



Dashboard in a Day – Lab 5

Collaboration

by Power BI Team, Microsoft



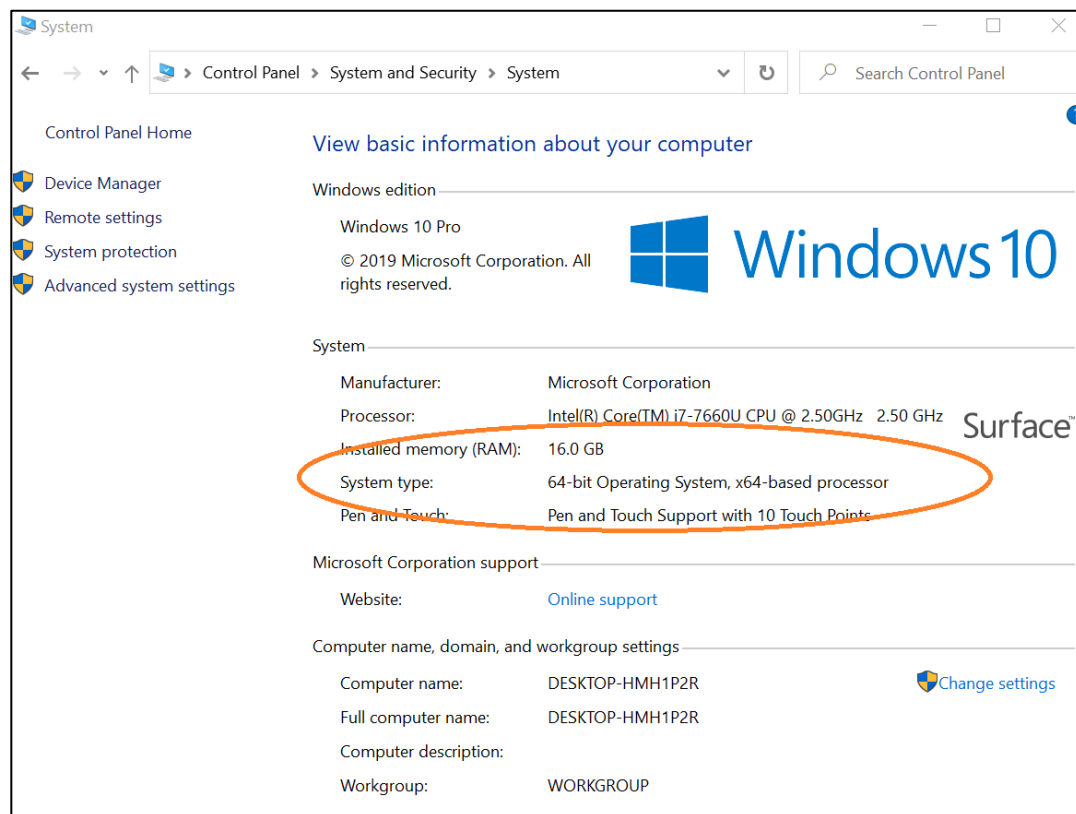
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Lab Prerequisites

The following prerequisites and setup must be done for successful completion of the lab:

- You must be connected to the internet.
- You must have Microsoft Office installed.
- 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 use the same URL as above.
- You must have, at minimum, a computer with 2-cores and 4GB RAM running Windows 8, Windows Server 2008 R2, or later.
- If you choose to use Internet Explorer, it will require version 10 or greater. You can also use Microsoft Edge or Google Chrome.
- You must verify if you have a 32-bit or a 64-bit operating system so you can install 32-bit or 64-bit applications. To check your operating system type:
 - Open Control Panel, click **System and Security**, and then click **System**.
 - You will be able to identify if your operating system is 32-bit or 64-bit based on the **System type** field as shown in the screenshot below.



- You must download the Power BI Content: Create a folder called **DIAD** on the C drive of your local computer. Copy all contents from the folder called **Dashboard in a Day Assets** to the **DIAD** folder you just created (C:\DIAD).
- You must download and install the Power BI Desktop using any one of the options listed below:
 - If you have Windows 10, use Microsoft App Store to download and install the Power BI Desktop app.
 - Download and install Microsoft Power BI Desktop from <http://www.microsoft.com/en-us/download/details.aspx?id=45331>.
 - If you already have Power BI Desktop installed, ensure you have the latest version of Power BI downloaded.
- You must download and install the 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 five of five total labs.

Please continue to use your file after completing Lab 4. If you are joining the DIAD at this point or were unable to complete previous labs, please start this lab with the provided **Lab 4 Solution.pbix** file located in the Reports folder.

At the end of this lab, you will have learned how to share your dashboard and collaborate with other users. You will also have learned how to access your dashboard on your mobile device.

The lab includes steps for the user to follow along together with associated screenshots that provide a visual aid. In the screenshots, sections are highlighted with red or orange boxes to indicate the area the user needs to focus on.

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

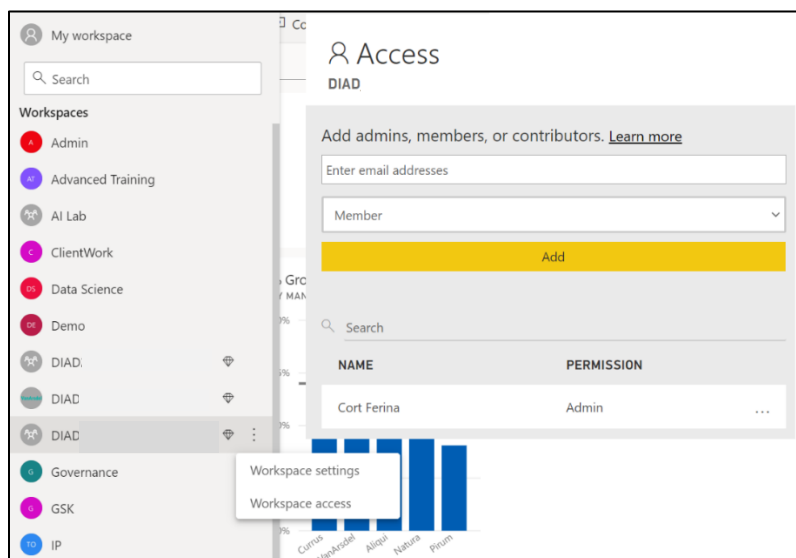
Power BI Service – Collaboration and Distribution

You have built the dashboard and are now ready to get feedback and collaborate with your team members.

1. Sign in to PowerBI.com to access your workspace.
2. From the left panel, click **Workspaces**.
3. Click the **ellipsis** next to **DIAD_<youremailaddress>**.
4. Click **Workspace access**.
5. The **Access** dialog opens. Enter the email addresses of the colleagues with whom you want to collaborate. Each user can belong to one of three roles as follows:

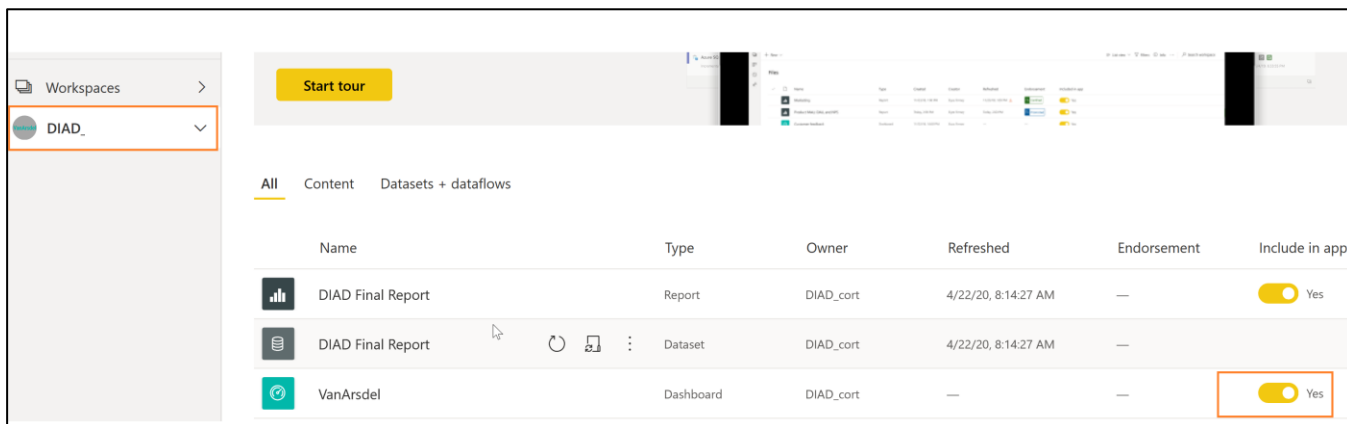
Contributor	Add/edit/delete content within workspace.
Member	Everything a Contributor can do. Re-share. Publish & update Apps.
Admin	Everything a member can do. Can change/delete workspace.
Viewer	Can add Admins. View/interact Read data stored in workplace Data Flows

6. Select the appropriate role and then click **Add**.
 7. Once you have finished adding your colleagues, click **Close**.
- Note:** If you don't have a colleague's email please close without submission.
- Note:** You can ask your colleague to login and access the workspace.



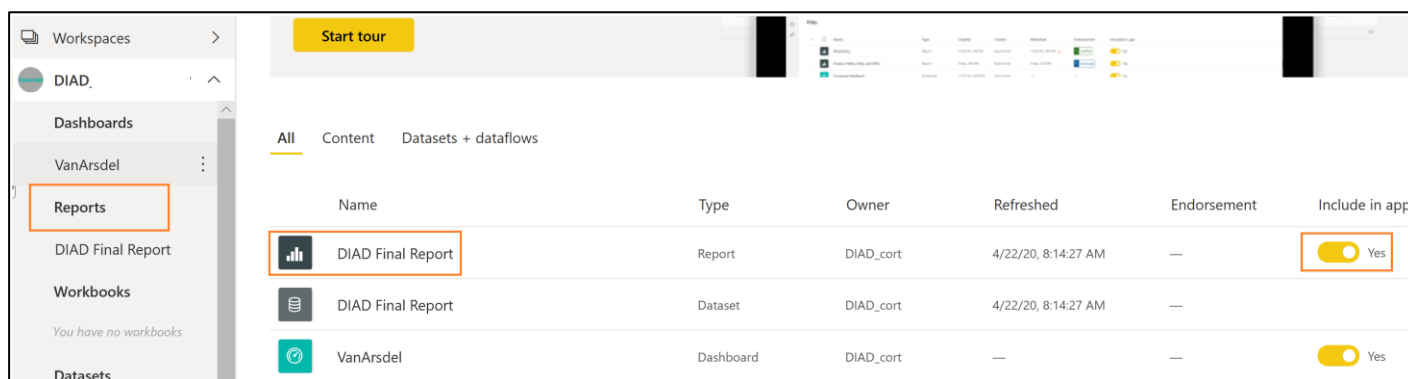
Now let's share the content we have created with report viewers and consumers. To start, we need to publish an app. An App can include multiple dashboards and reports.

1. In the left panel select the **DIAD_<youremailaddress> workspace**.
2. In the **Dashboard** page, notice there is an option named **Included in App** which can be selected to include the Dashboard in the App.

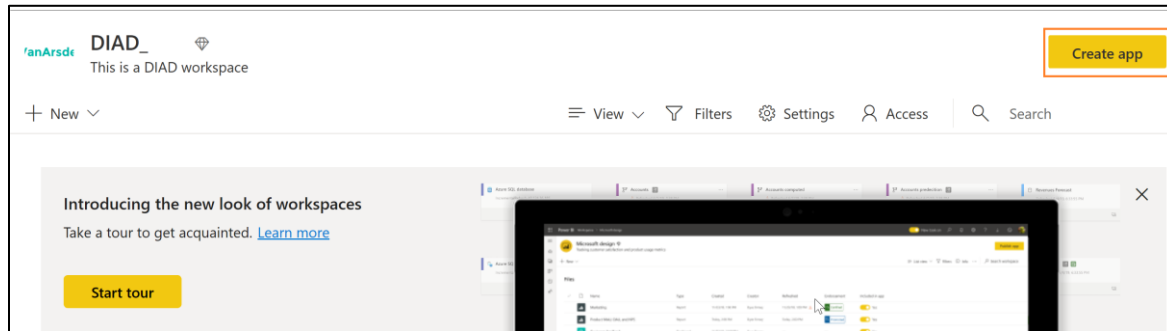


3. Navigate to the **Reports** page.
4. Notice there is an option named **Included in App** which can be selected to include the Reports in the App.

If you have reports and dashboards in your workspace that you do not want to share with report viewers, uncheck this box. In our case we would like to include two reports, so we will leave the box checked.



5. In the left panel, click the **DIAD_<youremailaddress> workspace**.
6. In the upper right corner, click the **Create app** button.



7. In the **Setup** page, type **This is DIAD app** in the description field.

8. Click the **Navigation** tab.

DIAD_cort

Setup

Navigation

Permissions

Build your app

App name *

DIAD_

Description *

This is a DIAD app

182 characters left

Support site

Share where your users can find help

9. From the **Navigation** menu, click **VanArsdel (dashboard)**.

10. When a user accesses the DIAD app, we want them to land on the **VanArsdel** dashboard.

11. Navigate to the **Permissions** page.

DIAD_cort

Setup **Navigation** Permissions

New navigation builder

☒ On

Add reports and dashboards to this app. Then organize the custom navigation pane so it's easy for people to find what they're looking for.

Navigation *

+ New

VanArsdel

DIAD Final Report

Dashboard details

Name * VanArsdel [Reset](#)

Dashboard link [Open](#)

<https://app.powerbi.com/groups/81e3b2c7-6df3-4c92-bcaf-0b96ee65b5a1/dashboards/a3ade2ab-48>

Section

No section

☐ Hide from navigation

> Advanced

Setup Navigation **Permissions**

Access

☐ Entire organization

☒ Specific individuals or group

Cort Ferina cort@obvience.com

Users and groups with access to this workspace can access this app.

This app will be created in a Power BI Premium workspace. As long as the workspace remains a Premium workspace, anyone in your organization can be given access to it.

Allow everyone who has app access to

☒ Allow all users to connect to the app's underlying datasets using the Build permission.

☒ Allow users to make a copy of the reports in this app.

☐ Allow users to share the app and the app's underlying datasets using the share permission.

[Learn more](#)

Installation

☐ Install this app automatically.

Publish app Cancel

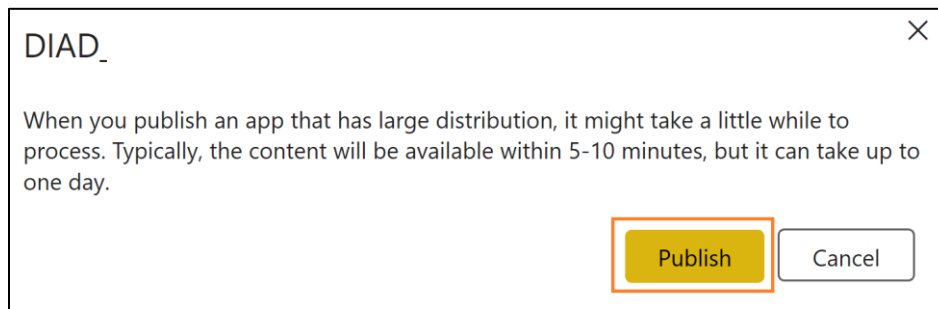
12. Enter the email addresses of the users or groups to whom you want to give access.

Note: If you didn't enter an email address previously, no need to enter one here.

13. On the bottom right corner, click **Publish App**.

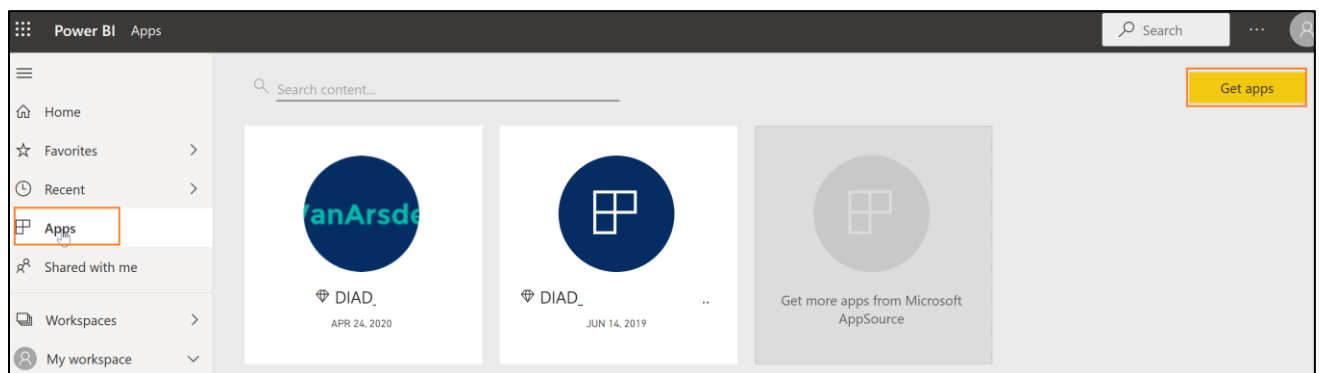
14. The **Ready to publish** dialog appears, click **Publish**.

15. Once the App is published a success dialog appears.



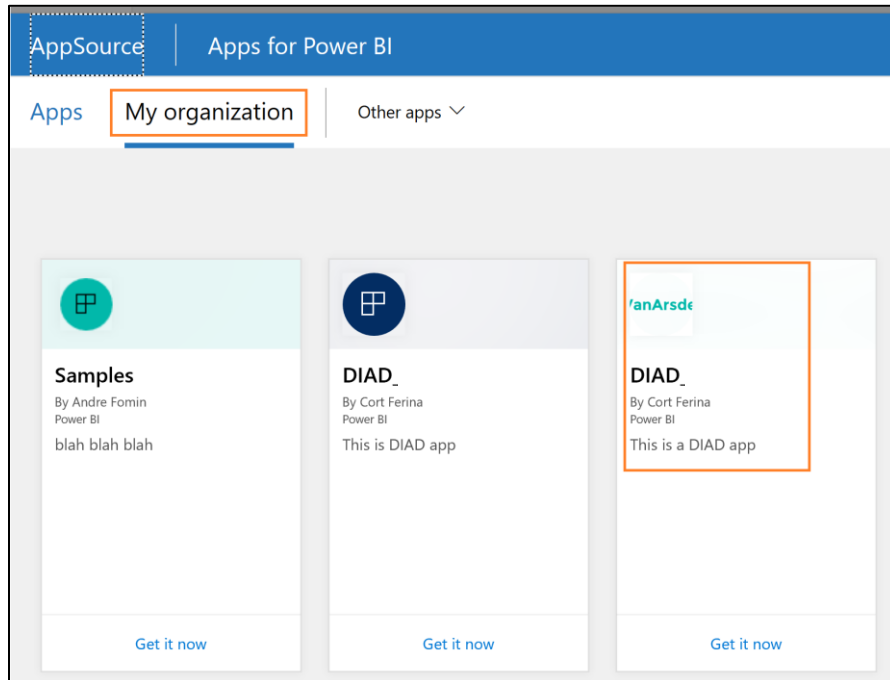
You can copy the link to the App after it's been successfully published and share it with individuals via email. A better way for report viewers to consume the App is by logging onto Power BI Service and registering the App. Let's impersonate a report viewer:

1. From the left menu, click **Apps**.
2. Click **Get Apps**.



3. The **AppSource** dialog opens. You will notice the **DIAD_<youremailaddress>** app is listed. Select the newly added app.

This is a one-time registration. Going forward when you select **Apps** in the left panel, you will see the **DIAD_<youremailaddress>** app in the list of Apps you have registered, and then you can click **Get it now**.

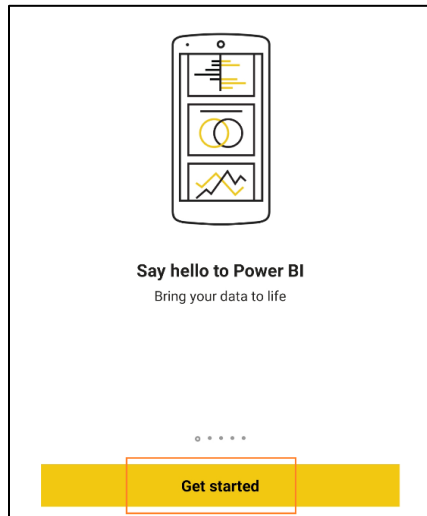


Power BI Mobile – Accessing Report on Mobile Device

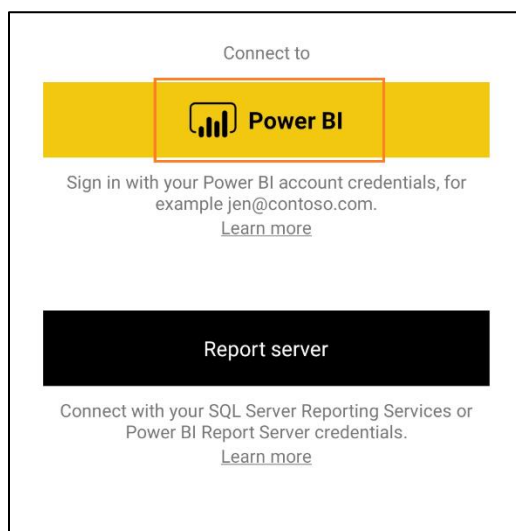
1. Open the Power BI Mobile app on your mobile device



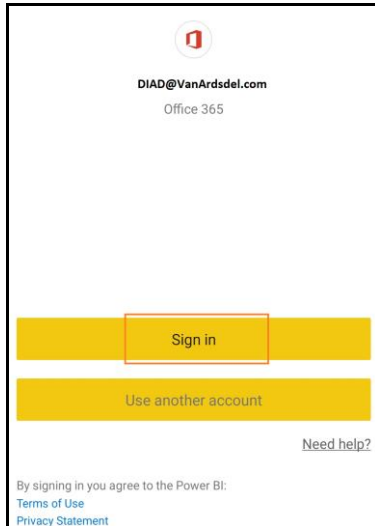
2. Click **Get Started** after the app is open.



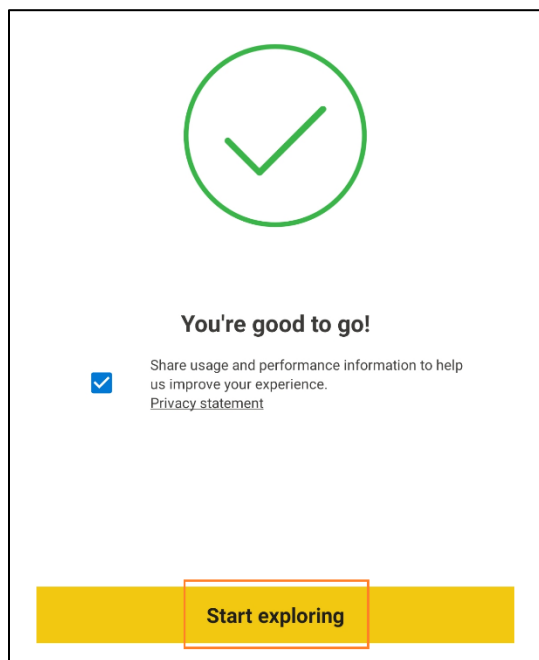
3. Click **Power BI** to connect to your report.



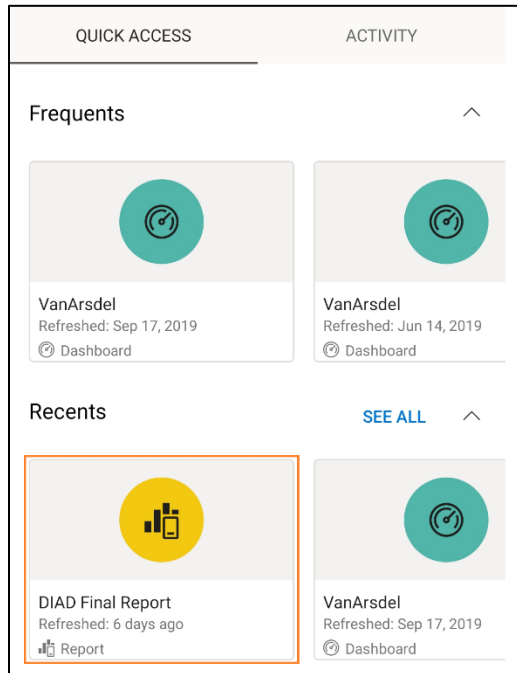
4. Click **Sign in** and enter your credentials.



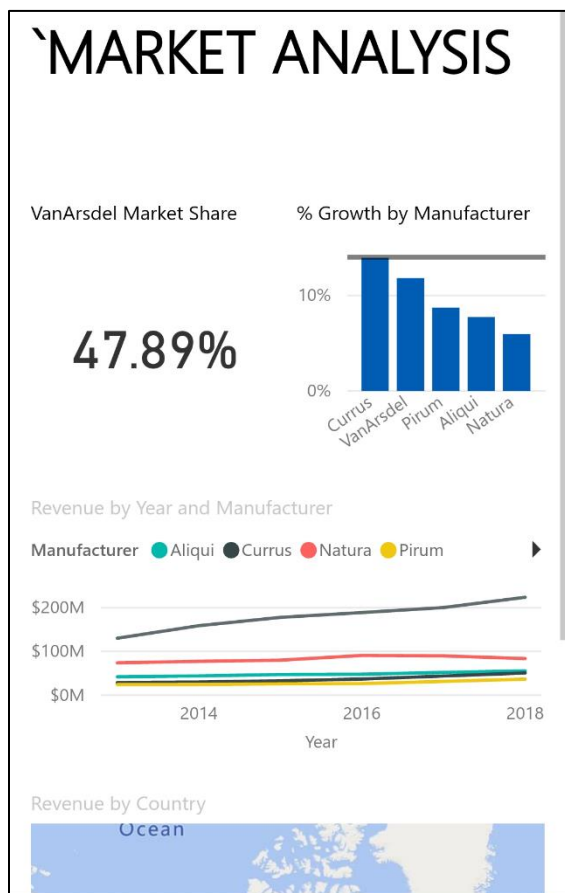
5. Verify you have successfully signed in and then click **Start exploring**.



6. Click the **DIAD Final Report** that you published from Power BI Desktop.

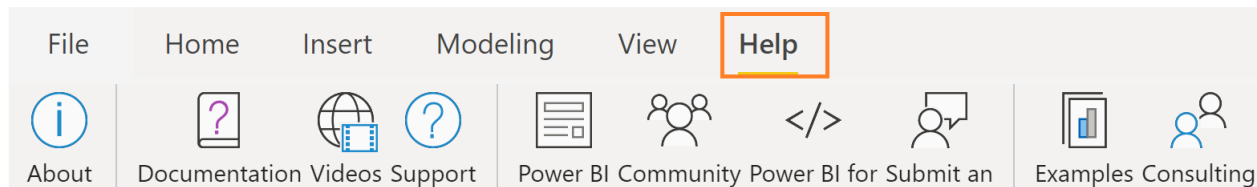


7. Verify that you see the mobile view you published from Power BI Desktop.



References

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



Here are 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>

New ideas for using Power BI https://aka.ms/PBI_Comm_Ideas

Power BI courses <http://aka.ms/pbi-create-reports>

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