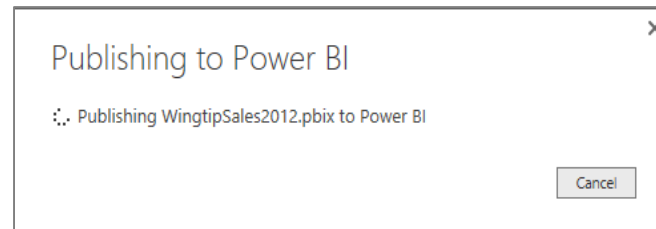
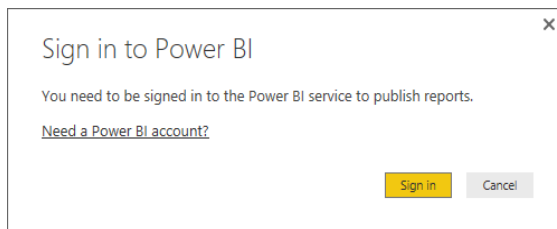


# Publishing a Power BI Desktop Project

- Power BI Desktop provides **Publish** command
  - Used to publish project to Power BI service



- Requires logging into your Office 365 account



- Published articles added to target workspace





**DEMO**

# **Publishing a PBIX Project File to the Power BI Service**

# Agenda

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# Power BI Team Blog

- Power BI Team Blog is an Essential Resource

<https://powerbi.microsoft.com/en-us/blog/>

- Be on the lookout for monthly updates

## Power BI Service and Mobile June Feature Summary

Announcements

Features

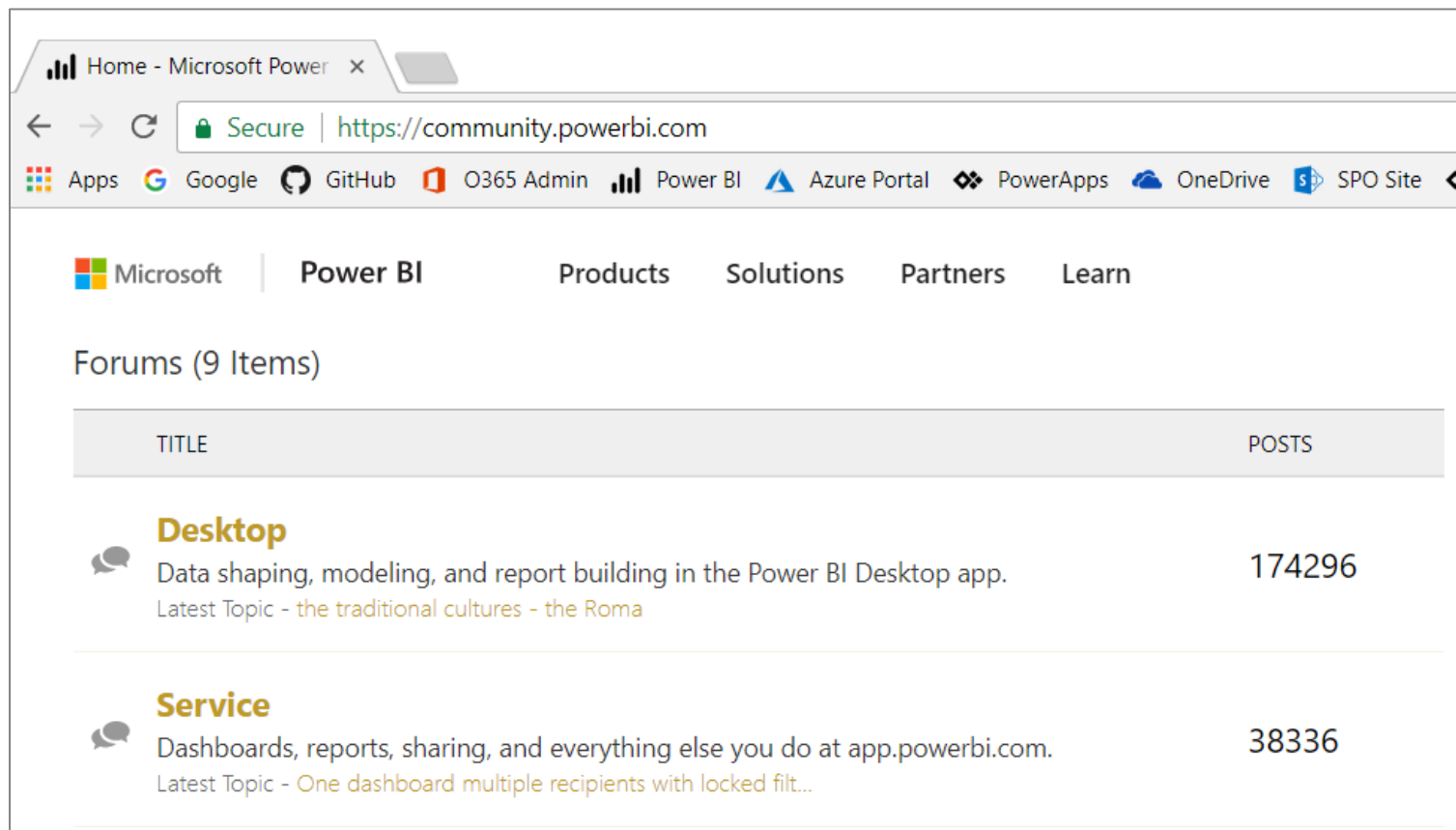
📅 July 11, 2018 by Nikhil Gaekwad

The month of June flew by quickly for Power BI. With summer in the air and MBAS just around the corner, we are laser focused on planning another unforgettable conference for you in Seattle! There...



# Power BI Community Forums

- Located at <https://community.powerbi.com/>
  - Great place to get answers to tough questions



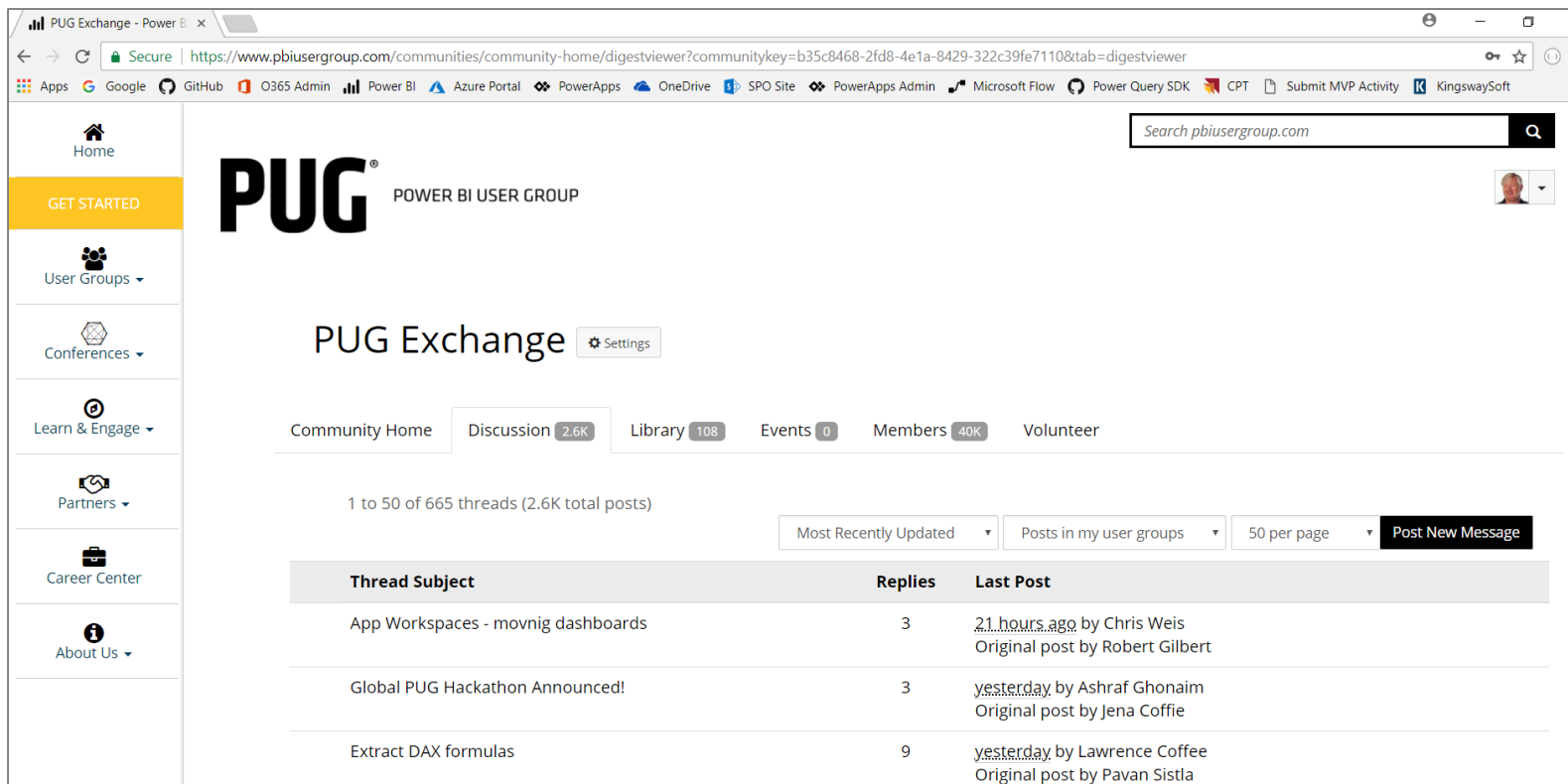
The screenshot shows a web browser window with the URL <https://community.powerbi.com>. The page features a navigation bar with links to Microsoft, Power BI, Products, Solutions, Partners, and Learn. Below the navigation bar, the section is titled "Forums (9 Items)". A table lists the forum categories:

TITLE	POSTS
<b>Desktop</b> Data shaping, modeling, and report building in the Power BI Desktop app. Latest Topic - the traditional cultures - the Roma	174296
<b>Service</b> Dashboards, reports, sharing, and everything else you do at app.powerbi.com. Latest Topic - One dashboard multiple recipients with locked filt...	38336



# Power BI User Group (PUG)

- Located at <http://pbiusergroup.com/>
  - PUG Exchange is another place to get questions answered
  - Also let's you find and connect with local Power BI User Groups



The screenshot shows the PUG Exchange website interface. The left sidebar contains navigation links: Home, GET STARTED, User Groups, Conferences, Learn & Engage, Partners, Career Center, and About Us. The main header features the PUG logo and the text 'POWER BI USER GROUP'. Below the header, the 'PUG Exchange' section includes a 'Settings' button and a navigation bar with links to Community Home, Discussion (2.6K), Library (108), Events (0), Members (40K), and Volunteer. The main content area displays a list of discussion threads, showing 1 to 50 of 665 threads (2.6K total posts). The threads are sorted by 'Most Recently Updated' and show 50 posts per page. A 'Post New Message' button is located at the bottom right of the thread list.

Thread Subject	Replies	Last Post
App Workspaces - movnig dashboards	3	21 hours ago by Chris Weis Original post by Robert Gilbert
Global PUG Hackathon Announced!	3	yesterday by Ashraf Ghonaim Original post by Jena Coffie
Extract DAX formulas	9	yesterday by Lawrence Coffee Original post by Pavan Sistla





# Summary

- ✓ Understanding the Power BI Platform
- ✓ Creating a Trial Office 365 Tenant for Testing
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