Dashboard in a Day

Publishing & Accessing Reports

by Power BI Team, Microsoft

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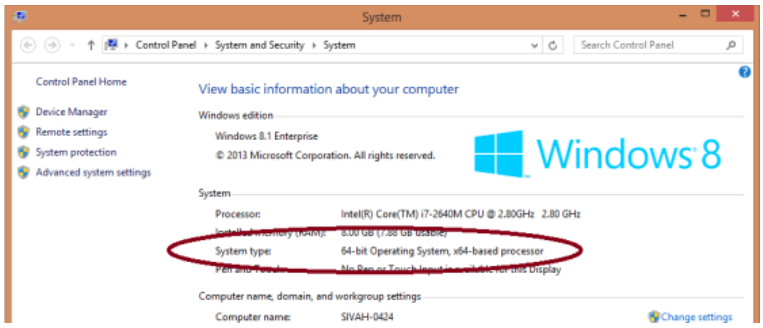
References .....**Error! Bookmark not defined.**

Lab Prerequisites

Following prerequisites and setup must be complete for successful completion of the exercise:

- You must be connected to the internet.
- **Signup for Power BI:** Go to http://aka.ms/pbidiadtraining and sign up for Power BI with a business email address. If you cannot sign up for Power BI, let the instructor know.
- If you have an existing account, please go to http://app.powerbi.com and **Sign in** using your **Power BI Account.**
- At minimum, a computer with 2-cores and 4GB RAM running one of the following version of Windows: Windows 8 / Windows Server 2008 R2, or later.
- Microsoft Power BI Desktop requires Internet Explorer 10 or greater.
- Verify if you have 32-bit or 64-bit operating system to decide if you need to install the 32-bit or 64-bit applications.
    - Search for computer on your PC, right click properties for your computer.
    - You will be able to identify if your operating system is 64 or 32 bit based on "system type" as shown below.



- **Download the Power BI Content:** Create a folder called **DIAD** on the C drive of your local machine. Copy all contents from the folder called **Dashboard in a Day Assets** to the **DIAD** folder you just created (C:\DIAD).
- **Download and install Power BI Desktop** using any one of the options listed below:
    - If you have Windows 10, use Microsoft App Store to download and install Power BI Desktop app.
    - Download and install Microsoft Power BI Desktop from http://www.microsoft.com/en-us/download/details.aspx?id=45331.
- **Download and install Power BI Mobile App on your mobile device**
    - If you are using an Apple product download and install the Microsoft Power BI Mobile app from the Apple store or this link https://apps.apple.com/us/app/microsoft-power-bi/id929738808
    - If you are using an Android product download and install the Microsoft Power BI Mobile app from the Google Play store or this link https://play.google.com/store/apps/details?id=com.microsoft.powerbim

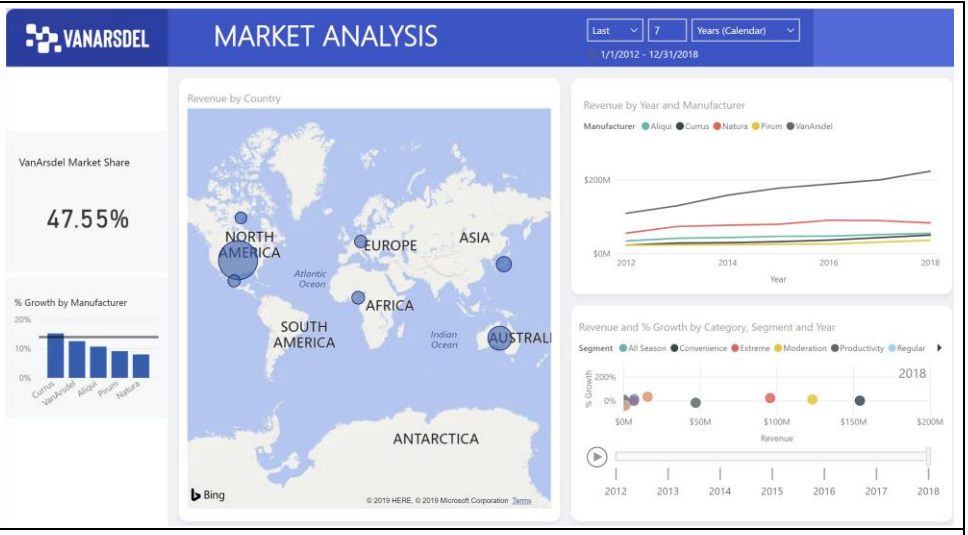
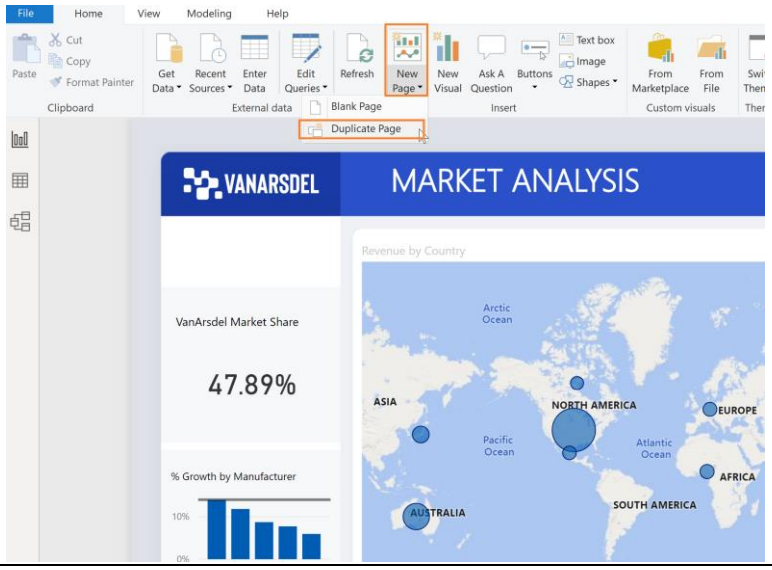
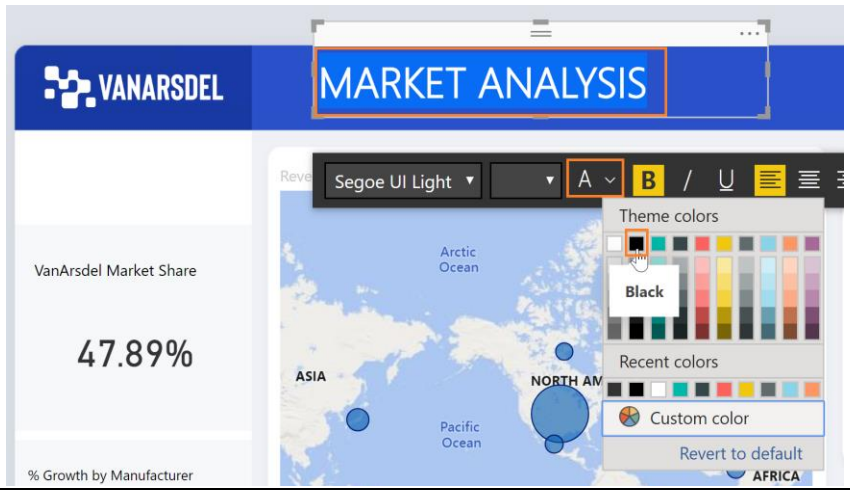
Document Structure

This document is lab 04 of 05 labs in total. The document structure and introduction section can be found in lab 01.

The document flow is in a table format. On the left panel are steps the user needs to follow and in the right panel are screenshots to provide a visual aid for the users. In the screenshots, sections are highlighted with red boxes to highlight the action/area user needs to focus on.

NOTE: This lab is using real anonymized data and is provided by ObviEnce LLC. Visit their site to learn about their services: www.obvience.com .
This data is property of ObviEnce LLC and has been shared for the purpose of demonstrating Power BI functionality with industry sample data. Any uses of this data must include this attribution to ObviEnce LLC.

Power BI Desktop – creating mobile view

1. Navigate to **/DIAD/Reports** folder. 2. **Open DIAD Final Report.pbix** file. This file uses the same dataset that you used for the lab. We have added a few more visuals and formatted the reports. Feel free to explore the report.	
3. Click on the Market Share tab, Click on New Page in the Home ribbon and select duplicate page	
4. Highlight the Market Analysis title and change the font to black	

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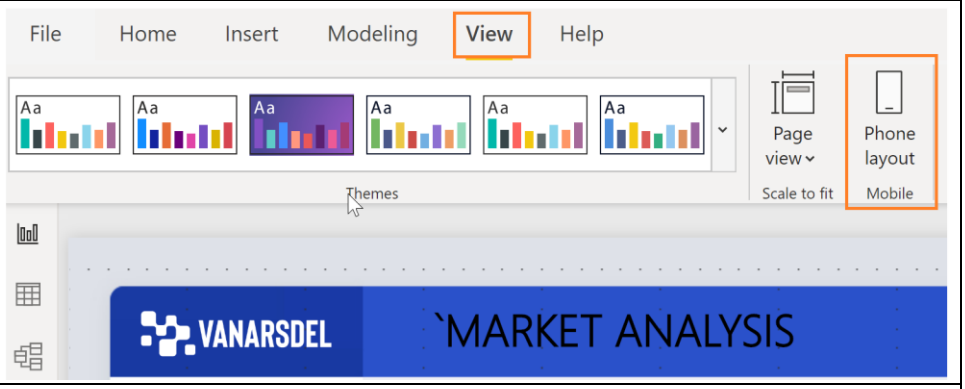
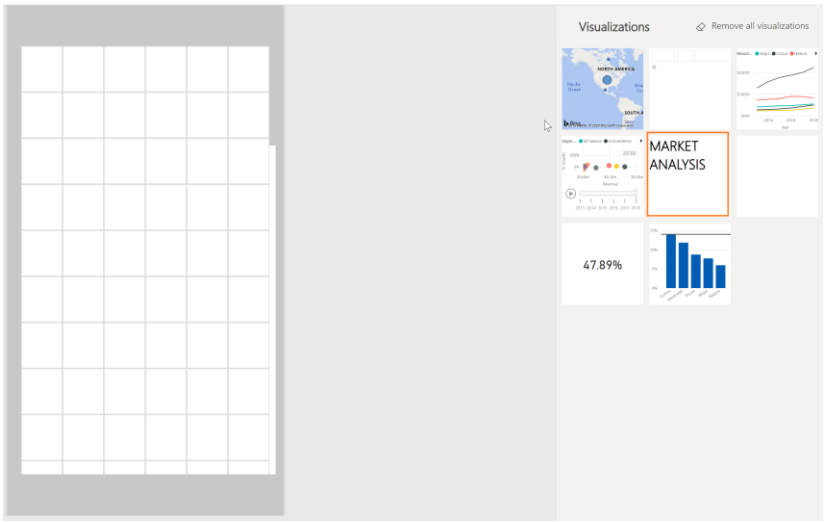
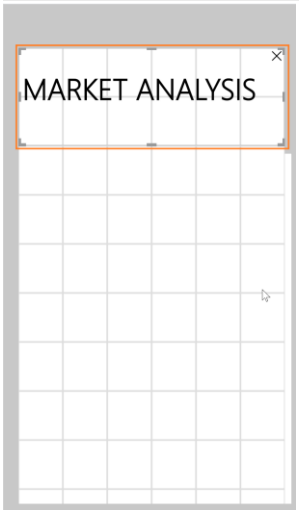
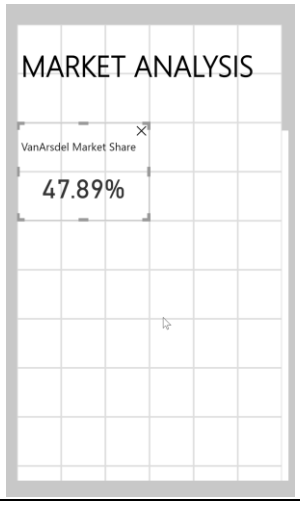
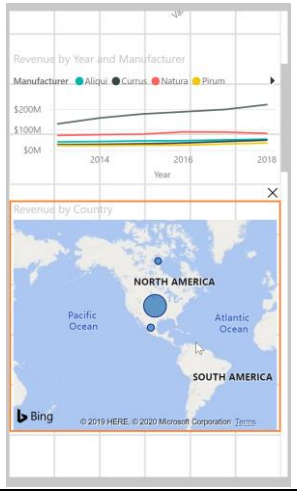
5. Click on the View ribbon and click Phone Layout	
6. Drag the Market Analysis title to the top of the phone layout	 

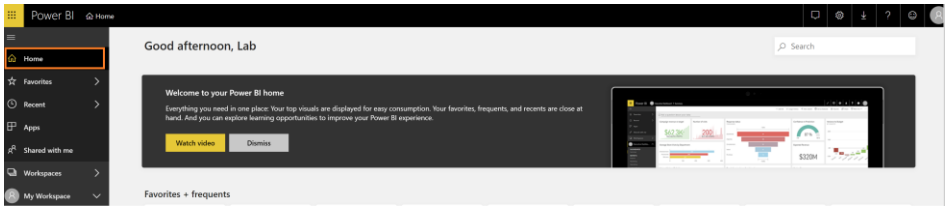
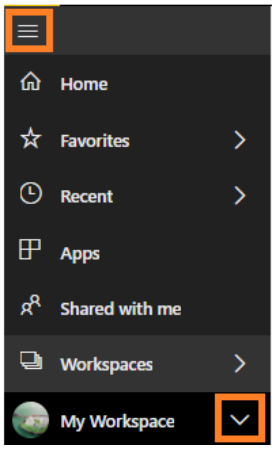
7. Drag the Market Share card onto the phone layout and resize	
8. Drag the % Growth by Manufacturer chart next to the card on the phone layout	
9. Drag the Revenue by Year and Manufacturer line chart below the card on the phone layout 10. Resize the line chart to stretch across the phone layout	

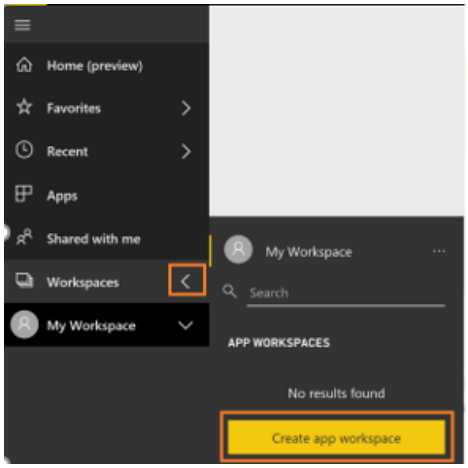
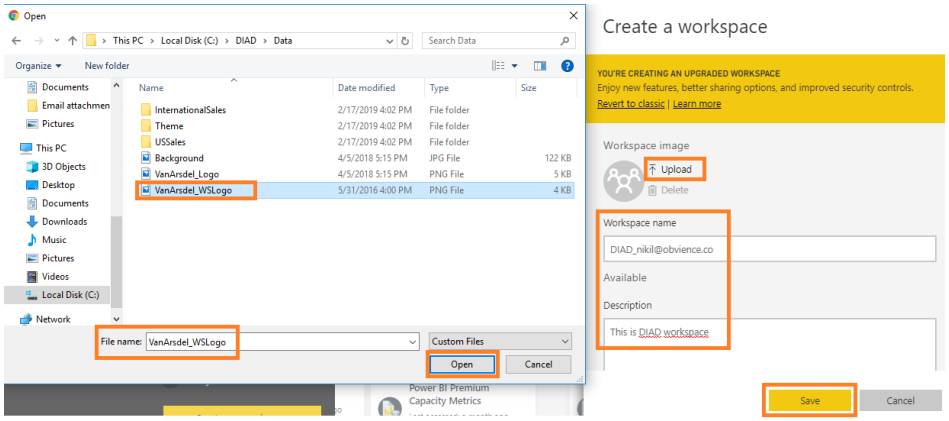
11. Drag the map below the line chart on the phone layout 12. Resize the map	

Power BI Service

You will now leverage the report authored using Power BI Desktop and create a dashboard for VanArsdel data analysis team and share it with the CMO. A Power BI Desktop file with additional reports / visuals is provided. Please use this for the next section of the lab.

Power BI Service – Publishing Report

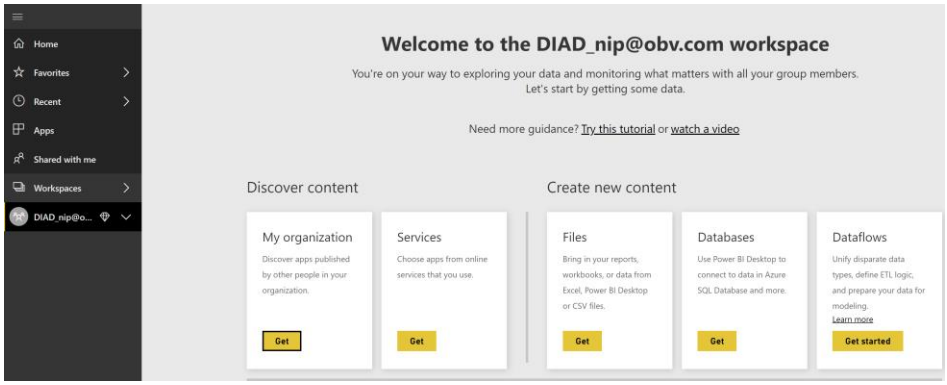
1. If you have not signed up for a Power BI account, go to http://aka.ms/pbidiadtraining and sign up for Power BI with a business email address. 2. If you have not already opened app.powerbi.com page, please open the browser and navigate to http://app.powerbi.com. 3. Sign in to Power BI using your user account. Once logged in, you will be navigated to the **Home** screen. **Note**: If you have previously signed into Power BI, then your Home screen will list your Favorites + frequents and recent reports and dashboards.	
4. If the left navigation is collapsed, select icon below Power BI on the top left of the screen to expand the left navigation. Following options are listed in the left navigation: **Home**: This is one-stop shop for all your content. It lists your favorite and recent content (reports, dashboards and apps), as well as the latest content that was shared with you, etc. **Favorites**: Lists all your favorite content (we will create a favorite in a later section). **Recent**: Lists the most recent content you have viewed.	

Apps: List all the apps you have installed. **Shared with me**: Lists the content that are shared with you (we will share dashboards in a later section). **Workspaces**: Lists all the workspaces you are assigned. By default, you are assigned My Workspace. 5. Select the down arrow next to **My Workspace**. Notice DASHBOARDS, REPORTS, WORKBOOKS and DATASETS sections. Let's import a Power BI Desktop file and create dashboards.	
My Workspace is your personal workspace. We need to create a workspace where we can collaborate with team members and distribute content to end users. Let's create a workspace. 6. In the left panel, select **Workspaces -> Create app workspace**. Create an app workspace dialog opens. **Note**: Creating workspace is a **Pro feature**. If you do not have Pro license, please choose the trial option.	
7. In the Create an app workspace, select **Upload Image**. 8. File browser dialog opens. Browse to **/DIAD/Data** folder. Select **VanArsdel_WSLogo** file. 9. In **Name your workspace** text area, enter **DIAD_<youremailaddress>**. **Note**: you are entering your email address as part of the workspace name to keep it unique. 10. In **Description** text area, enter "**This is DIAD workspace**". 11. Select **Save** to create the workspace.	

Notice you are now navigated from My Workspace to the workspace you just created. You are in the Welcome screen with options to discover or create content.
Discover content has options to connect to apps that are shared by your organization or the online services.
Create new content has options to connect to Files, Databases and Dataflows.
There are two options to publish the Power BI Desktop report we created.

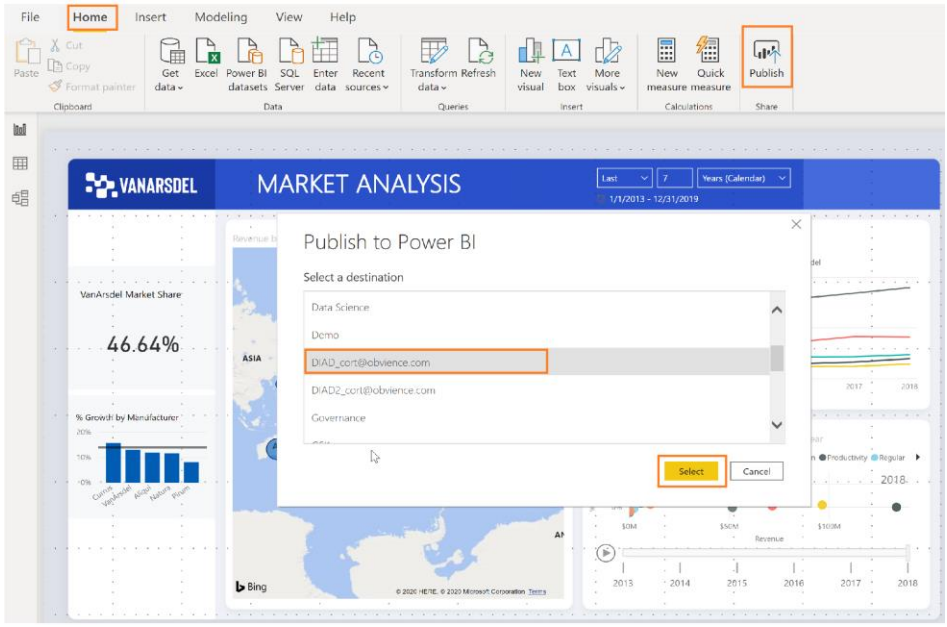
- Get option under Files.
- Publish from Power BI Desktop.

We are going to use the 2nd option.



Let's publish the report to Power BI Service and then we will come back to the browser.

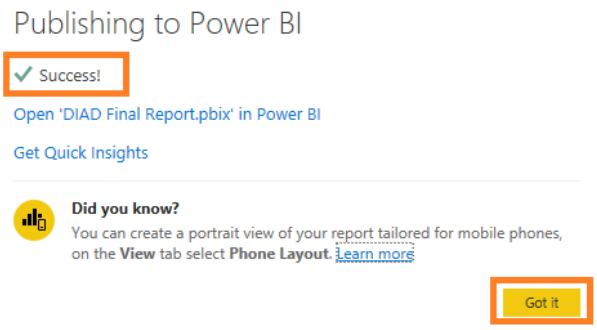
12. Navigate to **/DIAD/Reports** folder.
13. **Open DIAD Final Report.pbix** file.
14. From the ribbon select **Home -> Publish**.
15. If you have not already logged into Power BI, a **Sign in** dialog opens. Please sign in.
16. Once you are signed in, Publish to Power BI dialog opens. Select **DIAD_<youremailaddress>** from the dialog.
17. Click **Select**.



Publishing to Power BI dialog opens. Once completed, a success message is displayed.

18. Select **Got it** to close the dialog.

Now we have published the report to Power BI service. Let's navigate back to the browser and start exploring.



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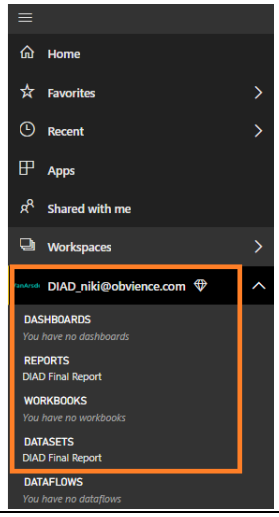
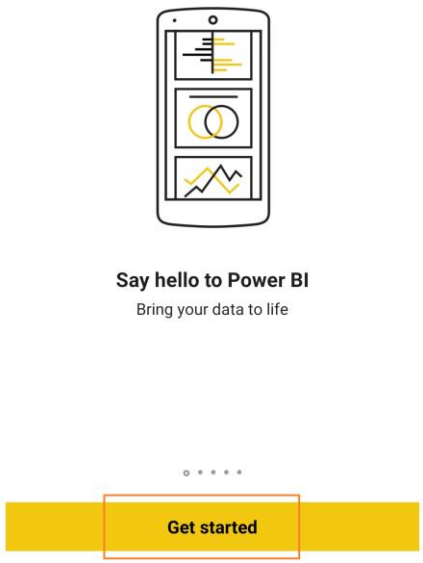
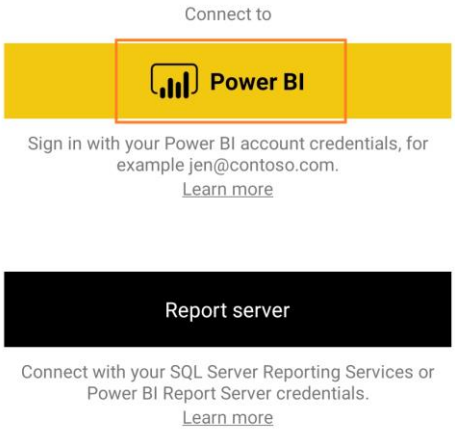
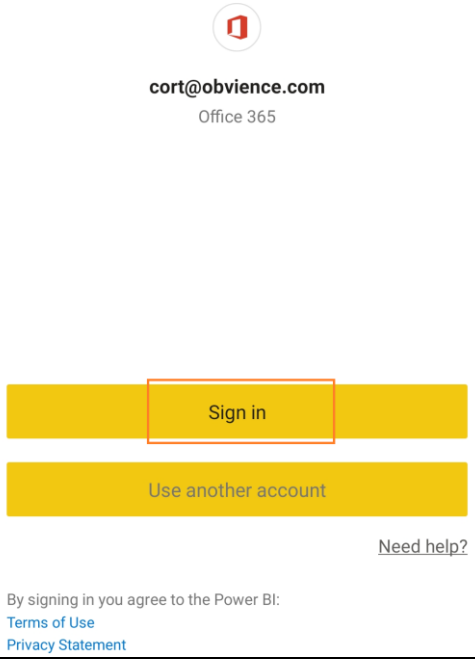
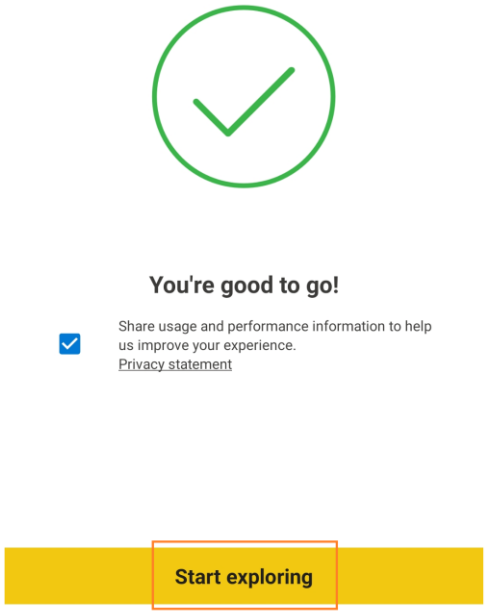
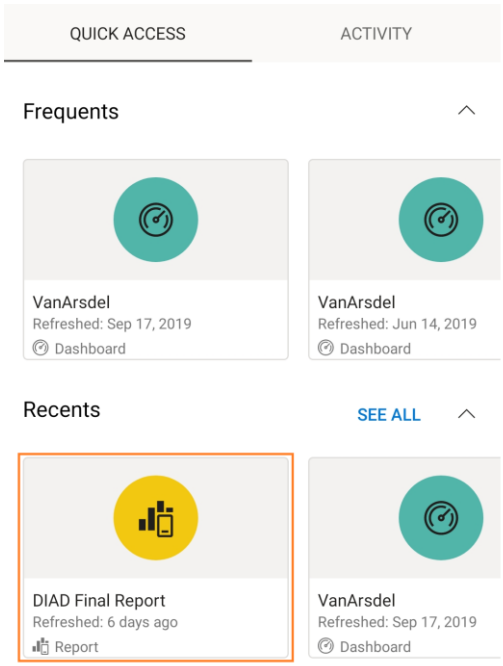
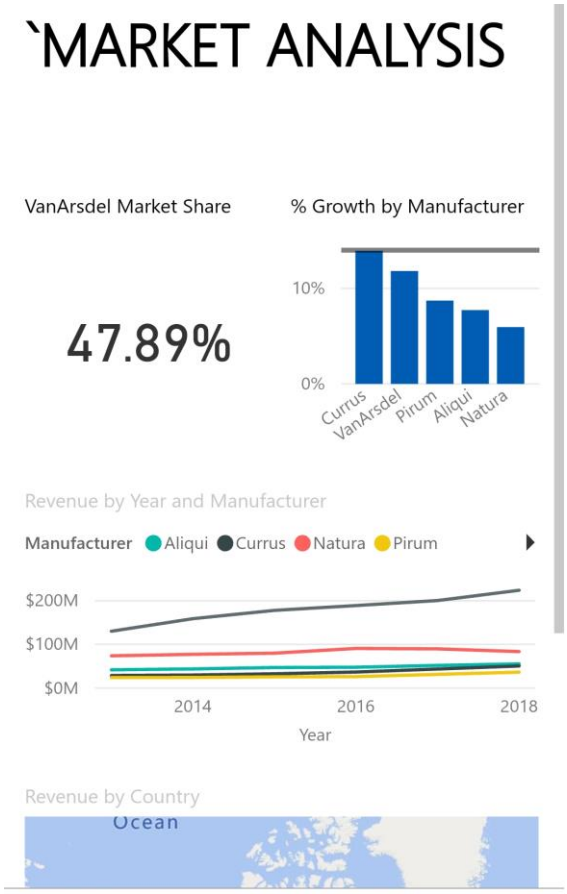
Once you are in the browser, in the left panel notice under **DIAD_<youremailaddress>**, you will see **REPORTS -> DIAD Final Report** and **DATASETS -> DIAD Final Report**.	

Power BI Mobile – Accessing Report on Mobile Device

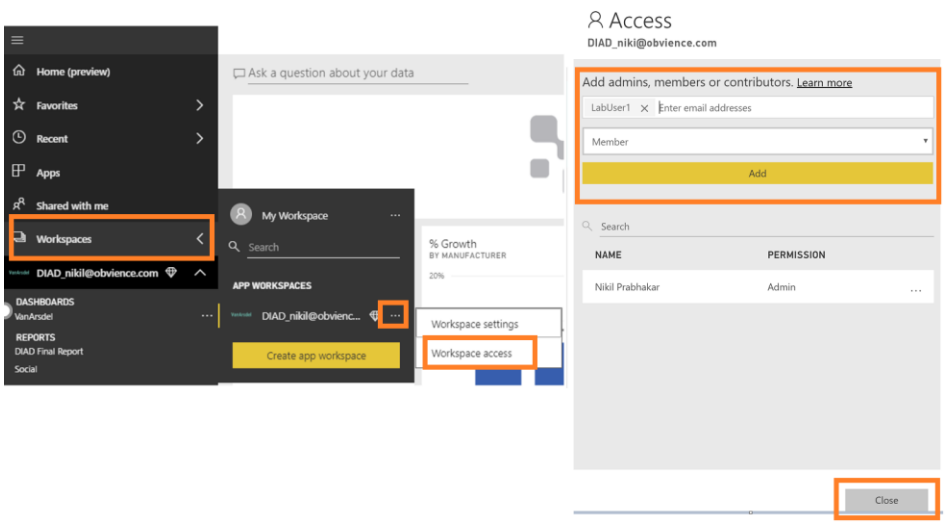
1. Open the Power BI Mobile app on your mobile device	
2. Click on Get Started once the app is open	

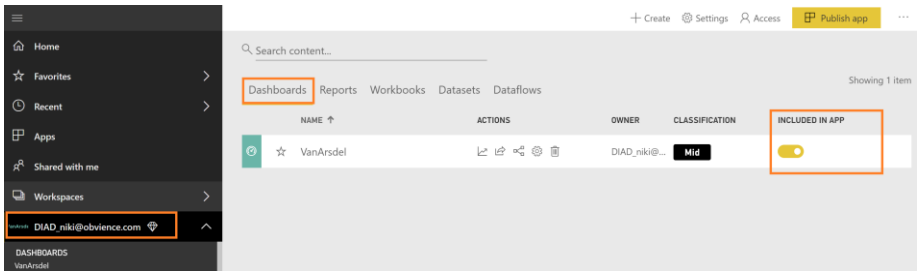
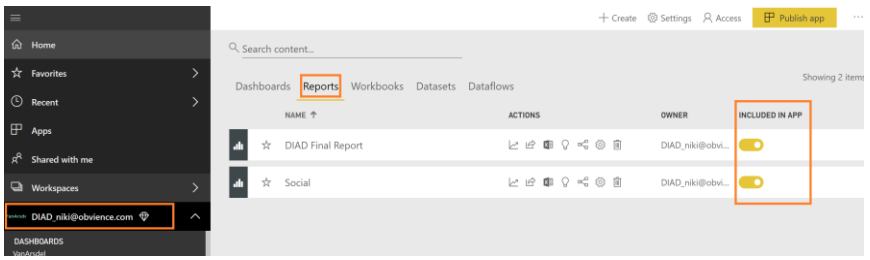
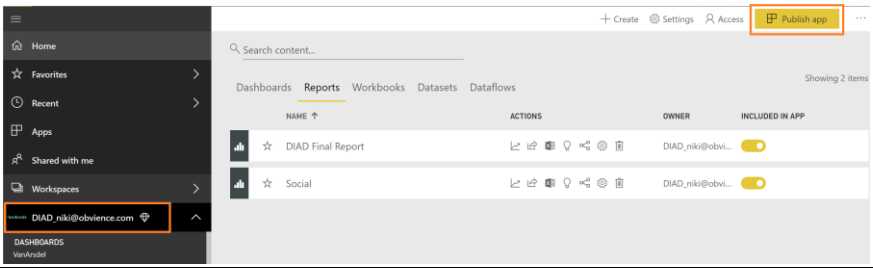
3. Click on Power BI to connect to your report	
4. Click on Sign in and enter your credentials	

5. Verify you have successfully signed in and click Start exploring	
6. Click on DIAD Final Report that you published from Power BI Desktop	

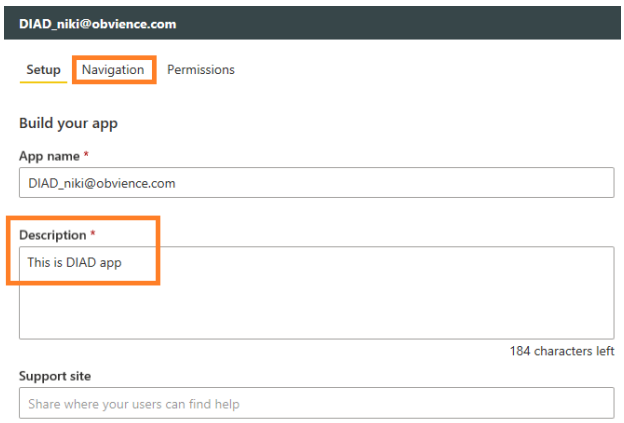
7. Verify you see the mobile view that you published from Power BI Desktop	

Power BI Service – Collaboration and Distribution

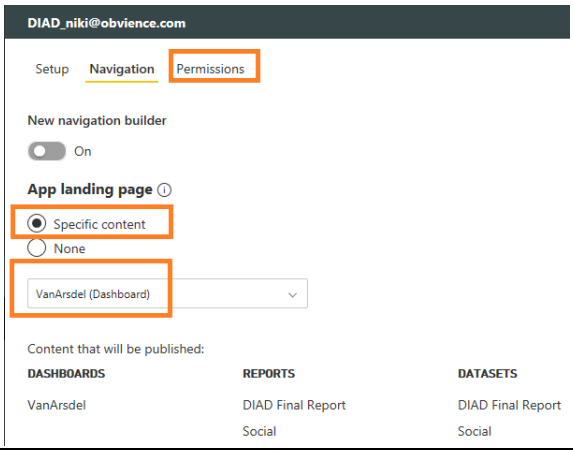
You have built the dashboard and ready to get feedback and collaborate with your team members. 1. From the left panel, select **Workspaces**. 2. Select the **ellipsis** next to **DIAD_<youremailaddress>.** 3. Select **Workspace access**. 4. Access dialog opens. You can **enter the email addresses** of the colleagues you want to collaborate with. Each user can belong to one of 3 **roles**: Contributor — Add/edit/delete content within workspace. Member — Everything a Contributor can do.	

Re-share. Publish & update Apps. Admin Everything a member can do. Can change/delete workspace. Can add Admins. 5. Select the **role** and select **Add**. 6. Once you finish adding your colleagues and select **Close**. **Note**: you can ask your colleague to login and access the workspace.	
Now let's share the content we created with the report viewers/consumers. We need to publish an app to do this. An App can include multiple dashboards and reports. 7. In the left panel select **DIAD_<youremailaddress> workspace**. 8. In the **Dashboard** page, notice there is an option **INCLUDED IN APP**, to include the Dashboard in the App.	
9. Navigate to **Reports** page. 10. Notice there is an option **INCLUDED IN APP** to include the Reports in the App. If you have reports and dashboards in your workspace that you do not want to share with report viewers, you can uncheck this box. In our case we would like to include the 2 reports, so we will leave the boxes checked.	
11. In the left panel select **DIAD_<youremailaddress> workspace.** 12. From the top right corner of the top menu select **Publish app.**	

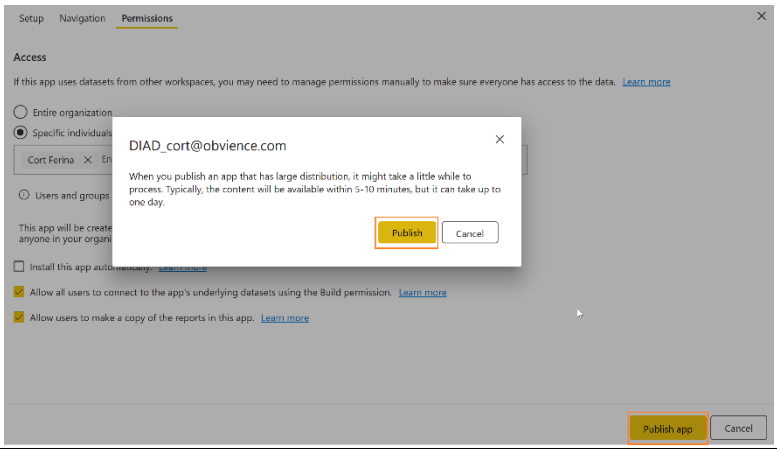
13. In the **Setup** page, enter "**This is DIAD app**" in the description field.
14. Click on **Navigation** page.



15. From the dropdown select **VanArsdel (dashboard)**.
When a user accesses the DIAD app, we want them to land on the VanArsdel dashboard.
16. Navigate to **Permissions** page.



17. **Enter the email addresses** of the users or groups you want to give access to.
18. On the bottom right corner, select **Publish App**.
19. **Ready to publish** dialog appears. Select **Publish**.
20. Once the App is published a success dialog appears.



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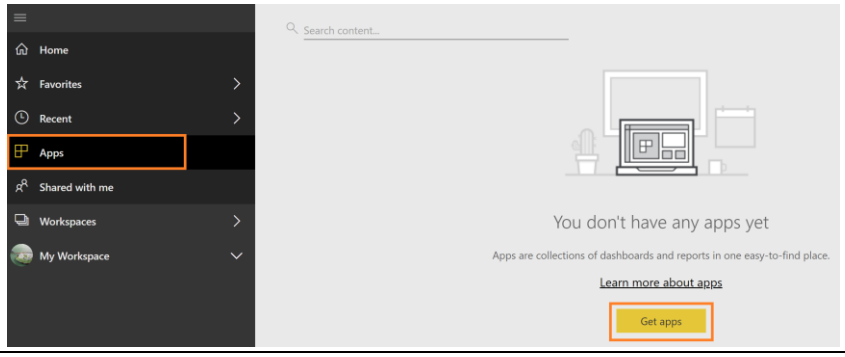
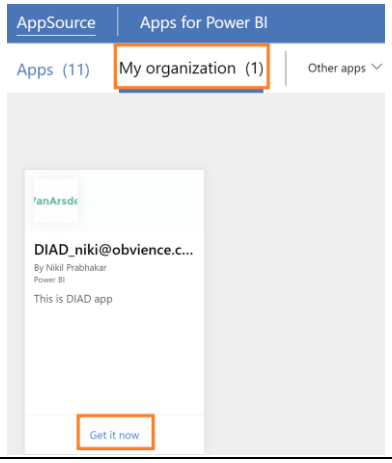
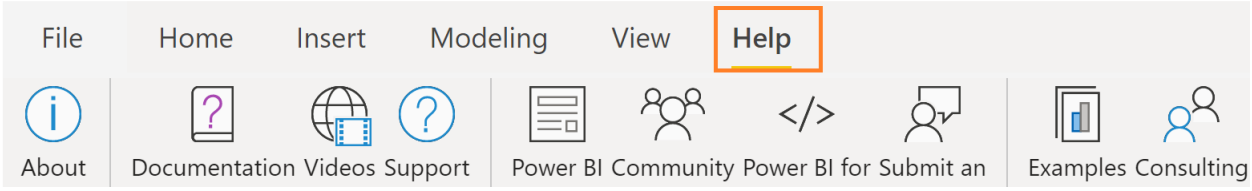
You can copy the link to the App and share it with the individuals via email. But a better way for report viewers to consume the App is by logging onto Power BI Service and registering the App. Let's impersonate a report viewer. 21. From the left menu, select **Apps**. 22. Select **Get Apps**.	
23. AppSource dialog opens. You will notice **DIAD_<youremailaddress>** App listed. Select **Get it now.** This is a one-time registration. Going forward when you select Apps in the left panel, you will see **DIAD_<youremailaddress>** app in the list of Apps you have registered.	

References

Dashboard in a Day introduces you to some of the key functionalities available in Power BI. In the ribbon of Power BI Desktop, the Help section has links to some great resources to help you as needed.



Here are a few more references that will help you with your next steps with Power BI.

Getting started: http://powerbi.com

Power BI Desktop: https://powerbi.microsoft.com/desktop

Power BI Mobile: https://powerbi.microsoft.com/mobile

Community site https://community.powerbi.com/

Power BI Getting started support page: https://support.powerbi.com/knowledgebase/articles/430814-get-started-with-power-bi

Support site https://support.powerbi.com/

Feature requests https://ideas.powerbi.com/forums/265200-power-bi-ideas

Power BI advanced Training: http://aka.ms/pbitraining

Power BI edX course:
https://www.edx.org/course/analyzing-visualizing-data-power-bi-microsoft-dat207x-0

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