



# Dashboard in a Day – Publishing & Accessing

by Power BI Team, Microsoft



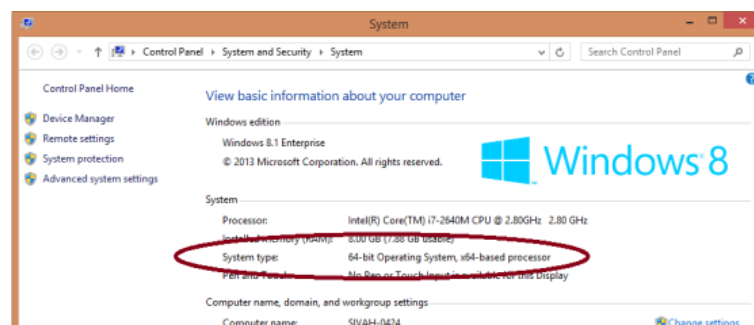
## Contents

Power BI Desktop – creating mobile view .....	5
Power BI Service .....	9
Power BI Service – Publishing Report .....	9
Power BI Mobile – Building a Dashboard .....	13
References .....	25

# 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 Power BI account please use the same url as above.
- Ensure you have the **latest version** of Power BI downloaded.
- 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>.
  - If you already have Power BI Desktop installed ensure you have the **latest version** of Power BI downloaded.
- **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.

If you are joining the DIAD at this point or were unable to complete previous labs, please start this lab with the provided: “Lab 3 Solution.pbix” file you can find in the Reports folder.

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.

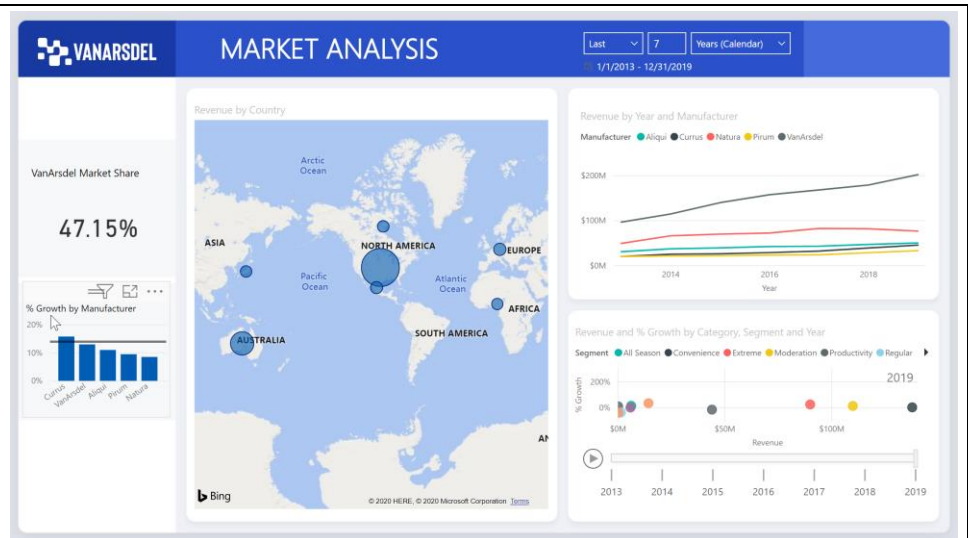
**NOTE:** This lab is using real anonymized data and is provided by ObviEnce LLC. Visit their site to learn about their services: [www.obvience.com](http://www.obvience.com).

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.

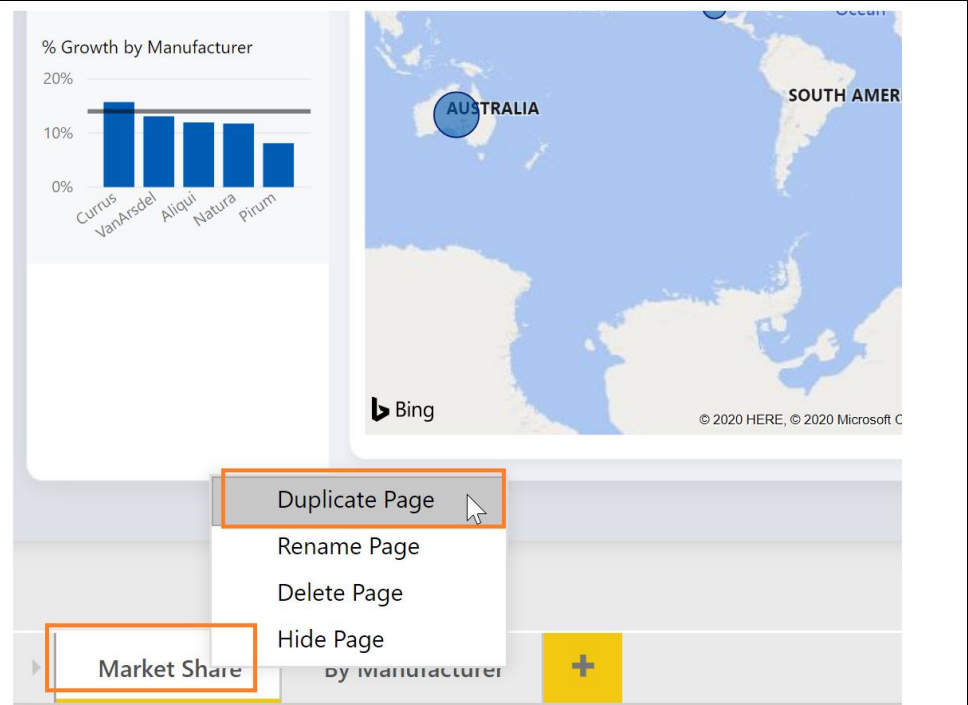
# Power BI Desktop – creating mobile view

1. Navigate to **/DIAD/Reports** folder.
2. Open **DIAD Final Report.pbix** file.

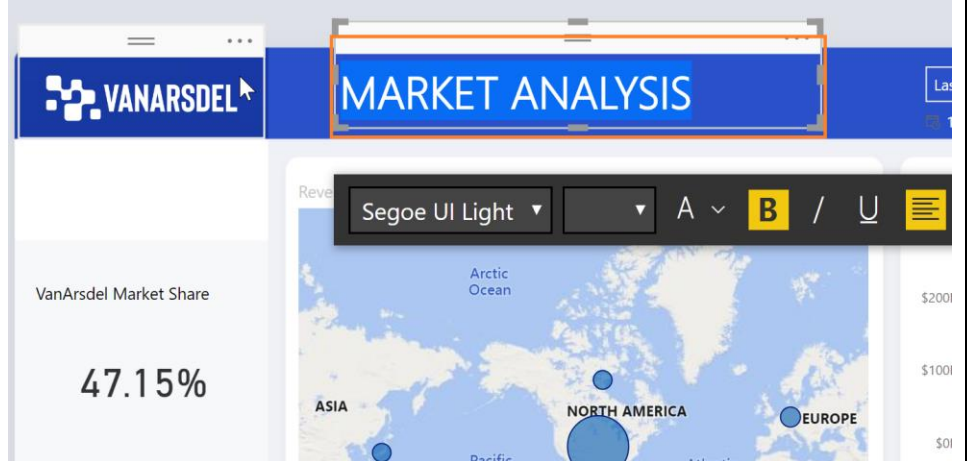
This file uses the same dataset that you used for the lab. We have added a few more visuals and formatted the reports. Feel free to explore the report.



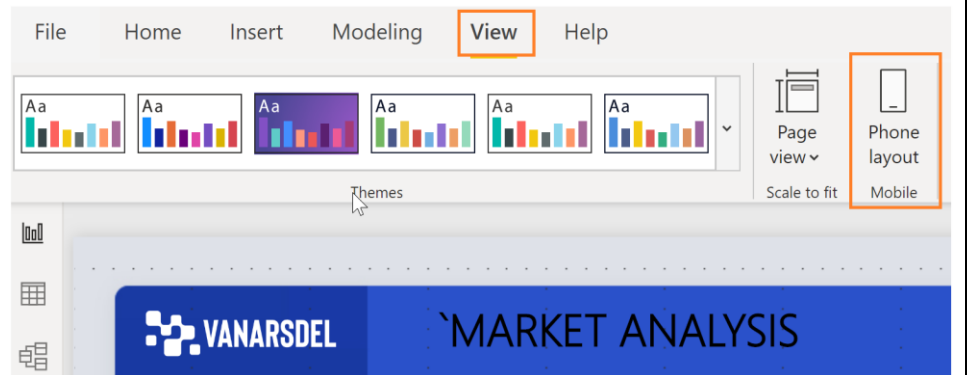
3. Right click on the Market Share tab and select **Duplicate Page**



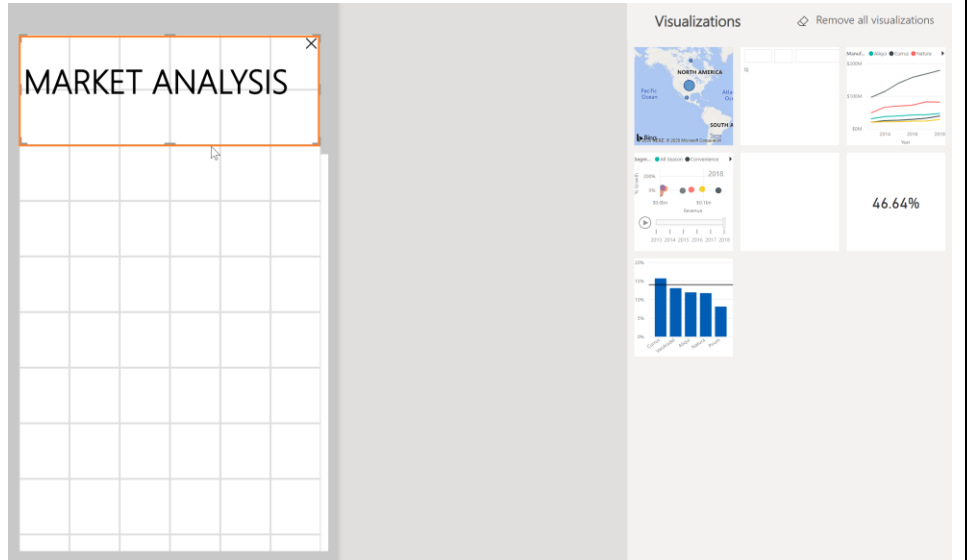
4. Highlight the Market Analysis title and change the font to black



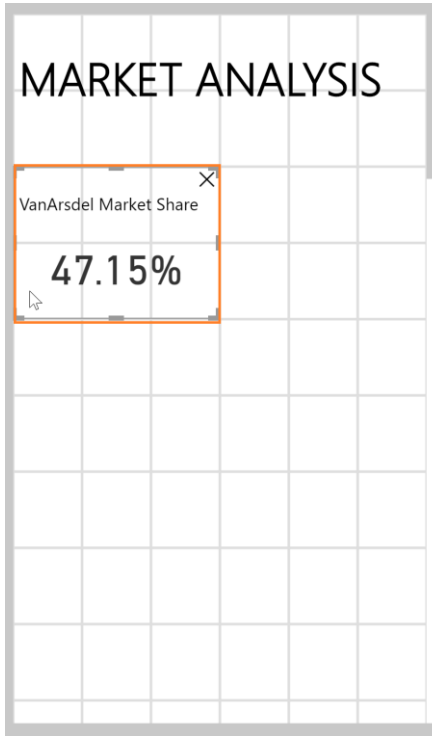
5. Click on the **View** ribbon and click **Phone Layout**



6. Drag the **Market Analysis** title to the top of the phone layout



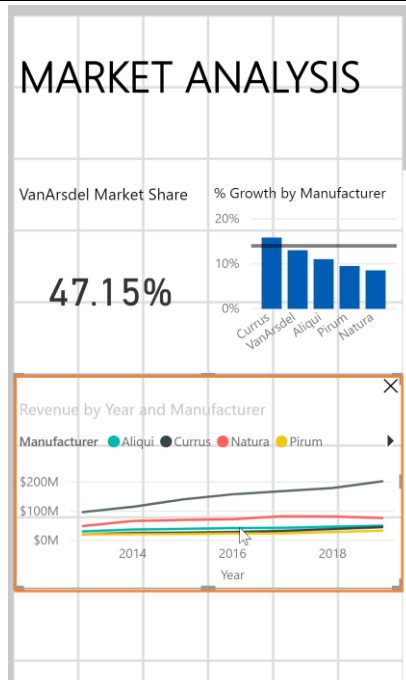
7. Drag the **Market Share card** onto the phone layout and resize



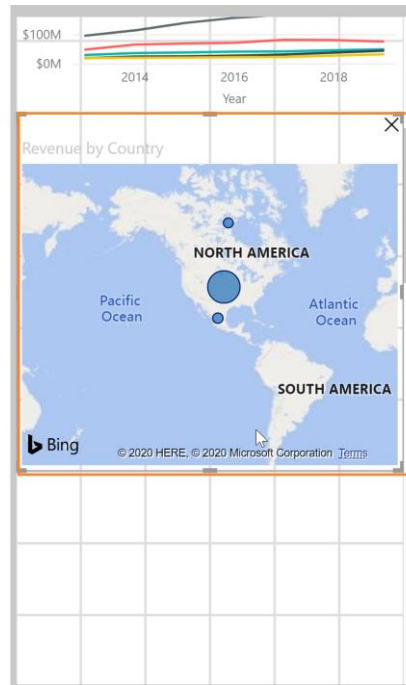
8. Drag the **% Growth by Manufacturer** chart next to the card on the phone layout



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
13. Save the file.

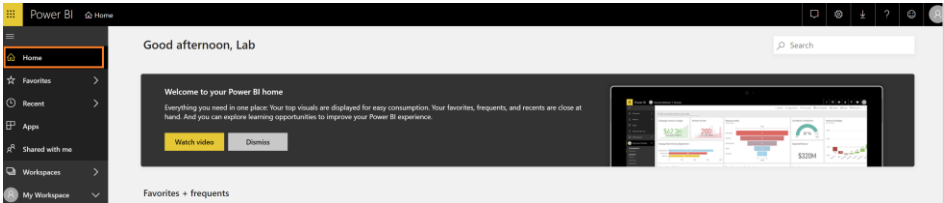

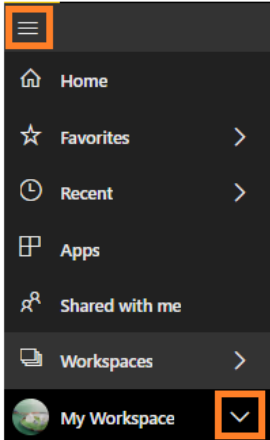


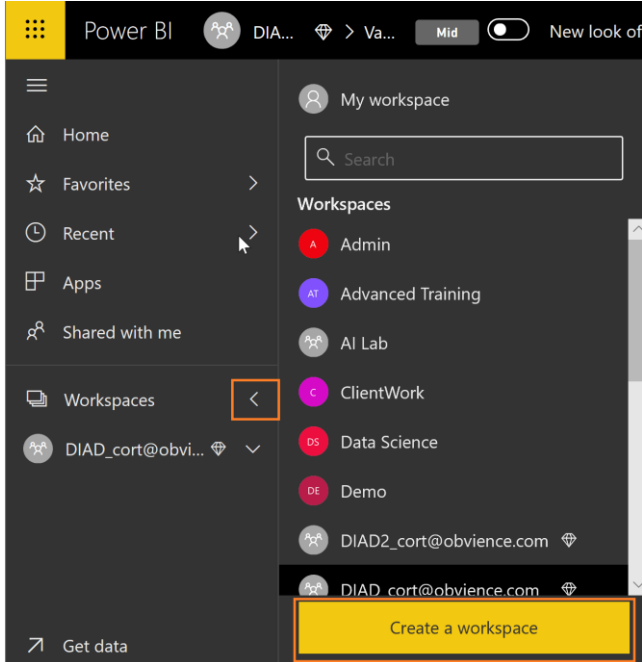
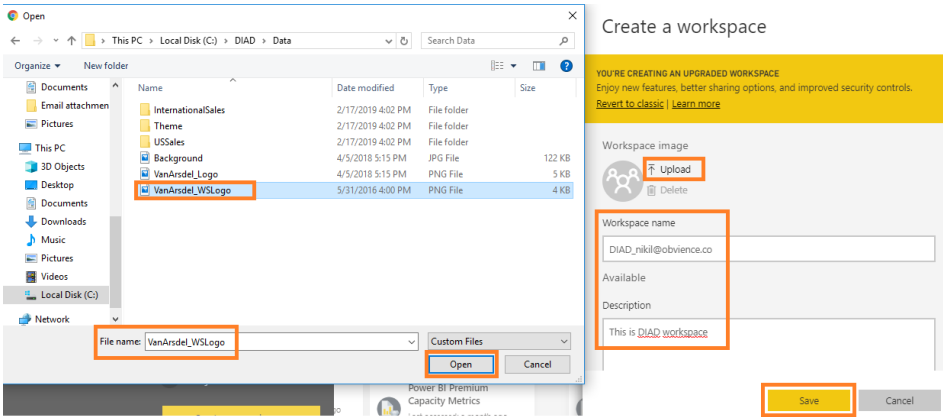


# Power BI Service

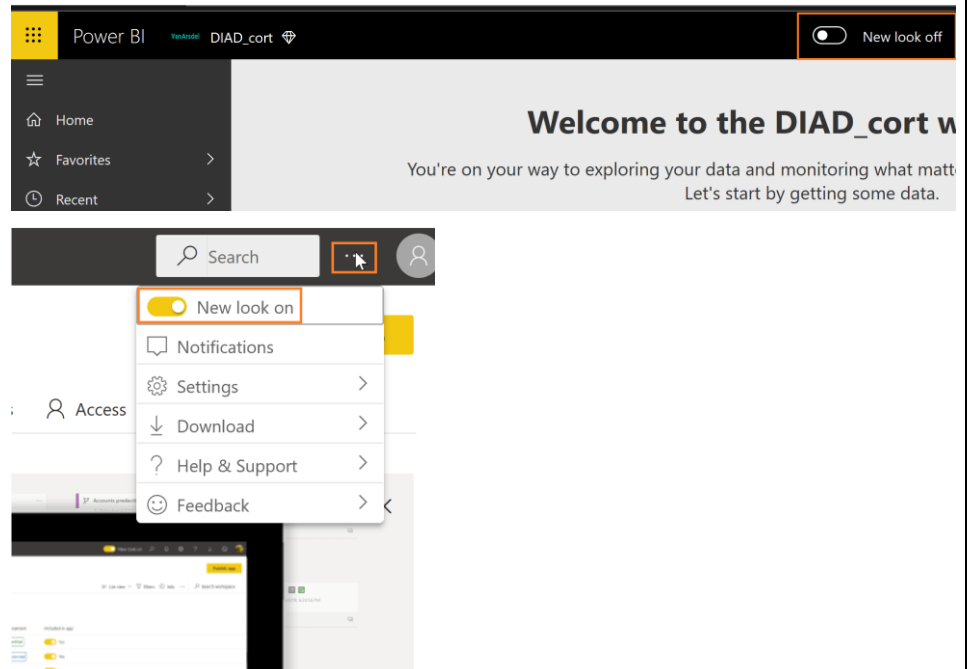
You will now leverage the report authored using Power BI Desktop and create a dashboard for VanArsdel data analysis team and share it with the CMO. A Power BI Desktop file with additional reports / visuals is provided. Please use this for the next section of the lab.

## Power BI Service – Publishing Report

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

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

12. Click on the **New look off** button to turn the new look on
13. Ensure New look is on by clicking on the ellipsis in the upper righthand corner to make sure New look on is selected



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.

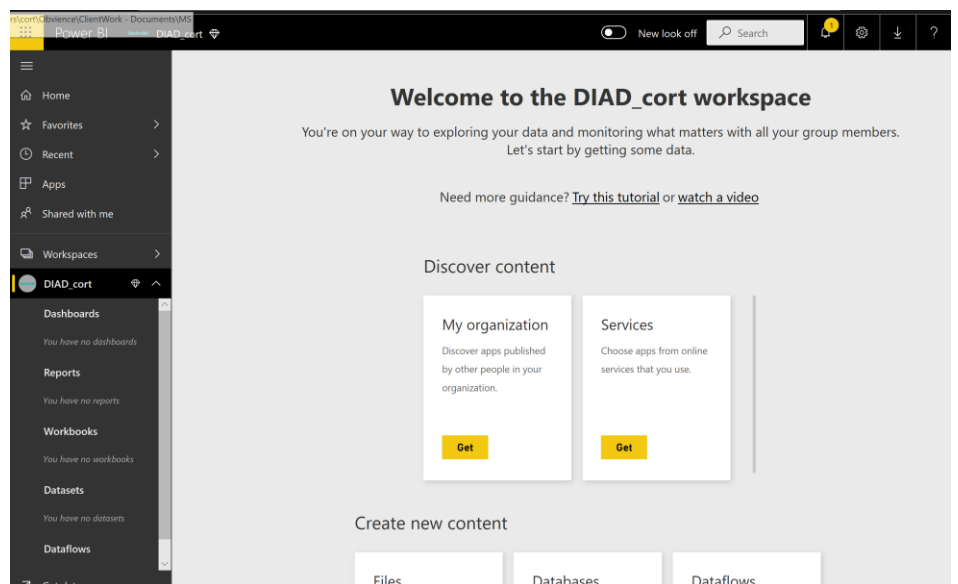
Discover content has options to connect to apps that are shared by your organization or the online services.

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 2<sup>nd</sup> option.



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

14. Navigate back to the **DIAD Final Report**

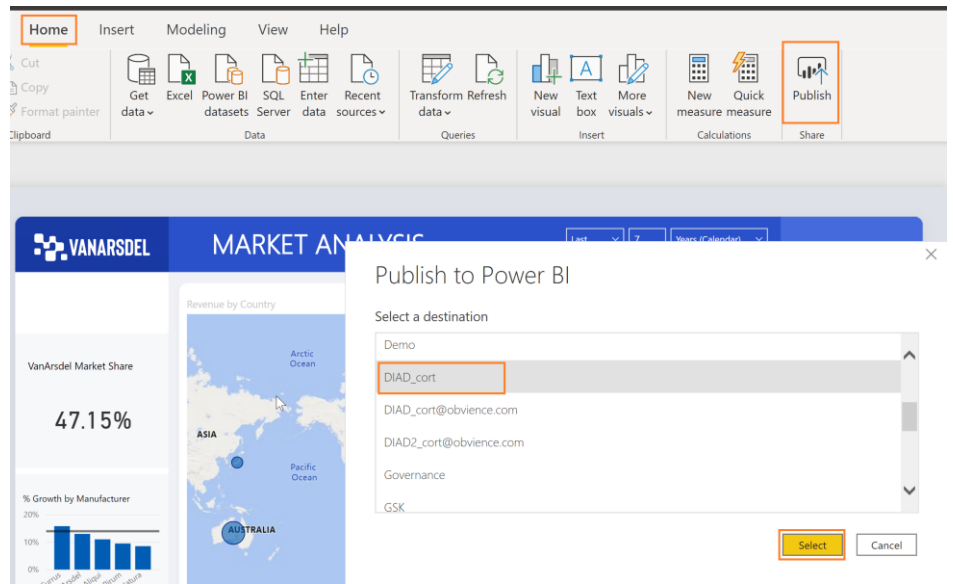
15. Ensure **Mobile View** is off

16. From the **Home** tab select **Publish**

17. If you have not already logged into Power BI, a **Sign in** dialog opens. Please sign in.

18. Once you are signed in, Publish to Power BI dialog opens. Select **DIAD\_<youremailaddress>** from the dialog.

19. Click **Select**.



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

20. 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.

## Publishing to Power BI

✓ Success!

[Open 'DIAD Final Report.pbix' in Power BI](#)

[Get Quick Insights](#)

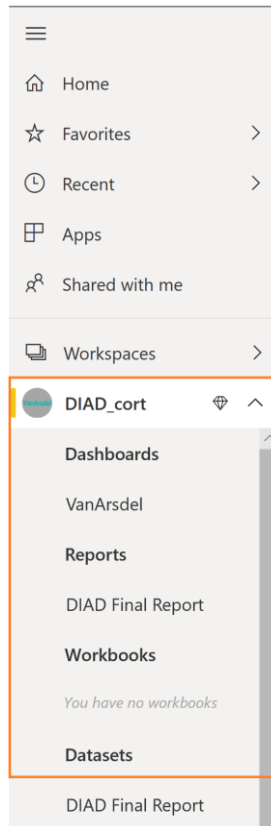


### Did you know?

You can create a portrait view of your report tailored for mobile phones, on the **View** tab select **Phone Layout**. [Learn more](#)

Got it

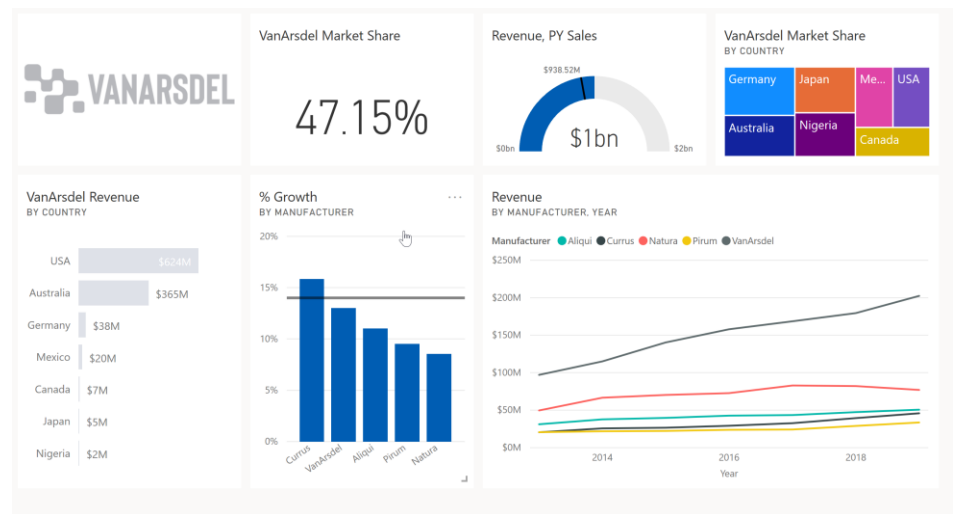
Once you are in the browser, in the left panel notice under **DIAD\_<youremailaddress>**, you will see **REPORTS -> DIAD Final Report** and **DATASETS -> DIAD Final Report**.



## Power BI Mobile – Building a Dashboard

In this section, we will create a dashboard that will combine data from the Market Share report as well as Social report.

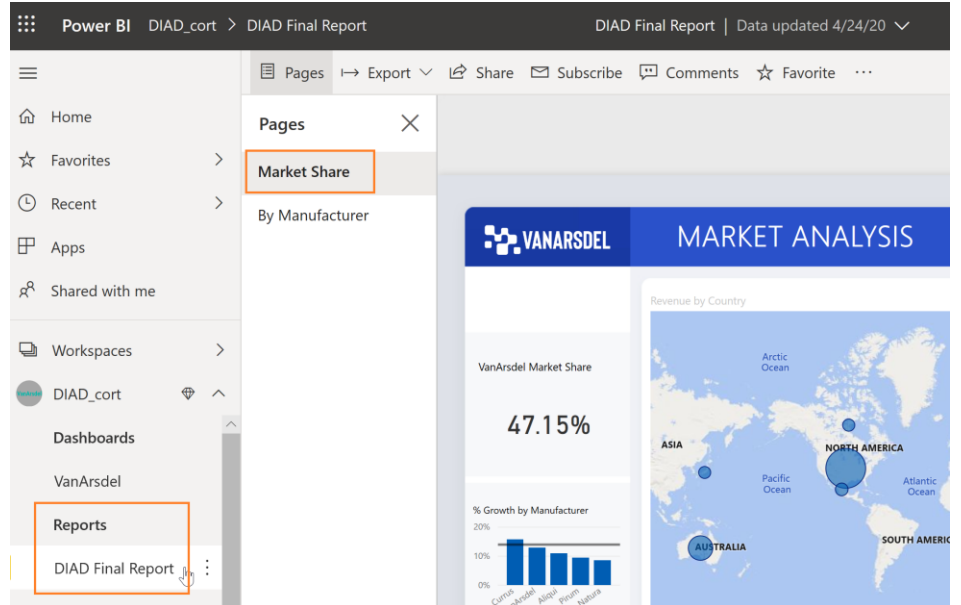
At the end of the section, we will create a dashboard that looks like the screenshot.



21. From the left menu, select **REPORTS** -> **DIAD Final Report**. You will be navigated to the report you just uploaded.

22. In the **map visual**, enable drill down by **hovering** over the visual.

23. Select the **down arrow** on the top right corner of the visual. Select **Australia** to drill down to **State level**.



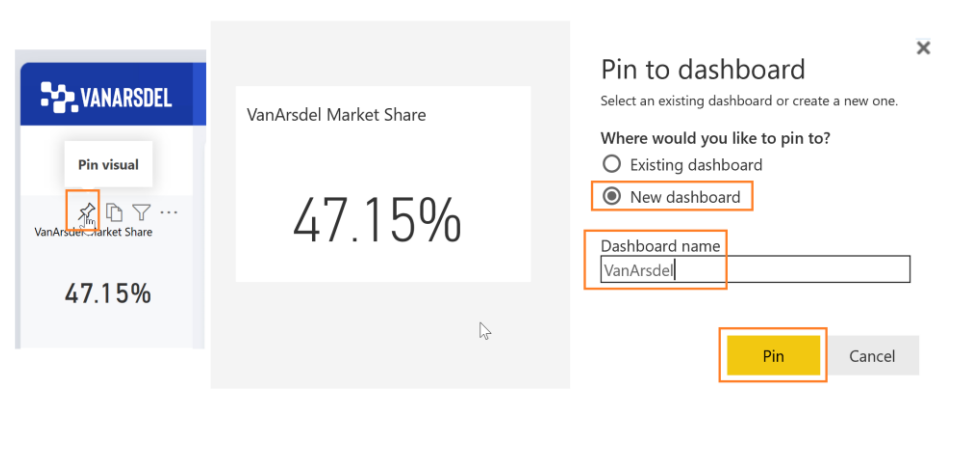
Let's pin visuals to the dashboard.

24. Hover over **VanArsdel Market Share** card visual.

25. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens.

26. We do not have a dashboard yet. Let's create one. With **New dashboard** selected, enter **VanArsdel** in the text box.

27. Select **Pin**.



Notice alert messages are displayed stating the dashboard is ready to view.

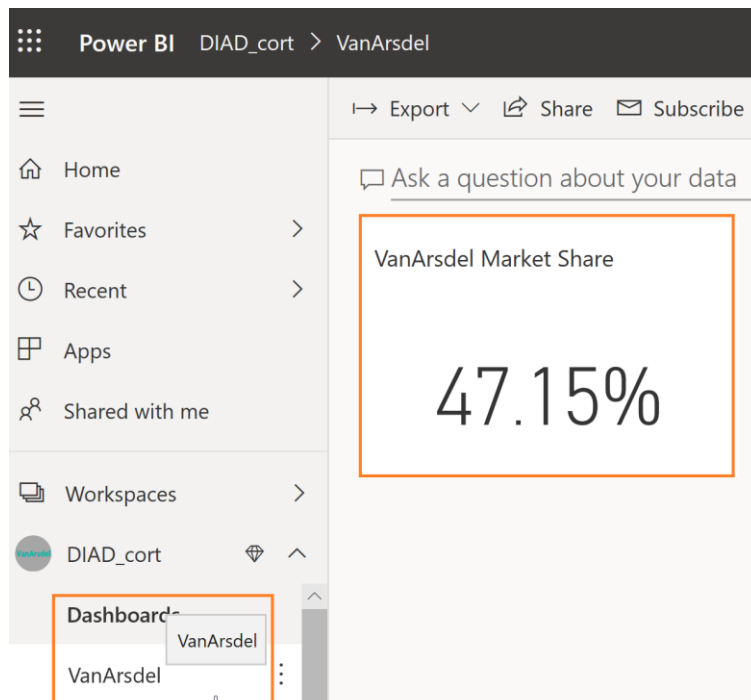
Notice in the left panel, VanArsdel Dashboard is created under DASHBOARDS.

28. From the left panel, select **DASHBOARDS -> VanArsdel**.

Notice the VanArsdel Market Share tile is pinned to the dashboard.

29. Click on **VanArsdel Market Share**, notice you are navigated to the report.

Tiles in dashboard are not interactive.

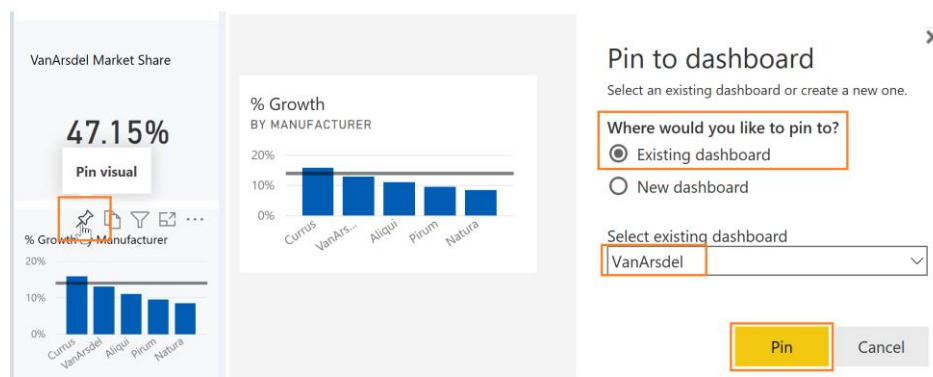


30. Hover over **% Growth by Manufacturer** visual.

31. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens.

32. Make sure **VanArsdel** is selected in the dropdown.

33. Select **Pin**.



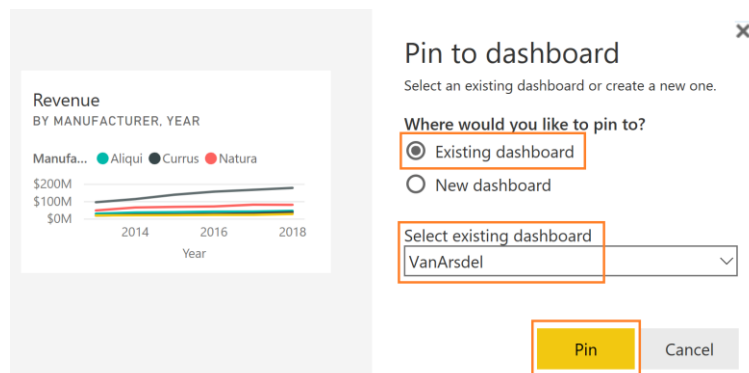
34. Close out alert dialogs.

35. Hover over **Revenue by Year and Manufacturer** visual.

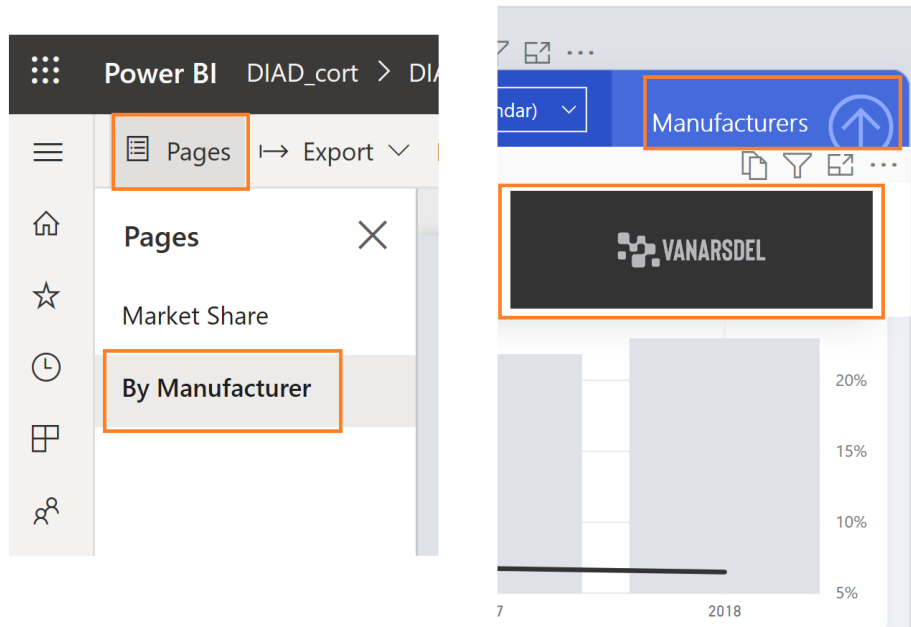
36. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens.

37. Make sure **VanArsdel** is selected in the dropdown.

38. Select **Pin**.

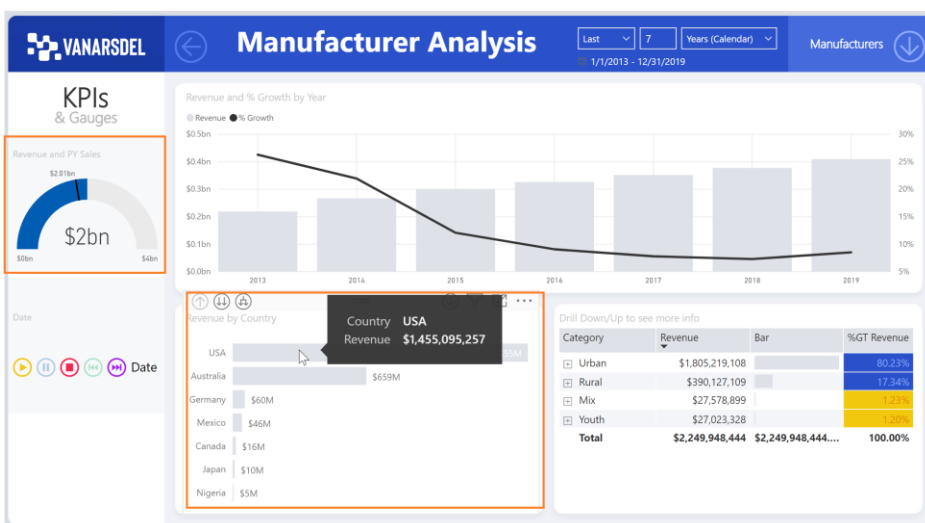


39. Close out alert dialogs.
40. Navigate to **By Manufacturer** page.
41. From the top right corner, select the **down arrow**. Notice manufacturer slicer displays.
42. Select **VanArsdel** from the slicer. This will filter the visuals.
43. From the top right corner, select the **up arrow**. Notice manufacturer slicer collapses.



44. Pin the **gauge visual** to the dashboard.
45. Pin **Revenue by Country** visual to the dashboard.
46. Close out alert dialogs.

Note: VanArsdel filter is applied to the tile that is pinned to the dashboard.





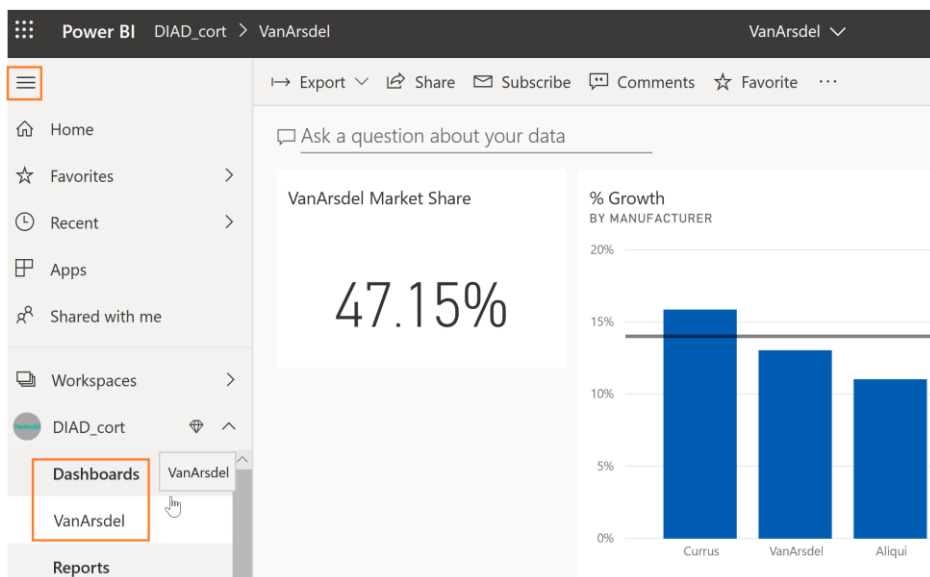
47. From the left panel select the three lines in the upper left hand corner, select **DASHBOARDS -> VanArsdel**.

Notice all the visuals are pinned as tiles to the dashboard.

You will see the visuals on the dashboard like the screenshot.

Each visual on the dashboard is called a tile. The tiles represent the data chosen and will be kept up to date as the data in the data model updates. Tiles are not interactive.

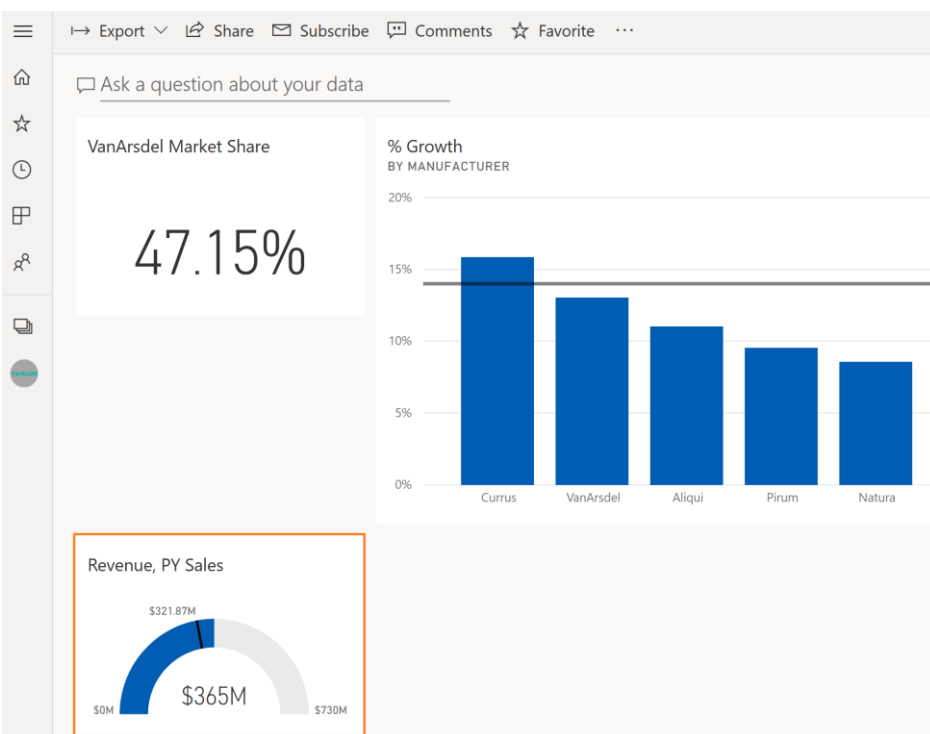
Let's organize the dashboard now.



48. Resize and move the **gauge tile** as shown in the screenshot.

49. Select the **bottom right corner** of the tile and move it diagonally to change the image size.

Tiles can be of **various sizes (1x1 to 5x5)**. Drag the tile using the bottom right corner to resize. As you are dragging, note the gray shadow which indicates the size of the tile when you stop dragging.



50. Click on the ellipsis and select **Add tile**.

Add tile dialog opens.

51. Select **Image** as the source.

52. Select **Next**.

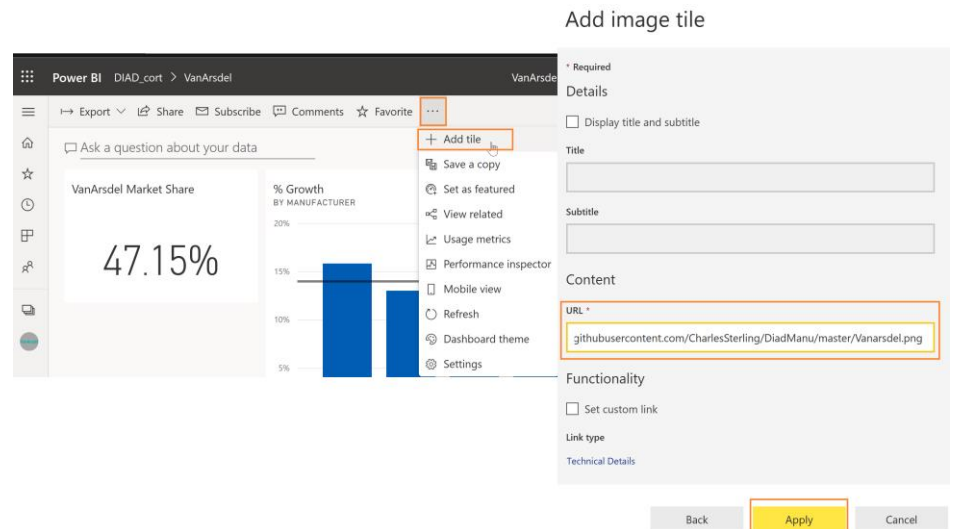
53. In **URL** text box, enter

<https://raw.githubusercontent.com/CharlesSterling/DiadManu/master/Vanarsdel.png>

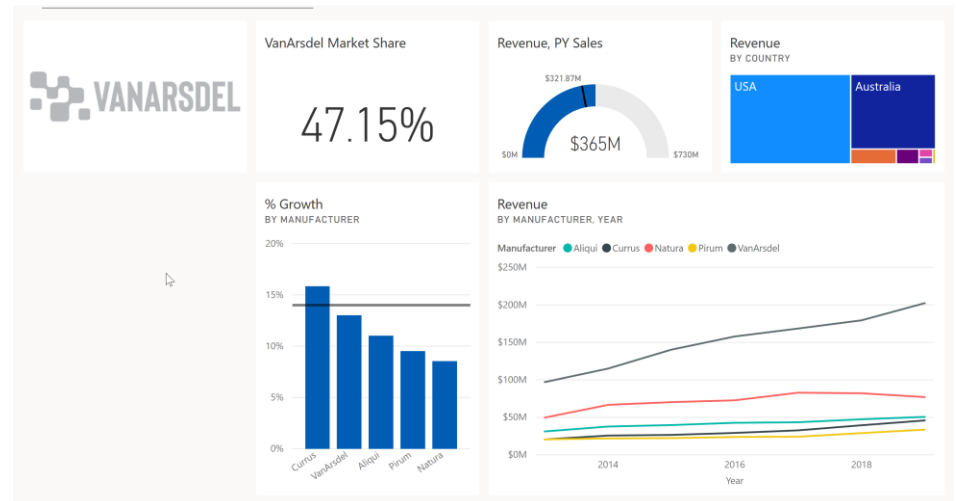
**Note: URL is case sensitive.**

54. Select **Apply**.

Notice a new tile with VanArsdel logo is added to the dashboard.



55. **Resize** and **rearrange** the tiles as shown in the screenshot.



Revenue by Country tile shows Revenue by Country for VanArsdel, so let's rename it.

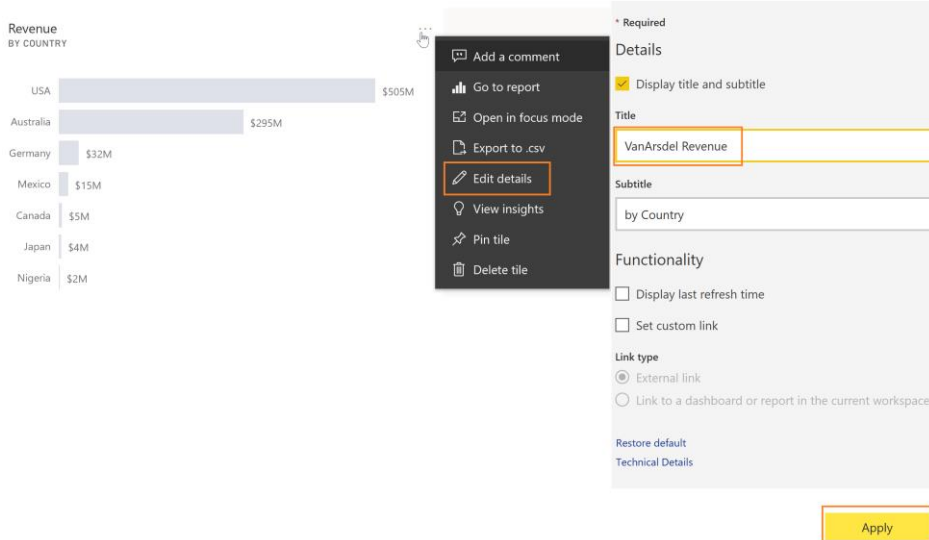
56. **Hover** over Revenue by Country tile.

57. Select the **ellipsis** on the top right corner of the tile.

58. Select **Edit Details**. Tile Details dialog opens.

59. Change **Title** to **VanArsdel Revenue**.

60. Select **Apply**.



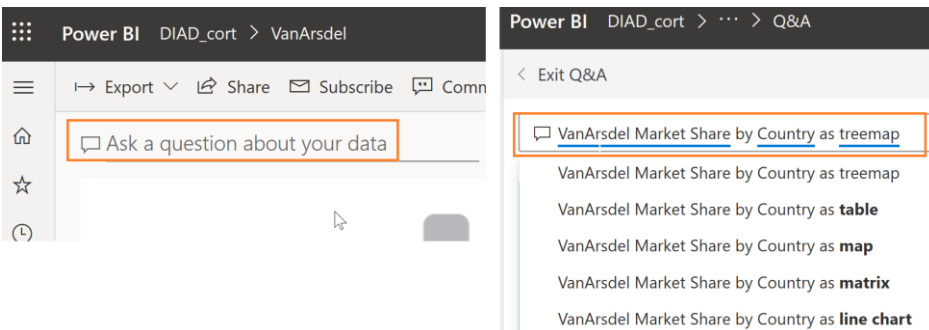
It will be nice to have a visual that represents Market Share by country. Notice on the top of the visual, there is an option to **Ask a question about your data**. This is similar to Ask a question in the desktop.

61. In the text box start typing, **VanArsdel market share**. Notice a card visual is created.

62. Continue typing **VanArsdel market share by country**. Notice a bar chart is created.

63. Continue typing **VanArsdel market share by country as treemap**. Notice a treemap visual is created.

**Note:** Remember we renamed tables. One of the reasons we did it is to make it user friendly for Q&A.

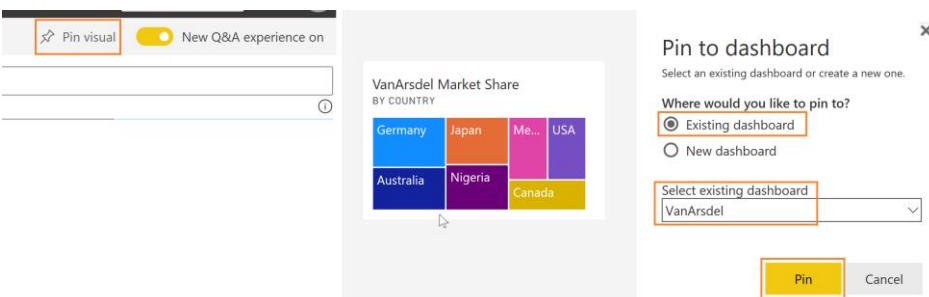


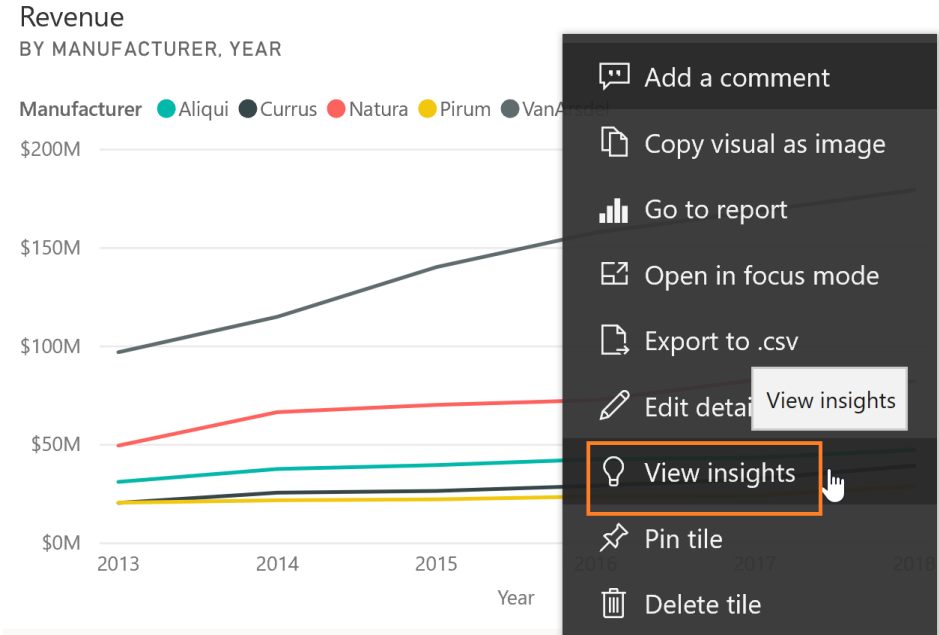
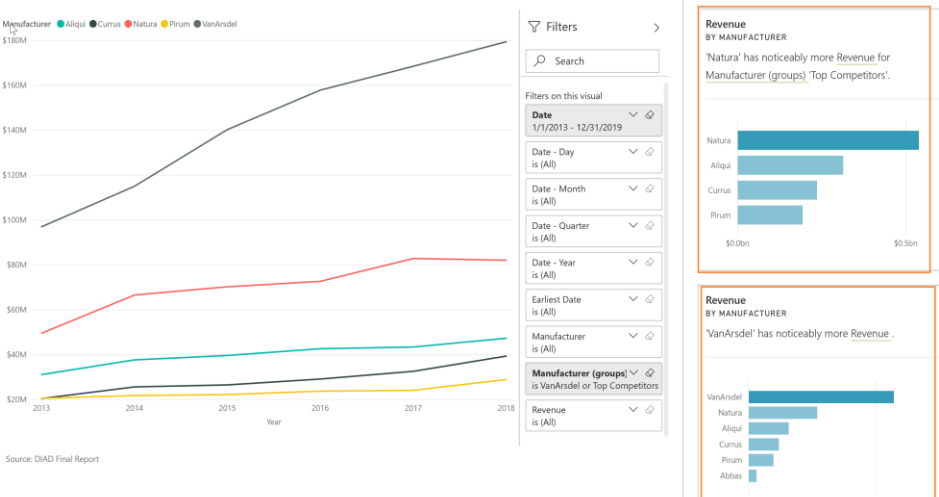
64. From the top right of the screen, select **Pin Visual**.

65. Pin to dashboard dialog opens. Select **Pin** to pin the visual to VanArsdel dashboard.

66. Close the alert dialogs.

67. Select **Exit Q&A** to navigate back to the dashboard.



<p>Notice the visual is added as tile to the dashboard. Clicking on the tree map visual will navigate you back to the Q&amp;A section.</p>	
<p>Power BI quickly searches different subsets of your dataset while applying a set of sophisticated algorithms to discover potentially-interesting insights. You can run insights against a dataset or dashboard tile. Let's generate insights on a dashboard tile. When we run insights on a dashboard tile, instead of searching for insights against an entire dataset, search is narrowed to the data used to create a single dashboard tile. This is often referred to as <b>scoped insights</b>.</p> <p>68. Hover over the <b>line chart</b> on the dashboard.</p> <p>69. Select the <b>ellipsis</b> on the top right corner.</p> <p>Select <b>View Insights</b>.</p>	 <p>Revenue BY MANUFACTURER, YEAR</p> <p>Manufacturer Aliqui Currus Natura Pirum VanArsdel</p> <p>\$200M \$150M \$100M \$50M \$0M</p> <p>2013 2014 2015 2016 2017 2018</p> <p>Year</p> <p>View insights</p>
<p>You will be navigated to <b>Focus mode</b> for the line chart.</p> <p>70. <b>Scroll</b> on the Insights panel to review the various insights Power BI can generate. Notice that there is an option to pin insight visuals to the dashboard.</p> <p>71. Click on <b>Exit Focus mode</b> on the top left to navigate back to the dashboard.</p>	 <p>Manufacturer Aliqui Currus Natura Pirum VanArsdel</p> <p>\$180M \$160M \$140M \$120M \$100M \$80M \$60M \$40M \$20M</p> <p>2013 2014 2015 2016 2017 2018</p> <p>Year</p> <p>Source: DIAD Final Report</p> <p>Filters</p> <p>Search</p> <p>Filters on this visual</p> <p>Date 1/1/2013 - 12/31/2019</p> <p>Date - Day is (All)</p> <p>Date - Month is (All)</p> <p>Date - Quarter is (All)</p> <p>Date - Year is (All)</p> <p>Earliest Date is (All)</p> <p>Manufacturer is (All)</p> <p>Manufacturer (groups) is VanArsdel or Top Competitors</p> <p>Revenue is (All)</p> <p>Revenue BY MANUFACTURER</p> <p>'Natura' has noticeably more Revenue for Manufacturer (groups) Top Competitors.</p> <p>Natura Aliqui Currus Pirum</p> <p>\$0.00m \$0.50m</p> <p>Revenue BY MANUFACTURER</p> <p>'VanArsdel' has noticeably more Revenue.</p> <p>VanArsdel Natura Aliqui Currus Pirum Abbas</p> <p>\$0m \$10m</p>

We want to be notified when VanArsdel's Market Share goes above or below a threshold. We can set up alerts to achieve this.

72. Hover over **VanArsdel Market Share** tile.

73. Click on the **ellipsis** on the top right corner of the tile.

74. Select **Manage alerts**. Manage alerts dialog opens.

75. Select **Add alert rule dialog**.

Notice you can add Above and Below threshold and notification frequency can be set.

This is an introduction to managing alerts. Complete functionality is not covered in this lab.

76. Select **Cancel** to close the dialog.

77. Select **Don't Save**.

The screenshot shows the Power BI interface with a report titled 'VanArsdel'. A tile for 'VanArsdel Market Share' displays '47.15%'. A context menu is open over this tile, with 'Manage alerts' selected. To the right, the 'Manage alerts' dialog is open, showing settings for an alert titled 'Alert for VanArsdel Market Share'. The alert is active, and the condition is set to 'Above' with a threshold of '0'. The maximum notification frequency is set to 'At most every 24 hours'. The dialog has 'Save and close' and 'Cancel' buttons at the bottom.

78. Click on **VanArsdel Market Share** tile to navigate to the report.

79. In map visual, right click on Australia bubble and select **Drillthrough -> By Manufacturer**.

80. You will be navigated to By Manufacturer page of the report with Australia filter applied to the report page.

The screenshot shows a map visual with bubbles for Australia, South America, and Africa. A context menu is open over the Australia bubble, with 'Drill through' selected. Below the map, a filter bar shows 'By Manufacturer' as the selected filter. The 'Drill through' button is highlighted in the context menu.

81. Hover over **matrix** visual.
82. Select **focus mode icon** on the top right corner of the visual.
83. Click on the double down arrow to drill down
84. Click **Back to report**

Power BI DIAD\_cort > DIAD Final Report

Pages Export Share Subscribe Comments

Back to report DRILL DOWN/UP TO SEE MORE INFO

Category	Revenue	Bar	%GT Revenue
Urban	\$355,041,437	\$355,041,436.7...	97.30%
Convenience	\$127,720,476		35.00%
Extreme	\$115,141,106		31.55%
Moderation	\$111,442,954		30.54%
Regular	\$736,901		0.20%
Rural	\$9,849,592	\$9,849,591.7275	2.70%
Productivity	\$9,772,256		2.68%
Select	\$77,335		0.02%
Total	\$364,891,028	\$364,891,028.46	100.00%

85. From the top menu, select **Bookmarks** and select **Show more bookmarks**. Bookmark pane opens on the right. There are 2 options, Personal bookmarks and Report bookmarks. **Report bookmarks:** are the bookmarks report author created (we did this in Power BI Desktop).
  - Personal bookmarks:** Report consumer can create their own bookmarks.
  86. Select **View** in the Report bookmarks pane.
- Notice you can view and navigate through the bookmarks using the arrow in the bottom of the screen. The behavior is like in Power BI Desktop.
- Select **Exit** in Bookmark pane to close it.

DIAD Final Report | Data updated 4/22/20

Favorite ... Reset to default Bookmarks

Personal bookmarks  
Capture this report's current state

Add a personal bookmark

Show more bookmarks

Bookmarks View

Personal bookmarks

Report bookmarks

Add Exit

Initial

USA Sales Increasing

AUS Sales Spike in 2018

JAP Sales Steady

DrillThrough by Aus

Extreme spike in 2018

Drill into Extreme

Product 04 - Spike

Product 21 also Spike

Product 20 - not so much

Spike in Sep and Oct 2018

Sen and Oct Product 04 spike

Power BI provides an option to get quick insights into the complete dataset.

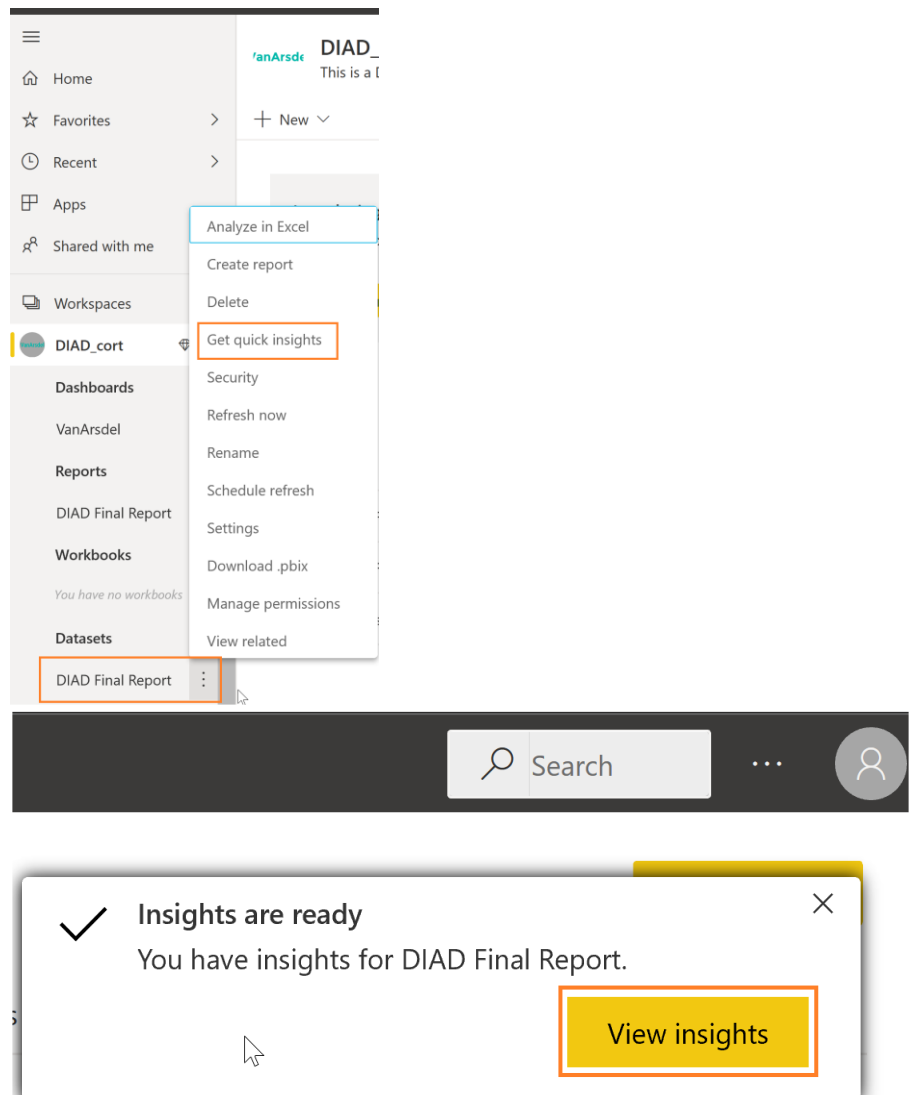
87. Navigate back to Power BI Service, In the left panel, hover over **DATASETS** -> **DIAD Final Report**.

88. Select the **ellipsis**.

89. Select **Get quick Insights**.

It might take a few minutes for the insights to be created. Once insights are ready a message appears of the top right corner.

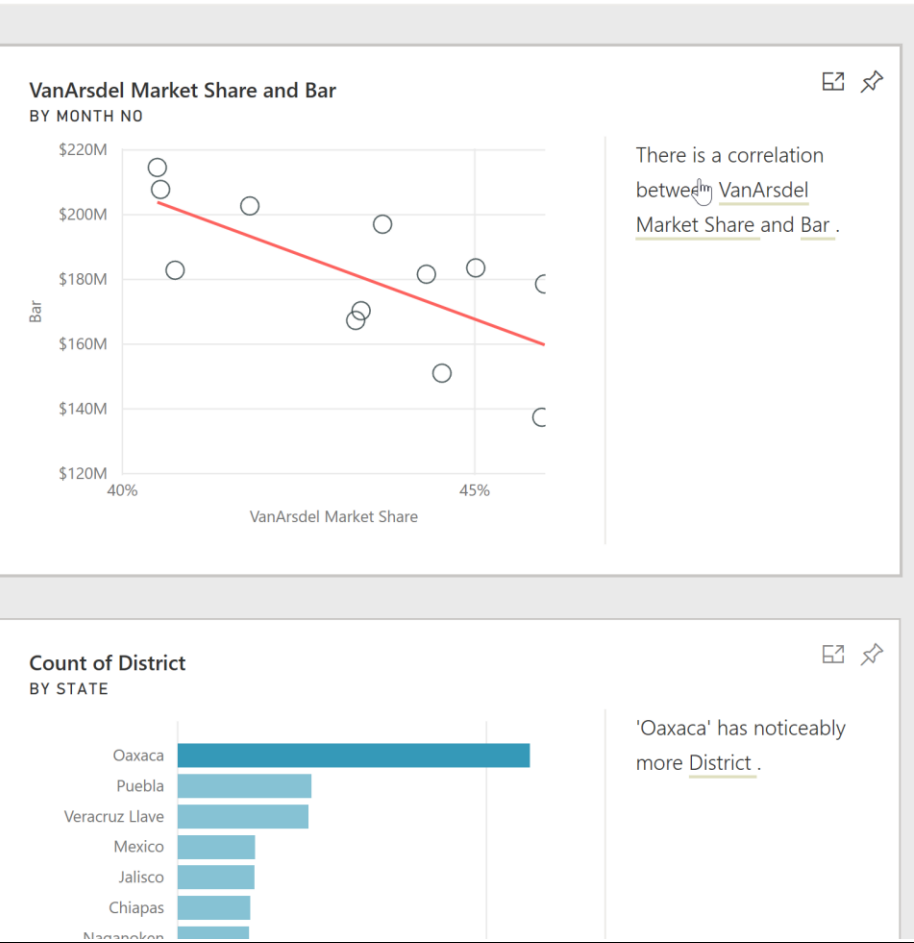
90. Select **View insights**.



A quick insights report is displayed based on the dataset. This provides insights into data you may have missed and helps to get a quick start with creating dashboards. Hovering over each report provides an option to Pin it to a dashboard.

## Quick Insights for DIAD Final Report

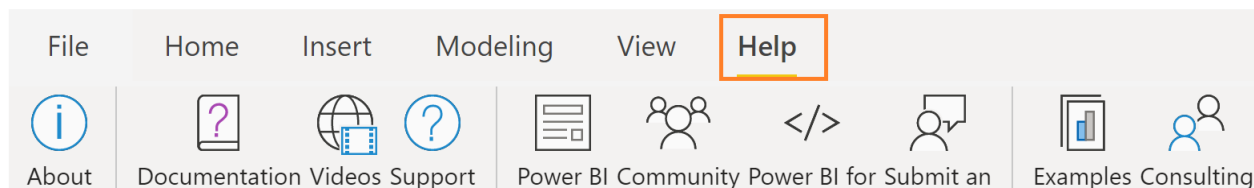
A subset of your data was analyzed and the following insights were found. [Learn more](#)





## 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 edX course <https://www.edx.org/course/analyzing-visualizing-data-power-bi-microsoft-dat207x-0>

© 2020 Microsoft Corporation. All rights reserved.

By using this demo/lab, you agree to the following terms:

The technology/functionality described in this demo/lab is provided by Microsoft Corporation for purposes of obtaining your feedback and to provide you with a learning experience. You may only use the demo/lab to evaluate such technology features and functionality and provide feedback to Microsoft. You may not use it for any other purpose. You may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell this demo/lab or any portion thereof.

COPYING OR REPRODUCTION OF THE DEMO/LAB (OR ANY PORTION OF IT) TO ANY OTHER SERVER OR LOCATION FOR FURTHER REPRODUCTION OR REDISTRIBUTION IS EXPRESSLY PROHIBITED.

THIS DEMO/LAB PROVIDES CERTAIN SOFTWARE TECHNOLOGY/PRODUCT FEATURES AND FUNCTIONALITY, INCLUDING POTENTIAL NEW FEATURES AND CONCEPTS, IN A SIMULATED ENVIRONMENT WITHOUT COMPLEX SET-UP OR INSTALLATION FOR THE PURPOSE DESCRIBED ABOVE. THE TECHNOLOGY/CONCEPTS REPRESENTED IN THIS DEMO/LAB MAY NOT REPRESENT FULL FEATURE FUNCTIONALITY AND MAY NOT WORK THE WAY A FINAL VERSION MAY WORK. WE ALSO MAY NOT RELEASE A FINAL VERSION OF SUCH FEATURES OR CONCEPTS. YOUR

EXPERIENCE WITH USING SUCH FEATURES AND FUNCTIONALITY IN A PHYSICAL ENVIRONMENT MAY ALSO BE DIFFERENT.

**FEEDBACK.** If you give feedback about the technology features, functionality and/or concepts described in this demo/lab to Microsoft, you give to Microsoft, without charge, the right to use, share and commercialize your feedback in any way and for any purpose. You also give to third parties, without charge, any patent rights needed for their products, technologies and services to use or interface with any specific parts of a Microsoft software or service that includes the feedback. You will not give feedback that is subject to a license that requires Microsoft to license its software or documentation to third parties because we include your feedback in them. These rights survive this agreement.

MICROSOFT CORPORATION HEREBY DISCLAIMS ALL WARRANTIES AND CONDITIONS WITH REGARD TO THE DEMO/LAB, INCLUDING ALL WARRANTIES AND CONDITIONS OF MERCHANTABILITY, WHETHER EXPRESS, IMPLIED OR STATUTORY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT. MICROSOFT DOES NOT MAKE ANY ASSURANCES OR REPRESENTATIONS WITH REGARD TO THE ACCURACY OF THE RESULTS, OUTPUT THAT DERIVES FROM USE OF DEMO/ LAB, OR SUITABILITY OF THE INFORMATION CONTAINED IN THE DEMO/LAB FOR ANY PURPOSE.

#### **DISCLAIMER**

This demo/lab contains only a portion of new features and enhancements in Microsoft Power BI. Some of the features might change in future releases of the product. In this demo/lab, you will learn about some, but not all, new features.