



Power platform App in a Day

Module 5: Power BI

Hands-on Lab Step-by-Step

December 2019

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Power BI

Lab Prerequisites

This is the fifth lab in a five-part series covering Power Apps, Common Data Service, Power Automate and Power BI. The assumption is that you have successfully completed the first four modules, or at least the initial part of setting up an environment as described in the overview – “**00-AppInADay Lab Overview.pdf**”.

If you have not completed the previous modules, you can use the completed version of the lab package in the “\Completed\Module4\Completed Solution” folder. Follow the instructions in the document “Complete Solution” before proceeding with this module, which will provision the app and the Common Data Service entity into your environment.

About Power BI

[Power BI](#) is a suite of business analytics tools that deliver insights throughout your organization. In this lab, we will be using Power BI to visualize data from the device procurement process. Power BI can connect to hundreds of data sources and prepare the data for use. In this lab, you will be using the Common Data Service and the Excel connectors.

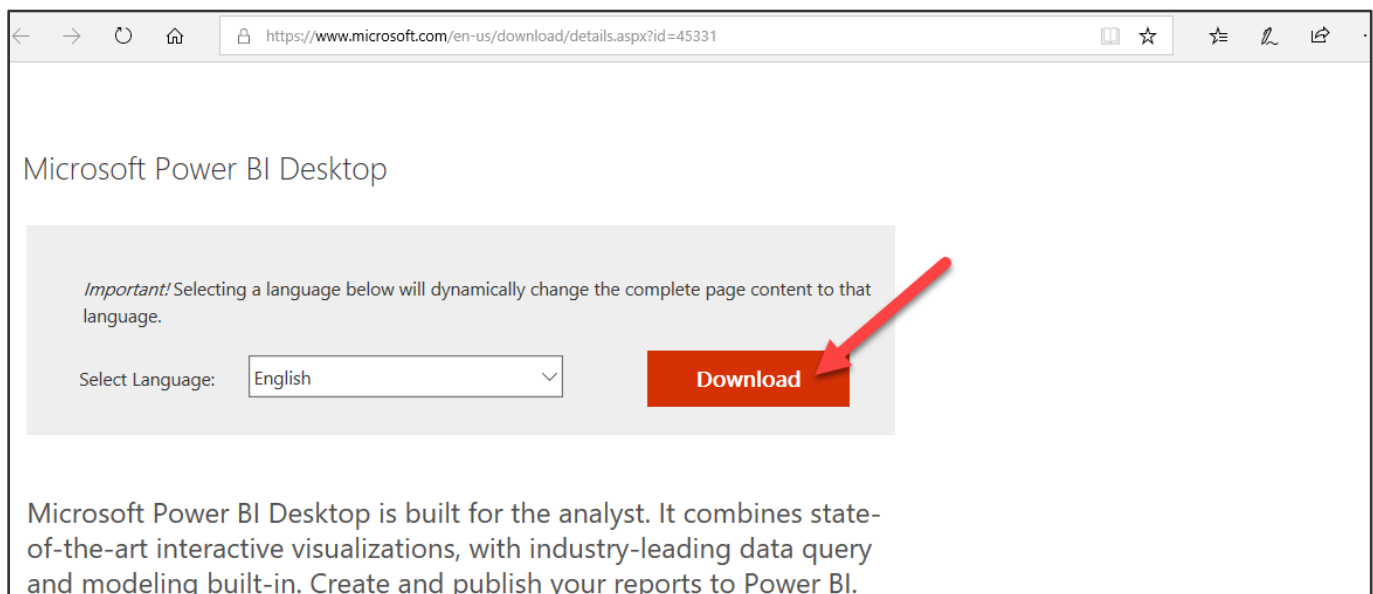
Exercise 1: Install Power BI Desktop

In this exercise you will install the Power BI Desktop application. **If you already have the application installed, you may skip to Exercise 2.**

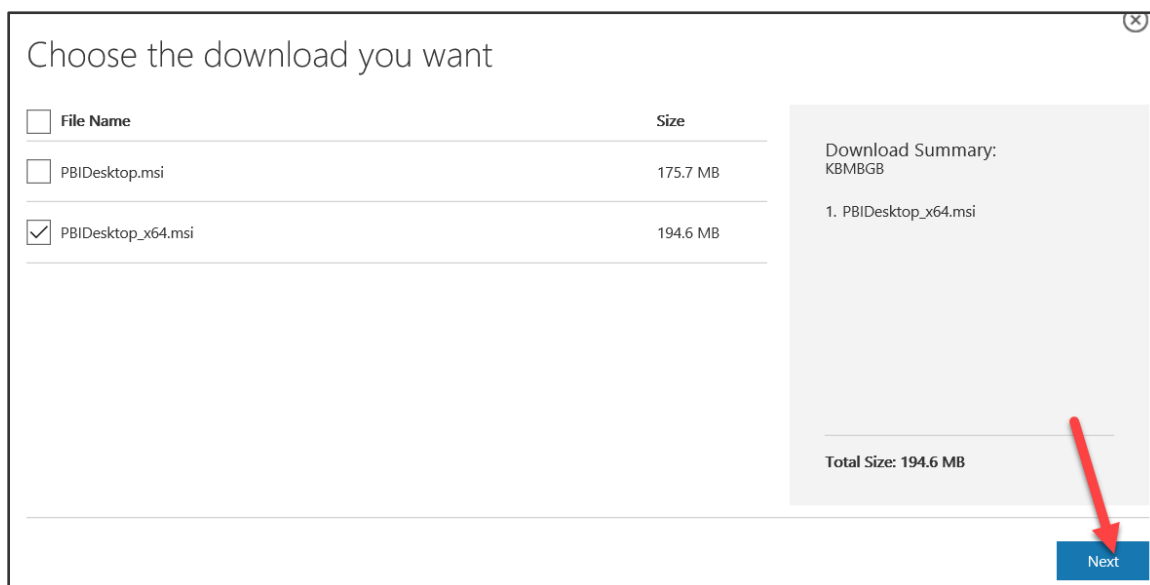
Task 1: Download and install Power BI Desktop

In this task, you will download and install Power BI Desktop.

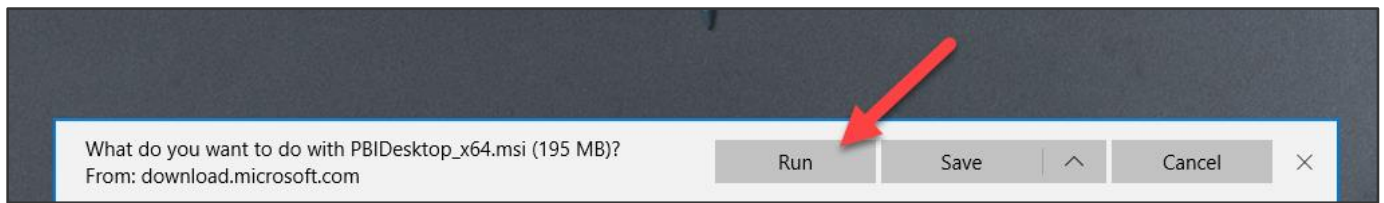
1. Navigate to <https://aka.ms/pbiSingleInstaller> and click Download.



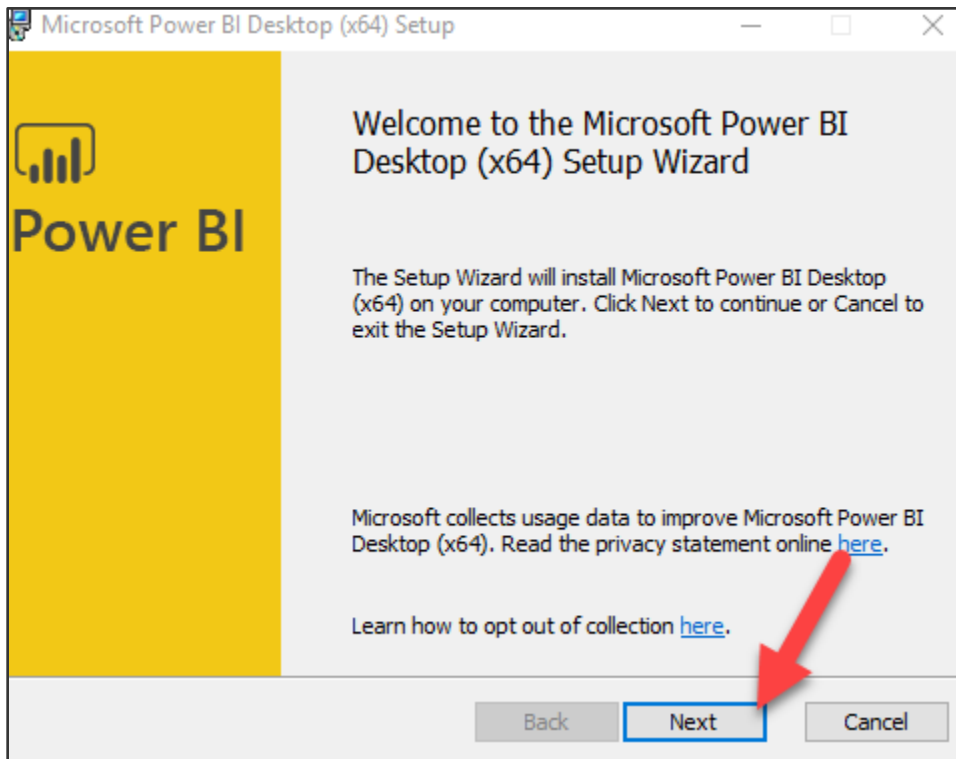
2. Select the appropriate version for your computer and click Next.



3. Click Run.



4. Click Next.



5. Follow the installation wizard and complete the installation.

Exercise 2: Import historical data

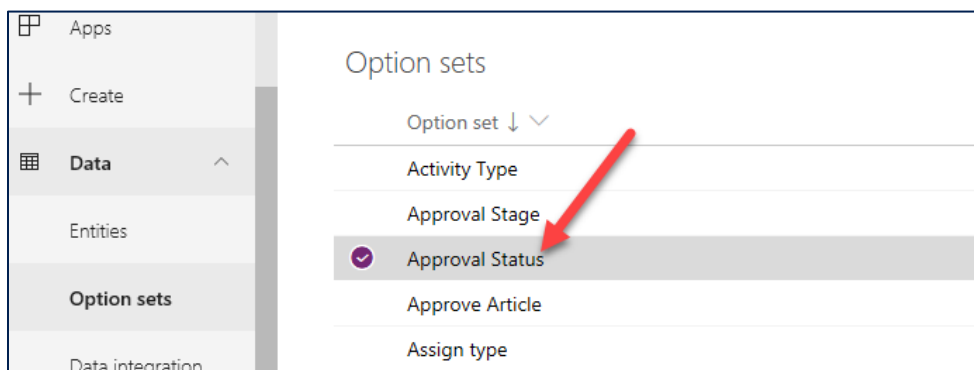
Task 1: Import past orders into Common Data Service

Since you probably only input four or five device orders when testing the PowerApp you built in the prior modules we need more test data to report on. To make the Power BI Analytics more interesting we need some additional data. In this task you will be importing some historical orders into the CDS Device Orders entity.

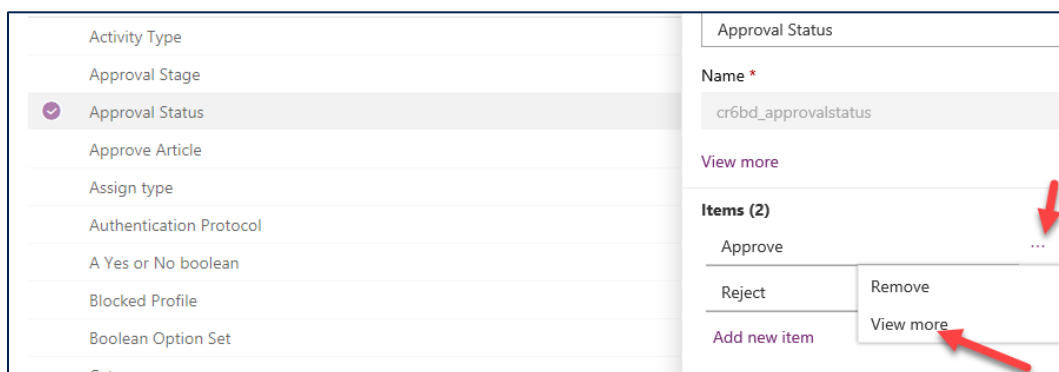
1. From <https://make.powerapps.com> log in to your existing Power Apps Environment that has your CDS data that you have used for the prior labs. Select your environment and expand **Data**.



2. Select **Option Sets** and click on the **Approval Status**.



3. Click the ... button of the **Approve** option and select View More.



4. Copy the Value.

Activity Type

- Approval Status
- Approve Article
- Assign type
- Authentication Protocol
- A Yes or No boolean
- Blocked Profile
- Boolean Option Set
- Category
- Channel Activities
- Component State
- Component Type
- Convert Activity
- Copy Article

Approval Status

Name *

crc69_approvalstatus

View more

Items (2)

Approve

Name *

Approve

Value *

453,660,000

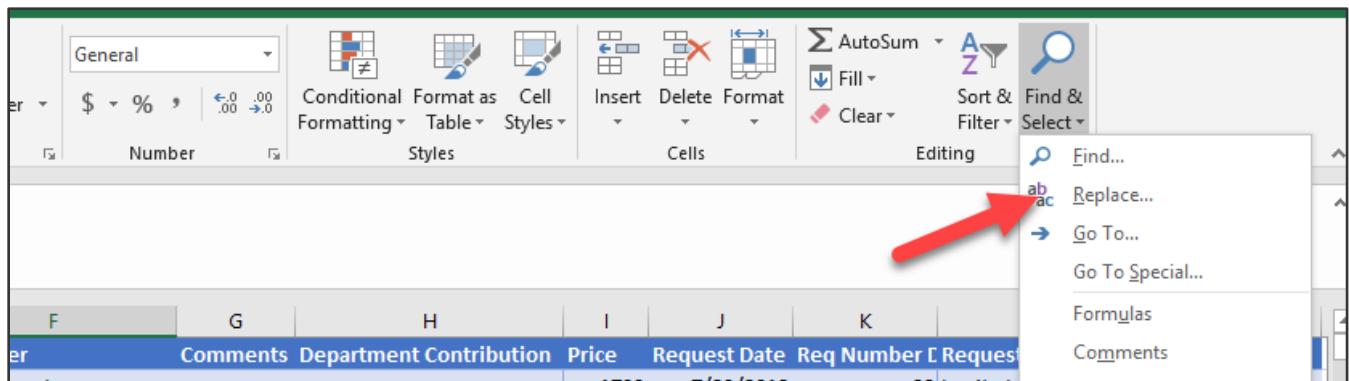
Save Cancel

Reject

5. Go to the resources folder of the module and open the Historical Device Order Excel file

Device-Order-Data	9/10/2018 11
Historical Device Orders	9/12/2018 12

6. Click Find and select Replace.



7. Enter 476290000 for Find, type the Value you copied (without the commas) in the Replace field, and click Replace All.

Find and Replace

Find Replace

Find what: 476290000

Replace with: 453660000

Within: Workbook

Search: By Rows

Look in: Formulas

Match case

Match entire cell contents

Options <<

Replace All

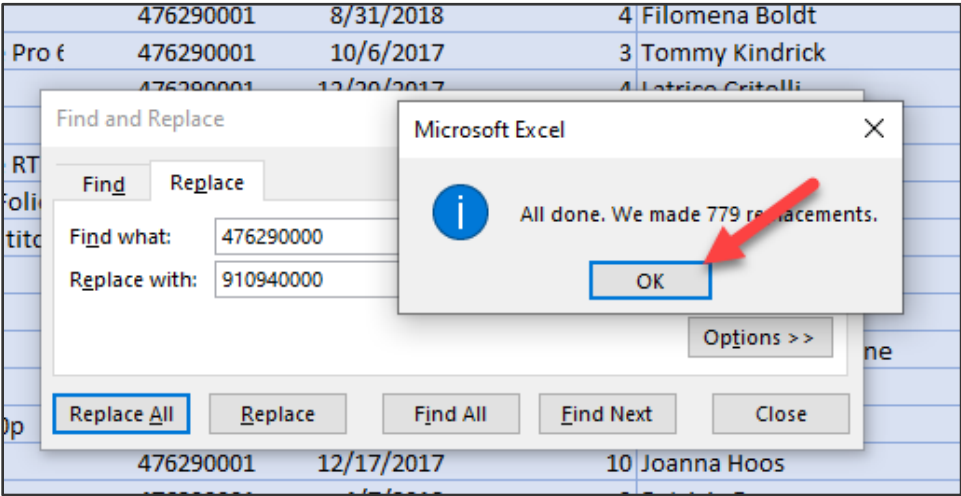
Replace

Find All

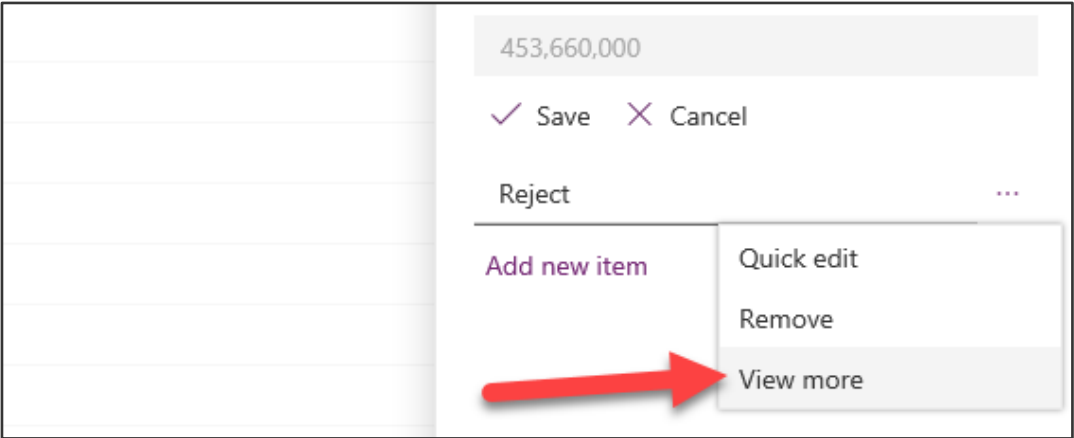
Find Next

Close

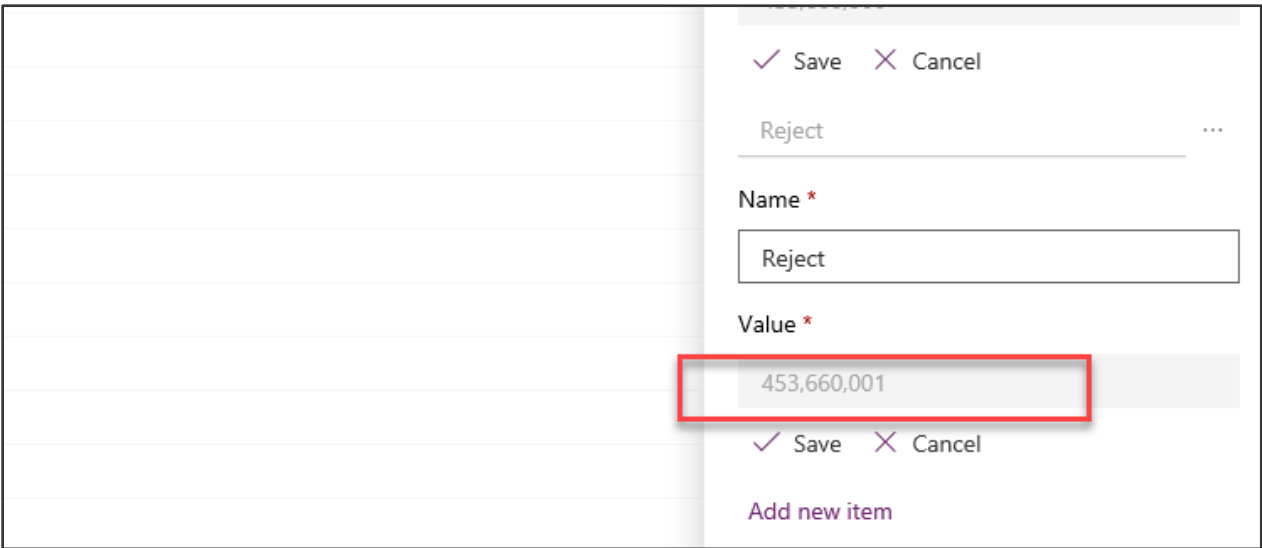
8. Click OK.



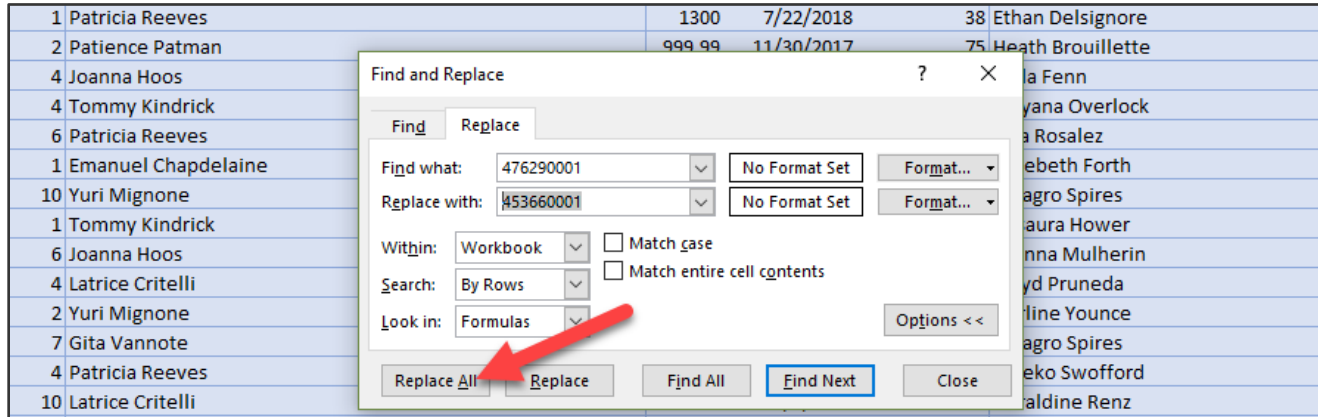
9. Go back to Power Apps, click on the ellipses button of the Reject option, and select View More.



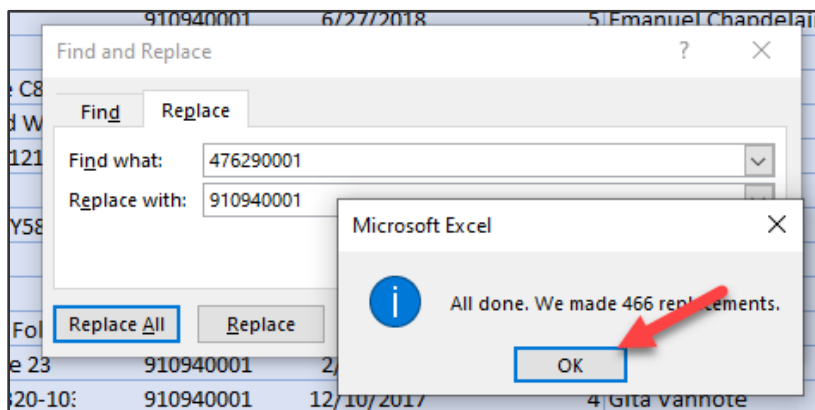
10. Copy the Value again.



11. Go back to the Excel file, type 476290001 on the find field, the value you copied (without the commas) in the replace field, and click Replace All.



12. Click Ok.



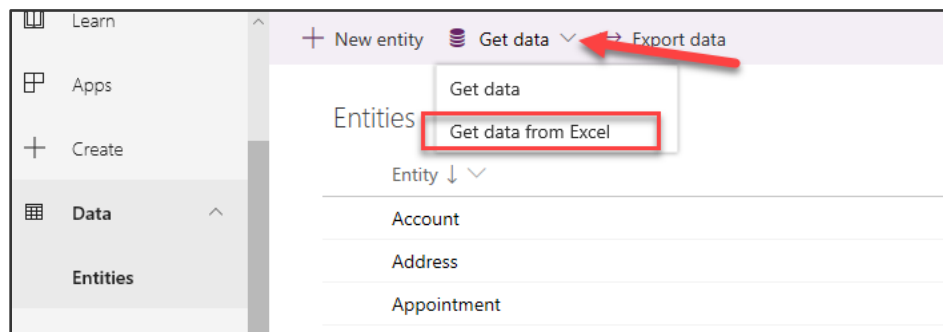
13. Close the Find and Replace dialog.
14. Save the Excel file and close it.

Note: The reason we are doing this is due to each environment having a unique publisher prefix, when you created your solution the values of the option set are prefixed based on that value. Currently the import process we are going to use requires the numeric value and not the label value so it must be adjusted.

15. Go back to the Power Apps and close the Option Set edit window.



16. There are many options available to get data into CDS. We are going to import from an Excel file. Select **Entities** click **Get Data** and select **Get Data From Excel**.



17. Scroll down the list of entities and choose **Device Order**

Customer Relationship	System
Data Map	Standard
✓ Device Order	Custom
Device Procurement Process	Custom

18. Scroll back up and in the upper right corner click **Next**



19. Click Upload to open the file browser

Import data

Choose the file you want imported for each entity, and we'll map the fields that match. [Learn more](#)

Name	File	Mapping status
Device Order	<div>File not uploaded</div> <div>↑ Upload</div>	Not mapped

20. Select the Historical Device Orders Excel file.

Device-Order-Data	9/10/2018 11
Historical Device Orders	9/12/2018 12

21. After the file upload is complete it will show mapping errors, Click **Map fields**

Import data

Choose the file you want imported for each entity, and we'll map the fields that match. [Learn more](#)

Name	File	Mapping status
Device Order	Historical Device Orde...	Upload Mapping errors exist Map fields

22. Map the following fields

Device Order fields	Source values
Approval Status Value	Approval Status
Approved Date	Approved Date
Approver	Approver
Comments	Comments
Device Name	Device Name
Price	Price
Process ID	Select None to un map
Request Date	Request Date
Requested By	Requested By

23. Change the Show: dropdown to Mapped fields to show only the fields you have mapped. Confirm your list matches the list show in the image.

Field mappings for Device Order

Filter by entity field name: No file Show: Mapped fields Entity field filter has been applied

Device Order fields	Source values
Approval Status Value	Approval Status
Approved Date	Approved Date
Approver	Approver
Comments	Comments
Device Name *	Device Name
Price	Price
Request Date	Request Date
Requested By	Requested By

24. Confirm that Process Id is not mapped to Approved Date, if it is then un map it by selecting None.

Import Sequence Number	Not set
Owning Business Unit	Not set
Price (Base)	Not set
Process Id	Not set
Send Survey	Not set
Stage Id	Not set

25. Click **Save changes** to proceed. You may still have an Error and a Warning that is ok

Cancel **Save changes**

Field mappings for Device Order

Filter by entity field name: Show: **Entity field filter has been applied**

Device Order fields	Source values
Approved Date	Approved Date

26. Click Import to begin the import of the historical data

Import

Import data

Choose the file you want imported for each entity, and we'll map the fields that match. [Learn more](#)

Name	File	Mapping status
Device Order	<input type="text" value="Historical Device Orde..."/>	Upload Mapping warnings exist Map fields

27. This should take a couple of minutes to complete – while processing you should see the following

Import data

Importing your data...

28. Once the import has completed you should see the following



29. If for some reason the import wasn't successful, download the log file and review. Most common cause is an improper mapping of a field type. If that happens just start this task again as it doesn't retain your mappings.

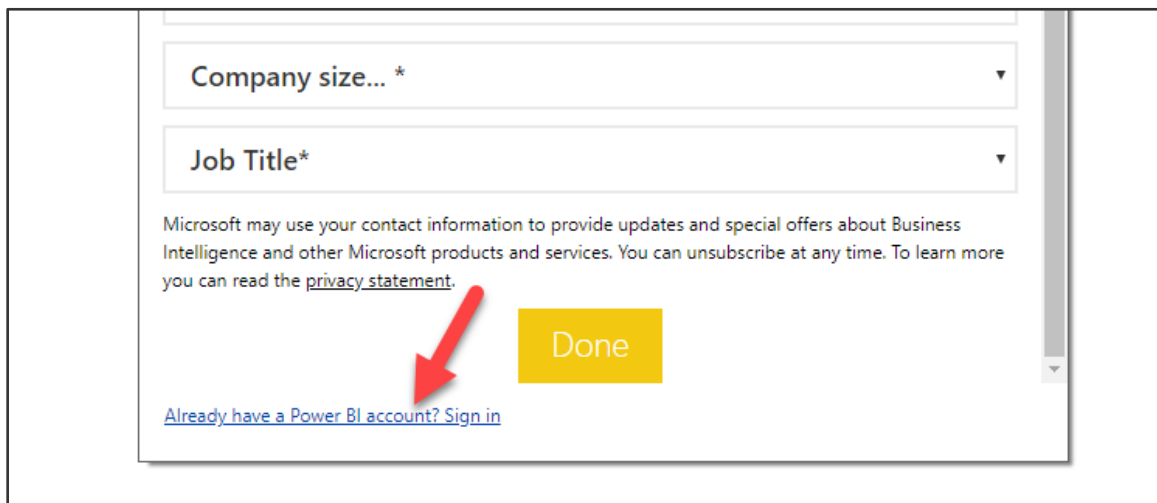
Exercise 3: Connect and reference data

In this exercise, you will connect to the Common Data Service using a connector. You will then be referencing the data from the device procurement process that you will use to build the visualizations. This includes selecting only the data that is useful to help have a easy to use data set to work with.

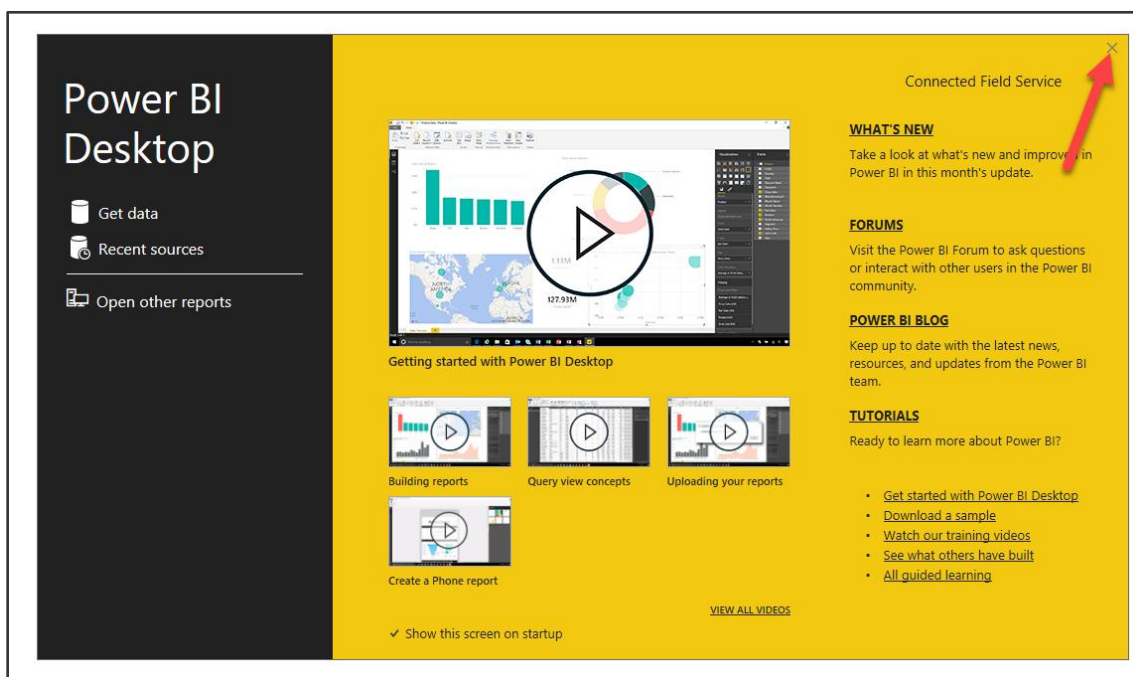
Task 1: Connect Power BI to the CDS Data

In this task, you will get data from your Common Data Service.

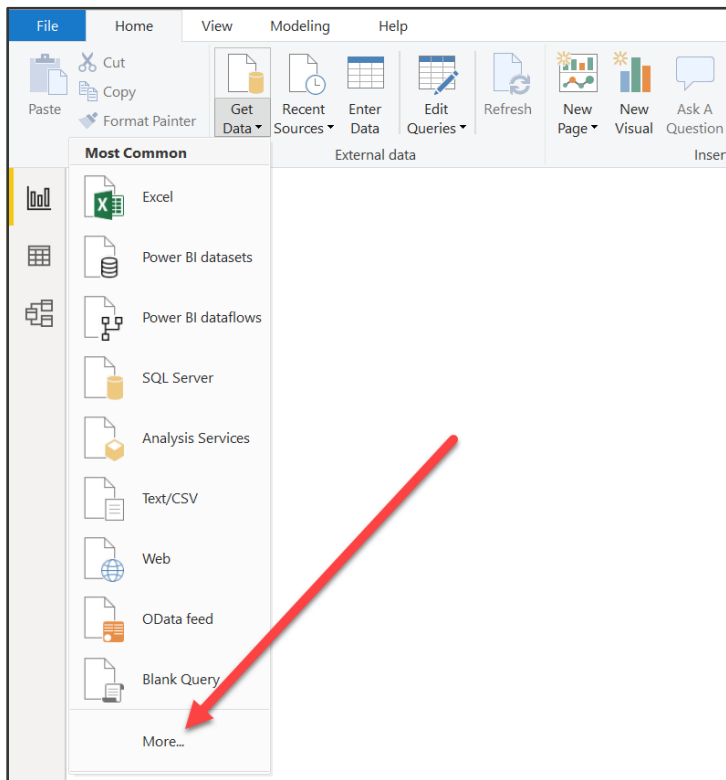
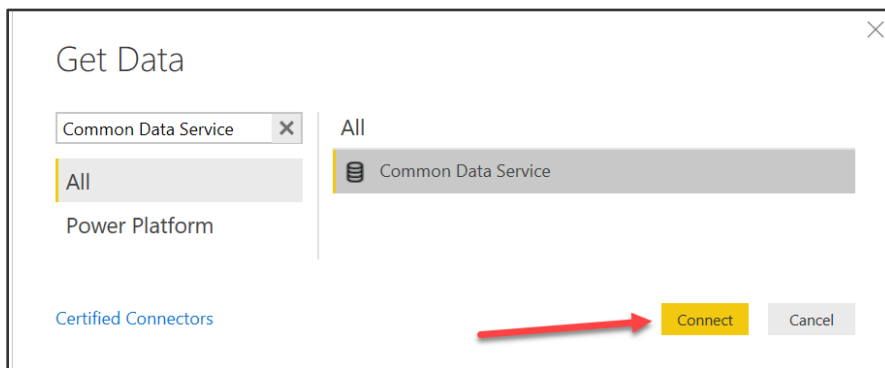
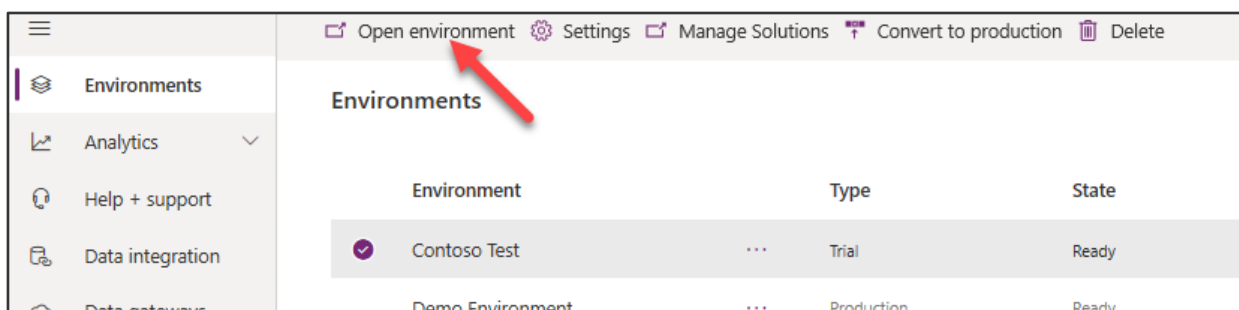
1. Start Power BI Desktop application and click Sign in.



2. Provide your credentials and sign in.
3. Close the splash screen.



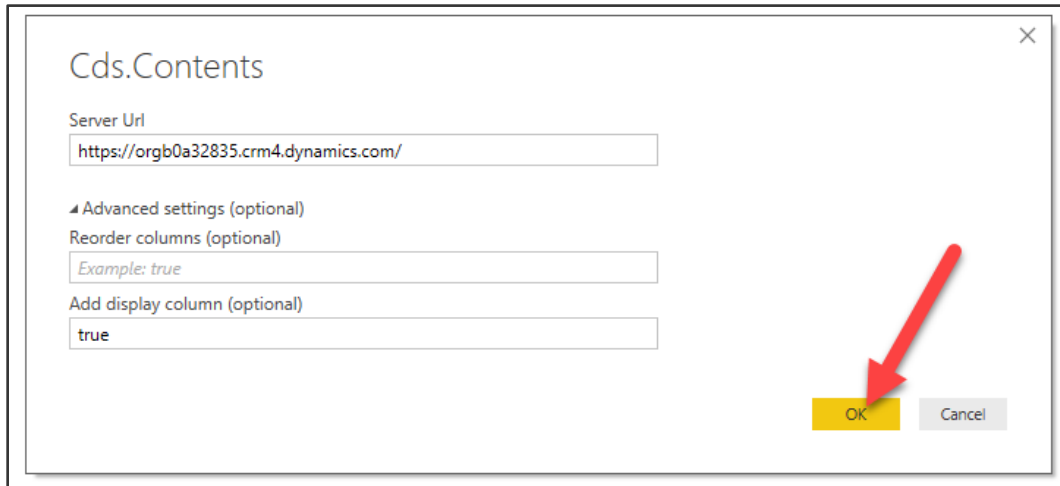
4. Click Get Data and select More...

5. Search for **Common Data Service**, select it, and click Connect.6. Navigate to <https://admin.powerplatform.microsoft.com/> and select Environments.7. Select your environment and click **Open Environment**.

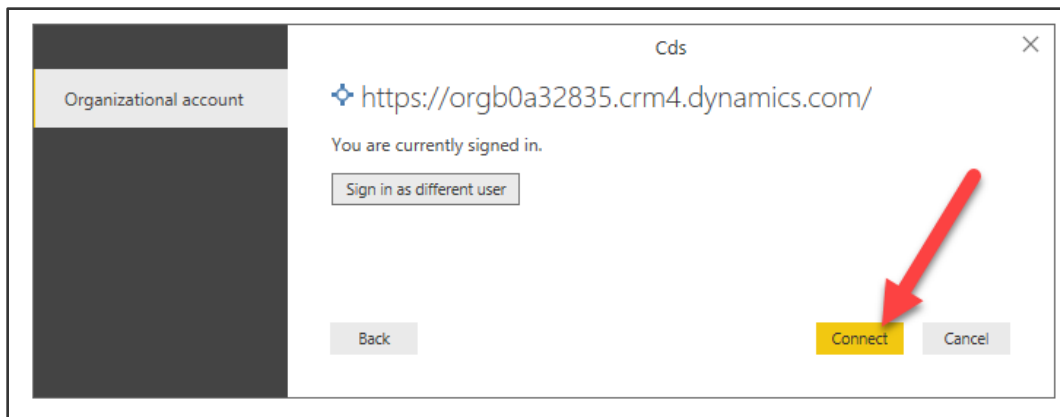
8. Copy the base part of the URL



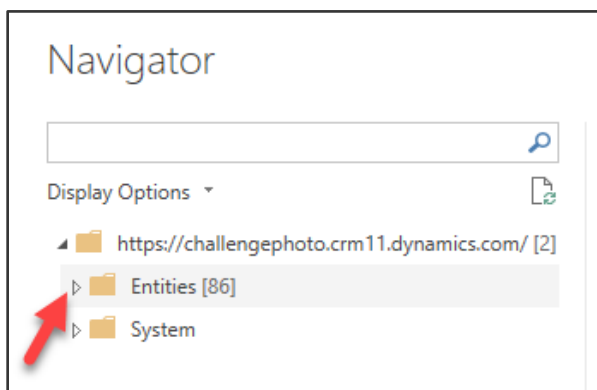
9. Go back to Power BI Desktop, paste the URL you copied into the Server URL field, type **true** in the Add Display Column field, and click OK.



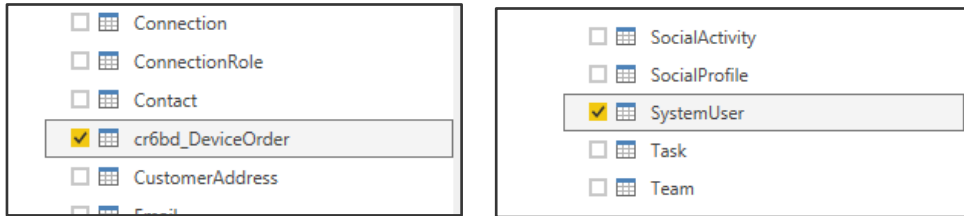
10. If you are prompted to sign in, click Sign in and provide your credentials.
11. Click **Connect**.



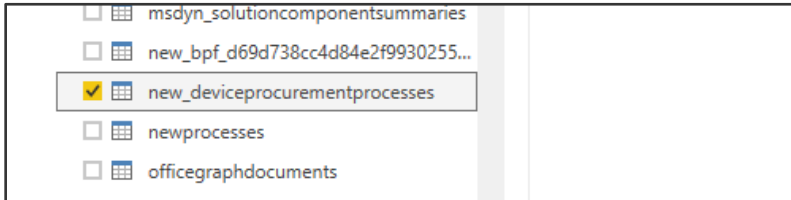
12. Expand **Entities**.



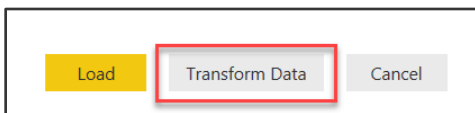
13. Select **_DeviceOrder** and **SystemUser** Note: it will be in the format of <prefix>_DeviceOrder where the prefix will be different in each environment.



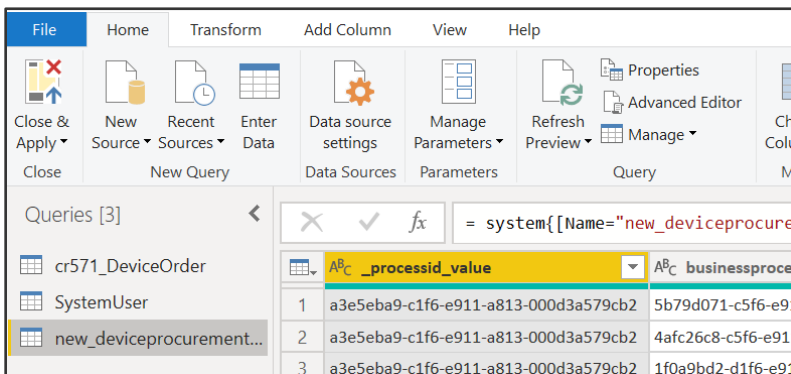
14. Expand **System** and select **new_DeviceProcurementProcesses**.



15. Click **Transform Data**

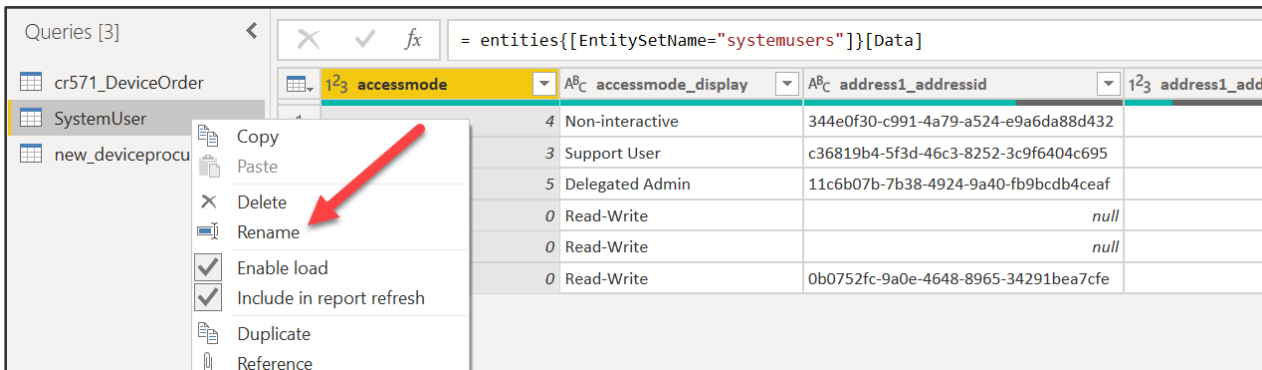


16. Your data will now be available in the Power Query Editor.



Task 2: Clean up and Transform

1. Right click on the **System User** table and click **Rename**.



2. Rename the table from **SystemUser** to **User**.

The screenshot shows the Power Platform interface with the 'Transform' tab selected. The 'Queries' list on the left shows 'cr571_DeviceOrder', 'User', and 'new_deviceprocurement...'. The main grid displays the transformed data for the 'User' table. The formula bar shows the query: `= entities[EntitySetName="systemusers"]{Data}`. The grid has columns: `accessmode`, `accessmode_display`, and `address1_addressid`. The data rows are:

	accessmode	accessmode_display	address1_addressid
1	4	Non-interactive	344e0f30-c991-4a79-a524-e9a6da
2	3	Support User	c36819b4-5f3d-46c3-8252-3c9f640
3	5	Delegated Admin	11c6b07b-7b38-4924-9a40-fb0bce

3. Rename the **DeviceOrder** table to **Device Order** and the **DeviceProcurementProcesses** to **Device Procurement Processes**. Your table names will now look like the image below.

The screenshot shows the Power Platform interface with the 'Transform' tab selected. The 'Queries' list on the left shows 'Device Order', 'User', and 'Device Procurement Process'. The main grid displays the transformed data for the 'Device Procurement Process' table. The formula bar shows the query: `= system{[Name="new_deviceprocurementprocesses",Signature="table"]}{Data}`. The grid has columns: `_processid_value`, `businessprocessflowinstanceid`, and `versionnumber`. The data rows are:

	_processid_value	businessprocessflowinstanceid	versionnumber
1	a3e5eba9-c1f6-e911-a813-000d3a579cb2	5b79d071-c5f6-e911-a813-000d3a5631e2	8
2	a3e5eba9-c1f6-e911-a813-000d3a579cb2	4afc26c8-c5f6-e911-a813-000d3a5631e2	8
3	a3e5eba9-c1f6-e911-a813-000d3a579cb2	1f0a9bd2-d1f6-e911-a813-000d3a5631e2	8

4. Next, we are going to remove columns from our query on the Device Order entity to make it fewer columns we need to work with.
5. Select the **Device Order** table and click **Choose Columns**. Alternatively, you can also select the column header in the grid while holding the Ctrl key and then select the columns, then right-click and select Remove Other columns.

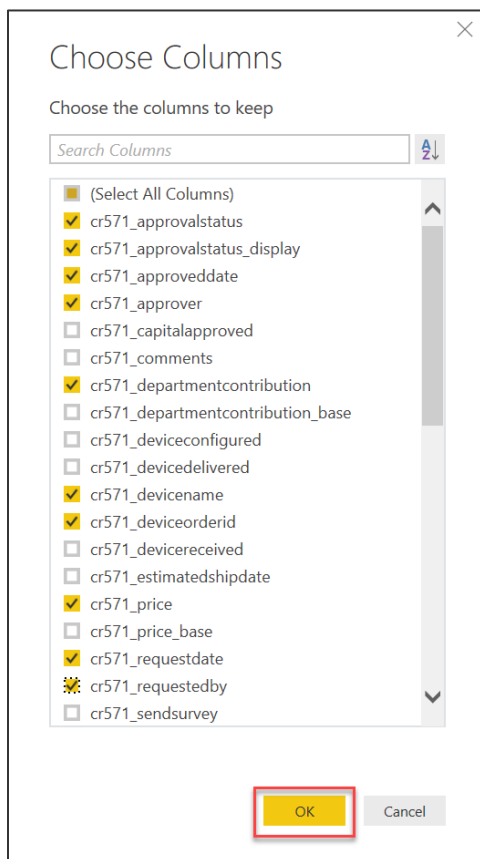
The screenshot shows the Power Platform interface with the 'Transform' tab selected. The 'Queries' list on the left shows 'Device Order', 'User', and 'Device Procurement Process'. The main grid displays the transformed data for the 'Device Order' table. The formula bar shows the query: `= entities[EntitySetName="cr571_deviceorders"]{Data}`. The grid has columns: `cr571_approvalstatus`, `cr571_approvalstatus_display`, `cr571_approveddate`, and `cr571_approver`. The data rows are:

	cr571_approvalstatus	cr571_approvalstatus_display	cr571_approveddate	cr571_approver
1	null	null	null	tiffany@AIADOctoberTrial.onmicroso
2	null	null	null	tiffany@AIADOctoberTrial.onmicroso
3	null	null	null	tiffany@AIADOctoberTrial.onmicroso
4	null	null	null	tiffany@AIADOctoberTrial.onmicroso

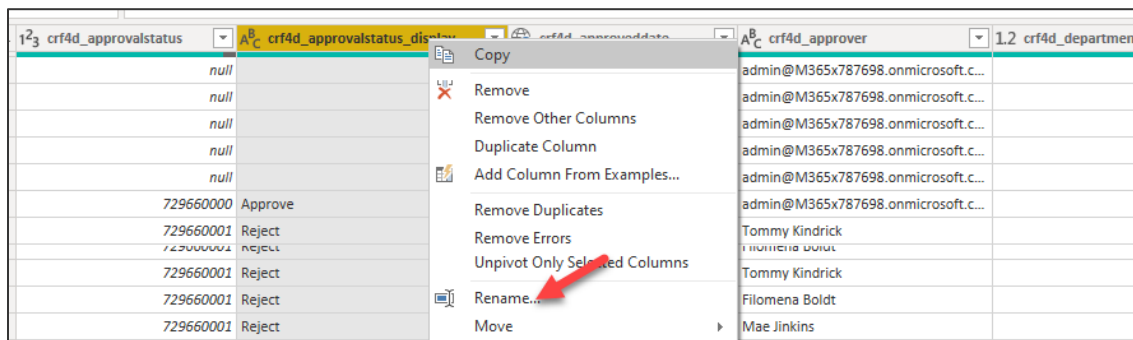
6. Un check the **Select All Columns** checkbox.
7. Select the columns listed below and click OK. Note: the action names will be in the format of <prefix>_<name>.

The following are the names

- Approvalstatus
- Approvalstatus_display
- Approveddate
- Approver
- Departmentcontribution
- Devicename
- Deviceorderid
- Price
- Requestdate
- Requestedby



8. Right click on the **Approvalstatus_display** column header and click **Rename**.



9. Rename the column **Approval Status**.

	123 cr571_approvalstatus	Approval Status	cr571_approveddate	cr571_approver
1	null	null	null	tiffany@AIADOctoberTrial.onmicrosoft.com
2	null	null	null	tiffany@AIADOctoberTrial.onmicrosoft.com
3	null	null	null	tiffany@AIADOctoberTrial.onmicrosoft.com
4	null	null	null	tiffany@AIADOctoberTrial.onmicrosoft.com
5	322730000	Approve	10/25/2019 3:00:29 AM +00:00	tiffany@AIADOctoberTrial.onmicrosoft.com
6	322730001	Reject	10/25/2019 3:00:33 AM +00:00	tiffany@AIADOctoberTrial.onmicrosoft.com
7	322730000	Approve	10/25/2019 3:31:12 AM +00:00	tiffany@AIADOctoberTrial.onmicrosoft.com
8	322730000	Approve	10/25/2019 3:36:15 AM +00:00	tiffany@AIADOctoberTrial.onmicrosoft.com

10. Rename the rest of the columns as shown below. You may rename other fields if you have time but not required for the lab.

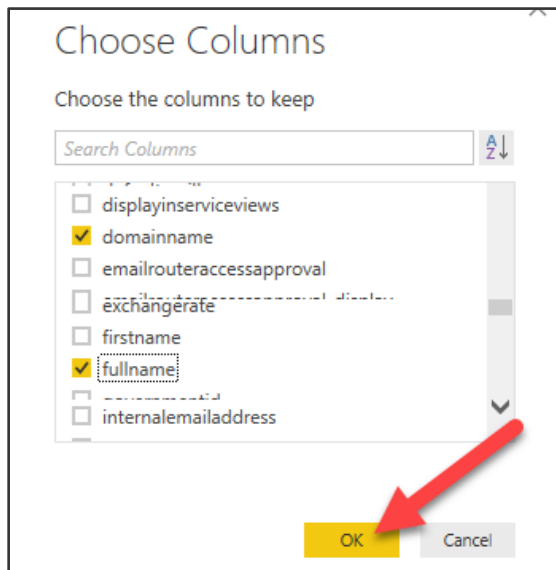
Current Name	New Name
approvalstatus	Approval Status ID
approveddate	Approved Date
approver	Approver
departmentcontribution	Department Contribution
devicename	Device Name
deviceorderid	Device Order
price	Price
requestdate	Request Date
requestedby	Requested By

11. Select the **User** table and click Choose Columns.

The screenshot shows the Power BI Desktop interface. On the left, the 'Queries' list shows 'Device Order', 'User', and 'Device Procurement Process'. The 'User' query is selected. The 'Choose Columns' dialog box is open, showing the 'EntitySetName' as 'cr571_deviceorders' and the 'Data' column selected. A red arrow points to the 'Choose Columns' button in the ribbon.

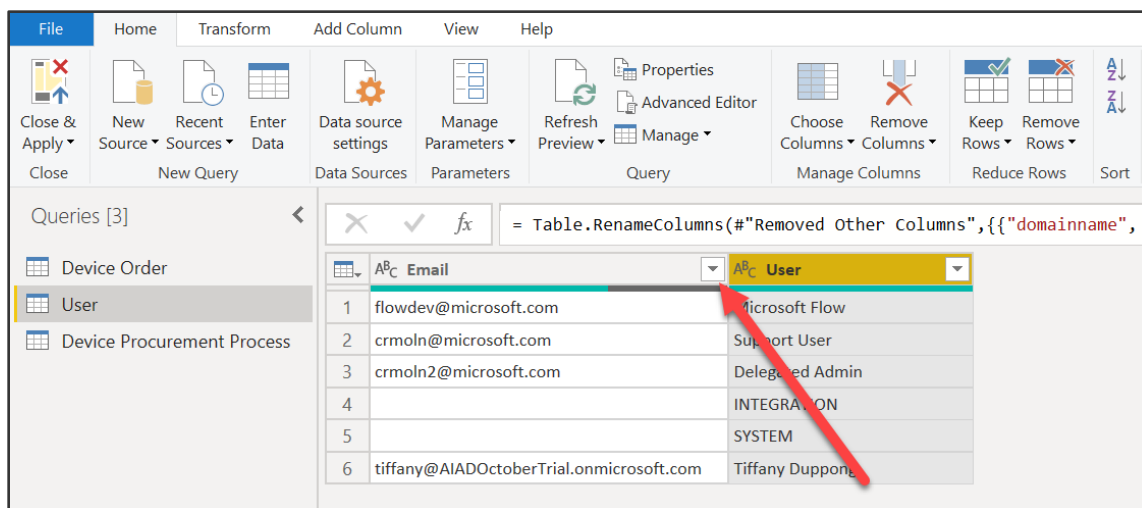
12. Uncheck Select All Columns

13. Select **domainname**, **fullname** and click **OK**. Tip: Using Search can speed up finding the columns.

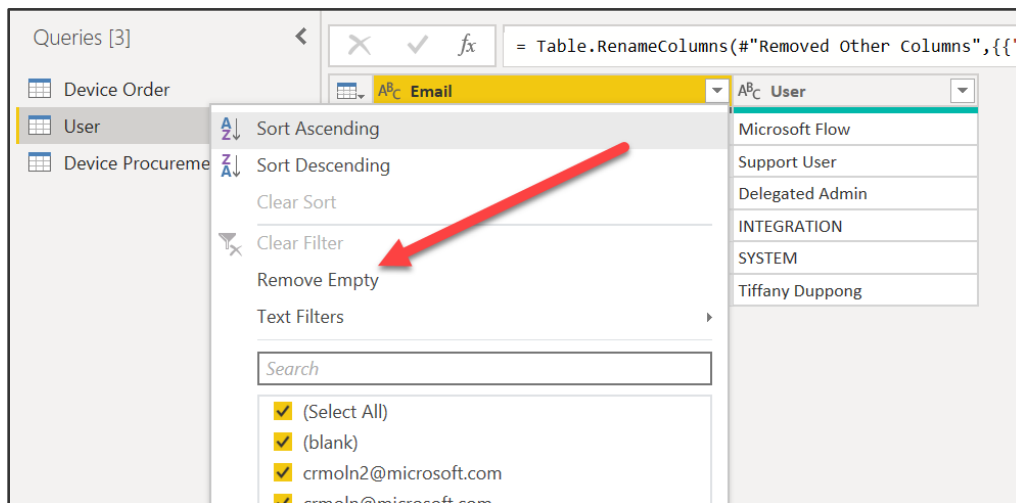


14. Rename the **domainname** column to **Email** and the **fullname** column to **User**.

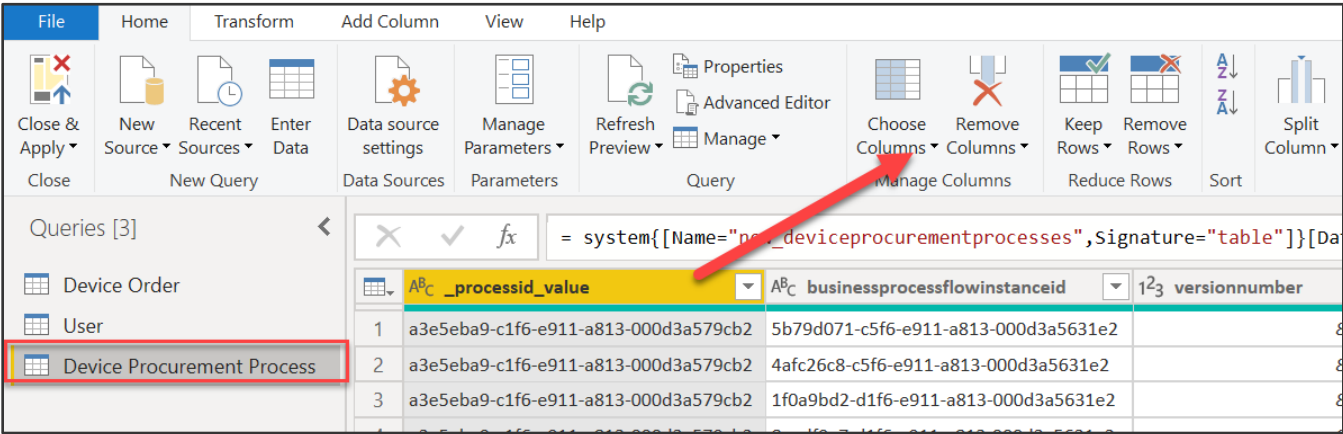
15. Click Sort on the **Email** column.



16. Click **Remove Empty**.



17. Select the **Device Procurement Process** table and click **Choose Columns**.



18. Uncheck **Select All Columns**.

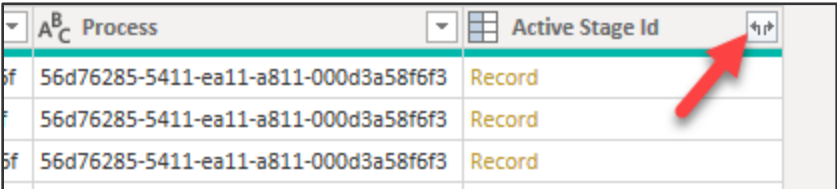
19. Select the columns listed below and click OK.

- bpf_name
- _processid_value
- completedon
- businessprocessflowinstanceid
- _bpf_CRC69_deviceorderid_value (Note: the CRC69 might be different in your list)
- Activestageid

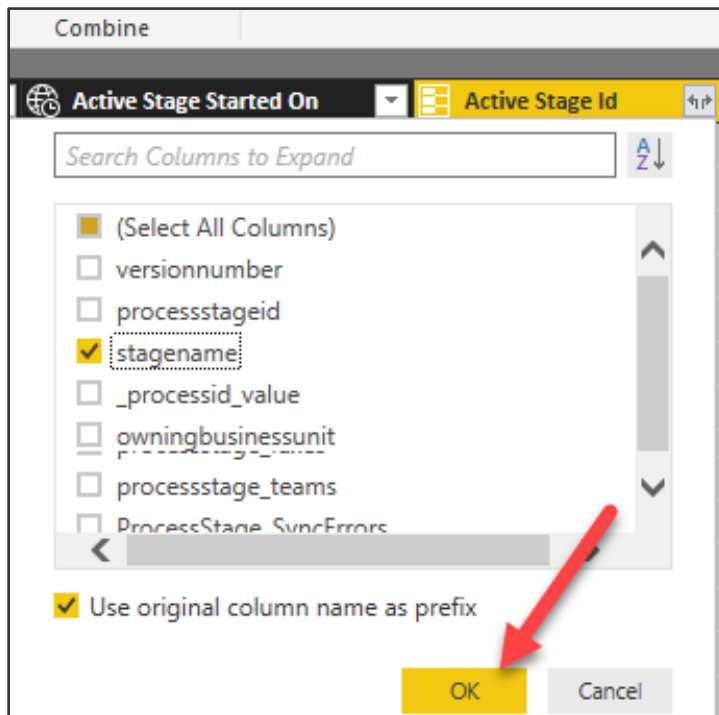
20. Rename the fields as shown below. You may rename the other fields.

Current Name	New Name
bpf_name	Name
_processid_value	Process
businessprocessflowinstanceid	Device Procurement Process
_bpf_CRC69_deviceorderid_value (Note: the CRC69 might be different in your list)	Device Order
activestageid	Active Stage Id
completedon	Completed On

21. Expand the **Active Stage** column. This will allow us to select one or more values from the related entity.



22. Select **stagename** and click OK.

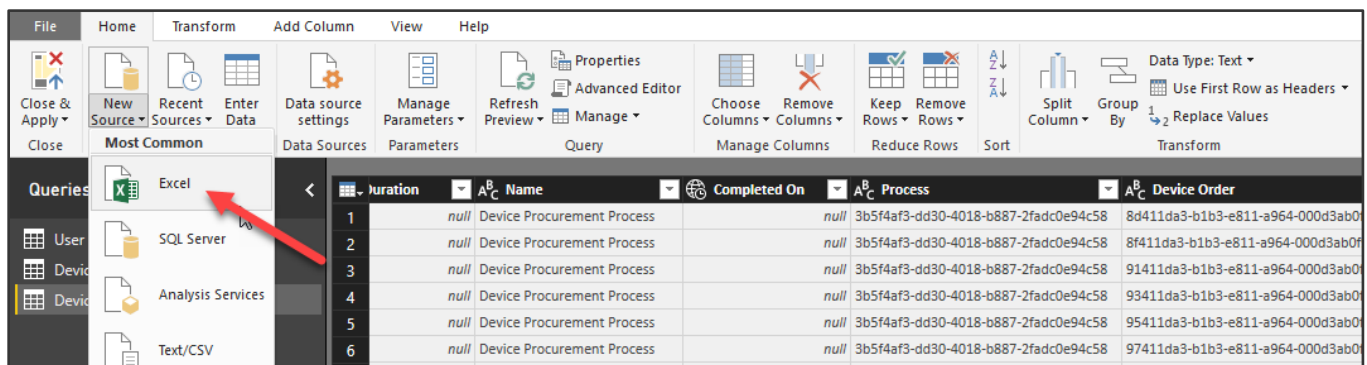


23. Rename the column to **Active Stage**.

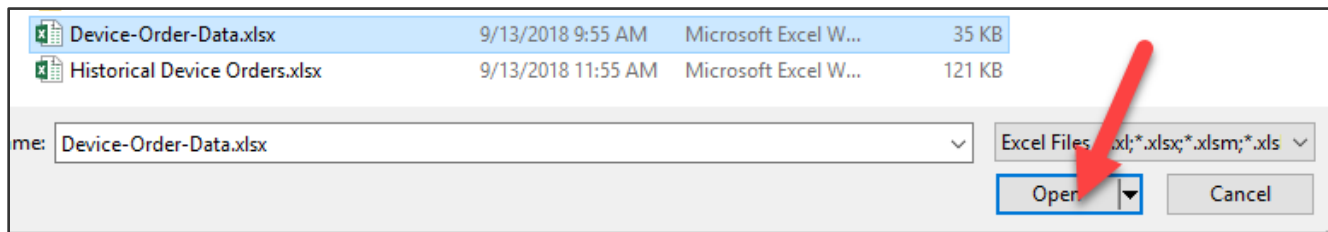
Process	Active Stage
85-5411-ea11-a811-000d3a58f6f3	Device Requested
85-5411-ea11-a811-000d3a58f6f3	Device Requested
85-5411-ea11-a811-000d3a58f6f3	Device Requested

Task 3: Add Device Manufacturer Data

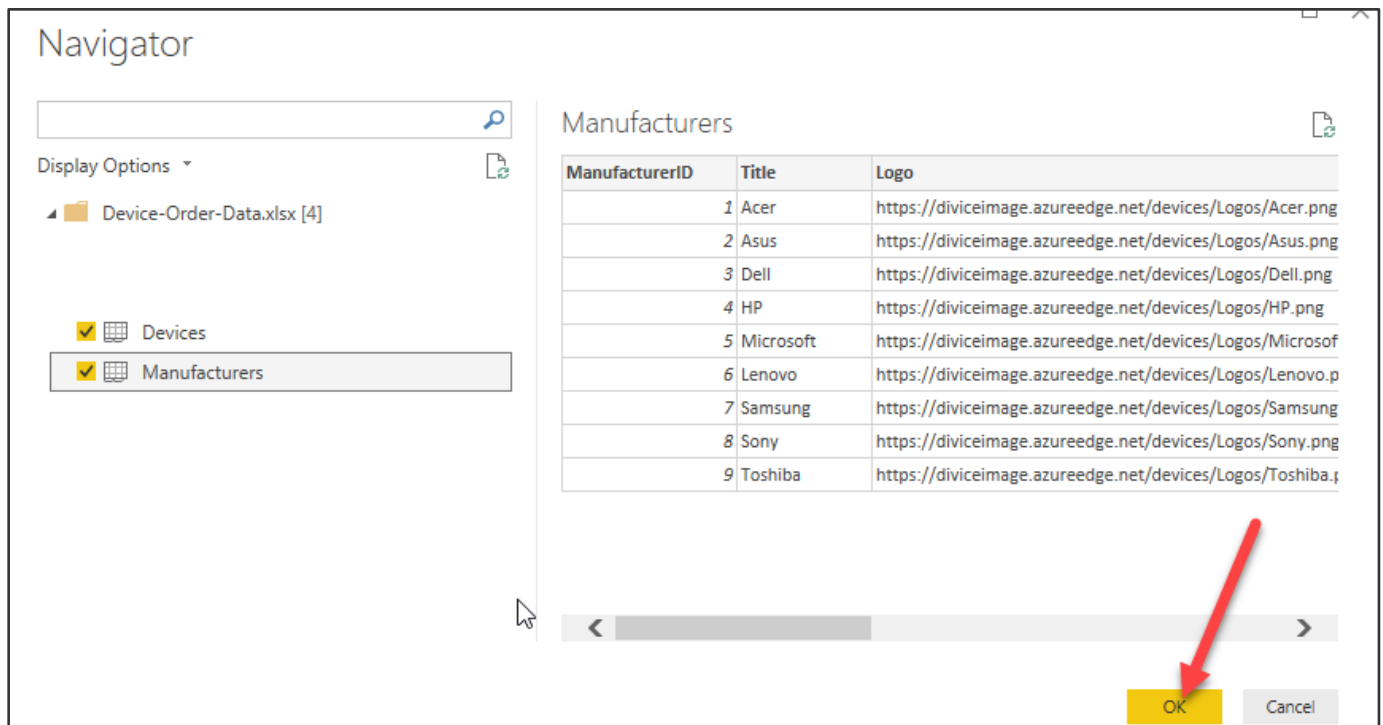
1. Select the Home tab, click **New Source**, and select **Excel**.



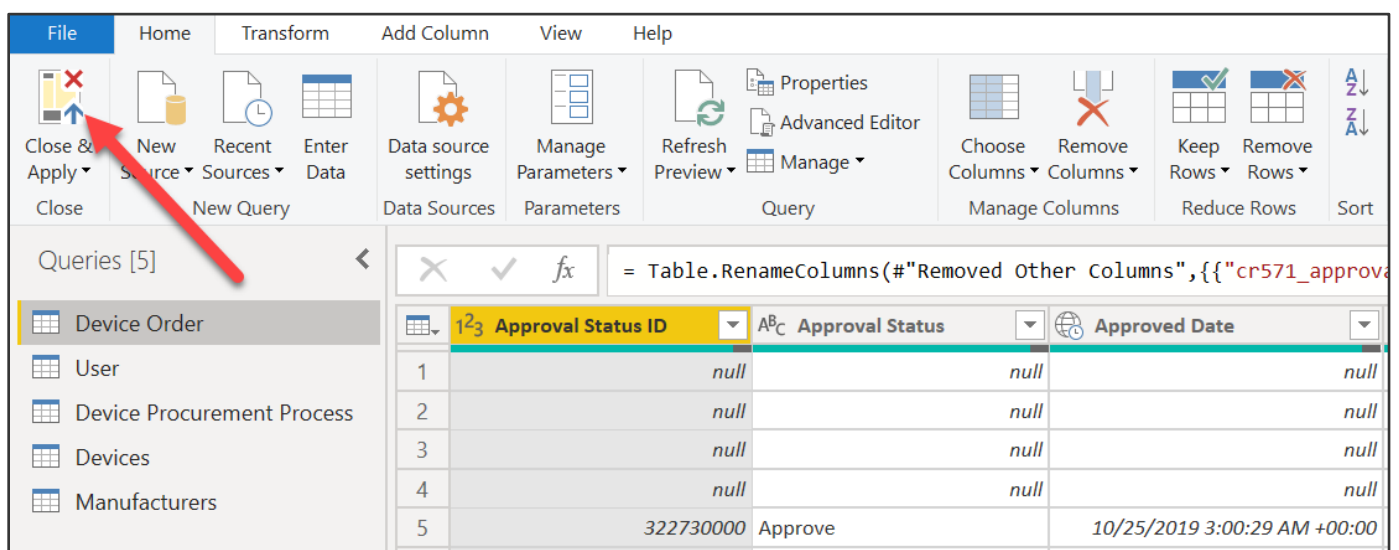
2. Select the Device Manufacturer Data (**Device Order Data.xlsx**) file provided to you and click Open.



3. Select the **Devices** and **Manufacturers** tables and click OK.



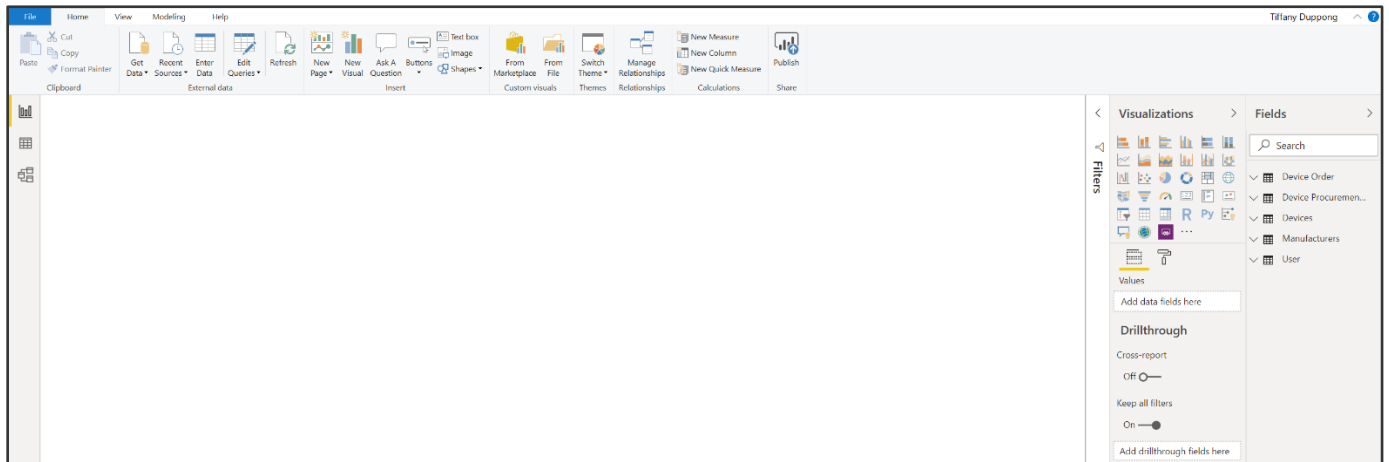
4. Click **Close and Apply**.



Note: Power Query has a lot of powerful transformations that can be done including trimming, replacing values, transpose, change data type, and many more. Each of these transformations are built as an M query that is

applied each time you refresh the data. You can see the query that is built by clicking on the Advanced Editor button.

5. The Power Query editor will close, and you will be back on the Power BI Desktop.

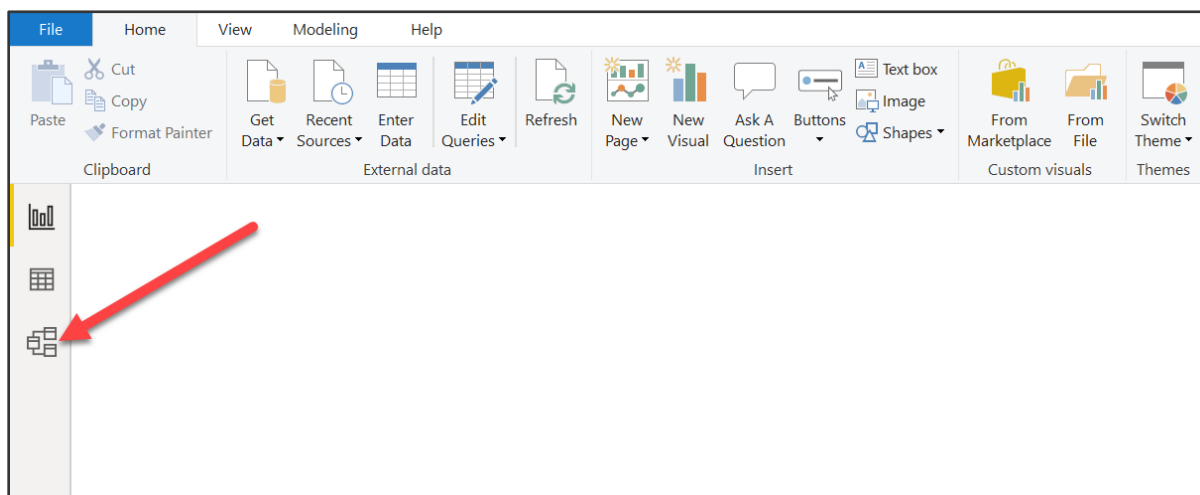


Exercise 4: Setup Relationships and Calculated Columns

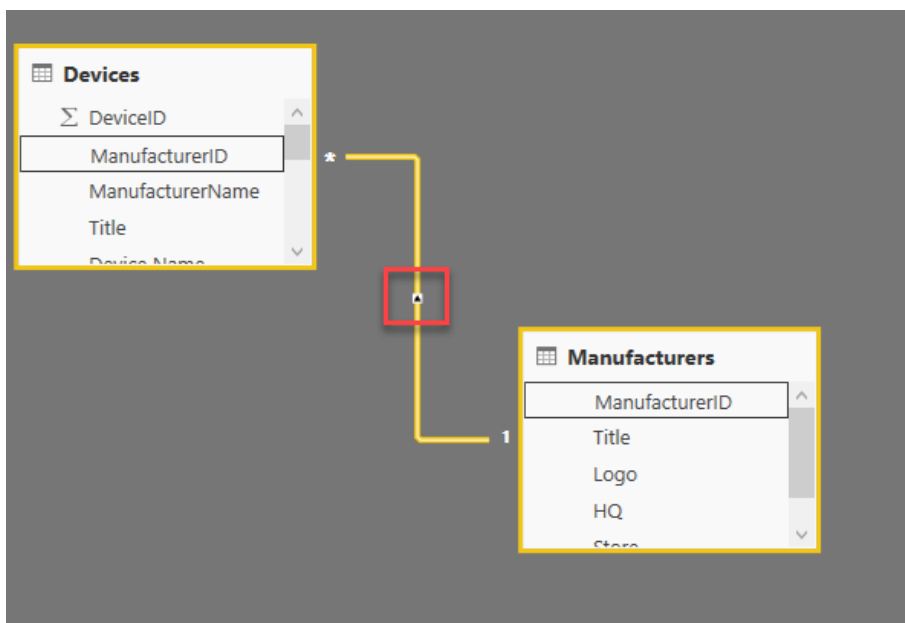
Task 1: Manage Relationships

In this task, you will establish the relationships between the data. You will notice auto detection identifies a couple of relationships within the data. In this task you will be establishing the remaining relationships.

1. Select **Relationships** from the left side navigation.



2. Double click the **Devices to Manufacturers** autodetected relationship and it will load the Edit relationship page. Here you can see the settings on the relationship and make any changes that was required to existing relationships.



3. Click **Cancel** to close the page.

Edit relationship

Select tables and columns that are related.

Devices

DeviceID	ManufacturerID	ManufacturerName	Title	Device Name	DeviceType	Price	Proc
1	1	Acer	Aspire U	Acer - Aspire U	All in one	1899.99	Intel Core i5-
2	1	Acer	Aspire M	Acer - Aspire M	Ultrabook	699.99	Intel Core i5-
3	1	Acer	Aspire S3	Acer - Aspire S3	Ultrabook	628	Intel Core i3-

Manufacturers

ManufacturerID	Title	Logo	HQ
1	Acer	https://deviceimage.azureedge.net/devices/Logos/Acer...	https://deviceimage.azureedge.net/devi
2	Asus	https://deviceimage.azureedge.net/devices/Logos/Asus...	https://deviceimage.azureedge.net/devi
3	Dell	https://deviceimage.azureedge.net/devices/Logos/Dell...	https://deviceimage.azureedge.net/devi

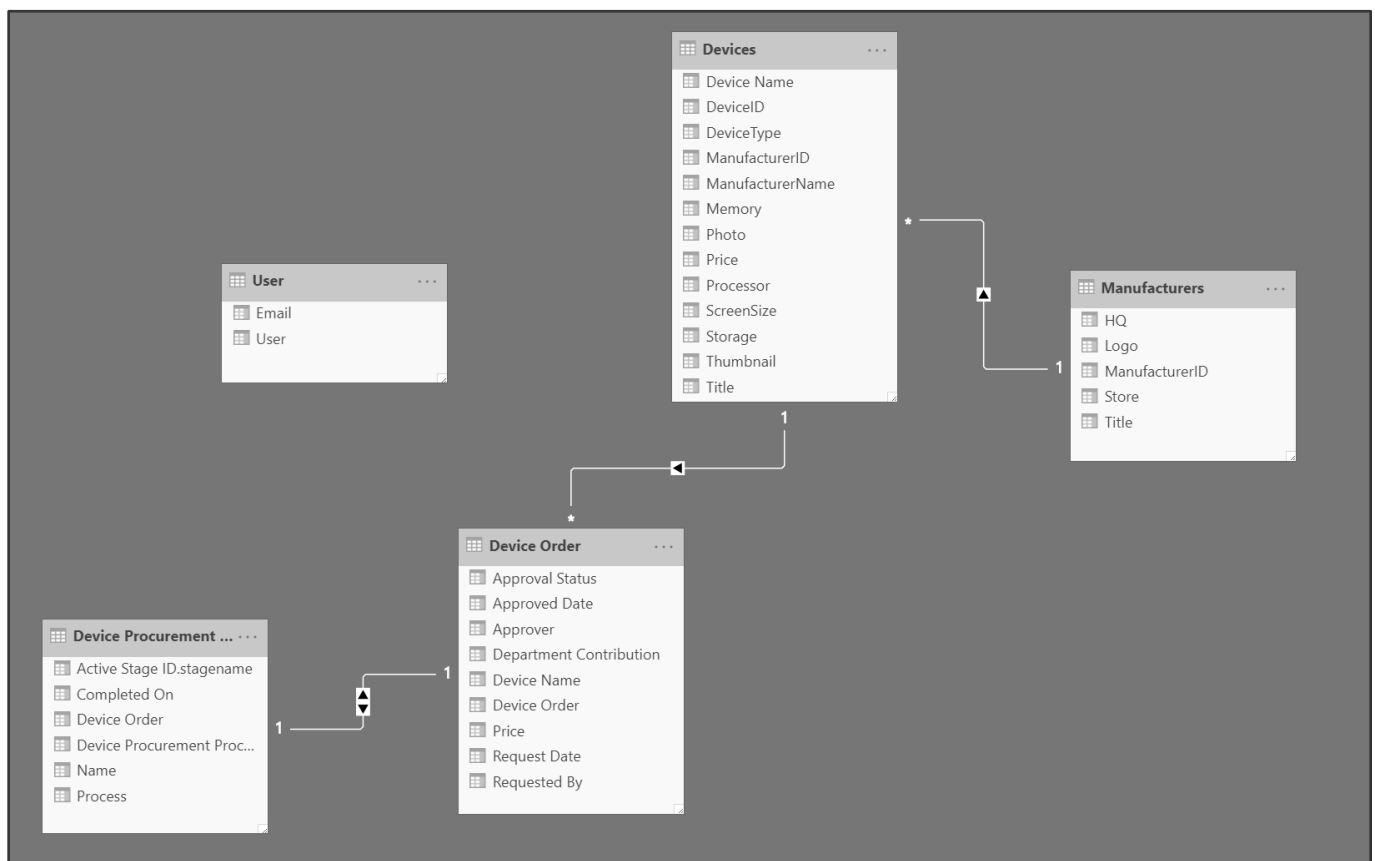
Cardinality: Many to one (*:1) Cross filter direction: Single

☒ Make this relationship active ☐ Apply security filter in both directions

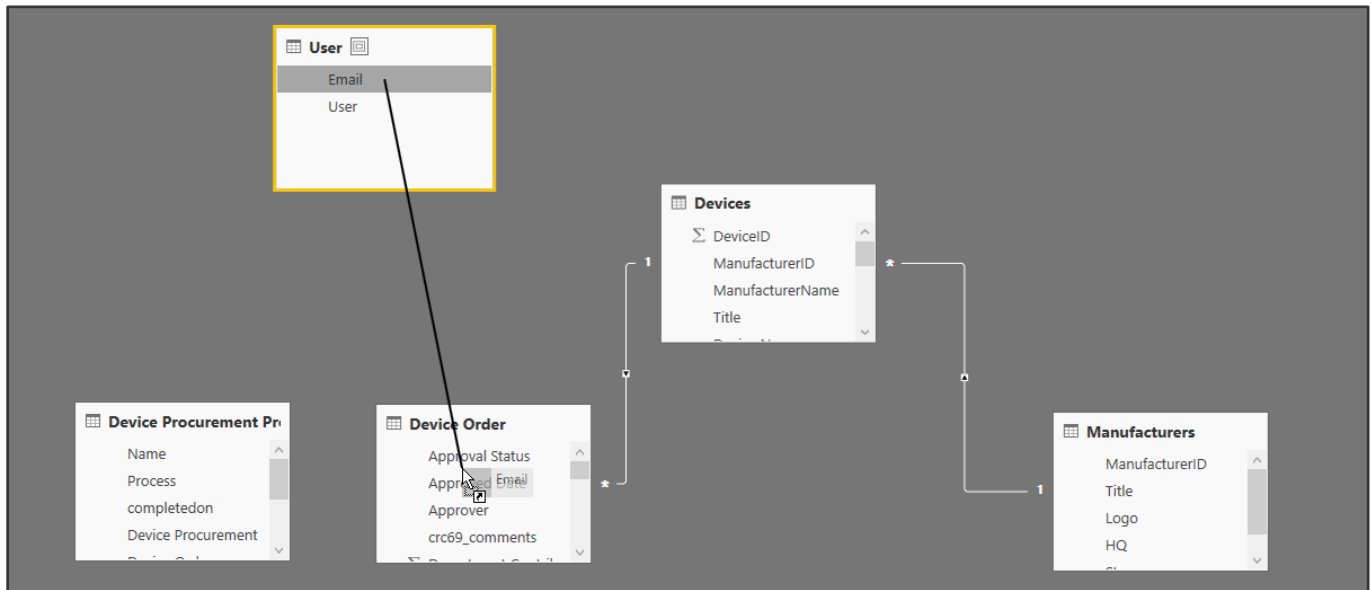
☐ Assume referential integrity

OK Cancel

4. Reposition the table as shown in the image below, so it will be easier to visualize the relationships. If you don't immediately see the User table, scroll left.



5. Drag the Email column of the **User** table to the **Device Order** table and release it.



6. A One to Many relationship will be created. Double click on the new relationship to edit the properties
7. Select **Requested By** from the **Device Order** table and **Email** from **User** table. Click **OK**. *Note: Yes the Requested By should also have e-mails in order for them to match, this is just different in the historical data you imported and won't impact your results in this lab.*

Device Order

	Estimated Ship Date	Price	Requested Date	Requested By	Capital Approved	Device Configured
0f992	7/29/2018 6:00:00 AM	999.99	7/5/2018 6:00:00 AM	Berenice Zarrella	False	Fal
0f992	11/20/2017 7:00:00 AM	999.99	10/25/2017 6:00:00 AM	Florencia Gee	False	Fal
0f992	6/14/2018 6:00:00 AM	999.99	5/27/2018 6:00:00 AM	Milagro Spires	False	Fal

User

Email	User
crmoln@microsoft.com	Support User
crmoln2@microsoft.com	Delegated Admin
bap_sa@microsoft.com	Business Application Platform Service account

Cardinality: Many to one (*:1)

Cross filter direction: Single

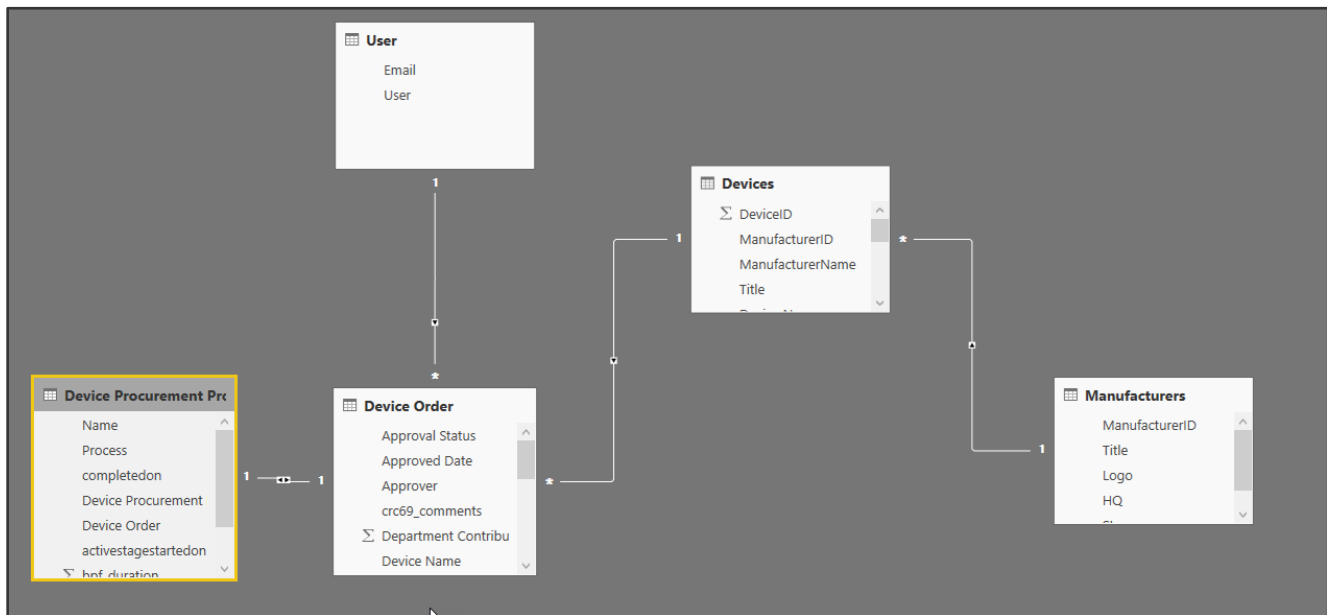
☒ Make this relationship active

☐ Assume referential integrity

☐ Apply security filter in both directions

OK Cancel

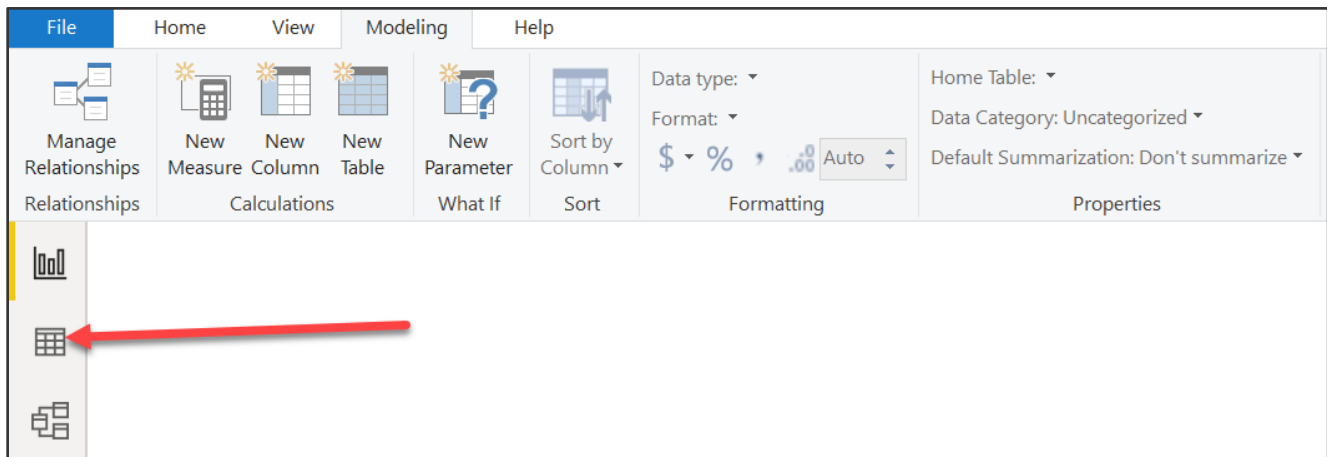
8. Your relationships will now look like the image below.



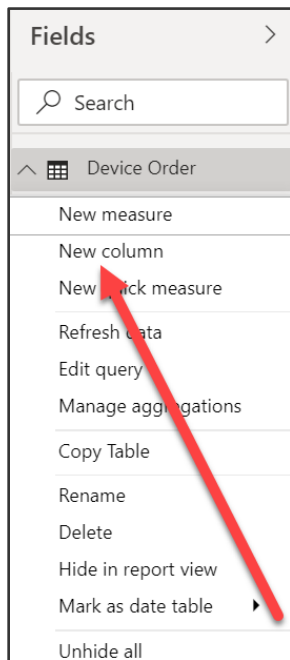
Task 2: Add Link to the Common Data Service (CDS) Record Form

A common ask when building a Power BI visual of CDS data is to allow the user to open the record using the CDS form. In this task you will build a column that will be a link to directly open the record.

1. Select **Data**.



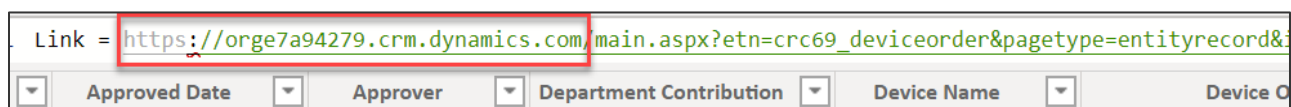
2. Right click on the **Device Order** table and select New Column.



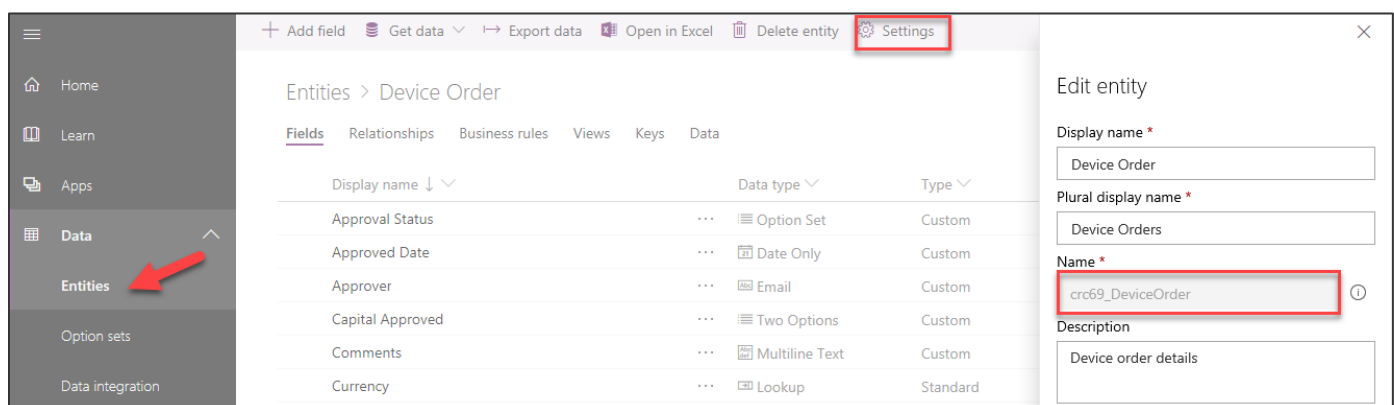
3. Provide the function below to build the column value. This needs to be adjusted to match your organization url and entity type name that can vary from environment to environment, for now paste it in exactly like you have below

Link = "https://orgb0a32835.crm.dynamics.com/main.aspx?etn=crc69_deviceorder&pagetype=entityrecord&id=%7B"&'Device Order'[Device Order]&"%7D"

4. Now get your organization URL, you can get this from <https://admin.powerplatform.microsoft.com> by selecting the environments and then ... and then open copy the url and replace it in the function



5. Next, we need to get the entity schema name for Device Order. You can get that by going to make.powerapps.com > Data > Entities, selecting the Device Order entity and clicking the Settings button



6. If your value is different than what is in the Link function, replace it in Power BI. This value can vary from environment to environment

Link = [https://orge7a94279.crm.dynamics.com/main.aspx?etn=crc69_deviceorder&pagetype=entityrecord&id=%7B"&'Device](https://orge7a94279.crm.dynamics.com/main.aspx?etn=crc69_deviceorder&pagetype=entityrecord&id=%7B)

7. Select the new column and from the Modeling tab click **Data Category**.

File

Home

Modeling

Manage Relationships

Relationships

New Measure

New Column

New Table

Calculations

Home Table: ▼

Data Category: Uncategorized ▼

Default Summarization: Don't summarize ▼

Properties

Manage Roles

View as Roles

Security

us ▼	Approved Date ▼	Device Name ▼	Device Order	Link ▼
	4/23/2018 12:00:00 AM	Asus - N56VJ	32e7c127-39f7-e911-a813-000d3a56	https://orge7a94279.crm.dynamics.com/main.aspx?etn=cr571Dev
	3/19/2018 12:00:00 AM	Dell - XPS 14	4be7c127-39f7-e911-a813-000d3a56	https://orge7a94279.crm.dynamics.com/main.aspx?etn=cr571Dev
	7/6/2018 12:00:00 AM	Dell - XPS 14	72e7c127-39f7-e911-a813-000d3a56	https://orge7a94279.crm.dynamics.com/main.aspx?etn=cr571Dev
	4/25/2018 12:00:00 AM	Dell - Alienware M14x	93e7c127-39f7-e911-a813-000d3a56	https://orge7a94279.crm.dynamics.com/main.aspx?etn=cr571Dev
	3/4/2018 12:00:00 AM	Dell - XPS 14	9ee7c127-39f7-e911-a813-000d3a56	https://orge7a94279.crm.dynamics.com/main.aspx?etn=cr571Dev

8. Select **Web URL**.

File Home Modeling Help

Manage Relationships Relationships

New Measure New Column New Table Calculations

New Parameter What If

Sort by Column Sort

Data type: Text Format: Text \$ % , .00 Auto

Home Table: Data Category: Uncategorized

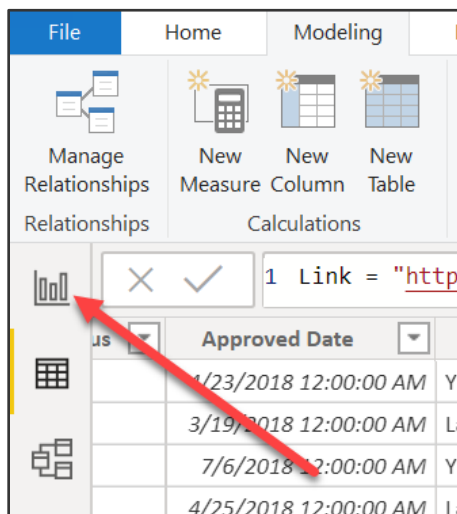
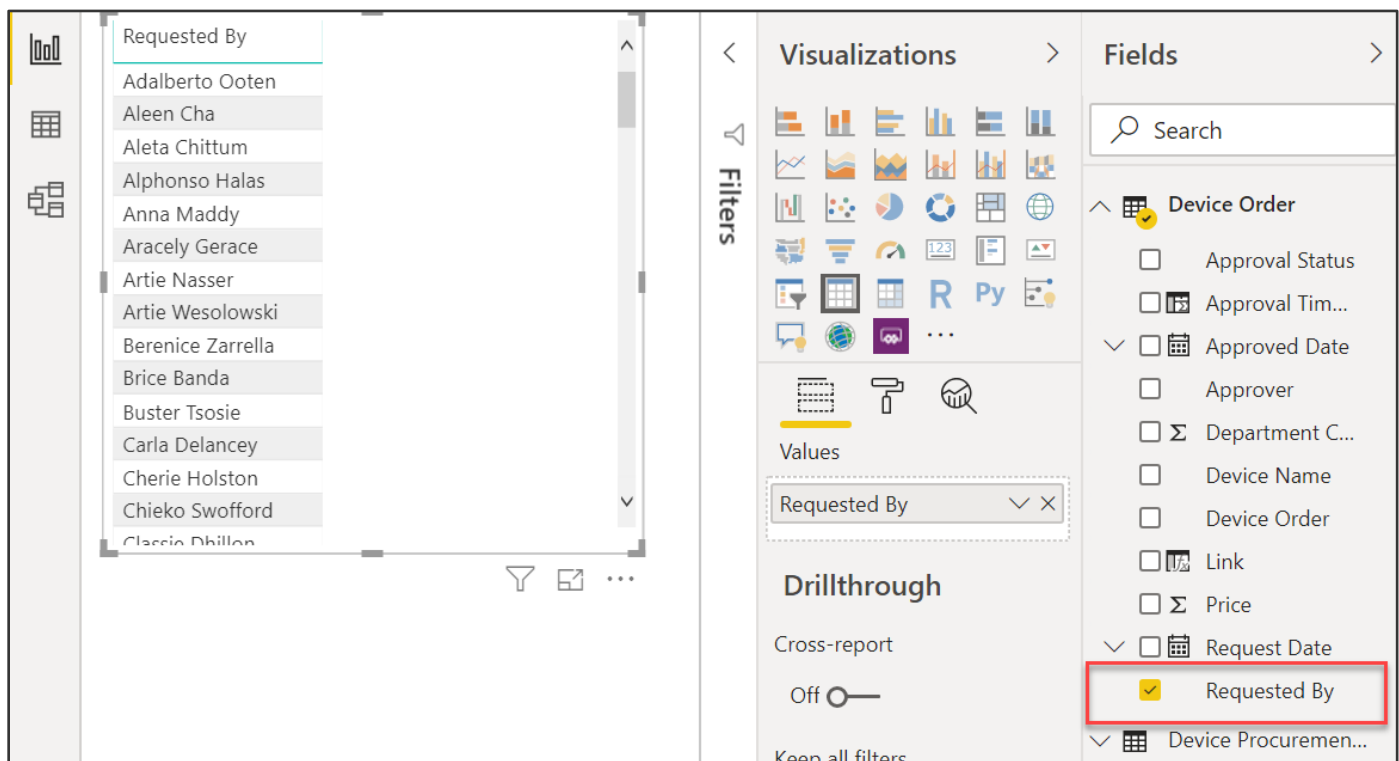
- Uncategorized
- Address
- City
- Continent
- Country/Region
- County
- Latitude
- State or Province
- Web URL
- Image URL
- Barcode

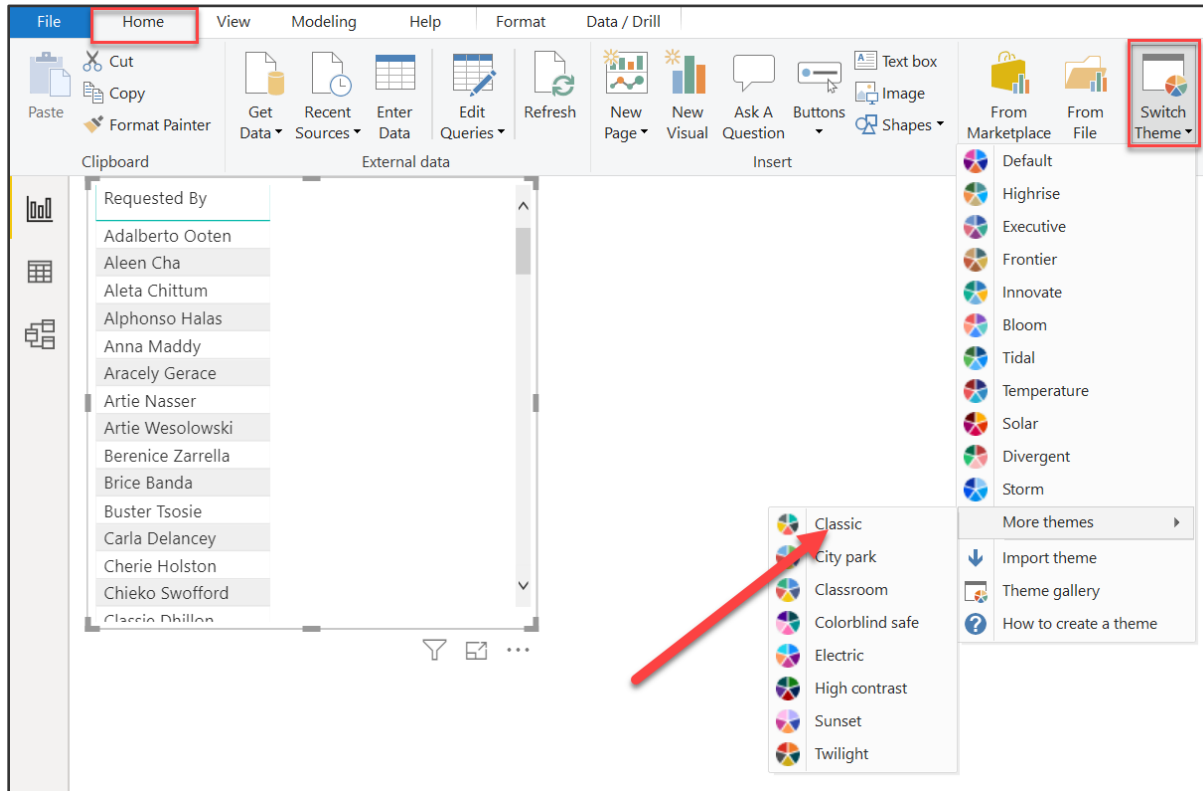
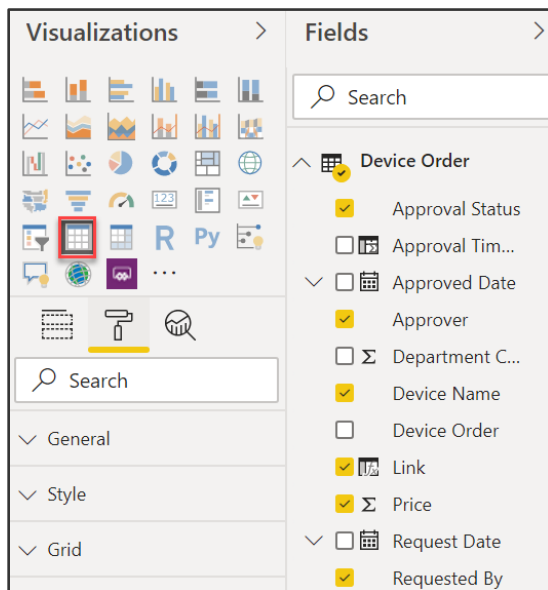
1 Link = "https://orger7a94279.crm.dynamics.com/main.aspx?..."

us	Approved Date	Approver	Department Contribution
	4/23/2018 12:00:00 AM	Yuri Mignone	100
	3/19/2018 12:00:00 AM	Latrice Critelli	100
	7/6/2018 12:00:00 AM	Yuri Mignone	100
	3/9/2018 12:00:00 AM	Emanuel Chapdelaine	100
	2/25/2018 12:00:00 AM	Filomena Boldt	100
	6/4/2018 12:00:00 AM	Yuri Mignone	100
	2/17/2018 12:00:00 AM	Gita Vannote	100
	5/18/2018 12:00:00 AM	Tommy Kindrick	100
	5/18/2018 12:00:00 AM	Patience Patman	100

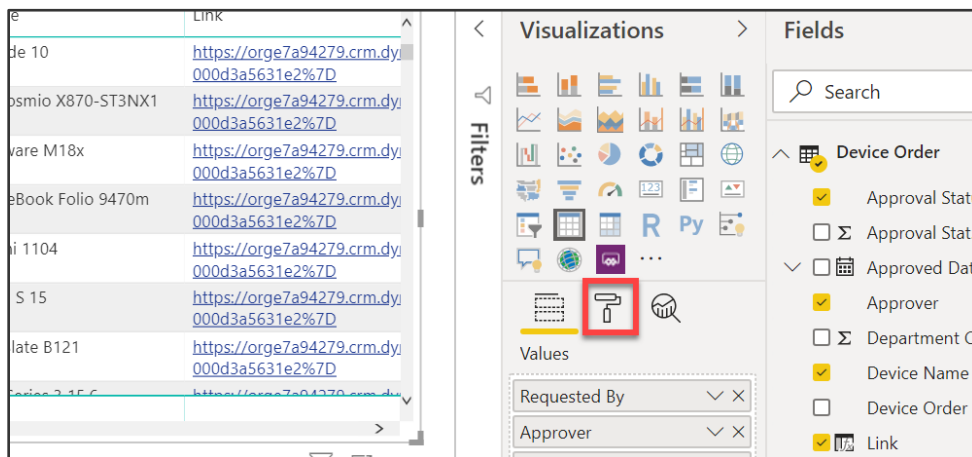
Asus - N56VJ f3dcbc2d-39f7-e9

Acer - ICONIA W7 f7dcbc2d-39f7-e9

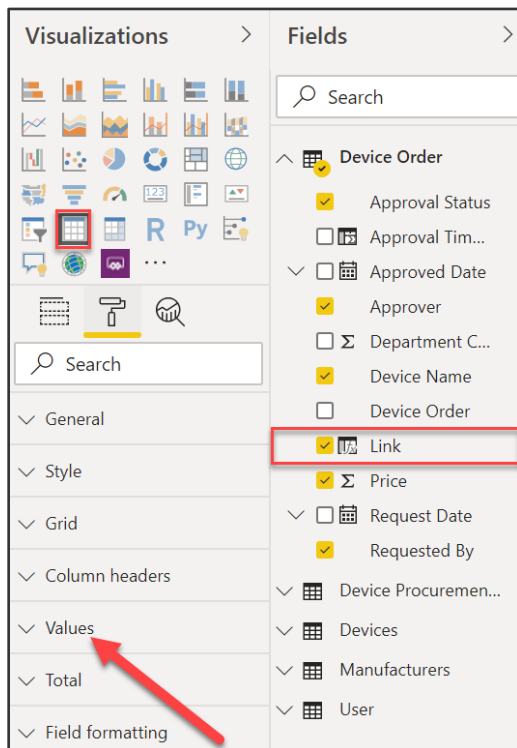
9. Select **Reports**.10. Expand the Device Order table and select **Requested By**.

11. From the Home tab, switch the theme to **Classic**.12. Select **Approver**, **Approval Status**, **Price**, **Device Name**, and **Link** from the Device Order table.

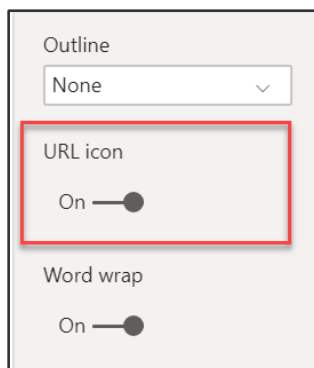
Price	Device Name	Link
479.99	Toshiba - Satellite C870-ST3NX3	https://challengephoto.crm11.dynamics.com/main.aspx?etn=cr2fe_deviceorder&pagetype=entityrecord&id=%7B00e578c6-0288-e911-a980-0022480149c2%7D
1,499.00	Asus - Eee Slate B121	https://challengephoto.crm11.dynamics.com/main.aspx?etn=cr2fe_deviceorder&pagetype=entityrecord&id=%7B013171cc-0288-e911-a980-0022480149c2%7D
1,299.99	Samsung - Series 9 13.3	https://challengephoto.crm11.dynamics.com/main.aspx?etn=cr2fe_deviceorder&pagetype=entityrecord&id=%7B018592ae-0288-e911-a980-0022480149c2%7D

13. Select the **Format** tab

14. Select the Link column and from the Format tab, expand Values.



15. Turn on the URL Icon.



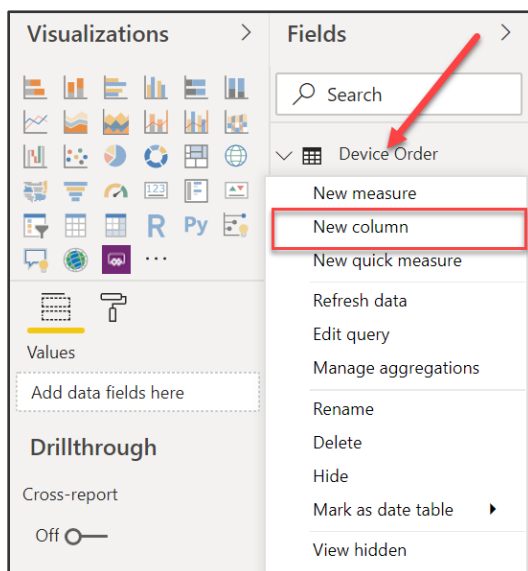
16. Click on the link. Your CDS record should open.

Requested By	Approver	Approval Status	Price	Device Name	Link
Anna Maddy	Patience Patman	Approve	1,299.99	Asus - ET2701INTI	Link
Martie Nasser	Emanuel Chapdelaine	Approve	799.99	Sony - VAIO S	Link
Chieko Swofford	Latrice Critelli	Approve	879.00	Lenovo - B540	Link
Morsche Espinal	Filomena Boldt	Approve	699.99	Lenovo - Essential G Series	Link
Collyie Garn	Gita Vannote	Approve	699.99	Lenovo - G480	Link
Concetta Nagao	Emanuel Chapdelaine	Approve	419.99	Samsung - Series 3 15.6	Link
Catharina Mazon	Joanna Hoos	Approve	379.99	Acer - Aspire E	Link
Alphonso Halas	Latrice Critelli	Reject	419.99	Samsung - Series 3 15.6	Link
Terline Younce	Yuri Mignone	Reject	1,399.99	Asus - ET2411INTI	Link
Amey Revard	Emanuel Chapdelaine	Reject	1,099.99	Asus - Zenbook	Link
Susan Coover	Patience Patman	Approve	1,349.00	HP - HP EliteBook Folio 9470m	Link

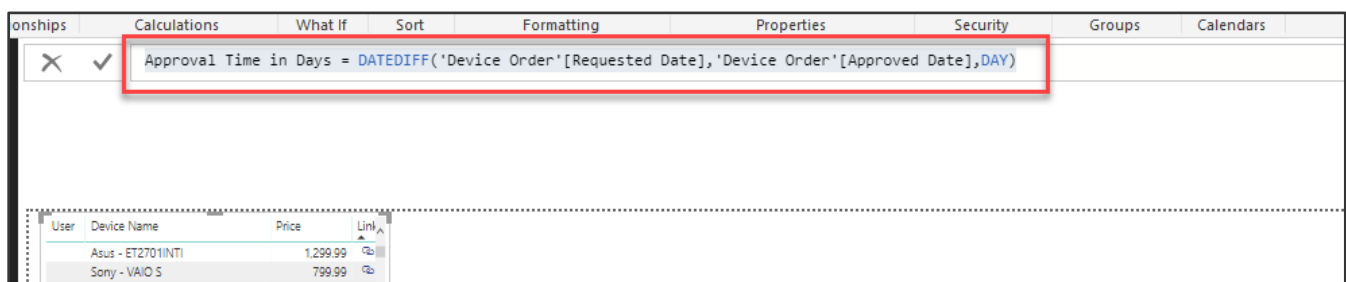
Task 3: Add a Calculated Field for approval time

In this task, you will add a calculated column with the approval time in days, you will add a column chart to the report page.

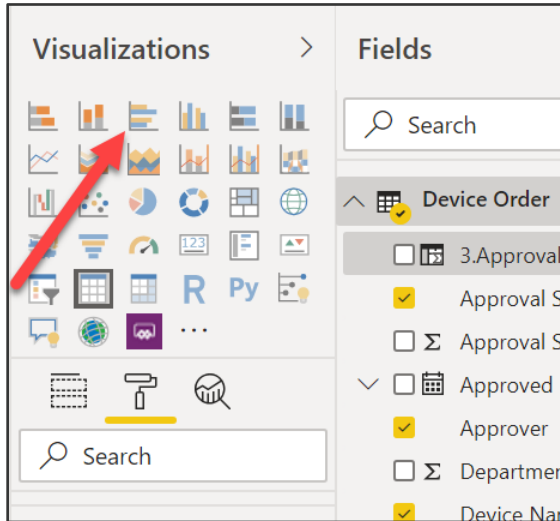
1. Right click on the **Device Order** table and select **New Column**.



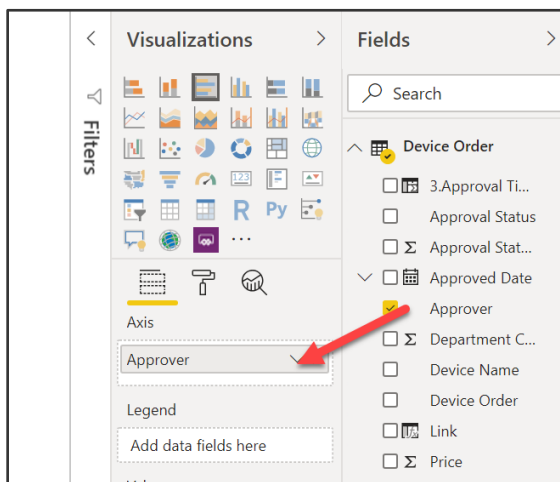
2. Type in the formula bar.
3. Approval Time in Days = DATEDIFF('Device Order'[Request Date], 'Device Order'[Approved Date], DAY)



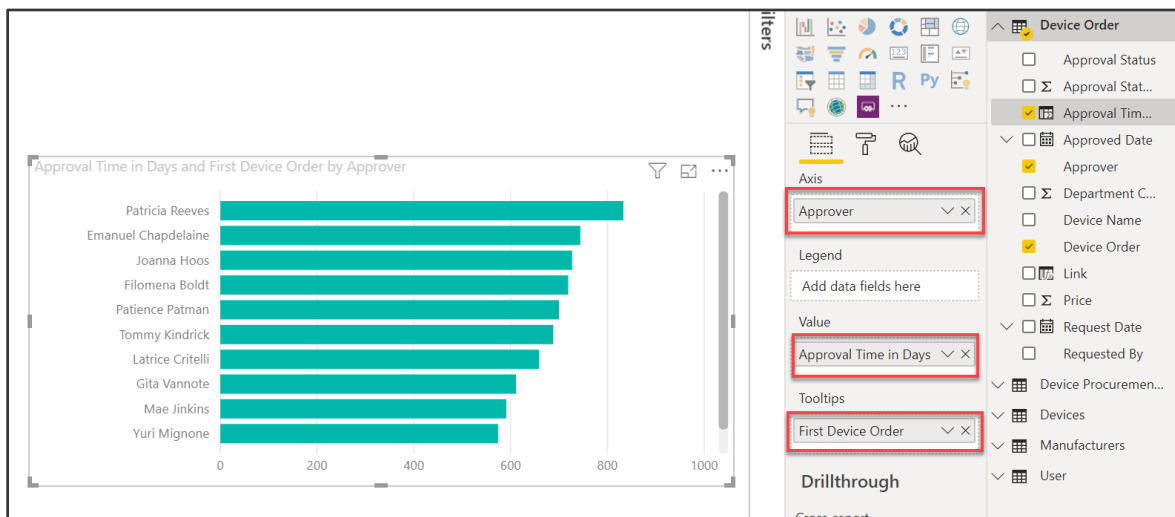
4. Select the canvas to make sure the list of device orders is no longer selected
5. Click **Clustered Bar Chart**.



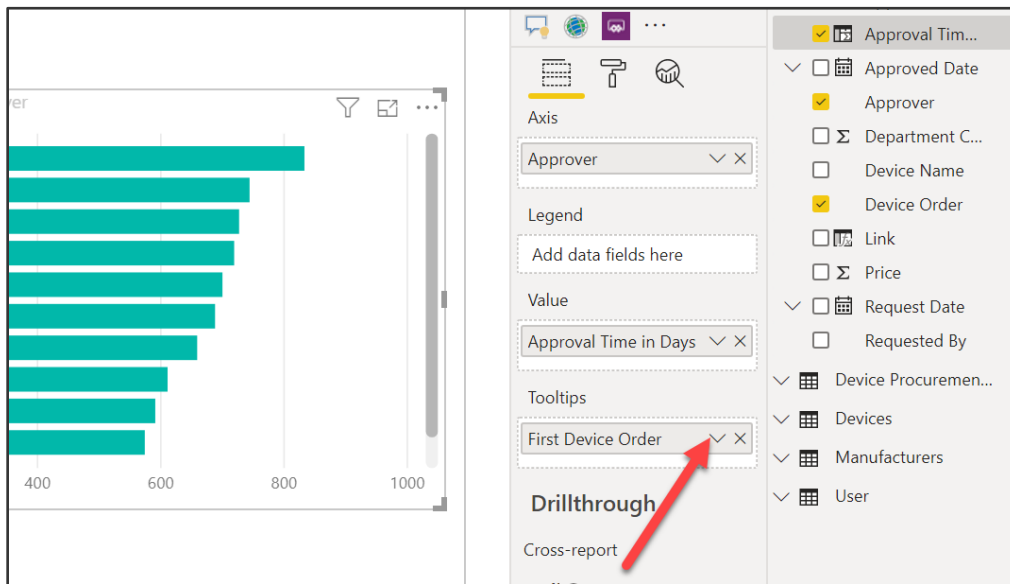
6. Select the chart you added, drag the Approver column and drop it in the Axes target.



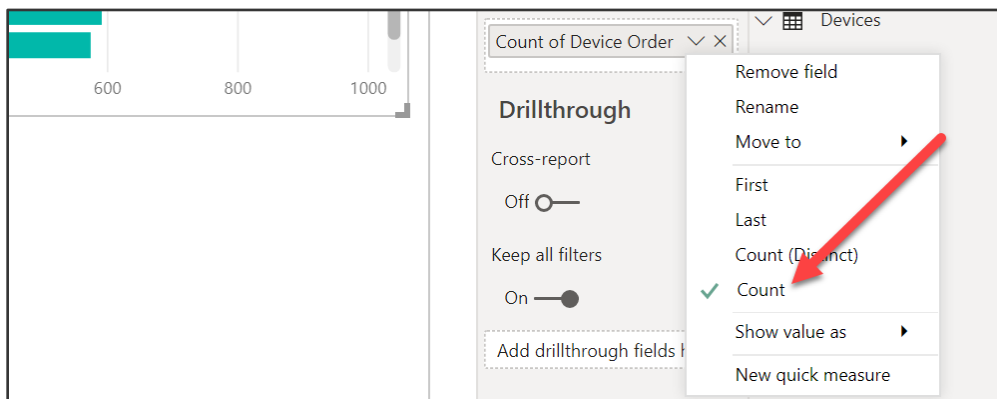
7. Drag **Approval Time in Days** to the Value target and drag **Device Order** to the Tooltip target.



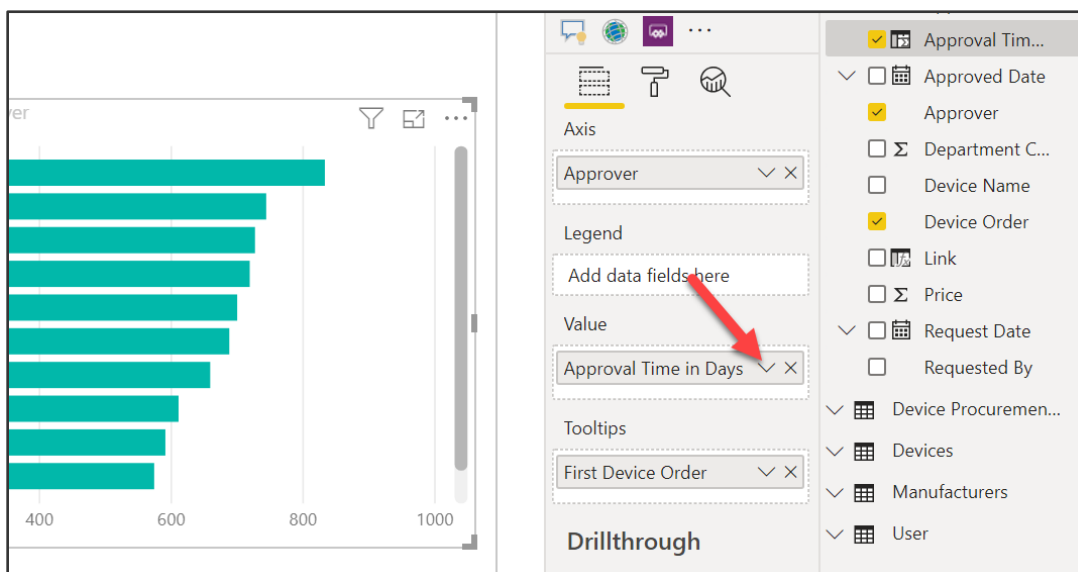
8. Click on the dropdown button next to the **First Device Order**.

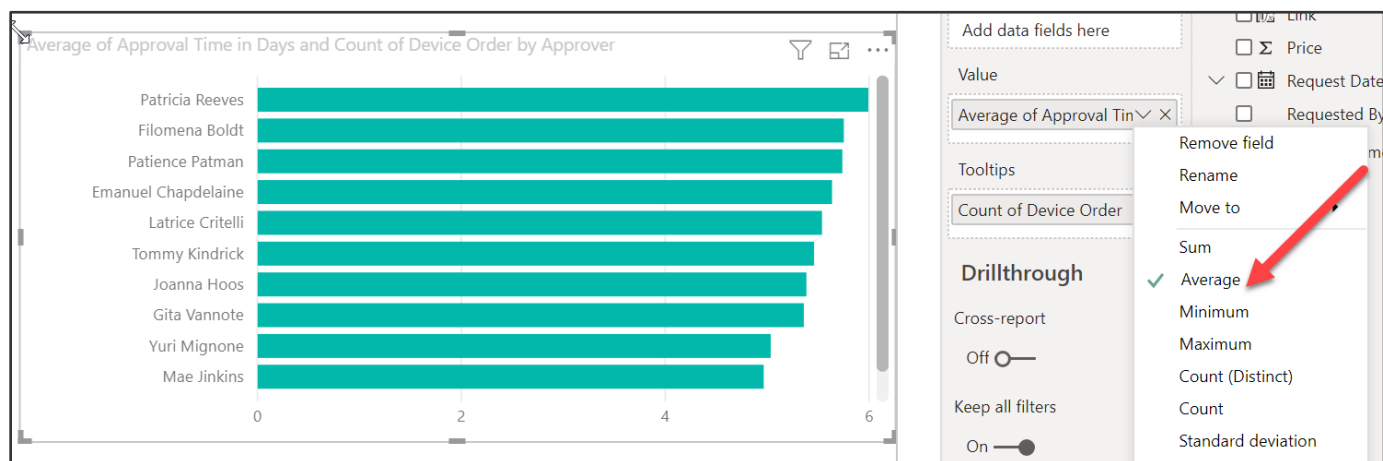
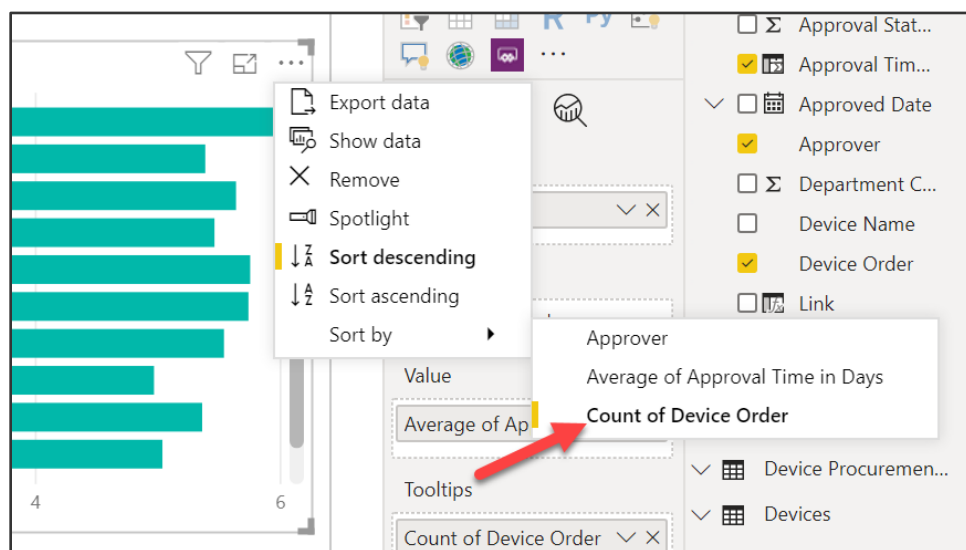


9. Select **Count**.

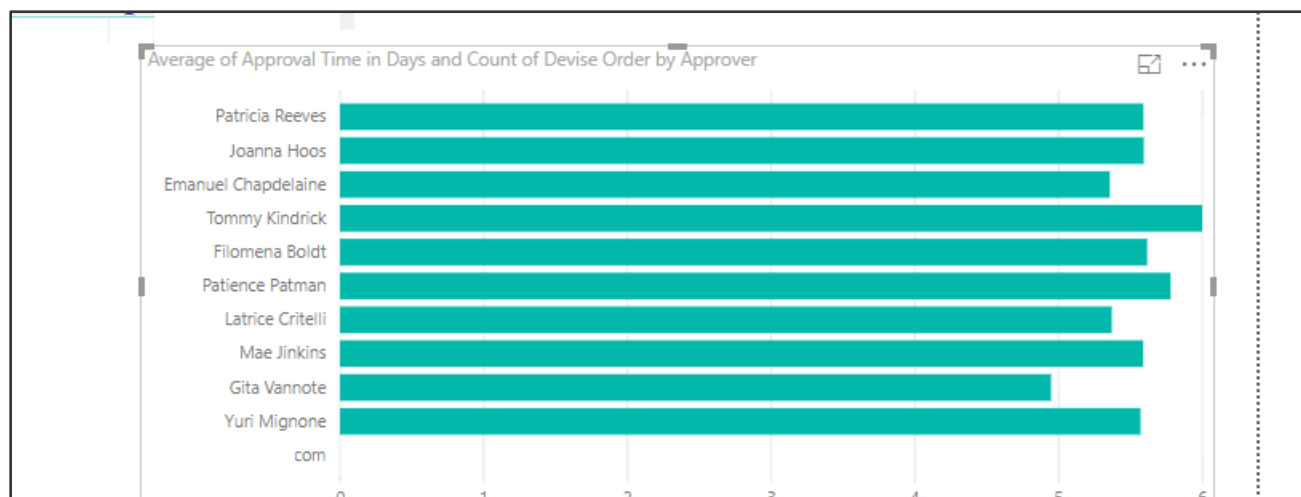


10. Click on the dropdown button next to the **Approval Time in Days**.



11. Select **Average**.12. Click on the chart ellipses (the ...), click Sort By, and select **Count of Device Order**.

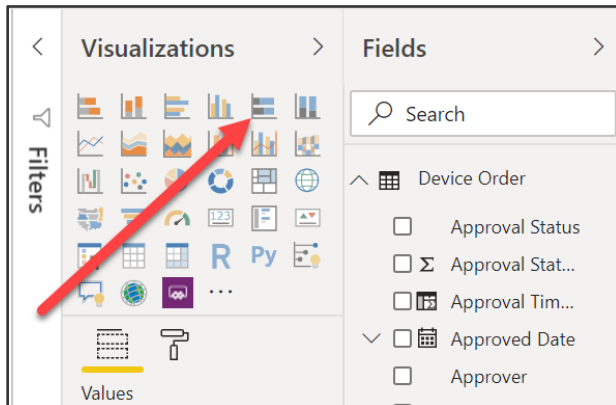
13. Your chart will now similar to the image below.



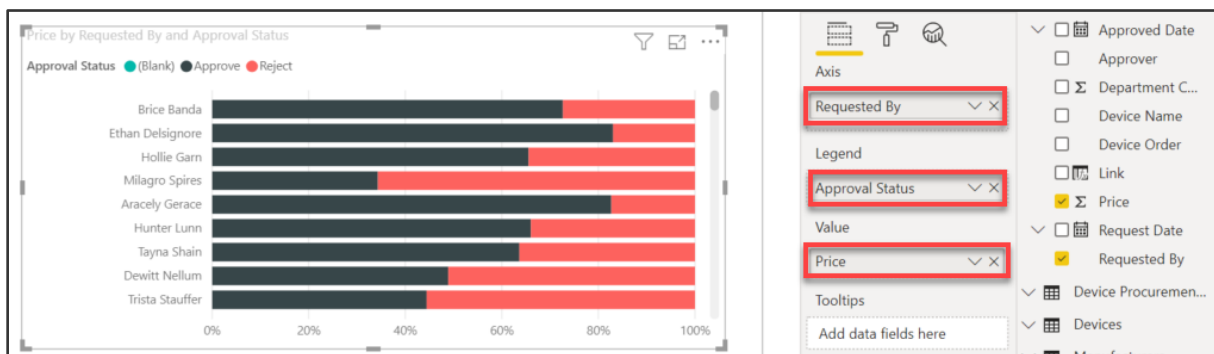
Exercise 5: Add visuals to the report

Task 1: Add Stacked Bar Chart of orders

1. Select an empty area of the canvas and click on the Stacked Bar Chart.



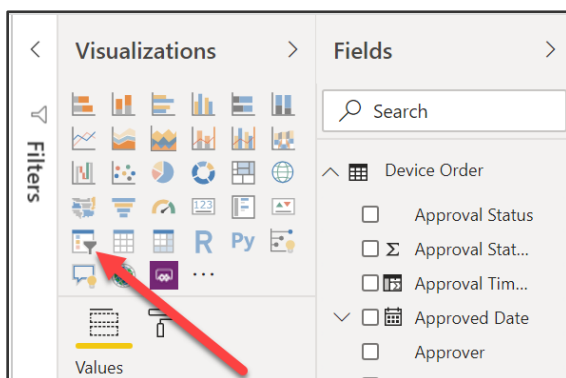
2. Select the columns below for the stacked bar chart. Note: Your chart may not look the same based on how many rejected items you have in your data. You can edit the records in CDS and reject more if you want!



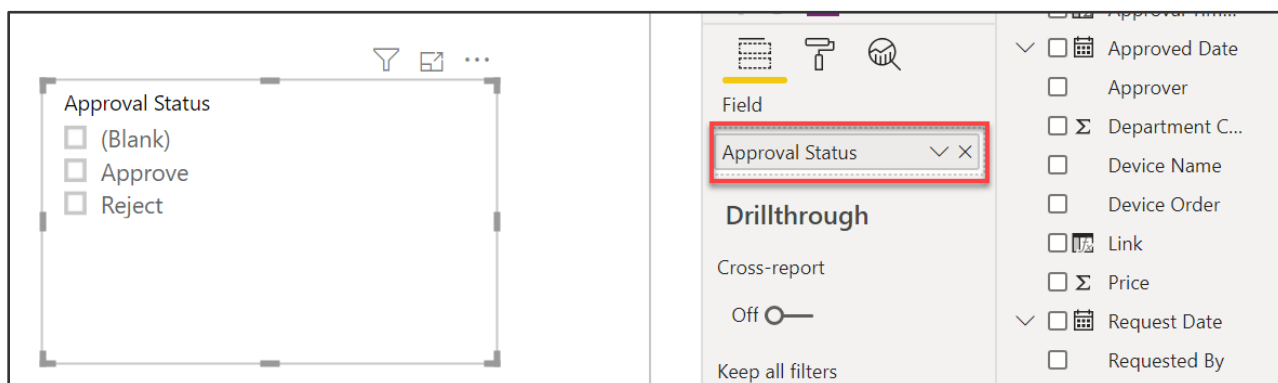
3. Note: If all of your approval status values show as null, you will need to repeat steps

Task 2: Add a Slicer on Approval Status

1. Select an empty area of the canvas and click Slicer.

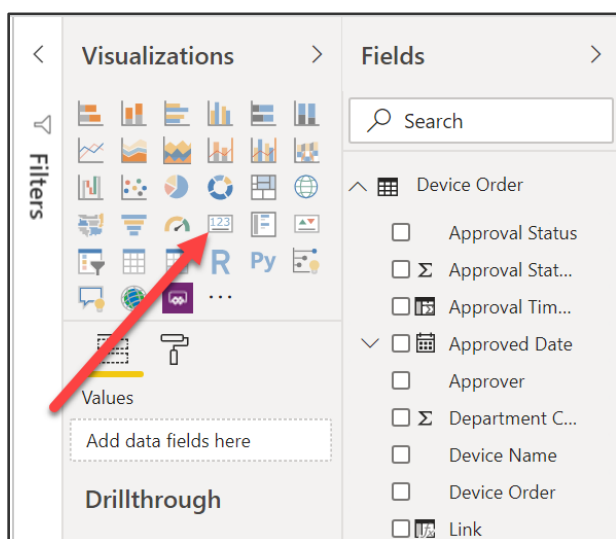


2. Drag the Approval Status to the Field target.

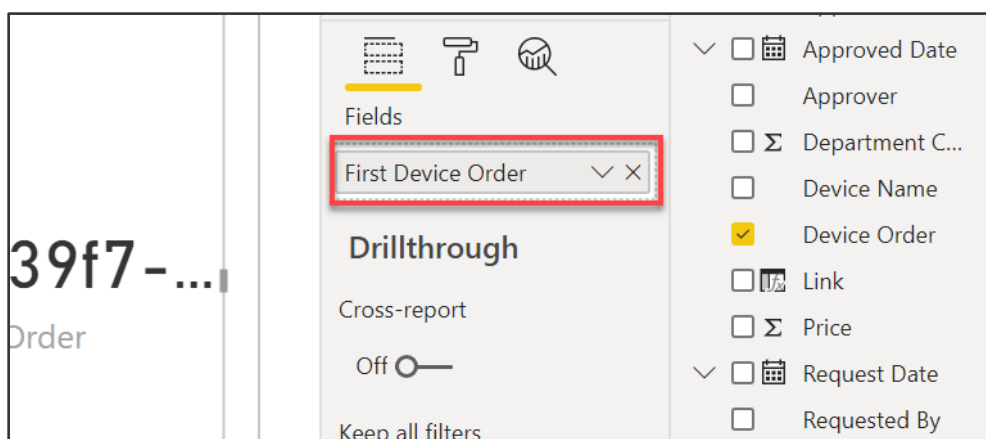


Task 3: Add Cards with Device Order statistics

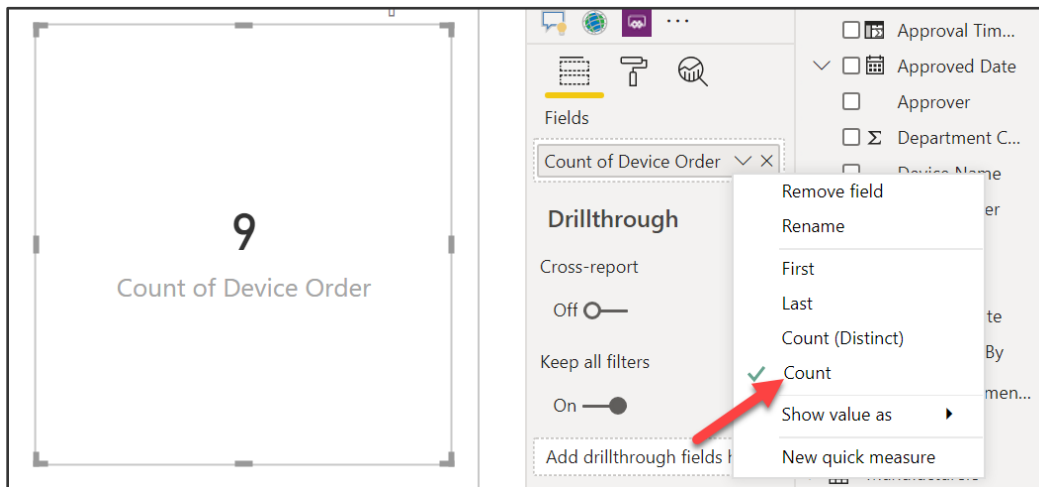
1. Select an empty area of the canvas and click Card.



2. This card will show the total count of devices ordered. Select the card and drag Device Order to the Fields target.

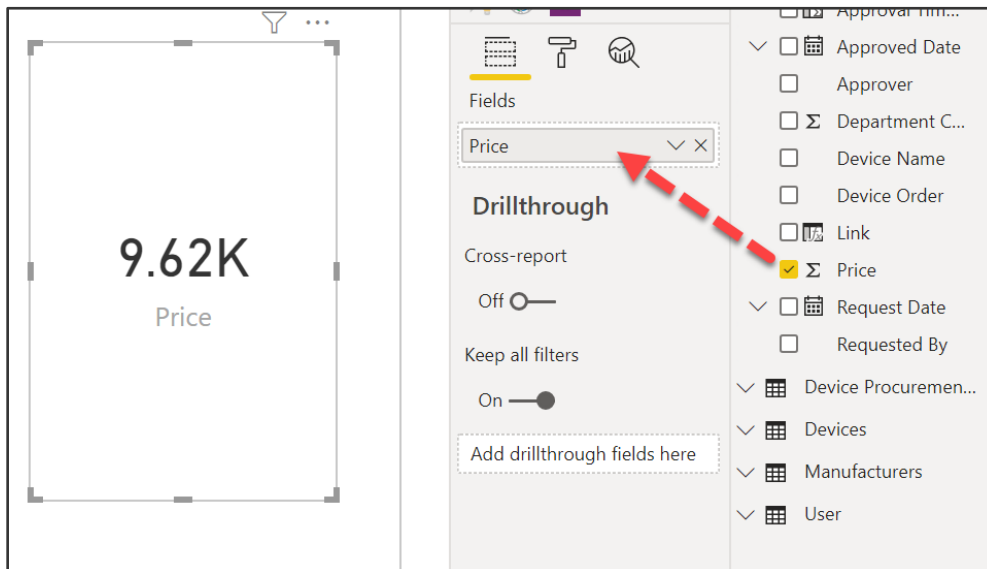


3. Select Count.

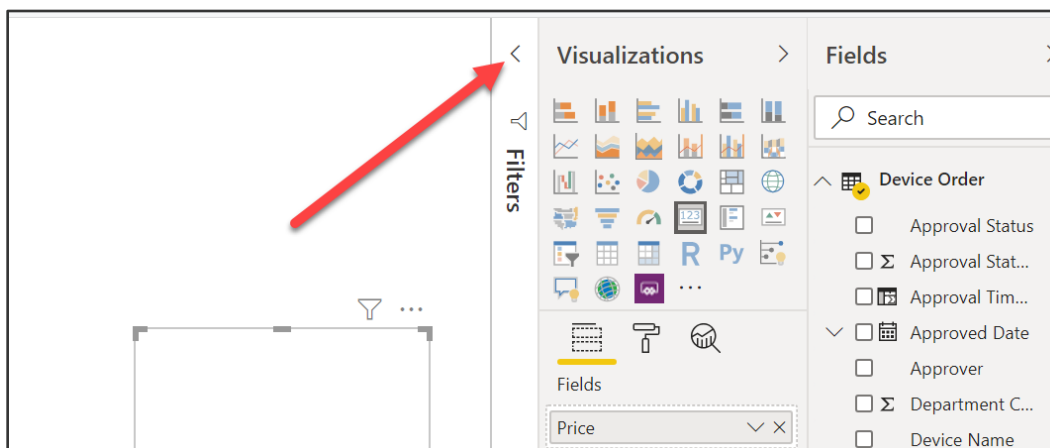


4. Add another Card to the canvas. This card will display total amount spent on approved devices.

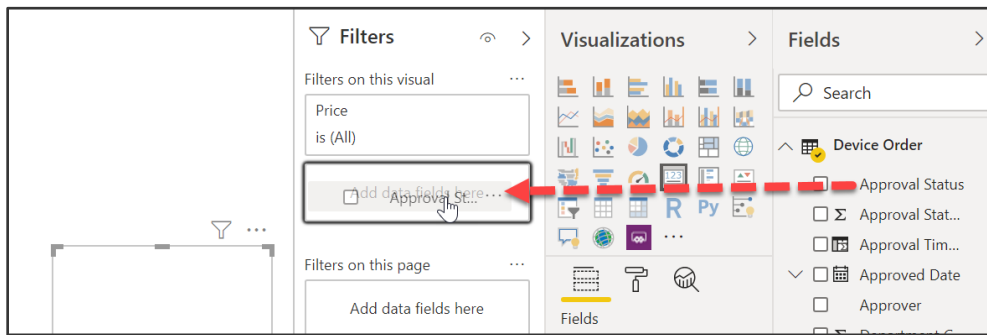
5. Drag the Price to the Fields target



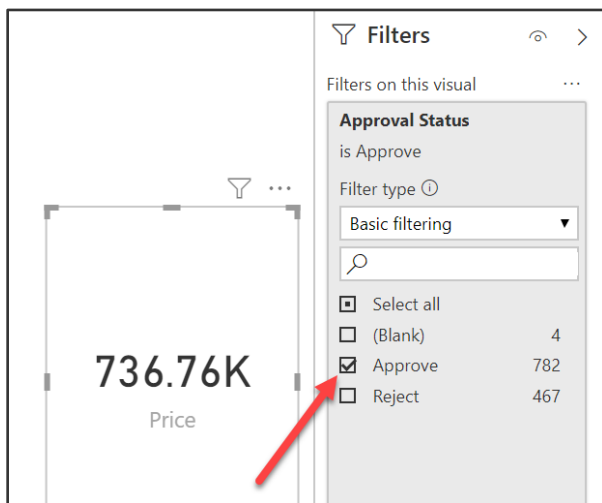
6. Click to expand the Filters pane



7. Drag the Approval Status to the Filters on this Visual target.



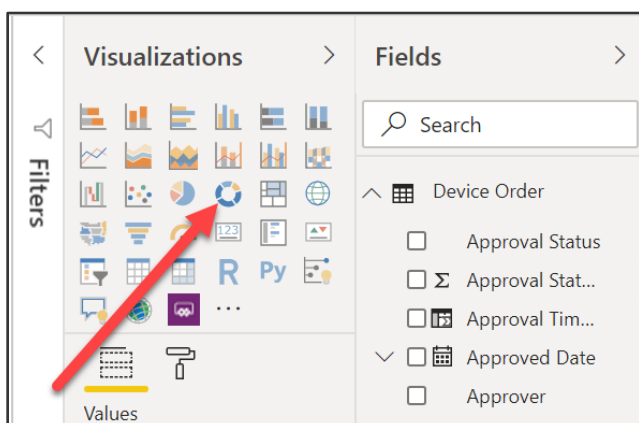
8. Select Approve to filter the amount only to those orders that are approved.



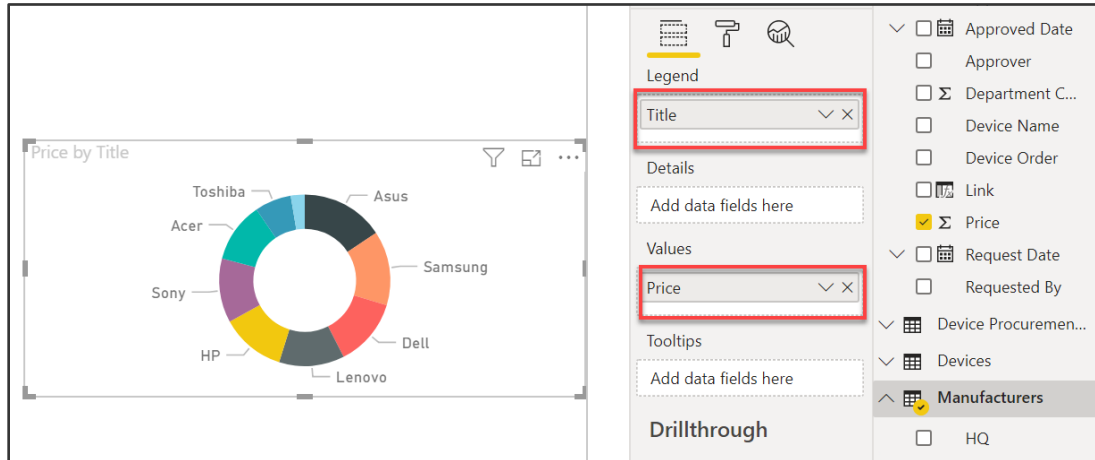
Task 4: Add a Donut Chart by Manufacture

In this task, you will add a Donut to represent the amount spent by manufacture. This can provide a quick visual way of allowing the CFO or other financial management staff to look at which manufactures they want to negotiate better pricing with. You can also click on a segment of the donut to filter the rest of the page to just that manufacture.

1. Add a Donut Chart to the canvas.

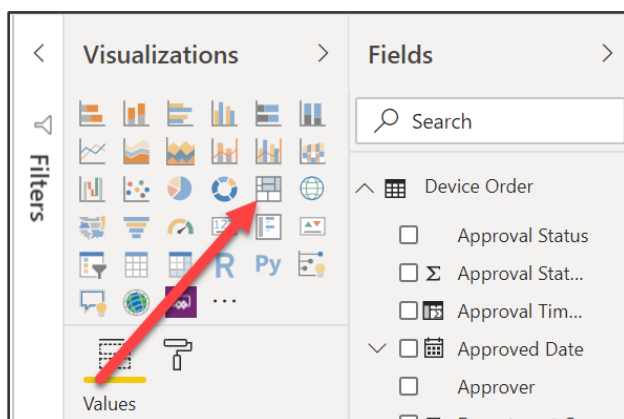


2. Drag **Title** from the **Manufacturers** table to the Legend target and **Price** from the **Devices** table to the Values target.

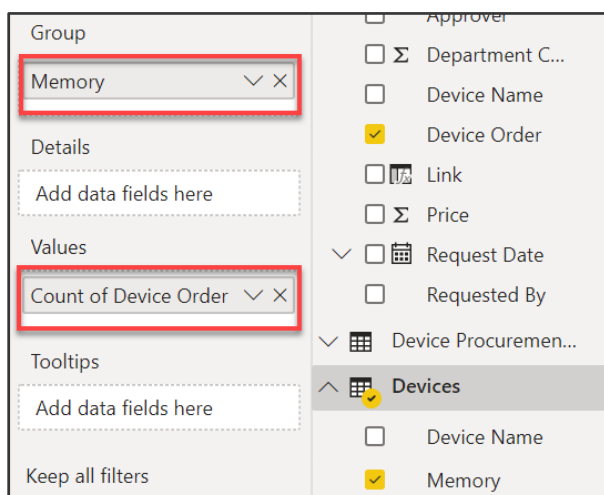


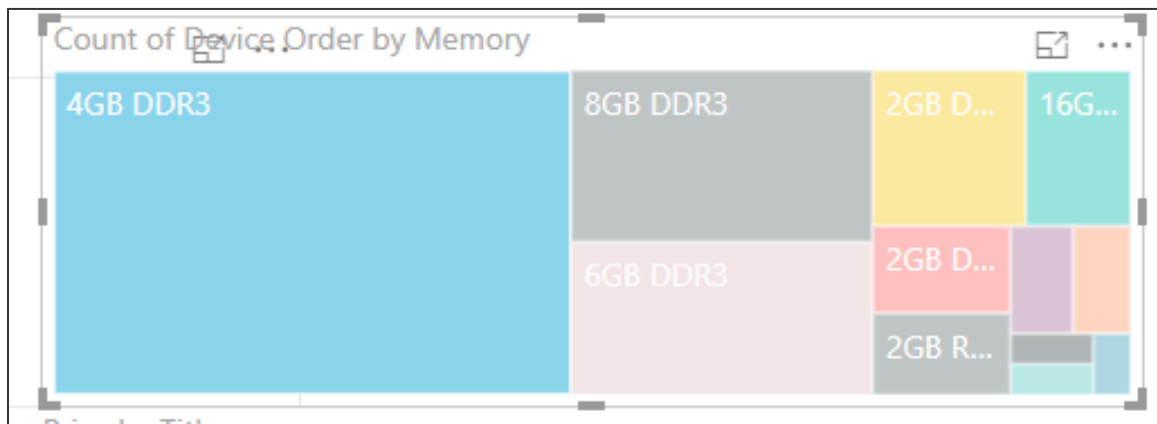
Task 5: Add a Tree Map by Device Name

1. Add Tree Map visual to the canvas.



2. Drag **Memory** from the Device table to the **Group** target and **Device Order** from **Device Order** table to the Values target.





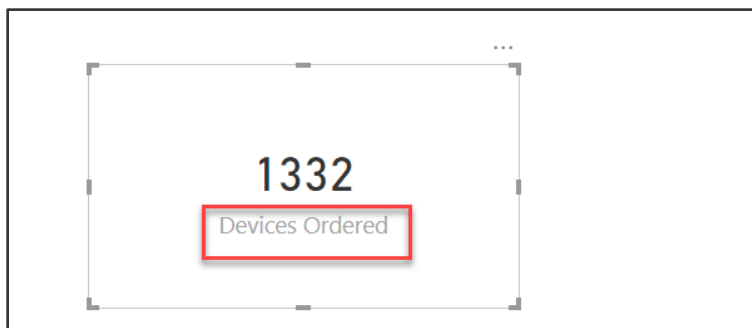
Task 6: Format the Statistics Cards

1. Select the **Count of Device Order** card and click Rename.

The screenshot shows the Power BI interface. On the left, a statistics card displays "1332" and "Count of Device Order". A red box highlights the card. On the right, the "Fields" pane shows the "Count of Device Order" field. A context menu is open over the field, with the "Rename" option highlighted by a red arrow. Below the card, a table shows the data:

User	Device Name	Price	Link
	Toshiba - Tecra R950	999.99	
	Toshiba - Tecra R950	999.99	

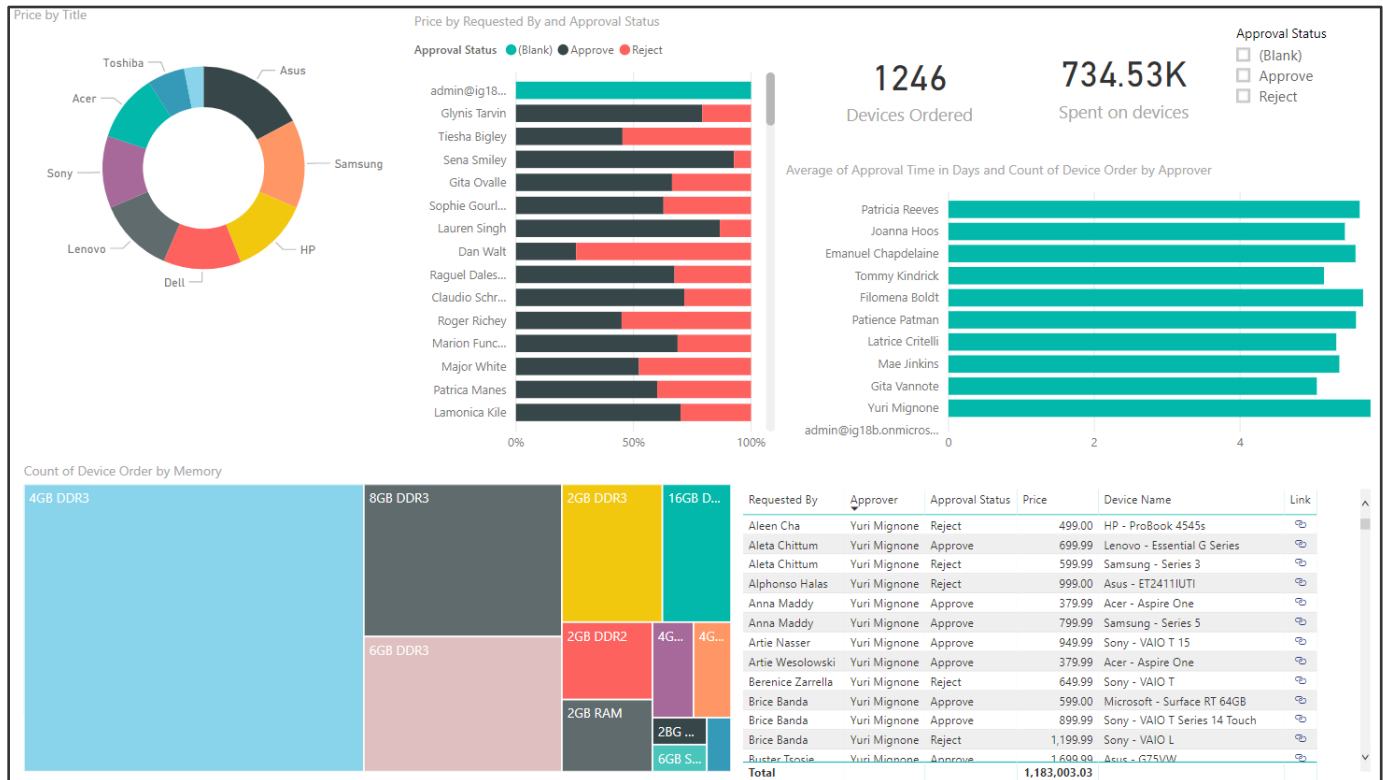
2. Rename it **Devices Ordered**.



3. You may rename other visuals as you see appropriate.

Task 7: Arrange the visuals on the report page

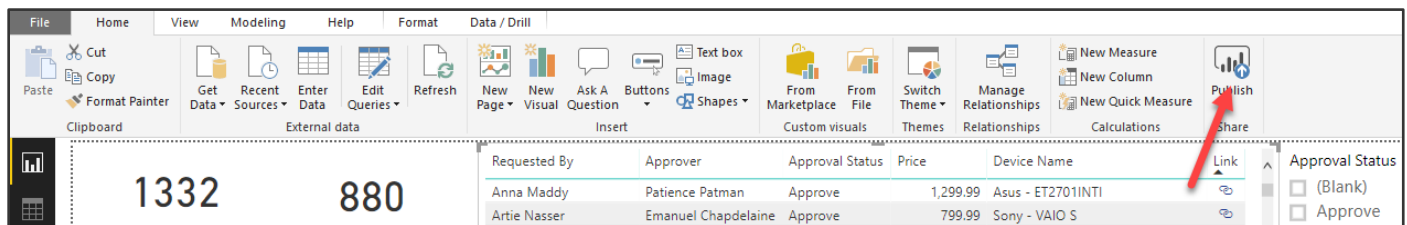
4. Arrange Visuals on the report page as shown in the image below.



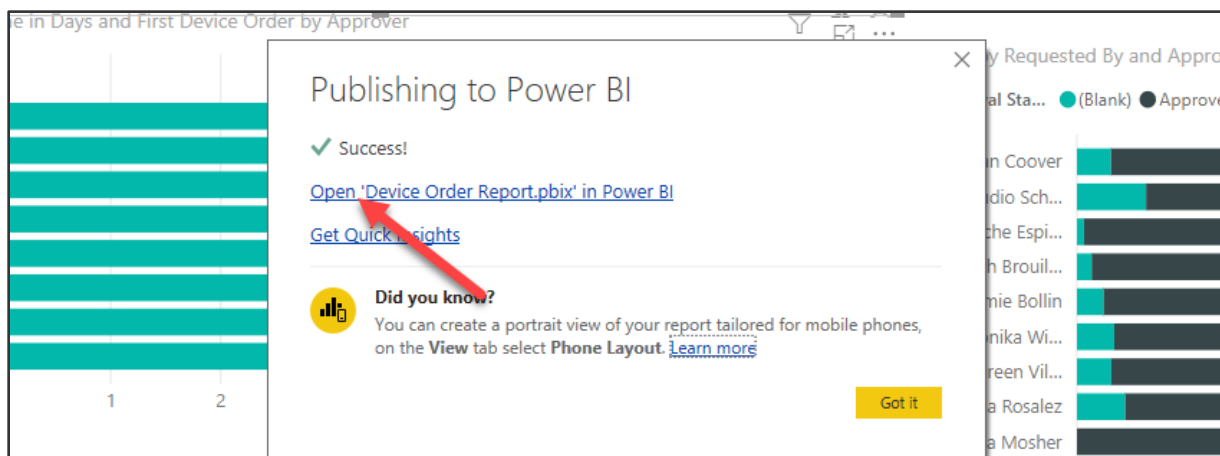
Exercise 6: Publish and Share

Task 1: Publish and Share

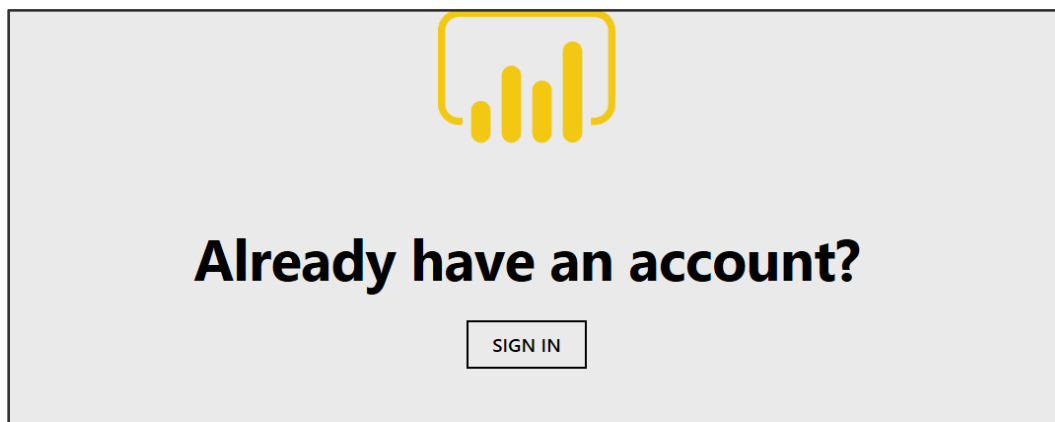
1. Make sure you are logged in in your environment.
2. Click Save.
3. Name the report Device Order Report and save it on your machine.
4. Click Publish.



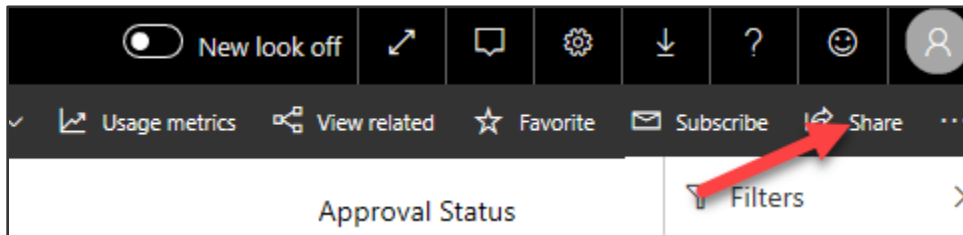
5. Click Select.
6. Click Open in Power BI.



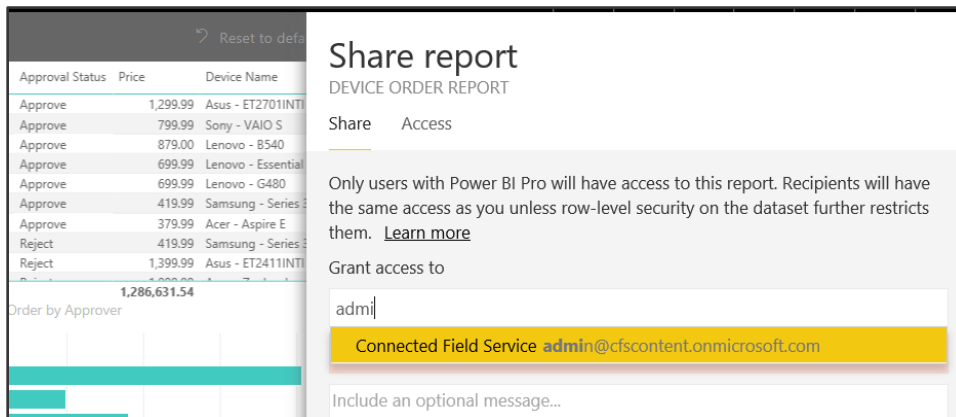
7. Click Sign in.



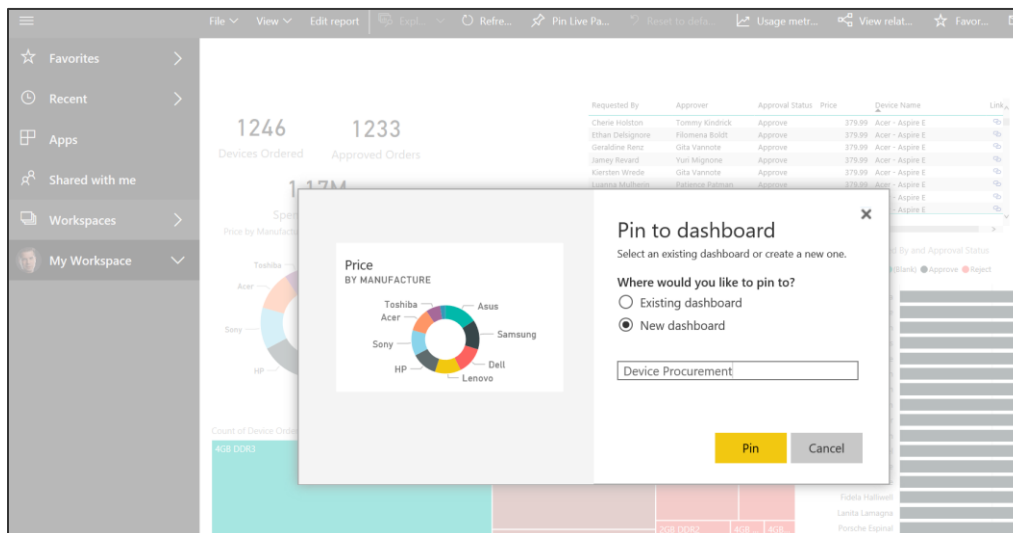
8. Click **Share**.



9. You can share with any user in your organization.



From within PowerBI.Com you can also add the report visualizations to an existing dashboard or create a new dashboard



You can also embed the Power BI Visualizations in a personal dashboard in CDS. You can read more about that here <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/use-power-bi#embed--visualizations-on-personal-dashboards> if you have time give it a try!

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