



Dataverse for Teams in a Day

Lab 04

**Power BI for Teams
(Optional)**

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Overview

The estimated time to complete this lab is 70 minutes.

Please note that this lab is optional since it requires use of Power BI Desktop and a Power BI Pro or Premium license, which is not included with Microsoft Teams. If you are unable to install/access Power BI Desktop, or if you lack the required licensing, this lab can be skipped.

In this lab, you will be using Power BI to connect to your Microsoft Dataverse tables, to build a report about the home office set up asset requests. Power BI is the tool that allows you get insights from your data by building interactive reports and dashboards. The Power BI app in Microsoft Teams allows team members to view and collaborate on reports and dashboards from within the Teams interface. The Power BI app contains the same features as Power BI Service. Power BI Service contains a basic range of tools for building and editing reports. For the full range of editing features, the report can be built using Power BI Desktop before publishing to Teams.

You will see how to connect Dataverse to Power BI. You will use Power BI Desktop tool to apply transformations to the data, to optimize it for reporting. It can then be published to a workspace in Teams, where you will build out and design your report to display data generated from the asset requests.

- **Exercise 1: Connect to Dataverse and Transform Data**

You will start by creating a Power BI workspace, where your report will be published. In this exercise, you will connect to your Dataverse for Teams Home Office Set Up tables and use Power Query in Power BI to apply transformations to the data. Transforming the data is required so that it is in a user-friendly format for the report.

- **Exercise 2: Build your Report in Teams**

In this exercise you will design your report and create visuals to display the data and insights.

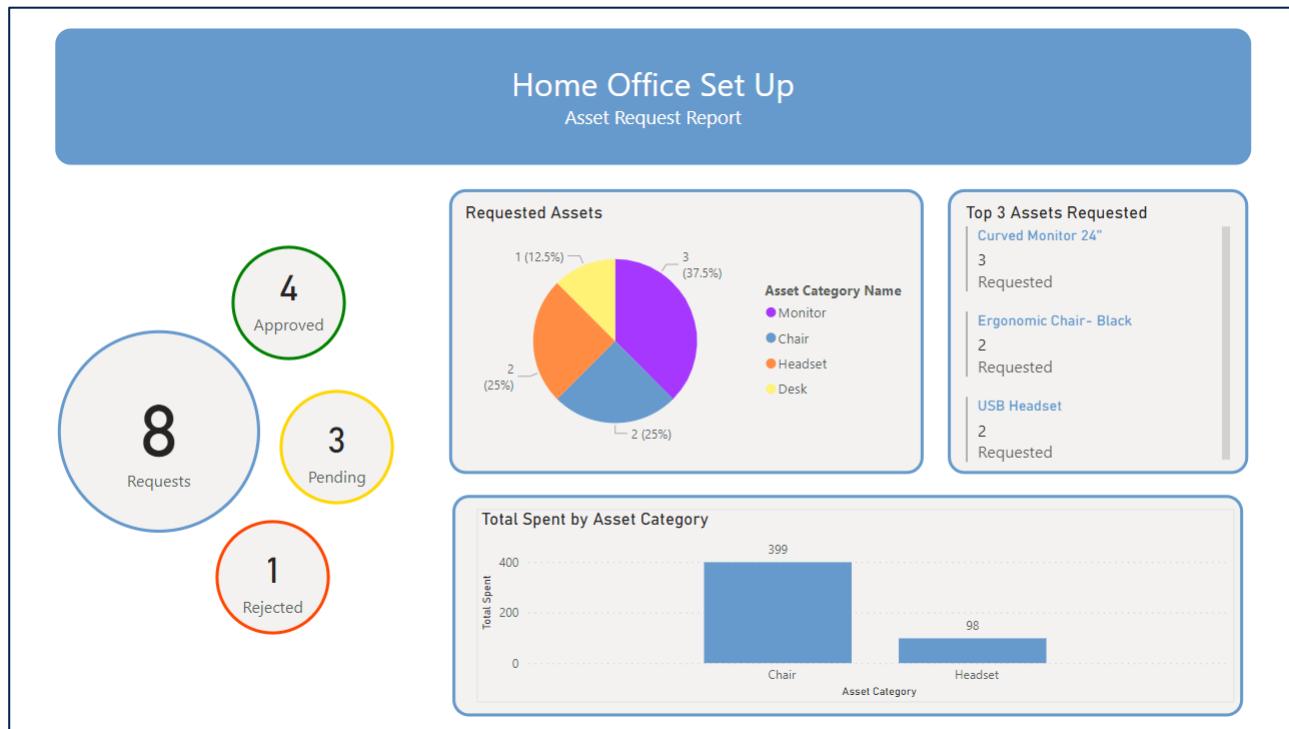
- **Exercise 3: Using the Report**

Add the report to your Teams channel.

For this lab, you will need access to Microsoft Power BI Desktop on your device. If you do not already have Power BI Desktop installed, you will need to download and install it using one of the following options.

- If you have Windows 10, use Microsoft App Store to download and install the Power BI Desktop app.
- Or, download and install Microsoft Power BI Desktop from <http://www.microsoft.com/en-us/download/details.aspx?id=45331>

Once you have completed this lab, your Power BI report will look like this:



Exercise 1: Connect to Dataverse and Transform Data

Task 1: Discover and add the Power BI app to Teams

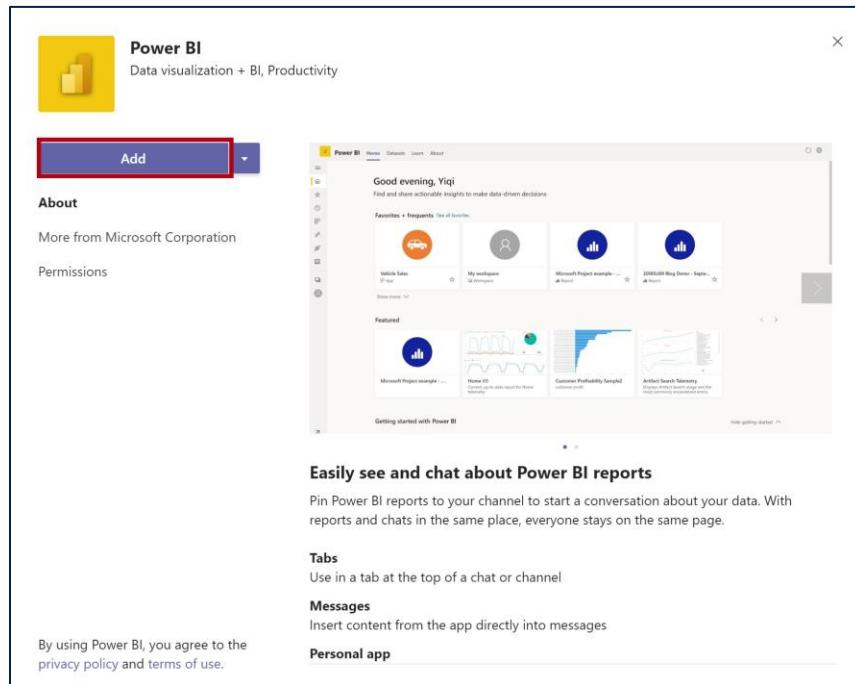
1. In Microsoft Teams, click on the **Apps** icon on the left toolbar, and then search for Power BI.

The screenshot shows the Microsoft Teams interface with the 'Apps' icon highlighted in the sidebar. The search bar at the top contains 'Search all apps' and a magnifying glass icon. Below the search bar, there's a dropdown menu with 'All' selected, followed by 'Personal apps', 'Bots', 'Tabs', 'Connectors', 'Messaging', 'Built for Contoso', 'Top picks', 'Popular apps', 'What's new', 'Analytics and BI', 'Developer and IT', 'Education', 'Human resources', 'Productivity', 'Project management', 'Sales and support', and 'Social and fun'. The main area displays a grid of apps under 'All apps'. One app, 'Power BI' by Microsoft Corporation, is highlighted with a red border. Other visible apps include ServiceDesk Plus Cloud, Workstreams.ai, Ment.io, Forms, Polly, YouTube, Jira Cloud, Azure Boards, Trello, Power Automate, and Communities.

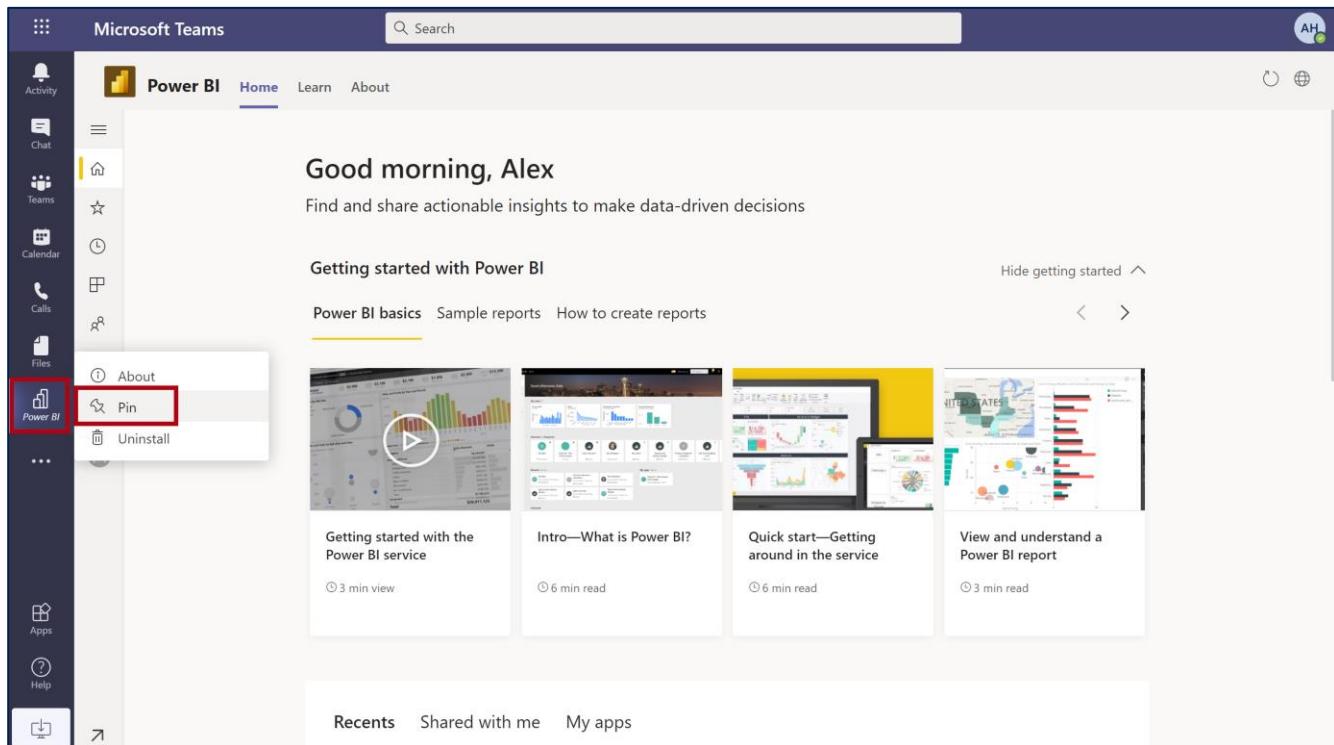
2. Click on the Power BI app when you find it in the search results.

This screenshot shows the Microsoft Teams interface after performing a search for 'power bi'. The search bar now displays 'power bi'. The search results show the 'Power BI' app by Microsoft Corporation, which is highlighted with a red border. The app's description is visible: 'Pin Power BI reports to your channel to start a conversation about your data. With reports and chats in the same place, everyone stays on the...'. The sidebar on the left remains the same as in the previous screenshot.

3. You will see a pop up with information about the Power Apps app for Microsoft Teams. Click on the **Add** button.

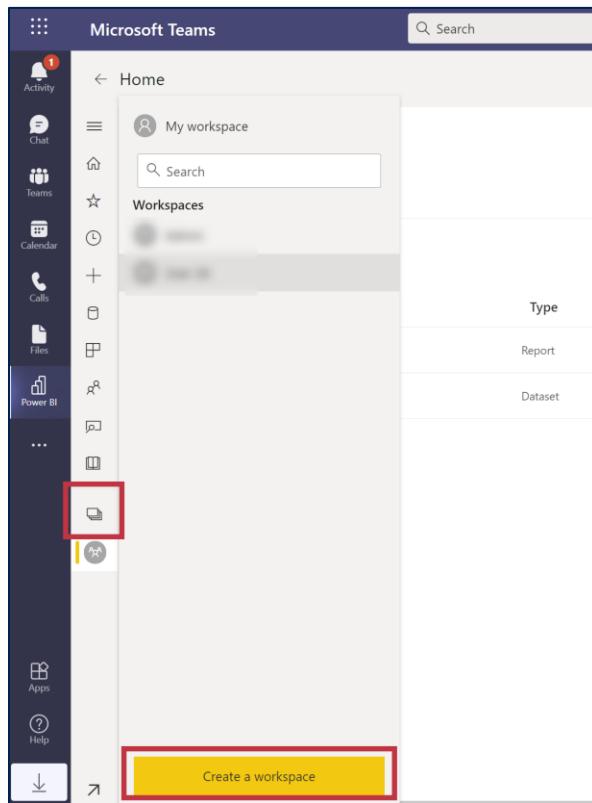


4. You will now see the Power BI app in the left-hand navigation bar. Right click on that icon and select **Pin**. This pins the app to the navigation bar, making it easier to return to it when you need to.



Task 2: Create a workspace

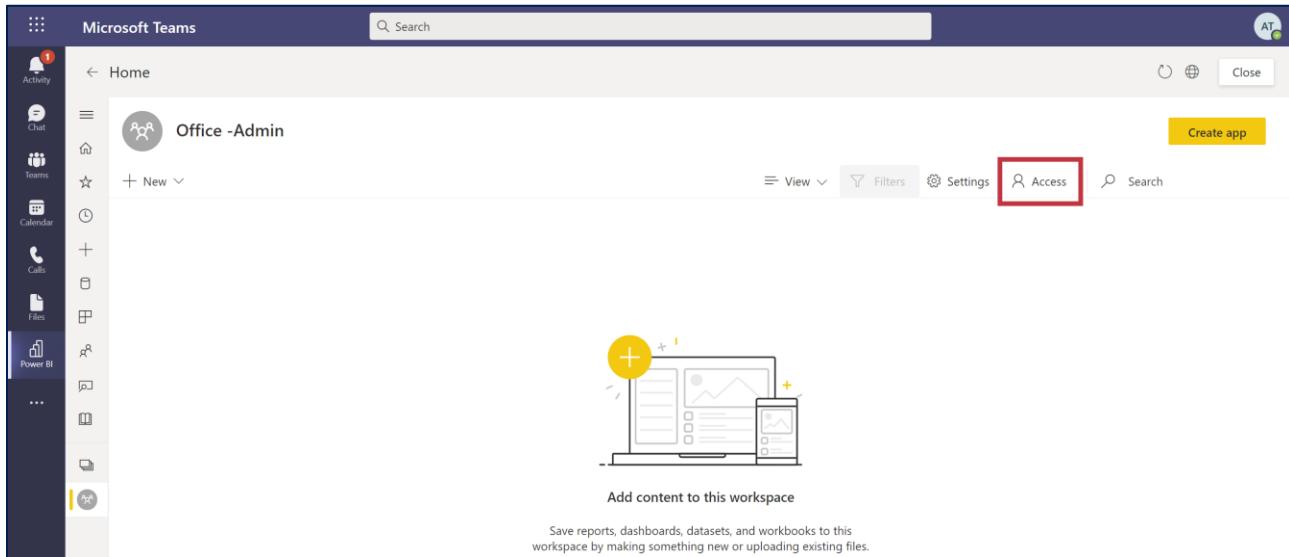
1. In the left navigation menu within the Power BI app, click on the Workspaces icon shown below then click **Create a workspace**.



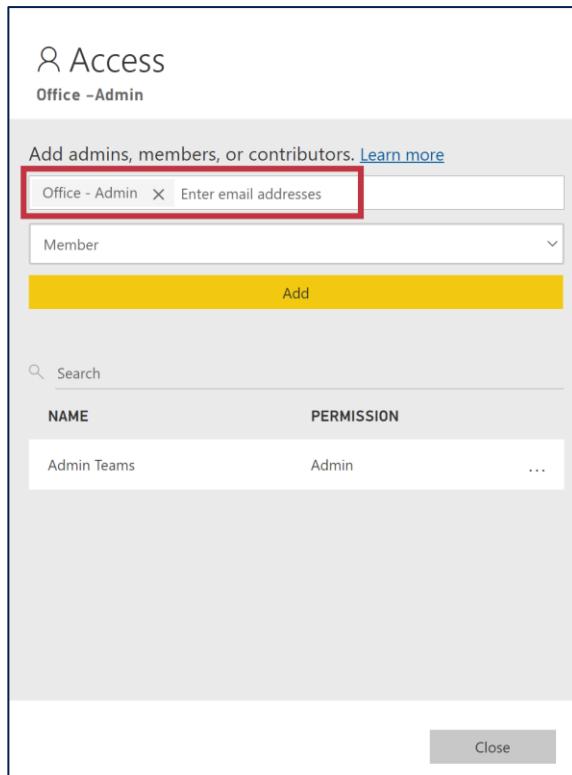
2. For the Workspace name, enter the name of the Team you have been using, e.g. **Office -<your name>** then click **Save**.

A screenshot of the 'Create a workspace' dialog box. It has fields for 'Workspace image' (with upload and delete options), 'Workspace name' (containing 'Office -Admin' which is highlighted with a red box), 'Available' status, 'Description' (with a text area for 'Describe this workspace'), and an 'Advanced' dropdown. At the bottom are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted with a red box.

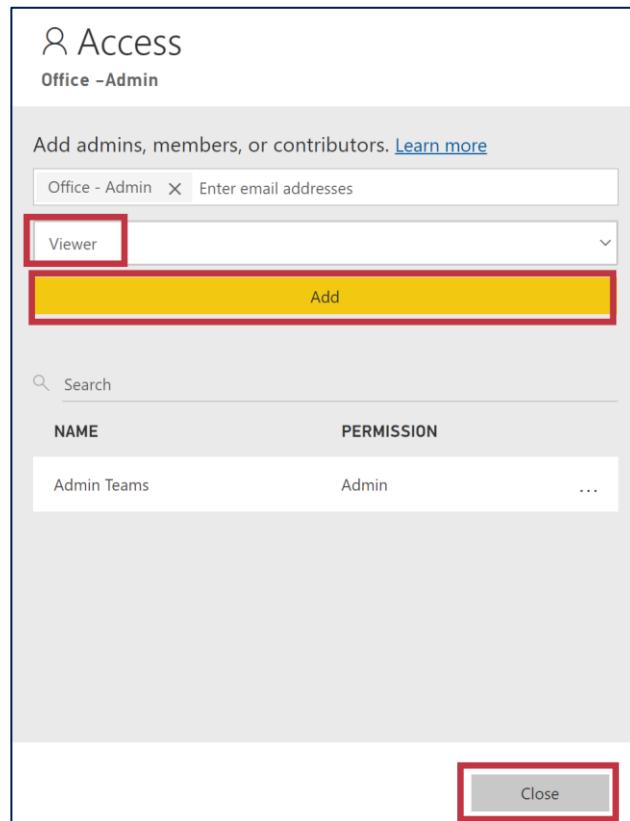
3. In your new workspace, click on **Access**.



4. In the Enter email address field, start typing in the name of your Team, e.g. Office-<your name>. You should see an email address appear using your Team name. Select that email. This will give all members of your Team access to the workspace to the Power BI report you will be creating.



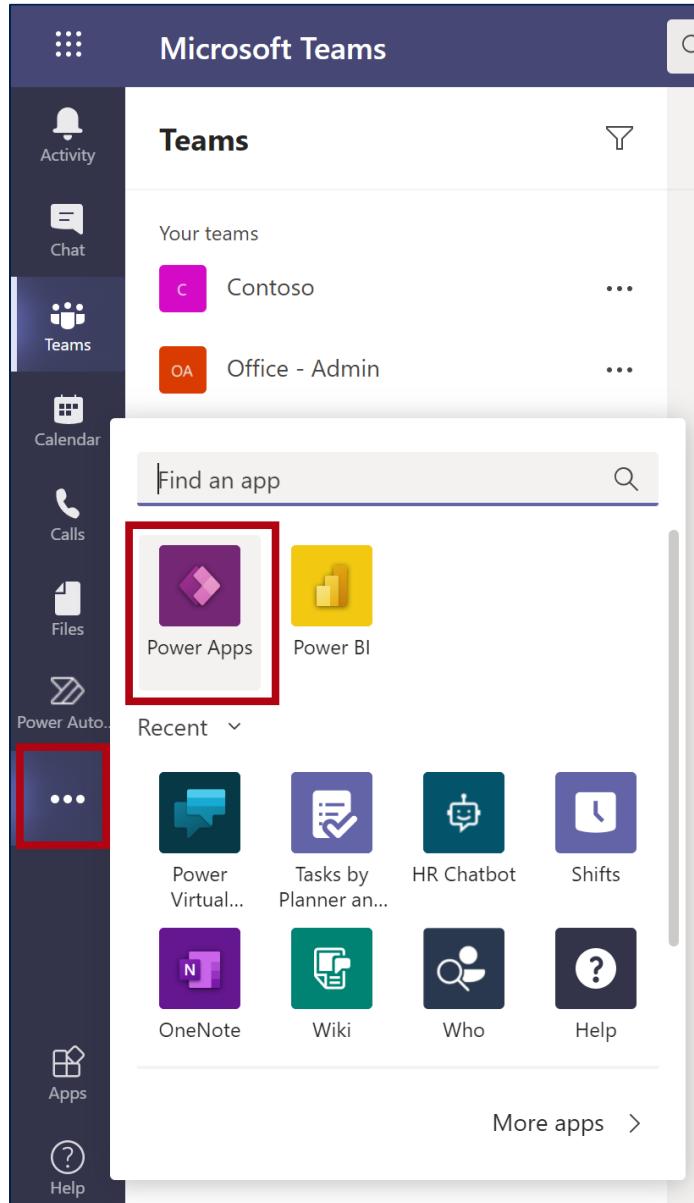
5. Set the access level to **Viewer** then click **Add**. Click **Close**.



Task 3: Connect to Dataverse

In this task, you will be downloading a Power BI file that is set up with a connection to your Dataverse tables created in Lab 1. From the file, you can perform transformations to the data, then publish it to Teams to build out your report.

1. Navigate to the Power Apps app in Teams.



2. Select the Team you have built your solution in, then click on the **Build** tab and **See all**.

The screenshot shows the Microsoft Teams interface with the Power Apps app open. The 'Build' tab is selected and highlighted with a red box. On the left, a sidebar lists various teams: HR, Issue Reporting- Admin, Office - Admin (which is also highlighted with a red box), and Sales. The main area displays a list of items created for the 'Office - Admin' team, titled 'Items created for Office - Admin'. The list includes:

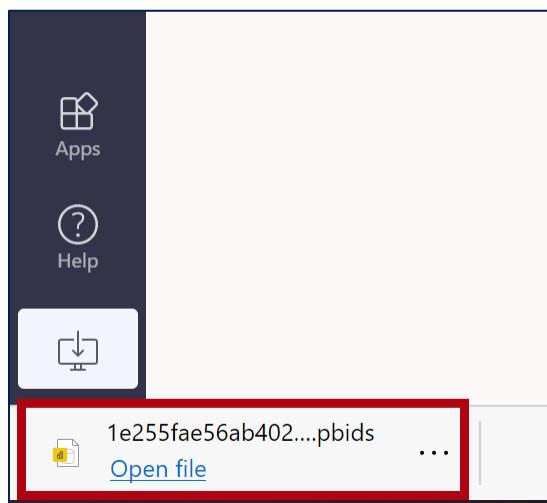
Name	Type
Asset	Table
Asset Category	Table
Home Office Set Up	Canvas App
Request	Table
Create a request	Flow
Get first asset	Flow

A 'New' button is at the top right, and a 'See all' button is at the bottom right, both highlighted with red boxes.

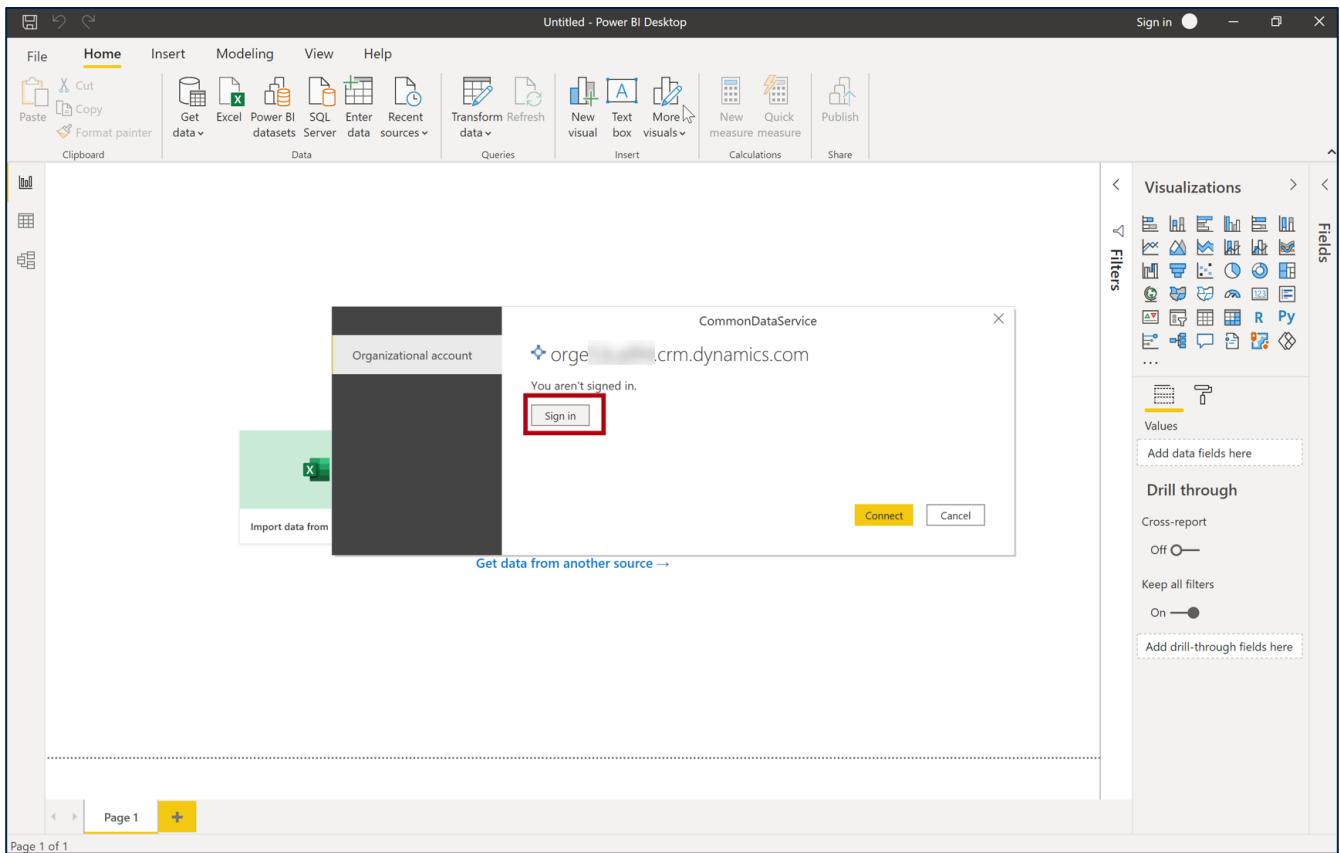
3. Click on **Tables**, then click on **Data > Analyze in Power BI**. This will download a Power BI file.

The screenshot shows the Power Apps interface with the 'Build' tab selected. The left sidebar has 'Tables' selected and highlighted with a red box. The main area shows the 'Data' menu, which is expanded, revealing options: 'New', 'Data' (highlighted with a red box), 'Get data', and 'Analyze in Power BI' (highlighted with a red box). Below this, a 'Table' section lists 'Asset', 'Asset Category', and 'Request'.

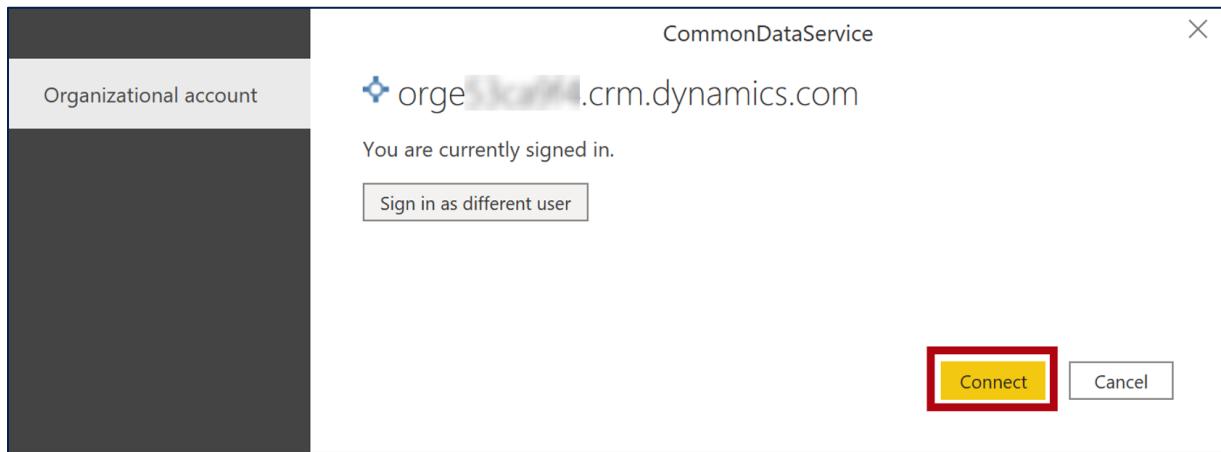
4. Once the file has finished downloading, click to open it in Power BI Desktop.



5. When you launch Power BI Desktop, you will be prompted to sign in. Click **Sign In**, and sign in with your lab credentials.



6. Once signed in, click **Connect**.



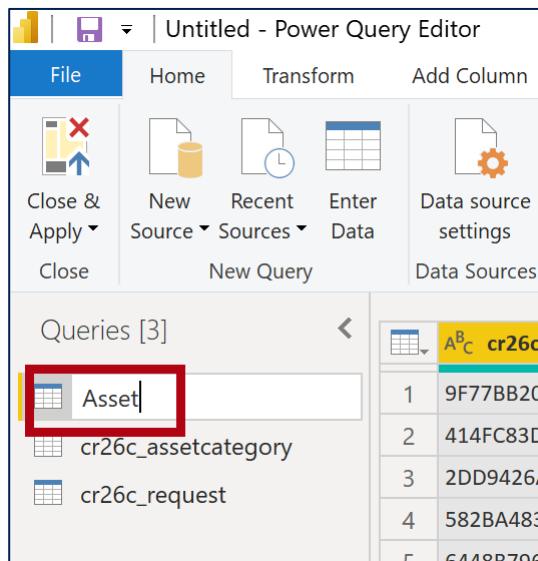
7. You will be loading the 3 tables that you created earlier in Lab 1. Scroll down the list until you find the Request, Asset and Asset Category tables. Your table name will be in a format such as cr26c_asset. *Your tables will begin with a unique prefix (which you identified in the previous lab), which is not the same as this example.* Mark the checkbox next to your 3 tables, then click on **Transform Data**. This will launch Power Query Editor in another window.

cr26c_requestid	createdon
41896161-193A-EB11-A813-000D3A9C34F6	9/12/2020 12:23:45 PM
D8217071-193A-EB11-A813-000D3A9C34F6	9/12/2020 12:24:12 PM
FA409C8B-193A-EB11-A813-000D3A9C34F6	9/12/2020 12:24:57 PM
2A290CC7-683A-EB11-A813-000D3A9C34F6	9/12/2020 9:52:06 PM
2C94E96D-AA3A-EB11-A813-000D3A9C34F6	10/12/2020 5:42:03 AM

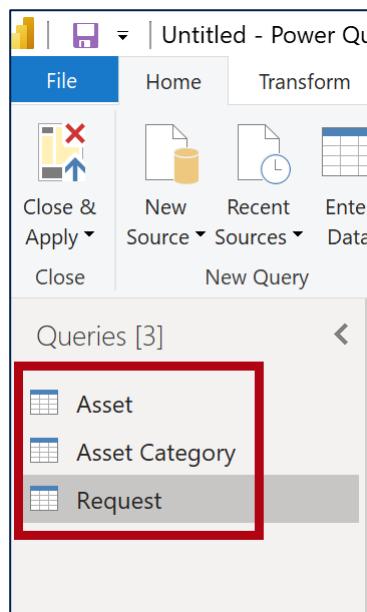
Task 4: Transform Data

Now that you have connected to your Dataverse tables, the next step involves cleaning or “transforming” your data so that it is optimized for reporting. Transformations are done in Power BI using the Power Query Editor tool.

1. From the Queries menu on the left side of the screen, double click on the `x_asset` query. Rename the query to **Asset**.



2. Rename `x_assetcategory` query to **Asset Category**.
3. Rename `x_request` query to **Requests**. Your queries should now appear as the following.



4. Click on the Asset query, then click on **Choose Columns** from the ribbon.

The screenshot shows the Microsoft Power Query Editor interface. The ribbon at the top has tabs for File, Home, Transform, Add Column, View, Tools, and Help. The Home tab is selected. On the far right of the ribbon, there is a dropdown menu with several options: Properties, Advanced Editor, Manage, Refresh Preview, Go to Column, Choose Columns, and Remove Columns. The 'Choose Columns' option is highlighted with a red box. In the left pane, under 'Queries [3]', the 'Asset' query is selected and highlighted with a red box. The main pane displays a table with 8 rows of asset data. The first column is labeled 'cr26c_assetid' and contains values like '9F77BB20-143A-EB11-A813-000D3A9C3...' and '414FC83D-143A-EB11-A813-000D3A9C3...'. The second column contains asset names such as 'Curved Monitor 24"', 'Ergonomic Chair- Black', 'High Back Chair- Brown', etc. The third column contains numerical values like 40, 40, 40, etc. The fourth column is partially visible.

cr26c_assetid	Asset Name	Value
9F77BB20-143A-EB11-A813-000D3A9C3...	Curved Monitor 24"	40
414FC83D-143A-EB11-A813-000D3A9C3...	Ergonomic Chair- Black	40
2DD9426A-153A-EB11-A813-000D3A9C3...	High Back Chair- Brown	40
582BA483-153A-EB11-A813-000D3A9C3...	LED Monitor 21.5"	40
6448B796-153A-EB11-A813-000D3A9C3...	Standing Desk- White	40
5A6E09B1-153A-EB11-A813-000D3A9C3...	Storage Desk- Oak	40
5B645BBE-153A-EB11-A813-000D3A9C3...	USB Headset	B4
C628B4E9-153A-EB11-A813-000D3A9C3...	Wireless On-ear Headset	B4

5. Untick **(Select All Columns)** to clear all columns from selection. Select the following 5 columns to bring in:

x_assetid (this will be at the top of the list)

x_name

x_assetcategory

x_assetcategoryname

x_price

x_productid

Click **OK**.

The screenshot shows the Microsoft Power Query Editor interface. On the left, there's a 'Queries [3]' pane with three items: 'Asset', 'Asset Category', and 'Requests'. The 'Asset' query is currently selected. In the main area, a table is displayed with columns 'cr26c_assetid' and 'createdon'. Below the table, a 'Choose Columns' dialog box is open. This dialog has a title 'Choose Columns' and a sub-instruction 'Choose the columns to keep'. It contains a 'Search Columns' input field and a list of column names with checkboxes. Most checkboxes are unchecked except for the five specified in the task: 'cr26c_name', 'cr26c_assetcategory', 'cr26c_assetcategoryname', 'cr26c_price', and 'cr26c_productid'. At the bottom right of the dialog, the 'OK' button is highlighted with a red box.

	cr26c_assetid	createdon
1	9F77BB20-143A-EB11-A813-000D3A9C3...	9/12/20.
2	414FC83D-143A-EB11-A813-000D3A9C3...	9/12/20.
3	2DD426A-153A-EB11-A813-000D3A9C3...	9/12/20.
4	582BA483-153A-EB11-A813-000D3A9C3...	9/12/20.
5	6448B796-153A-EB11-A813-000D3A9C3...	9/12/20.
6	5A6E09B1-153A-EB11-A813-000D3A9C3...	9/12/20.
7	5B645BBE-153A-EB11-A813-000D3A9C3...	9/12/20.
8	C628B4E9-153A-EB11-A813-000D3A9C3...	9/12/20.

6. You will rename the columns in the Asset query. To rename a column, double click on the column header. Alternatively, you can right click on the column header and click Rename. You will rename each column to the following new name.

x_assetid	Asset ID
x_name	Asset Name
x_assetcategory	Asset Category ID
x_assetcategoryname	Asset Category Name
x_price	Price
x_productid	Product ID

The screenshot shows the Power Query Editor interface with the 'Asset' query selected. A context menu is open over the 'A^B_Asset Name' column header. The 'Rename...' option is highlighted with a red box. Other options visible in the menu include Copy, Remove, Remove Other Columns, Duplicate Column, Add Column From Examples..., Remove Duplicates, Remove Errors, Change Type, Transform, Replace Values..., Replace Errors..., Split Column, Group By..., Fill, Unpivot Columns, Unpivot Other Columns, Unpivot Only Selected Columns, and Drill Down.

The screenshot shows the Power Query Editor interface with the 'Asset' query selected. The columns have been renamed to 'Asset ID', 'Asset Name', 'Asset Category ID', 'Asset Category Name', and 'Price'. The data in the table includes:

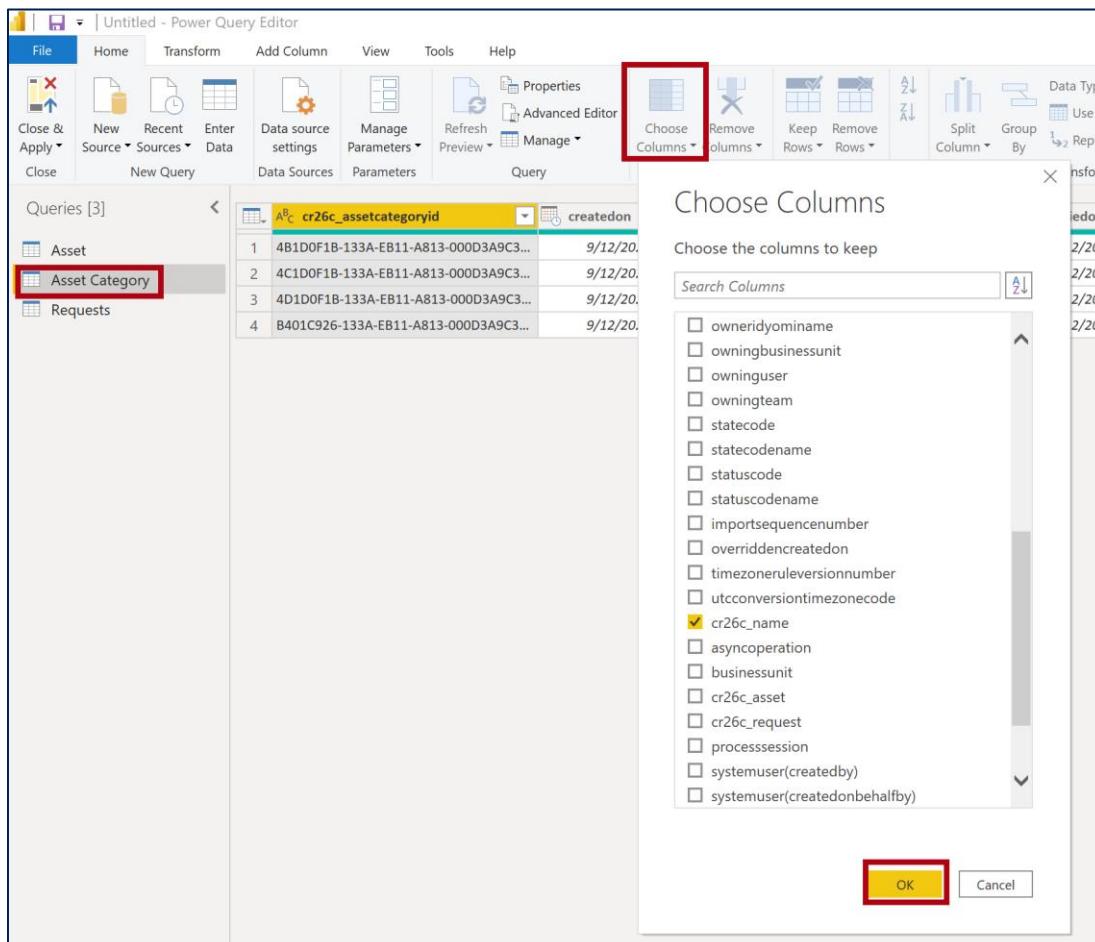
	A ^B _Asset ID	A ^B _Asset Name	A ^B _Asset Category ID	A ^B _Asset Category Name	1.2 Price
1	9F77BB20-143A-EB11-A813-000D3A9C3...	Curved Monitor 24"	4D1D0F1B-133A-EB11-A813-000D3A9C3...	Monitor	
2	414FC83D-143A-EB11-A813-000D3A9C3...	Ergonomic Chair- Black	4B1D0F1B-133A-EB11-A813-000D3A9C3...	Chair	
3	2DD9426A-153A-EB11-A813-000D3A9C3...	High Back Chair- Brown	4B1D0F1B-133A-EB11-A813-000D3A9C3...	Chair	
4	582BA483-153A-EB11-A813-000D3A9C3...	LED Monitor 21.5"	4D1D0F1B-133A-EB11-A813-000D3A9C3...	Monitor	

7. Click on the **Asset Category query**, then click on **Choose Columns** from the ribbon. You will pick the columns you want displayed in the Asset Category query, as done previously in step 5. Untick **(Select All Columns)** to clear all columns from selection. Select the following 2 columns to bring in:

x_assetcategoryid (this will be at the top of the list)

x_name

Click **OK**.



8. Rename the columns in the **Asset Category** query. To rename a column, double click on the column header. Alternatively, you can right click on the column header and click Rename. You will rename each column to the following new name.

x_assetcategoryid	Asset Category ID
x_name	Asset Category

The screenshot shows the Power Query Editor interface. On the left, there is a sidebar titled 'Queries [3]' containing three items: 'Asset', 'Asset Category' (which is selected and highlighted in yellow), and 'Requests'. The main area displays a table with four rows. The first row contains the headers 'Asset Category ID' and 'Asset Category'. The subsequent rows contain data: Row 1 has ID '4B1D0F1B-133A-EB11-A813-000D3A9C3...' and Category 'Chair'; Row 2 has ID '4C1D0F1B-133A-EB11-A813-000D3A9C3...' and Category 'Desk'; Row 3 has ID '4D1D0F1B-133A-EB11-A813-000D3A9C3...' and Category 'Monitor'; Row 4 has ID 'B401C926-133A-EB11-A813-000D3A9C3...' and Category 'Headset'. The 'Asset Category' column header is highlighted with a yellow border.

	A ^B _C Asset Category ID	A ^B _C Asset Category
1	4B1D0F1B-133A-EB11-A813-000D3A9C3...	Chair
2	4C1D0F1B-133A-EB11-A813-000D3A9C3...	Desk
3	4D1D0F1B-133A-EB11-A813-000D3A9C3...	Monitor
4	B401C926-133A-EB11-A813-000D3A9C3...	Headset

9. Click on the **Requests query**, then click on **Choose Columns** from the ribbon. You will pick the columns you want displayed in the Request query. Untick **(Select All Columns)** to clear all columns from selection. Select the following 10 columns to bring in:

x_requestid (this will be at the top of the list)

x_name

x_requestno

x_comment

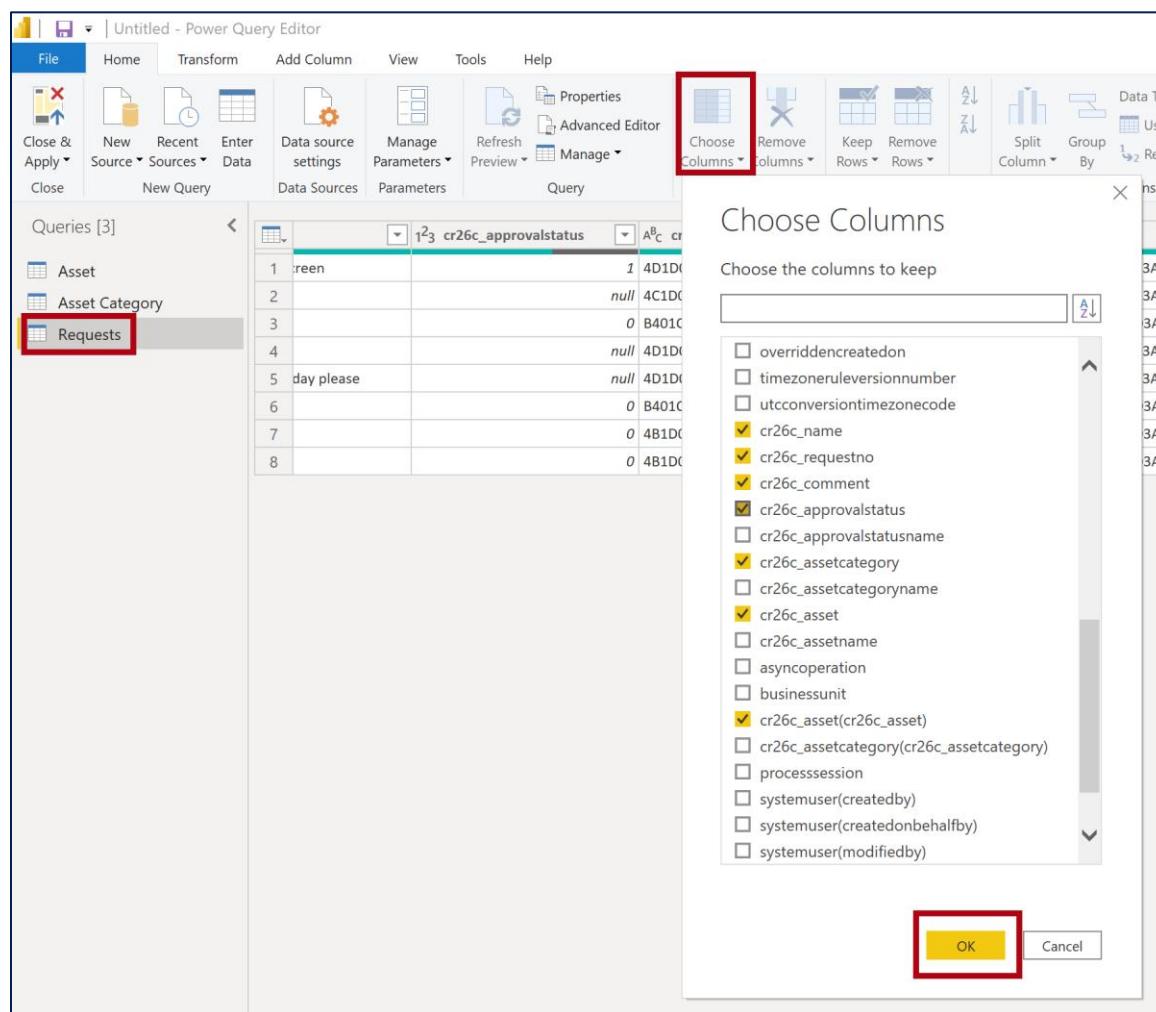
x_approvalstatus

x_assetcategory

x_asset

x_asset(x_asset)

Click **OK**.



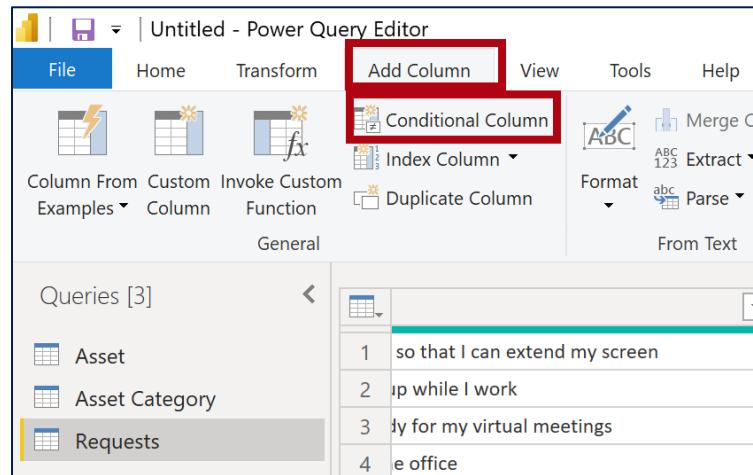
10. You will need to bring the Price column from the Asset query into the Requests query. In the Requests query, go to the last column **x_asset(x_asset)** and click on the **expand** button. Deselect all the columns by unticking (**Select All Columns**). Find **x_price** column to select it, then, click on **OK**.

The screenshot shows the Power Query Editor interface. On the left, under 'Queries [3]', there are three entries: 'Asset', 'Asset Category', and 'Requests'. The 'Requests' query is currently selected. In the main area, there is a table with several columns. The last column is labeled 'x_asset(x_asset)'. A red box highlights this column. At the top of the screen, the ribbon has a 'Transform' tab selected. A second red box highlights the 'Transform' tab. A third red box highlights the 'Expand' button in the 'Transform' group of the ribbon. To the right of the table, there is a 'Search Columns to Expand' dropdown menu. It contains a list of columns from the expanded 'Asset' query. One column, 'x_price', has a checked checkbox, indicated by a yellow box. Below the dropdown, there is a checkbox for 'Use original column name as prefix' and two buttons at the bottom: 'OK' (highlighted with a yellow box) and 'Cancel'.

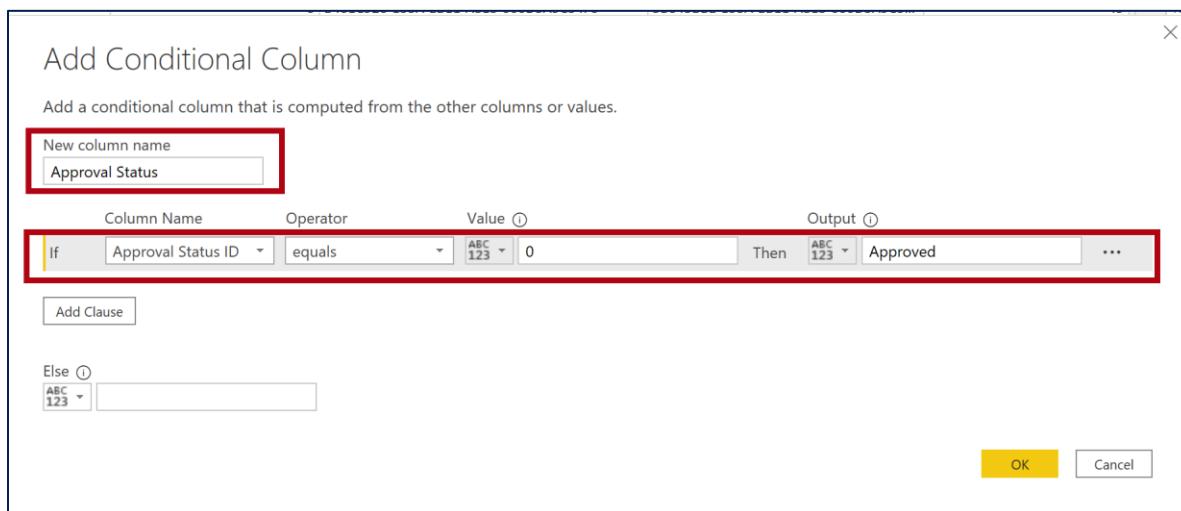
11. In the Requests query, rename each column to the following new name.

<i>x_requestid</i>	Request ID
<i>x_name</i>	Request Name
<i>x_requestno</i>	Request No.
<i>x_comment</i>	Comment
<i>x_approvalstatus</i>	Approval Status ID
<i>x_assetcategory</i>	Asset Category ID
<i>x_asset</i>	Asset ID
<i>x_asset(x_asset)</i>	Asset Price

12. You will notice that the Approval Status ID column contains a number value rather than the words "Approved" or "Rejected", as was originally created in the table. When connecting to Dataverse, data in columns of the Choice type will appear as a corresponding number value. The number corresponds to the order in which the Choice was created. We will add in a conditional column so that in our data, we can see the Approval Status values in a user-friendly format. In the ribbon, click on the **Add Column** tab, then select **Conditional Column**.



13. Enter the name of the conditional column as **Approval Status**, then enter in the following clause:
Column Name = Approval Status ID
Operator = equals
Value= 0
Output = Approved



14. Click the **Add Clause** button to add another condition. Enter in the following clause:

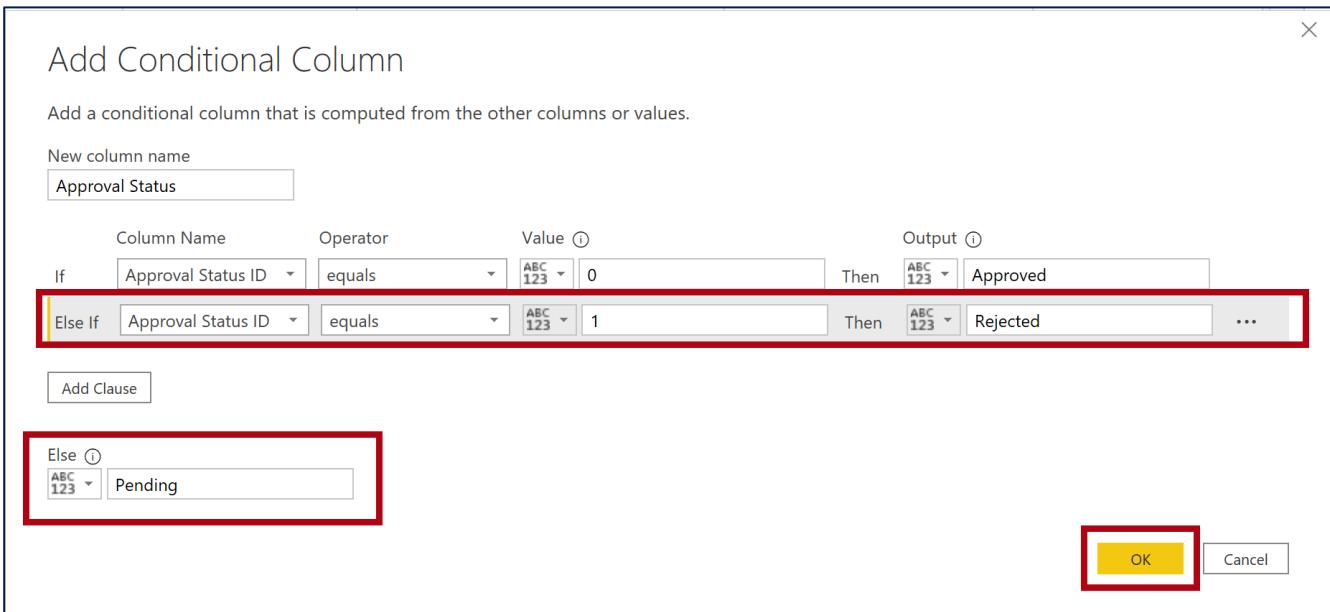
Column Name = Approval Status ID

Operator = equals

Value= 1

Output = Rejected

In the Else field, type in **Pending**. Click **OK**.



15. In your newly created conditional column for **Approval Status**, click on the icon in the column header that says ABC 123. This is to change the column type. Select **Text**.

The screenshot shows the Power BI Data View with a table of data. On the left, there's a sidebar with 'Queries [3]' and three items: 'Asset', 'Asset Category', and 'Requests', with 'Requests' selected. The main area shows a table with columns: Status ID, Asset Category ID, Asset ID, Asset Price, and Approval Status. The 'Approval Status' column has a dropdown arrow icon in its header. A context menu is open over this icon, listing various data types: Decimal Number, Fixed decimal number, Whole Number, Percentage, Date/Time, Date, Time, Date/Time/Timezone, and Duration. The 'Text' option is highlighted with a red box at the bottom of the list.

16. We no longer need the Approval Status ID column, so you can delete it. Right-click in the header of **Approval Status ID** column, then click **Remove**.

The screenshot shows the Power BI Data Editor interface. On the left, there's a sidebar titled "Queries [3]" with three items: Asset, Asset Category, and Requests. The Requests query is currently selected and displayed in the main area as a table. The "Approval Status ID" column header is highlighted with a red box. A context menu is open at this header, also with a red box around it. The menu options include: Copy, Remove (which is highlighted with a red box), Remove Other Columns, Duplicate Column, Add Column From Examples..., Remove Duplicates, Remove Errors, Change Type, Transform, Replace Values..., Replace Errors..., Group By..., Fill, Unpivot Columns, Unpivot Other Columns, Unpivot Only Selected Columns, Rename..., Move, Drill Down, and Add as New Query.

17. The screenshots below show you the columns that each of your queries should include:

Asset Query:

	A ^B C Asset ID	A ^B C Asset Name	A ^B C Asset Category ID	A ^B C Asset Category Name	I.2 Price	A ^B C Product ID
1	9F77BB20-143A-EB11-A813-000D3A9C3...	Curved Monitor 24"	4D1D0F1B-133A-EB11-A813-000D3A9C3...	Monitor		321 M932
2	414FC83D-143A-EB11-A813-000D3A9C3...	Ergonomic Chair- Black	4B1D0F1B-133A-EB11-A813-000D3A9C3...	Chair		199.5 C09223
3	2DD9426A-153A-EB11-A813-000D3A9C3...	High Back Chair- Brown	4B1D0F1B-133A-EB11-A813-000D3A9C3...	Chair		215 BC129
4	582BA483-153A-EB11-A813-000D3A9C3...	LED Monitor 21.5"	4D1D0F1B-133A-EB11-A813-000D3A9C3...	Monitor		198.4 LED35711

Asset Category:

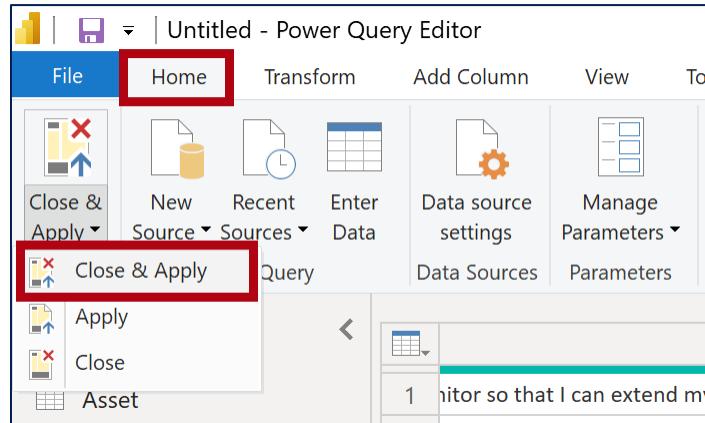
	A ^B C Asset Category ID	A ^B C Asset Category
1	4B1D0F1B-133A-EB11-A813-000D3A9C3...	Chair
2	4C1D0F1B-133A-EB11-A813-000D3A9C3...	Desk
3	4D1D0F1B-133A-EB11-A813-000D3A9C3...	Monitor
4	B401C926-133A-EB11-A813-000D3A9C3...	Headset

Requests:

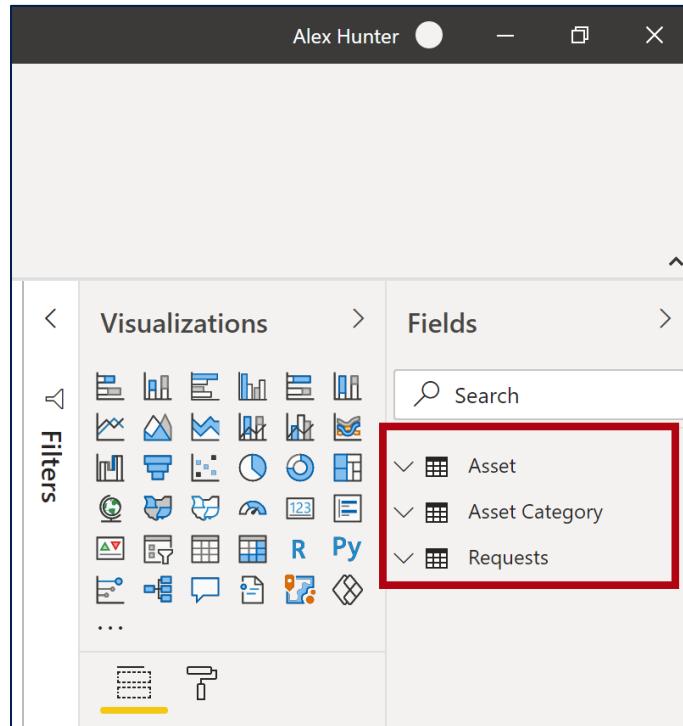
	A ^B _C Request ID	A ^B _C Request Name	A ^B _C Request No.	A ^B _C Comment	
1	D06CAB64-BF5A-EB11-A812-000D3A8C6...	Need a new headset	1013	old one is broken	
2	C36A2600-C674-EB11-A812-000D3A9AB...	New headset	1014		null
3	FA409C8B-193A-EB11-A813-000D3A9C3...	Headset needed	1002	This will come in handy for my virtual meetings	
4	74A79F81-B93D-EB11-A813-000D3A9C3...	New USB Headset	1005	My previous headset is no longer working	

	A ^B _C Asset Category ID	A ^B _C Asset ID	1.2 Asset Price	A ^B _C Approval Status
	B401C926-133A-EB11-A813-000D3A9C3...	C628B4E9-153A-EB11-A813-000D3A9C3...	199	Approved
/	B401C926-133A-EB11-A813-000D3A9C3...	C628B4E9-153A-EB11-A813-000D3A9C3...	199	Pending
	B401C926-133A-EB11-A813-000D3A9C3...	5B645BBE-153A-EB11-A813-000D3A9C3...	49	Approved
	B401C926-133A-EB11-A813-000D3A9C3...	5B645BBE-153A-EB11-A813-000D3A9C3...	49	Approved

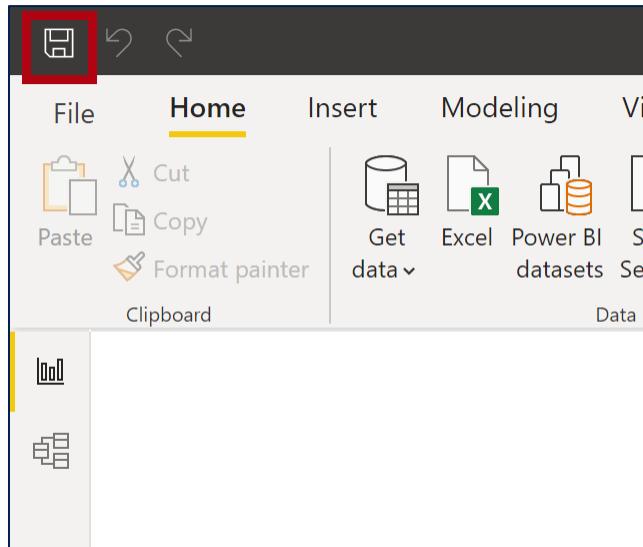
18. Now that you have finished with the transformation steps, you can apply your changes. In the ribbon, click on the **Home** tab, then click on **Close and Apply**.



19. Once it has finished applying, you will be taken back to your Power BI Desktop window, and you can see your 3 tables in the fields pane on the right side of your screen.



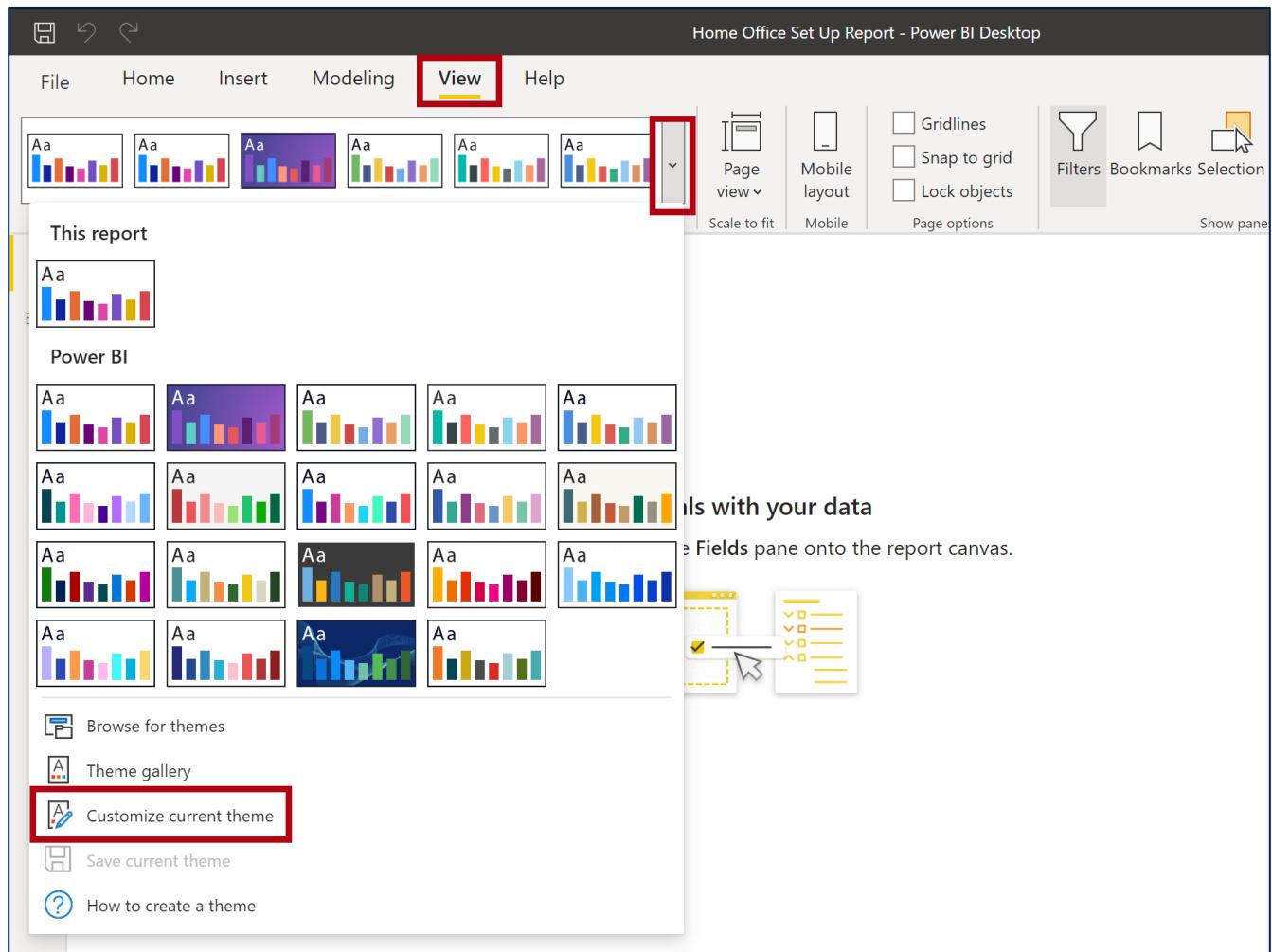
20. You can now save your Power BI File. Click the **Save** icon in the top left of the screen. Name your file **Home Office Set Up Report**, then save it in a location of your choice.



Task 5: Change Report Theme

You can customize the theme of your report to make designing easier. We will customize the theme so that there is consistency across the colors used in the report.

1. In your Power BI Desktop file, click on the **View** tab of the ribbon. Click on the **Themes** dropdown, and select **Customize current theme**.



2. Enter in the corresponding HEX value for each of the colors of the theme:

Color 1: #6699CC

Color 2: #FFF275

Color 3: #FF8C42

Color 4: #A537FF

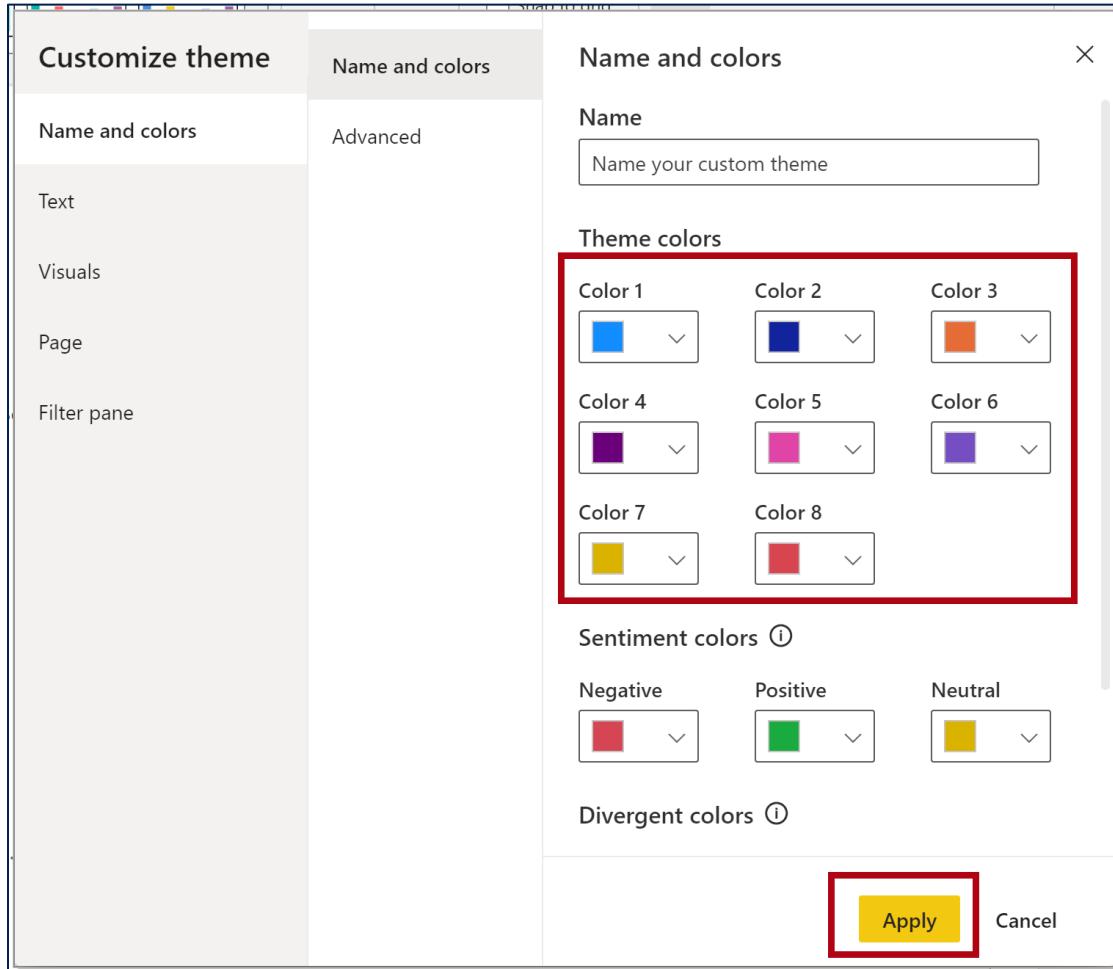
Color 5: #A23E48

Color 6: #FF4500

Color 7: #FFD700

Color 8: #008000

Click **Apply**.

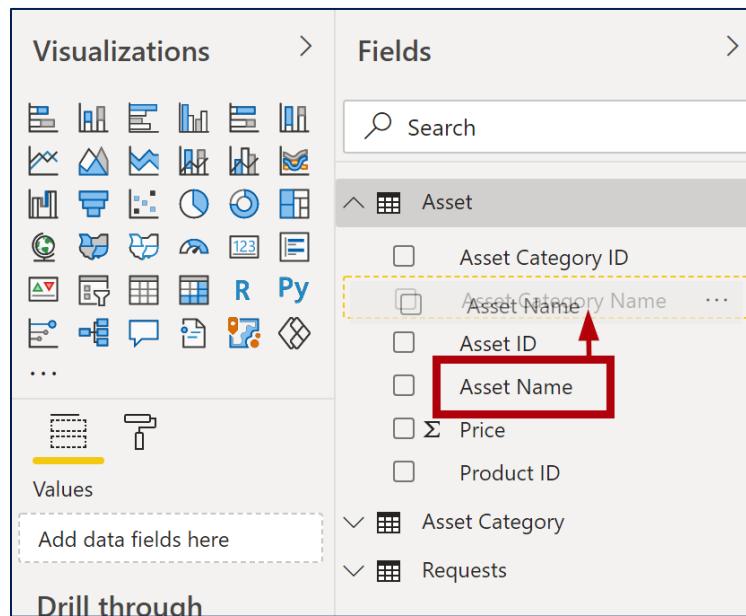


3. **Save** your file.

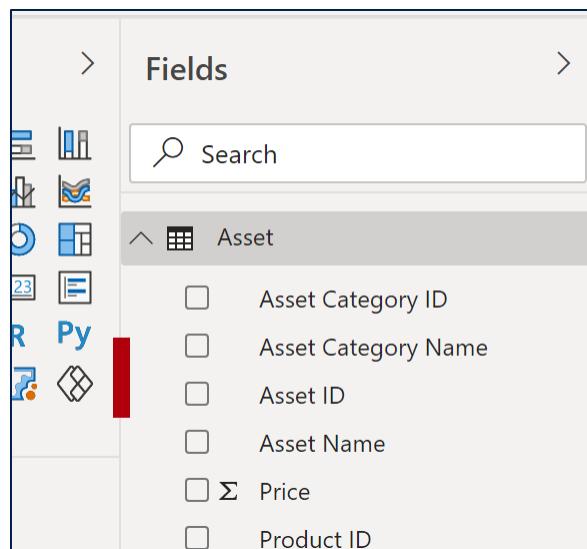
Task 6: Create an Asset Category Hierarchy

A hierarchy allows you to drill down into data in your report. We will create a hierarchy in the Asset table, which will allow us to drill into asset names based on the asset category. This will be used for a visual later in the lab.

1. From the Fields pane, expand the Asset table so that you can see the fields. Click on the **Asset Name** field, and drag and drop it onto the **Asset Category Name** field.



You can expand the size of the pane to better see the field names, if they are getting cut off. Just click on the border of the pane to resize it.



2. Your Asset Category Hierarchy is now created.

The screenshot shows the Microsoft Power BI Fields pane. On the left, there is a 'Visualizations' section with various chart icons and a 'Values' section containing a button labeled 'Add data fields here'. On the right, there is a search bar with the placeholder 'Search' and a list of fields under the category 'Asset'. A red box highlights a specific section of the field list:

- Asset Category Name ... (with three sub-options: Asset Category Name, Asset Name, and Asset ID)
- Asset ID
- Asset Name
- Σ Price
- Product ID

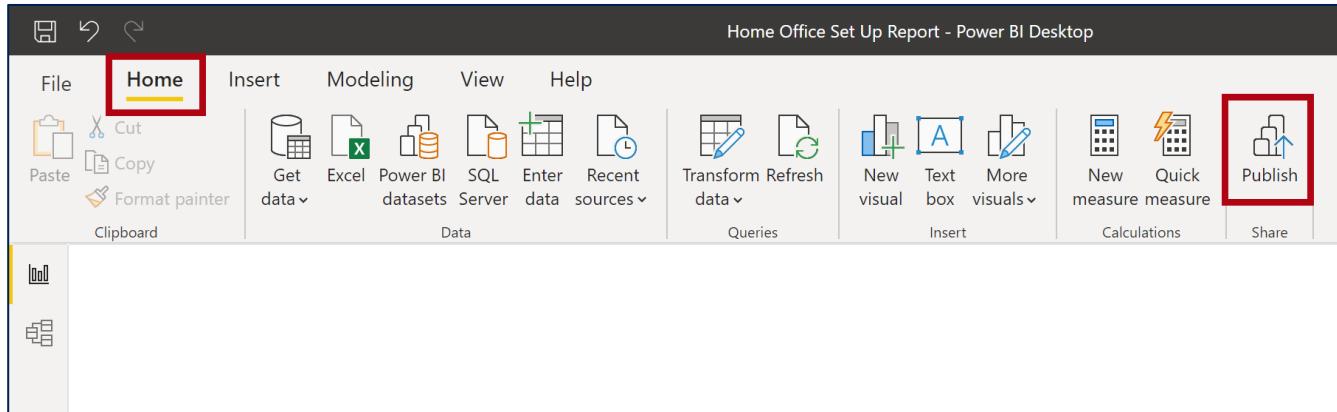
3. **Save** your file.

Exercise 2: Build your Report in Teams

You can build the rest of your Power BI report either in Power BI Desktop or the Power BI app for teams. The Power BI app for teams is an embedded version of Power BI Service. Power BI Desktop contains the full range of report building capabilities. If you build the report in Teams, other users are able to collaborate with you. In this lab, you will build out the rest of the report in Microsoft Teams.

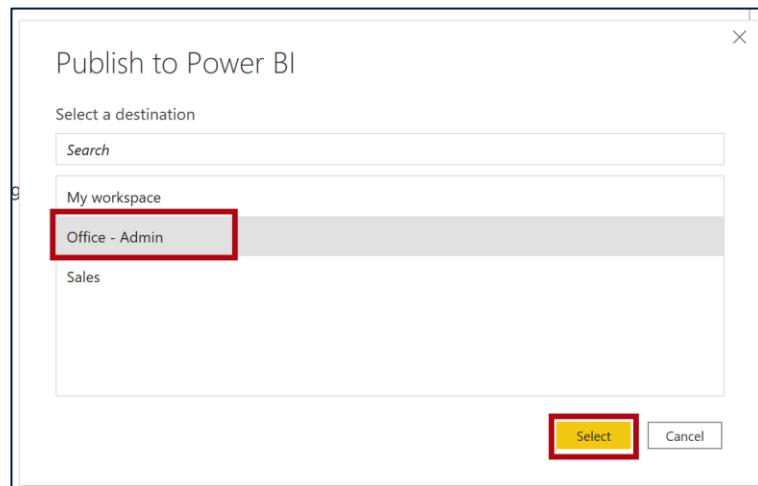
Task 1: Publish Report to Teams

1. In your Power BI Desktop file, click on the Home tab in the ribbon, then click on **Publish**. If prompted, click to save your changes.

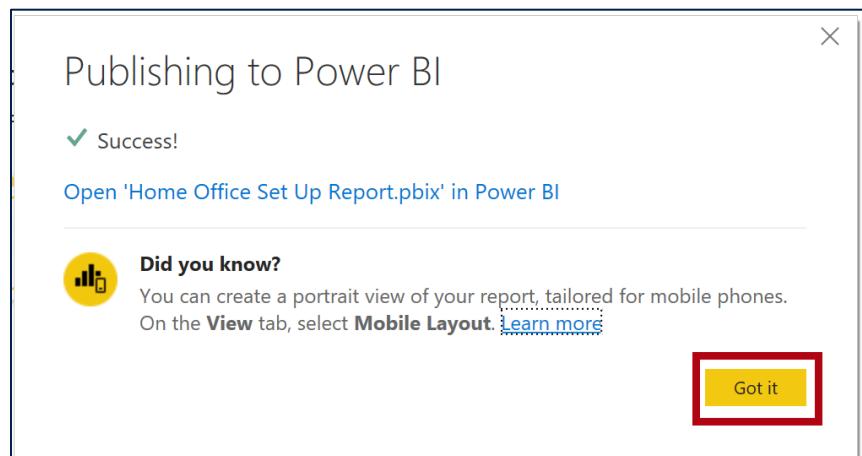


2. You can now select the workspace you wish to publish to. Select the name of the workspace you created earlier in this lab, i.e. **Office - <your name>**, then click **Select**.

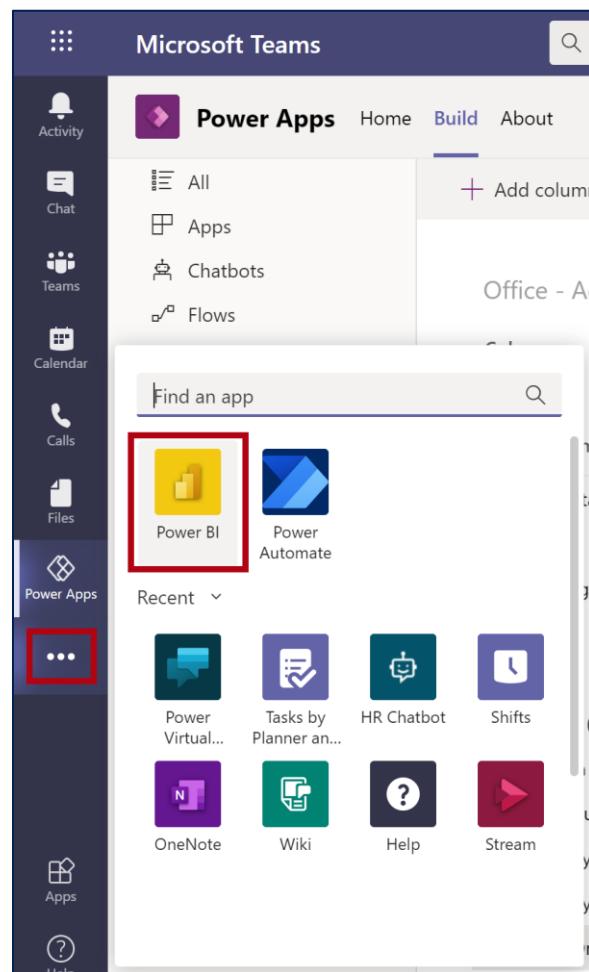
*Note: Publishing to a team requires Power BI Pro or Premium license, which should have been set up either by your lab facilitator or by yourself in the prerequisites. If you are unable to access the Pro or Premium license, you can choose to publish your report to the **My workspace** workspace.*



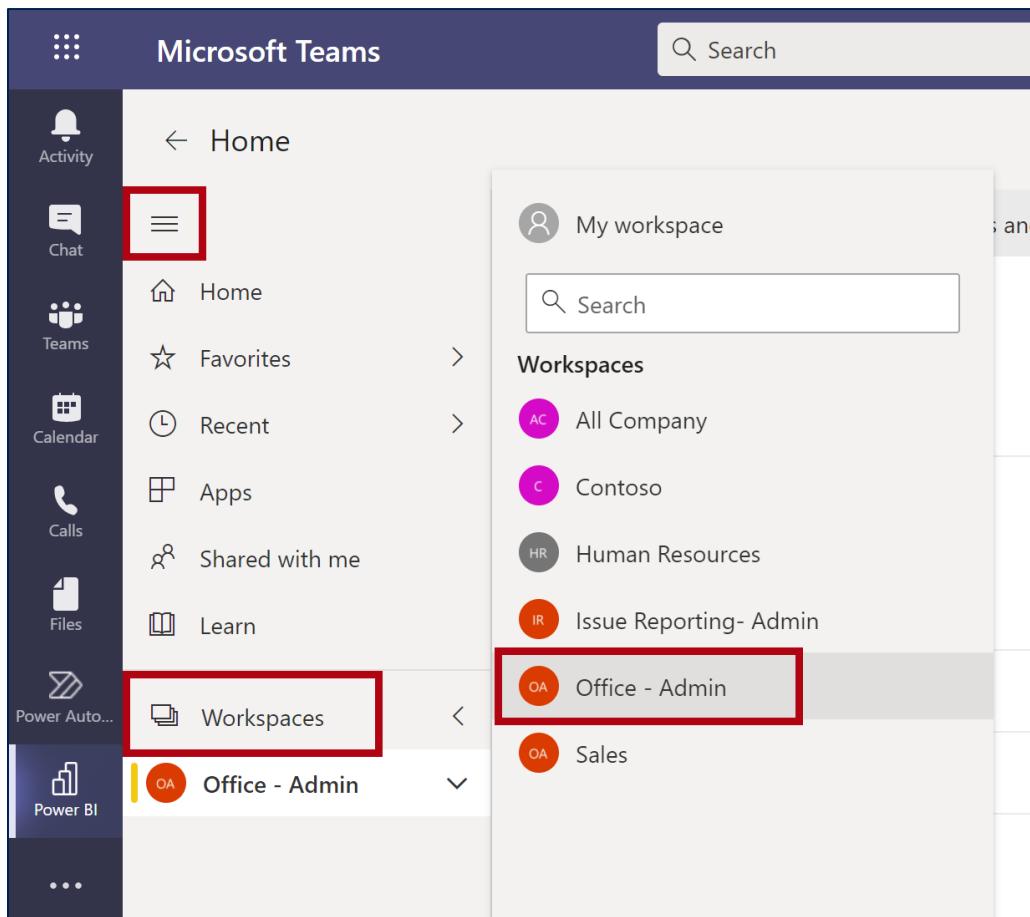
4. You will get this confirmation once the report has been published. Click **Got it**.



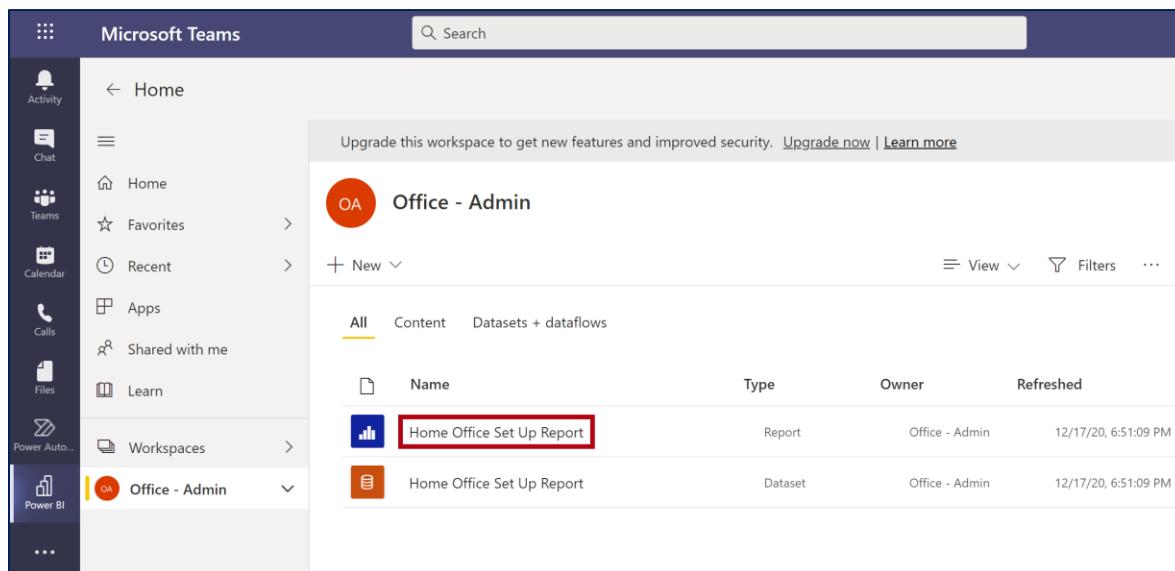
5. Navigate back to Microsoft Teams. If you need to open it again, you can access it by going to <https://teams.microsoft.com/> in your web browser, and signing in with your lab credentials. In Teams, launch the Power BI app.



6. Click on the hamburger icon  to expand the menu, then click on Workspaces. If not selected already, click on the team you have just published the report to.



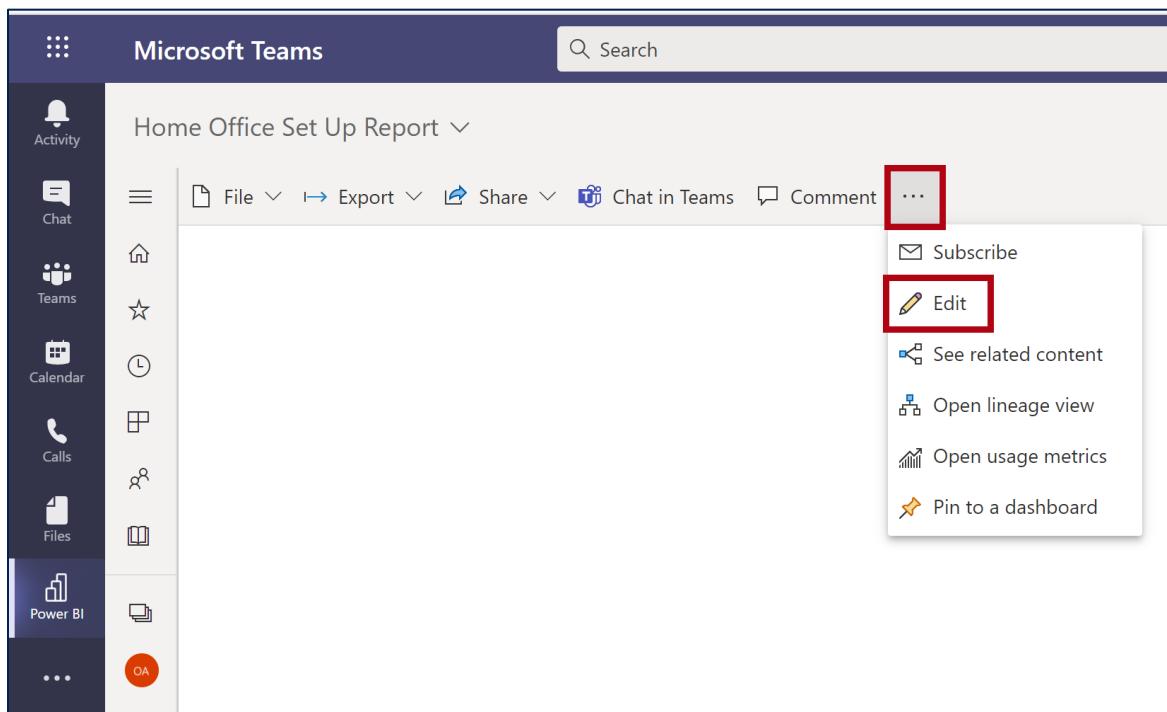
7. Click on **Home Office Set Up Report**, of the Report type (do not click on the dataset).



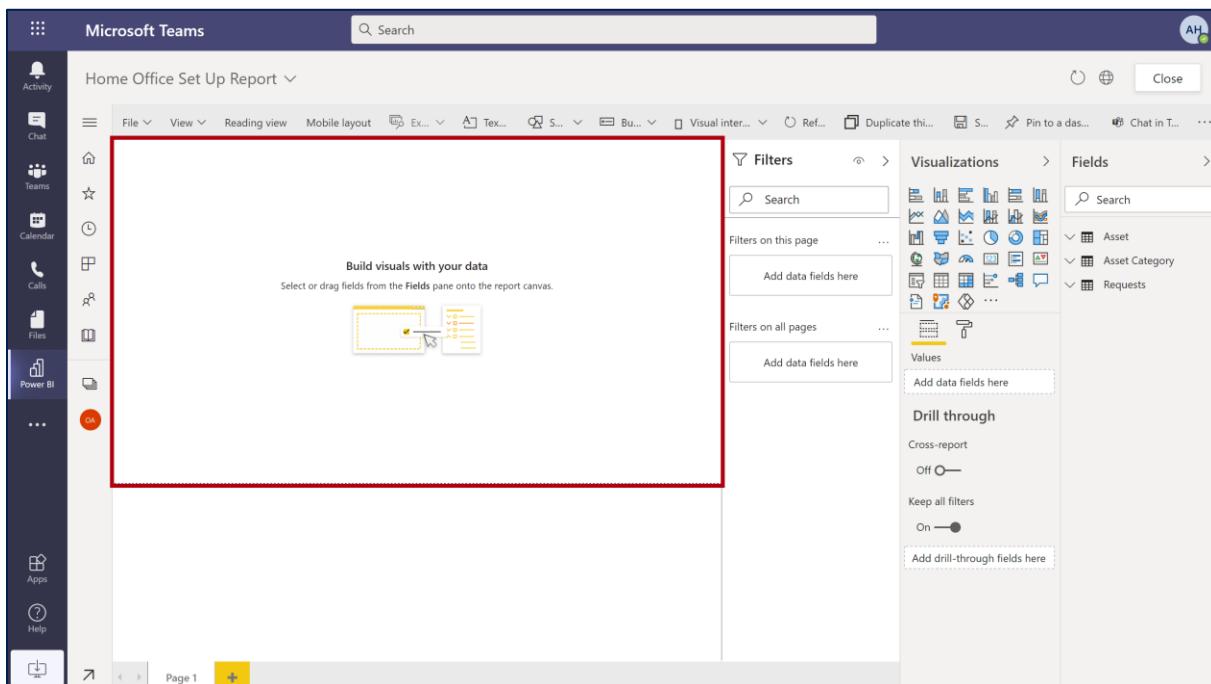
The screenshot shows the Microsoft Teams workspace for the 'Office - Admin' team. At the top, there is a message about upgrading the workspace. Below it, a table lists items under the 'All' tab. The first item, 'Home Office Set Up Report', is highlighted with a red box. It is a Report type, owned by Office - Admin, and was last refreshed on 12/17/20, 6:51:09 PM. There is another entry for 'Home Office Set Up Report' which is a Dataset type.

Name	Type	Owner	Refreshed
Home Office Set Up Report	Report	Office - Admin	12/17/20, 6:51:09 PM
Home Office Set Up Report	Dataset	Office - Admin	12/17/20, 6:51:09 PM

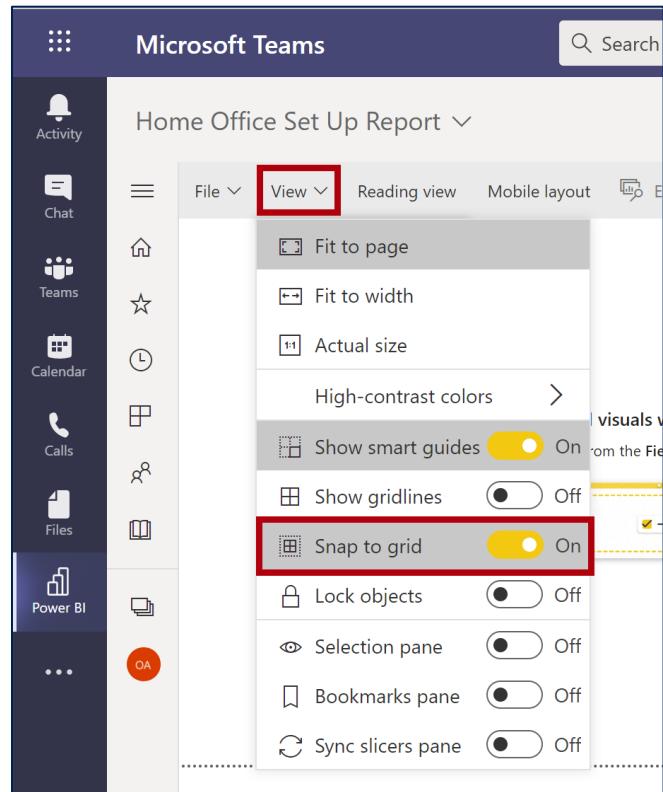
8. On the ribbon at the top of the report, click **Edit**.



9. The space indicated below is the report canvas, where you will be building your report. There are 3 panes at the left side of the screen- Filters, Visualizations and Fields, which can be collapsed if you wish to zoom in on the canvas. Depending on the size of your screen, some buttons in the ribbon of the top may be hidden behind the ... on the right side of the screen.



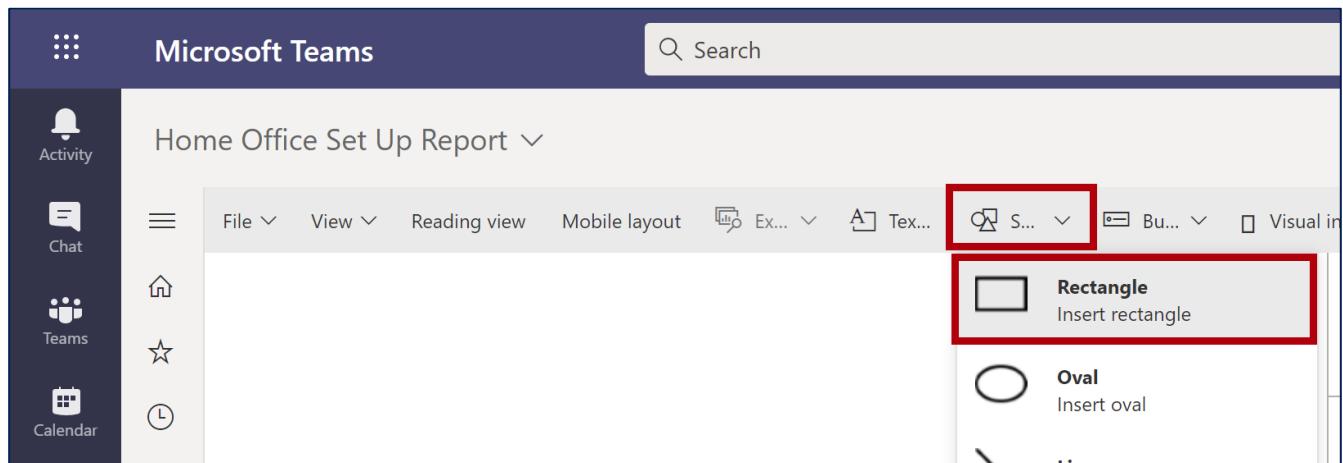
10. Click on the **View** button to switch the toggle for Snap to grid to on. This will make formatting your report easier.



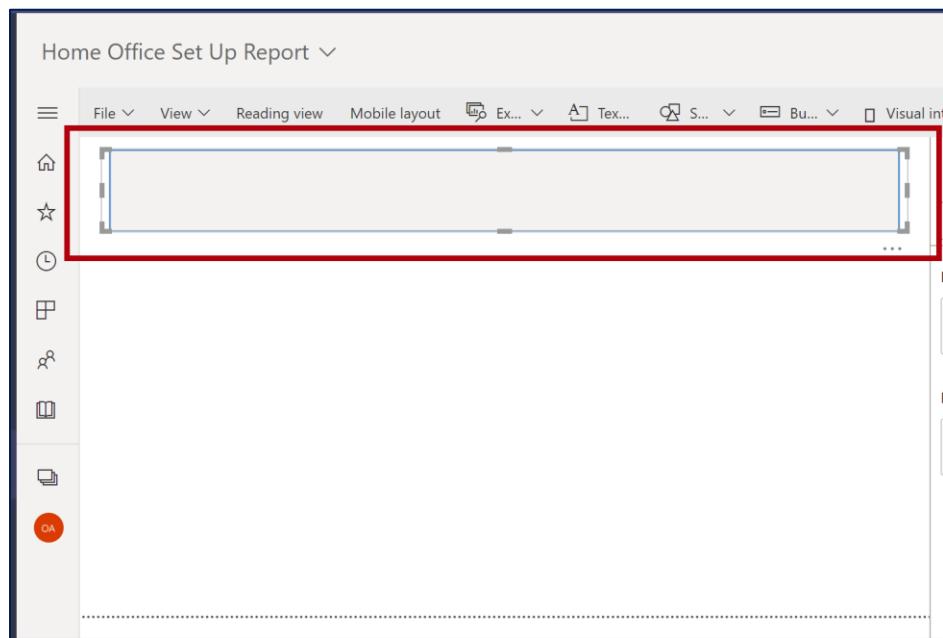
Task 2: Design your report page

We will add in some shapes and other objects into your report page to design a template before we start creating our visuals.

1. In your report page, click on the **Shapes** button, and select **Rectangle**.



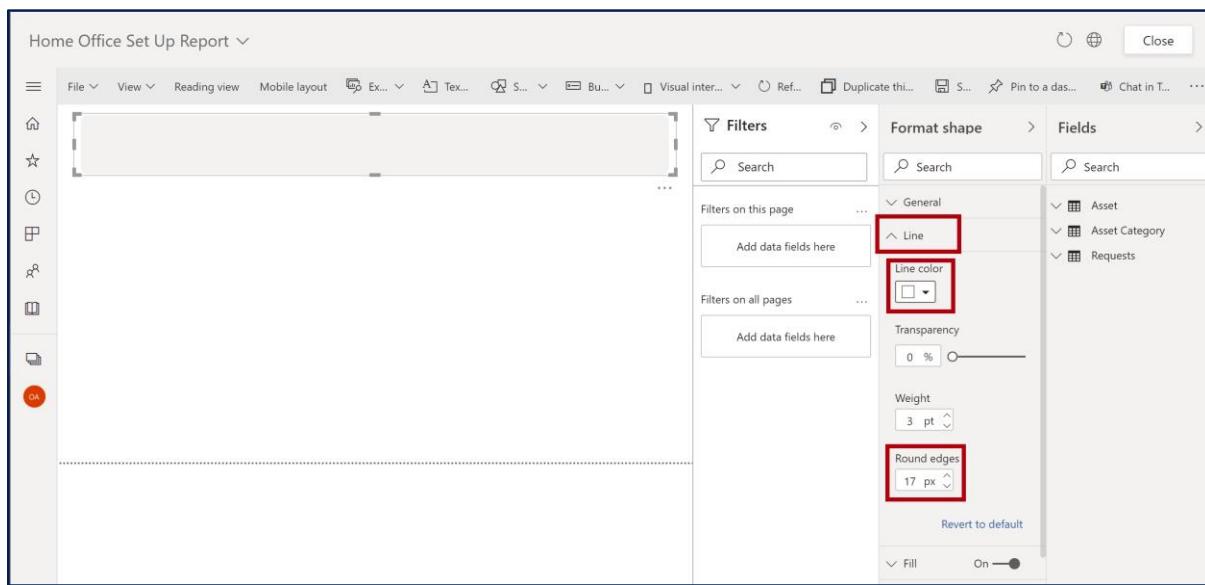
2. When editing visuals and other objects in your report, you can click and drag the edges of the object to resize it. You can also click and drag the object itself to move it around. Resize and move the rectangle so that it appears as shown below on the report canvas.



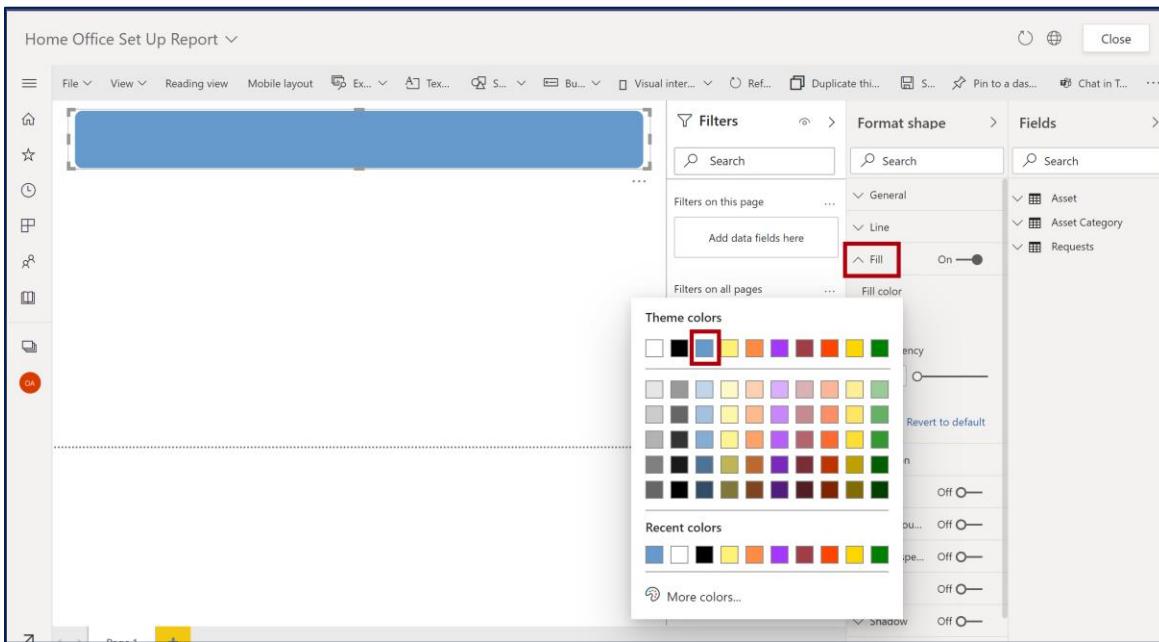
3. With the rectangle selected, click on **Line** from the Format shape pane on the right side of the screen. Change the following values.

Line color: White

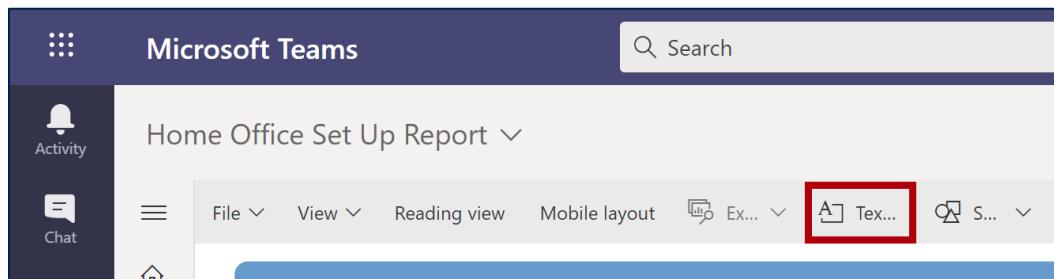
Round Edges: 17 px



4. In the Format Shape pane, expand **Fill** and change the Fill of the rectangle to the **blue** as shown below.



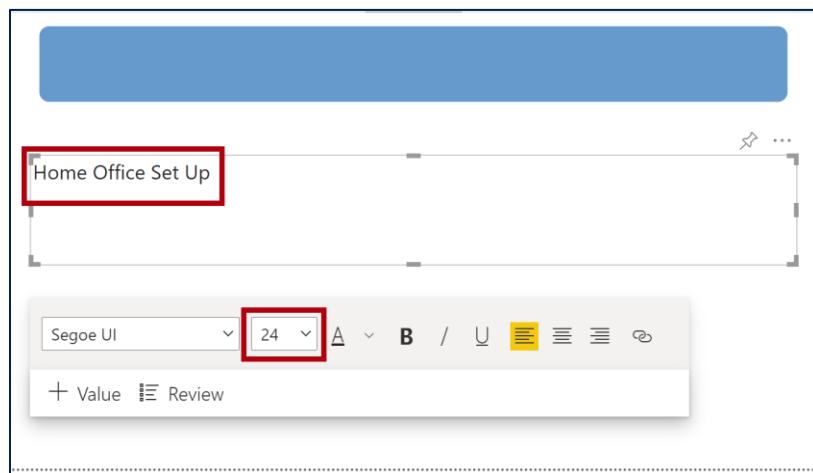
5. Click to insert a **text box**.



6. Type the following text into the textbox.

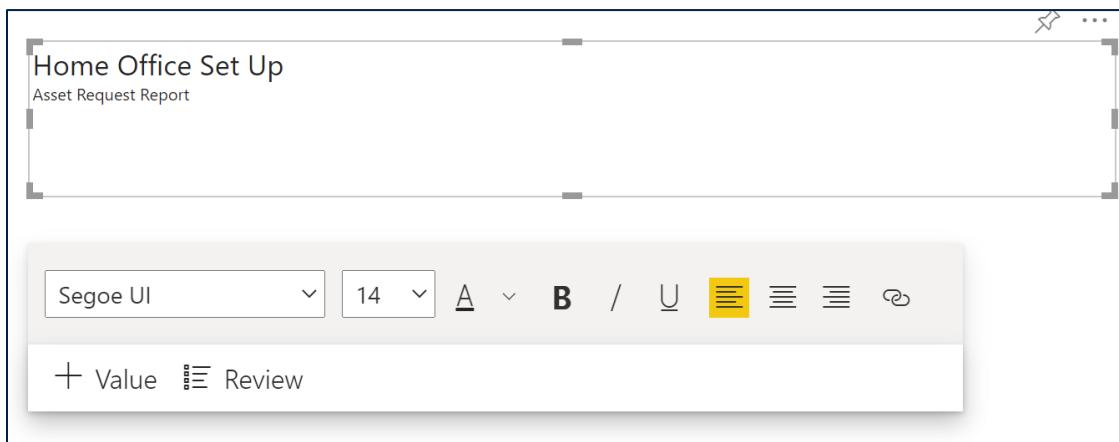
Home Office Set Up

Highlight the text, then change the text size to **24**.

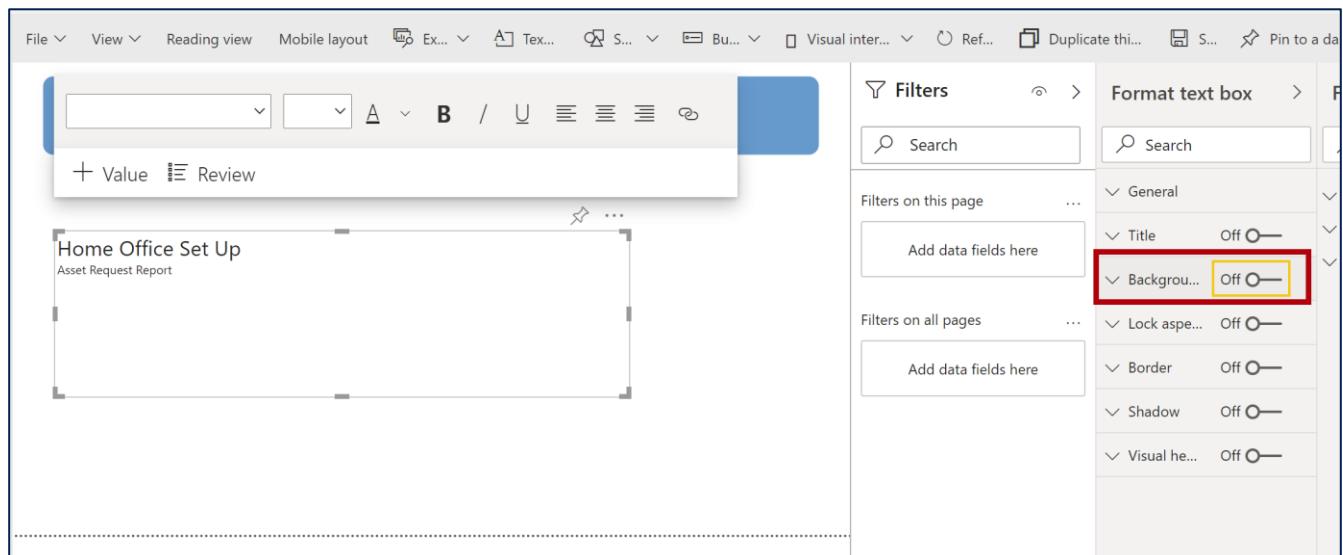


7. In the text box, place your cursor at the end of the line you have just typed, then press Enter on your keyboard to start typing on a new line. Enter the following text, then change the text size of the new text to **14**. It should now appear as shown below.

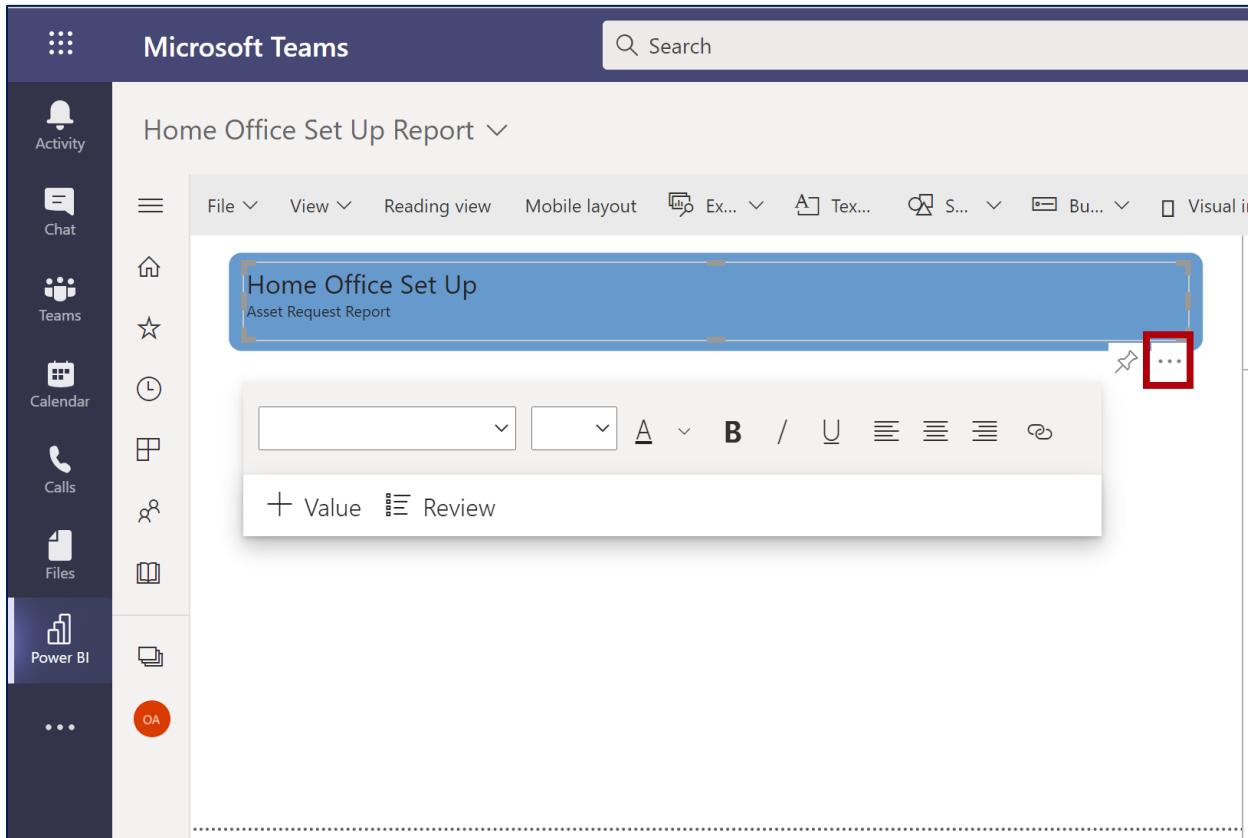
Asset Request Report



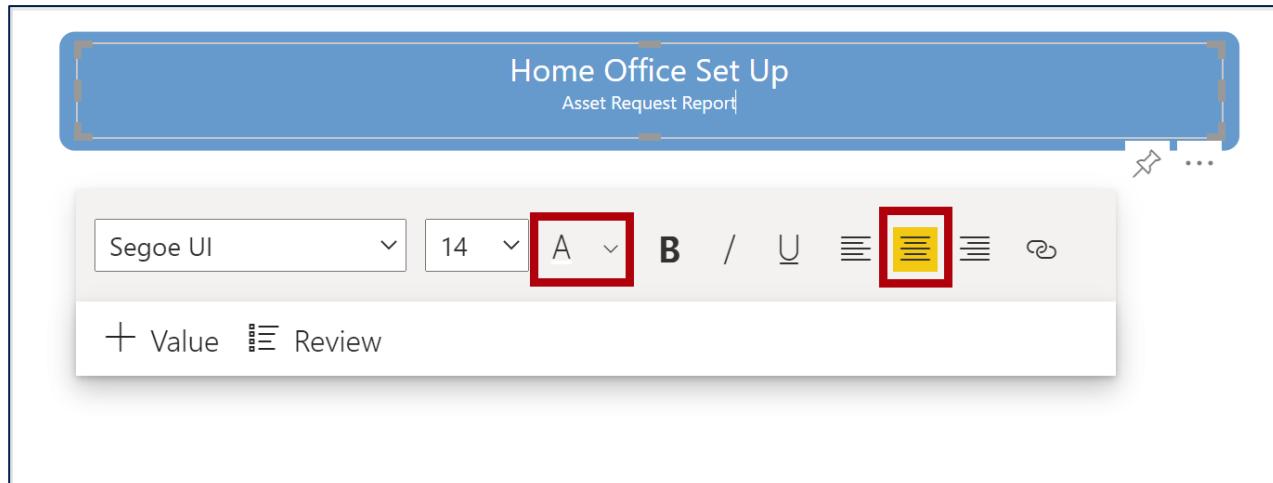
8. With the text box selected, within the **Format text box** pane, switch the **Background** toggle to **Off**.



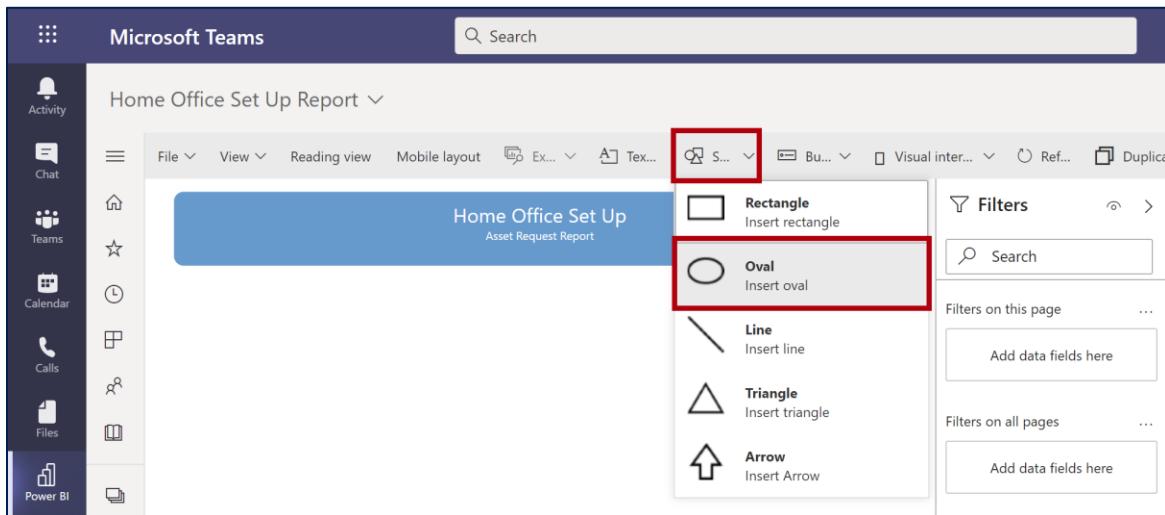
9. Drag the text box to position it over the rectangle as shown below. You can click on the ... icon shown below to move the text box. Resize the text box so that it appears as shown.



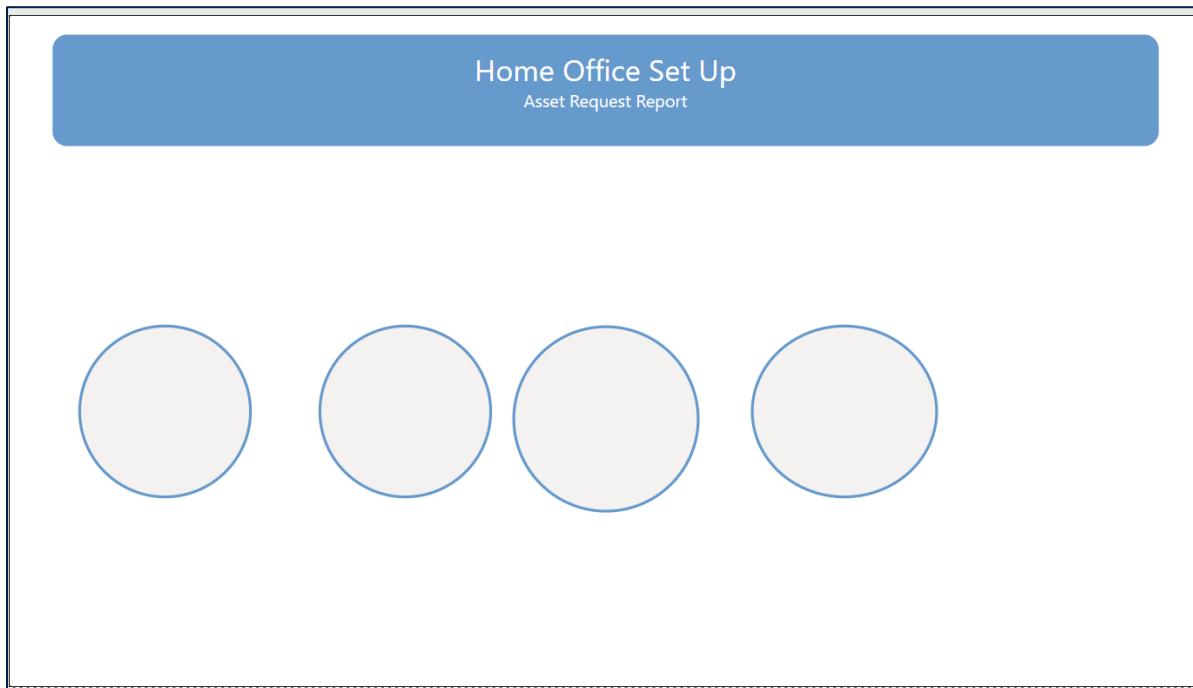
10. Highlight all the text you have entered into the text box. Center the text, then change the text color to white. It should now appear as shown.



11. Click on **Shapes** to insert an **Oval**.



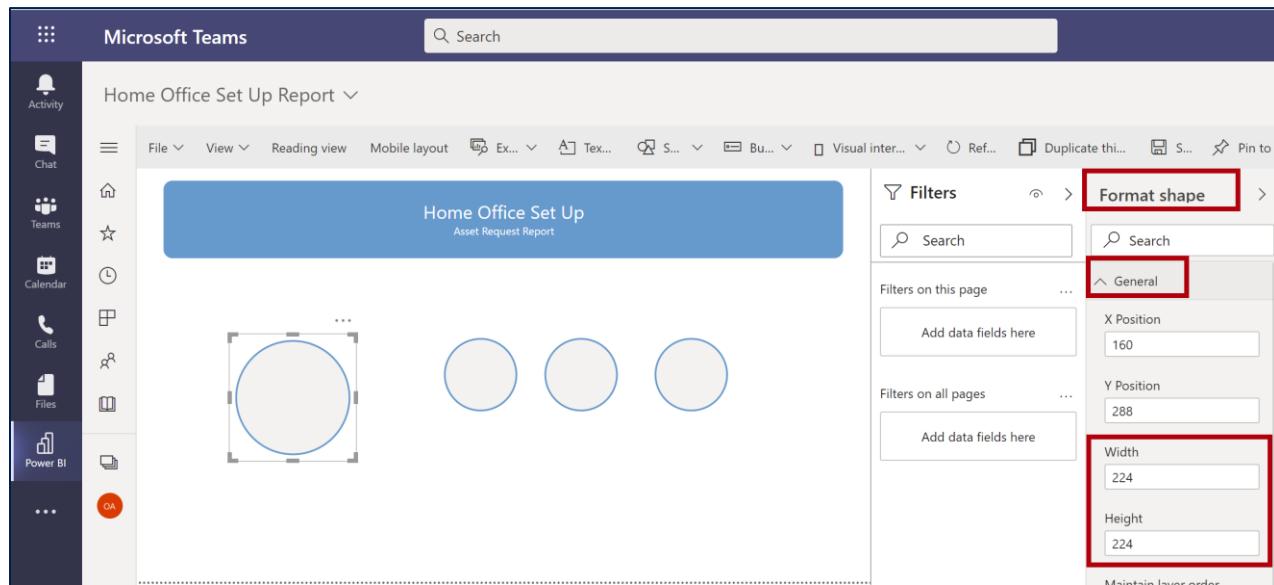
12. With the oval selected, use keyboard shortcuts to duplicate oval 3 times. You can use this by using the shortcut for Copy (press Ctrl+C on the keyboard) and Paste (press Ctrl+V on the keyboard). You should now have 4 ovals. You can rearrange and resize the ovals so that they are easier to interact with.



13. Click on 1 oval and apply the following changes from the Format shape pane, under the **General** section.

Width = 224

Height = 224

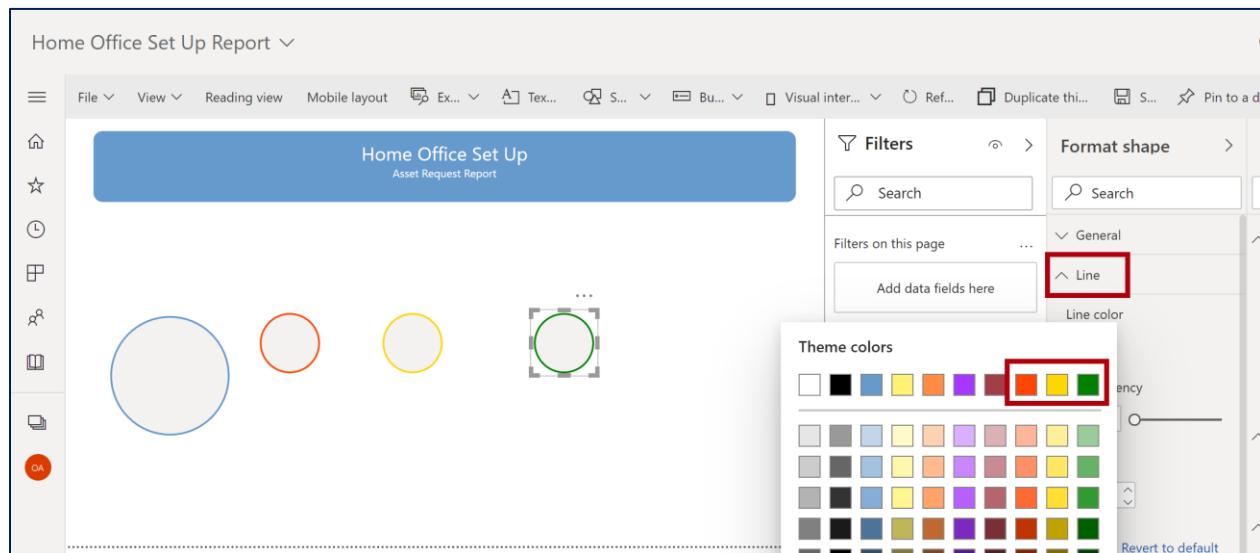


14. For the remaining 3 ovals, change the size to the following values, as you did in step 13.

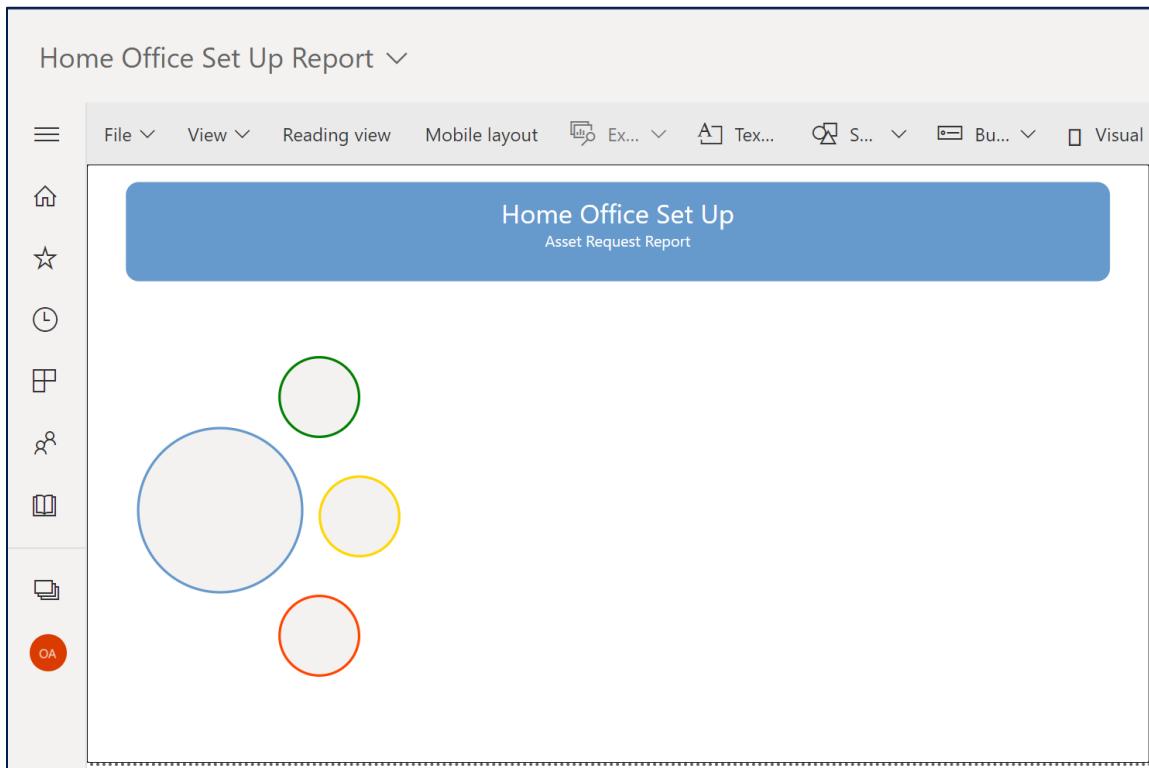
Width = 128

Height = 128

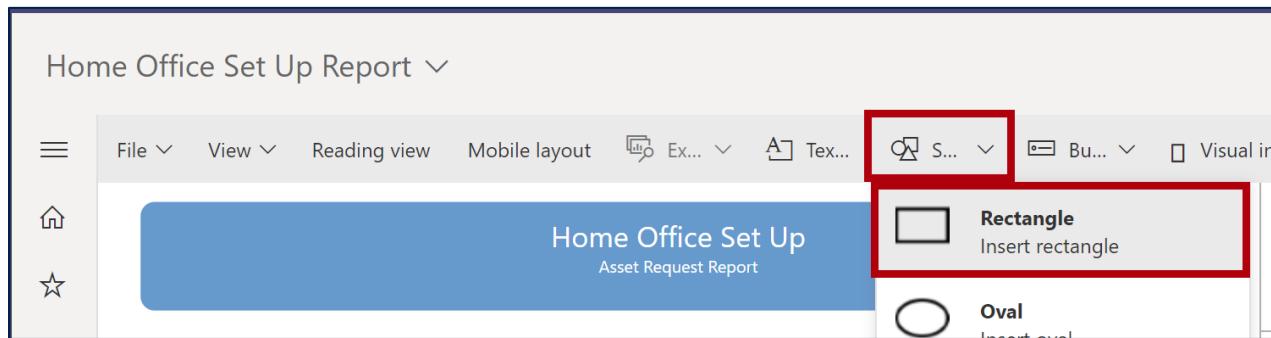
15. For the 3 smaller ovals, you will also change the line color of each to correspond to each value in the Approval Status field. You can change the line color by selecting the oval, then expanding the **Line** tab of the Format shape pane. Allocate a line color to each of the 3 ovals, from the red, yellow and green colors shown below.



16. Rearrange the ovals on the report canvas so that it appears as shown below.

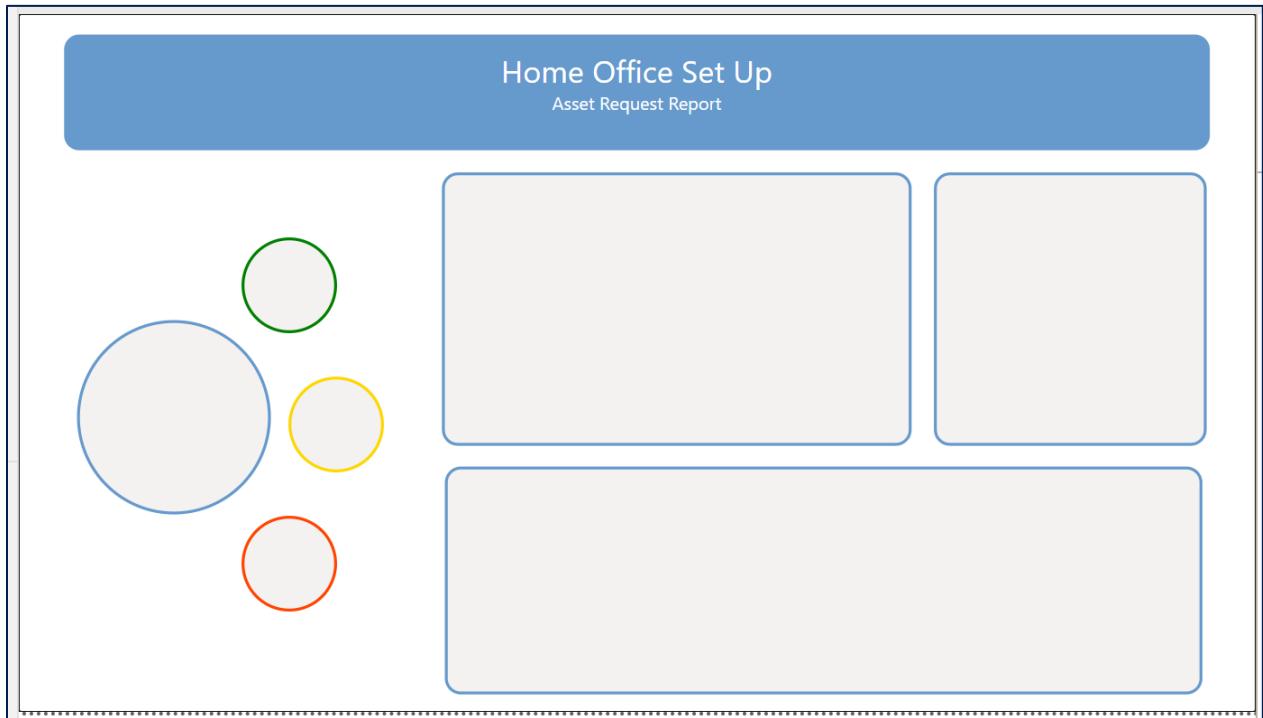


17. Insert another rectangle into your report canvas. In the Format shape pane, expand Line, and change the **Round edges** value of the rectangle to **15 px**.



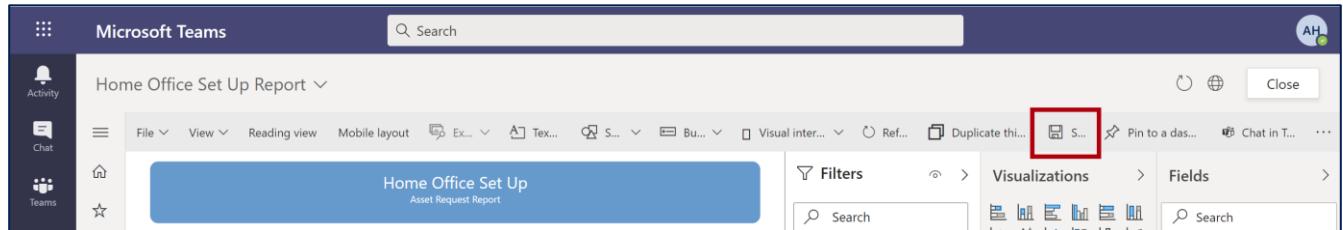
A screenshot of the Microsoft Power BI Report Builder interface. On the left, there is a blue header bar with the text 'Home Office Set Up Asset Request Report'. Below it, on the canvas, there is a white rectangle with a blue border and rounded corners. To the right, the 'Format shape' pane is open. It shows the 'General' section expanded, with the 'Line' section also expanded. Under 'Line', the 'Round edges' setting is set to '15 px', which is highlighted with a red box. Other settings visible include 'Line color' (blue), 'Transparency' (0%), and 'Weight' (3 pt).

18. Copy (Ctrl+C) and paste (Ctrl+V) the rectangle 2 times, so that you have a total of 3 of the same rectangles. Rearrange and resize the rectangles on your page so that they appear as below.



19. Click **Save** to Save your report.

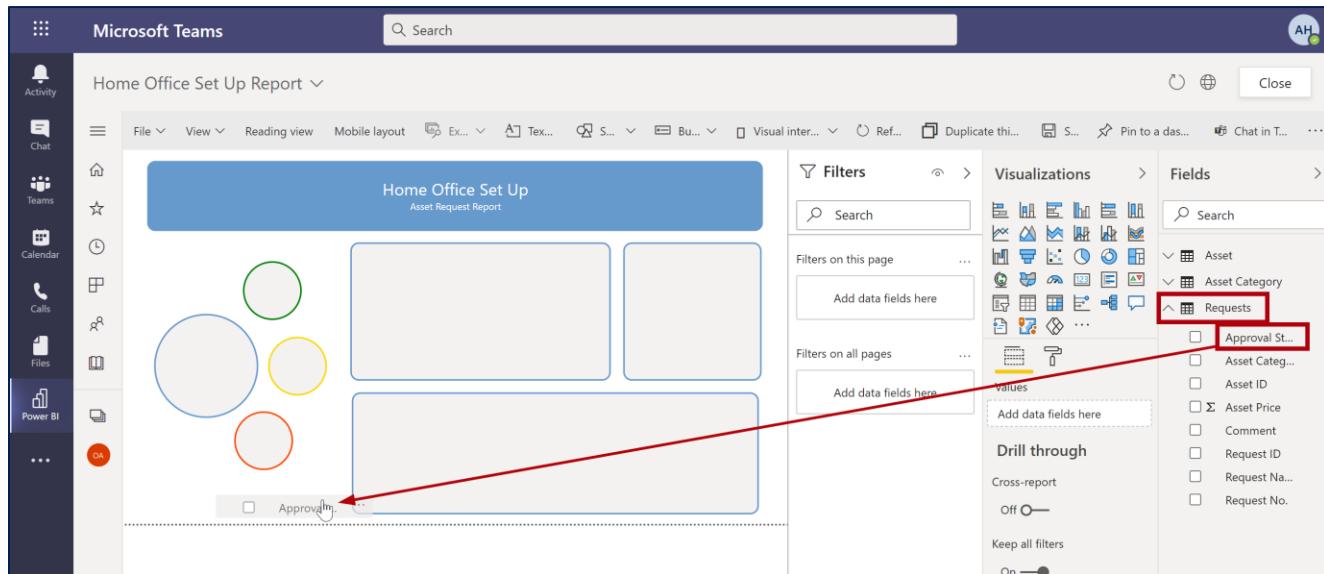
You should save your report regularly throughout the lab.



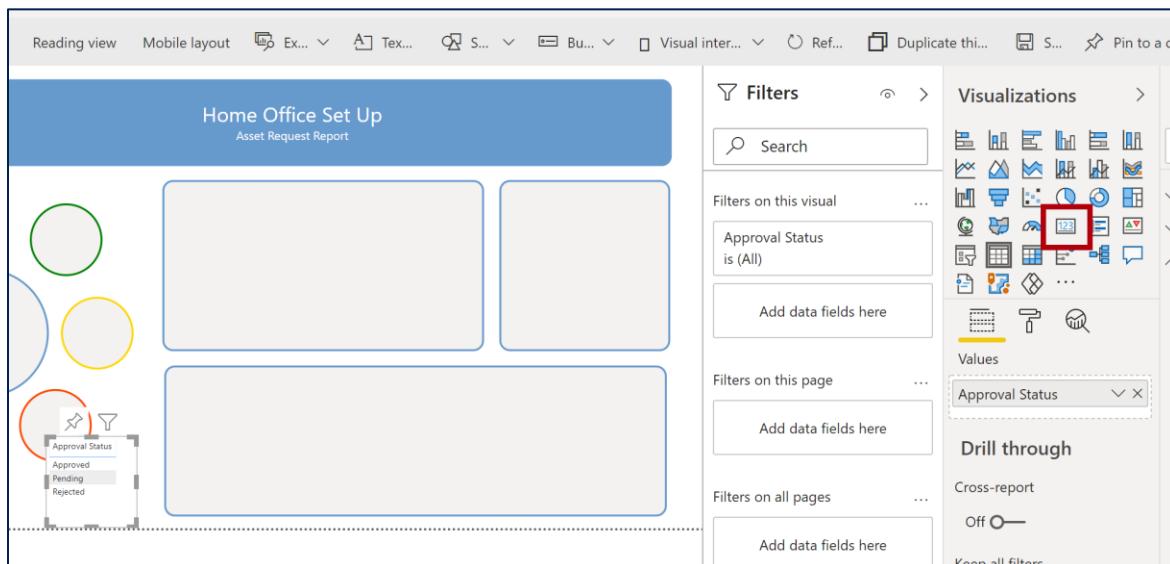
Task 3: Create card visuals for number of requested assets

Now that the template for your report is ready, you can begin creating your visuals. The visuals you create first will be 4 cards to display the total number of requests, and those that have been approved, pending, or rejected. You can create visuals by dragging and dropping fields into your report canvas.

1. From the Fields pane on the right side of your screen, expand the Requests table so that you can see a list of the columns. From the Requests table, click on the **Approval Status** field and drag it onto whitespace in your report canvas.



2. This will automatically create a table visual using your approval status data. With the newly created visual selected, click on the card visual icon from from Visualizations page, to change the visual into a **card**.



3. From the Visualizations pane, click on the arrow next to the **Approval Status** value, and change it to **Count**. The card visual will now display a number showing the total number of requests that have been submitted.

The screenshot shows the Power BI desktop interface with the 'Home Office Set Up' report. The Visualizations pane is open on the right, displaying various visualization icons. A context menu is open over the 'Count of Approval Status' field in the Fields list. The 'Count' option is highlighted with a red box. Other options visible in the menu include 'Remove field', 'Rename for this visual', 'First', 'Last', 'Count (Distinct)', and 'Show value as'.

Your values will vary from all the visuals shown in this lab, as it will be based on the data you have submitted earlier in the labs. If you have recently submitted more data, you can click on the Refresh  icon from the ribbon at the top of the page to refresh the data displayed in the report.

4. In the Visualizations pane, double click on the field name **Count of Approval Status**. Rename it to **Requests**.

The screenshot shows the Power BI desktop interface with the 'Home Office Set Up' report. The Visualizations pane is open on the right. The 'Count of Approval Status' field in the Fields list has been renamed to 'Requests'. A red box highlights the 'Requests' field in the list. The rest of the Visualizations pane and report area are visible.

5. From the Visualizations pane, click on the paint roller icon, and switch the toggle for **Background** to **Off**.

The screenshot shows the Power BI interface with the report titled "Home Office Set Up" and subtitle "Asset Request Report". On the right side, the "Visualizations" pane is open, displaying various visualization icons. A specific icon, which looks like a paint roller, is highlighted with a red box. Below this icon, under the "Background" section, there is a toggle switch labeled "Off" with a yellow border around it, also highlighted with a red box.

6. Expand **Data label**, and change the **text size** to **60**.

The screenshot shows the Power BI interface with the report titled "Home Office Set Up" and subtitle "Asset Request Report". On the right side, the "Visualizations" pane is open. The "Data label" section is expanded, showing options like "Color", "Display units", "Value decimal places", and "Text size". The "Text size" field is set to "60 pt" and is highlighted with a red box.

7. Use shortcuts to copy (Ctrl+C) and Paste (Ctrl+V) the card visual once. On the 2nd card visual, change the **Data label Text size** to **30**.

The screenshot shows the Power BI interface with the report titled "Home Office Set Up - Asset Request Report". The left pane displays two card visualizations. The first card has a value of "8 Requests" and the second card also has a value of "8 Requests". The right pane contains the "Visualizations" pane, which includes a "Filters" section and a "Visualizations" section. In the "Visualizations" section, under "General", there is a "Data label" section. Within this section, the "Text size" dropdown is highlighted with a red box and set to "30 pt".

8. For the 2nd card visual, click on the fields tab of the Visualizations pane, and rename the field **Requests** to **Approved**.

The screenshot shows the Power BI interface with the report titled "Home Office Set Up - Asset Request Report". The left pane displays two card visualizations. The first card has a value of "8 Requests" and the second card has a value of "8 Approved". The right pane contains the "Visualizations" pane. A red box highlights the "Fields" tab in the "Visualizations" section. Another red box highlights the "Approved" field in the list of fields.

9. With the 2nd card visual still selected, from your Fields pane, drag and drop the **Approval Status** field from the Requests table into the Filters pane, under **Filters on this visual**, as shown below.

The screenshot shows the Power BI desktop interface with the 'Home Office Set Up' report open. A card visual is selected, displaying the value '8 Approved'. In the 'Filters' pane, under 'Filters on this visual', there is a dropdown menu with 'Approved' selected. In the 'Fields' pane, the 'Requests' table is expanded, and the 'Approval St...' field is selected, indicated by a red arrow. Other fields listed include Asset, Asset Category, Asset ID, Asset Price, Comment, Request ID, Request Name, and Request No.

10. Expand the **Approval Status** field in the Filters pane, and tick the box next to the word **Approved**. This will filter the card so that only the number of assets that have been approved are displayed.

The screenshot shows the Power BI desktop interface with the 'Home Office Set Up' report open. A card visual is selected, displaying the value '4 Approved'. In the 'Filters' pane, under 'Filters on this visual', the 'Approval Status' field is expanded, showing 'Approved' selected with a red box around it. Other options in the list include Pending (3) and Rejected (1). The 'Fields' pane shows the 'Approved' field selected in the 'Visualizations' section.

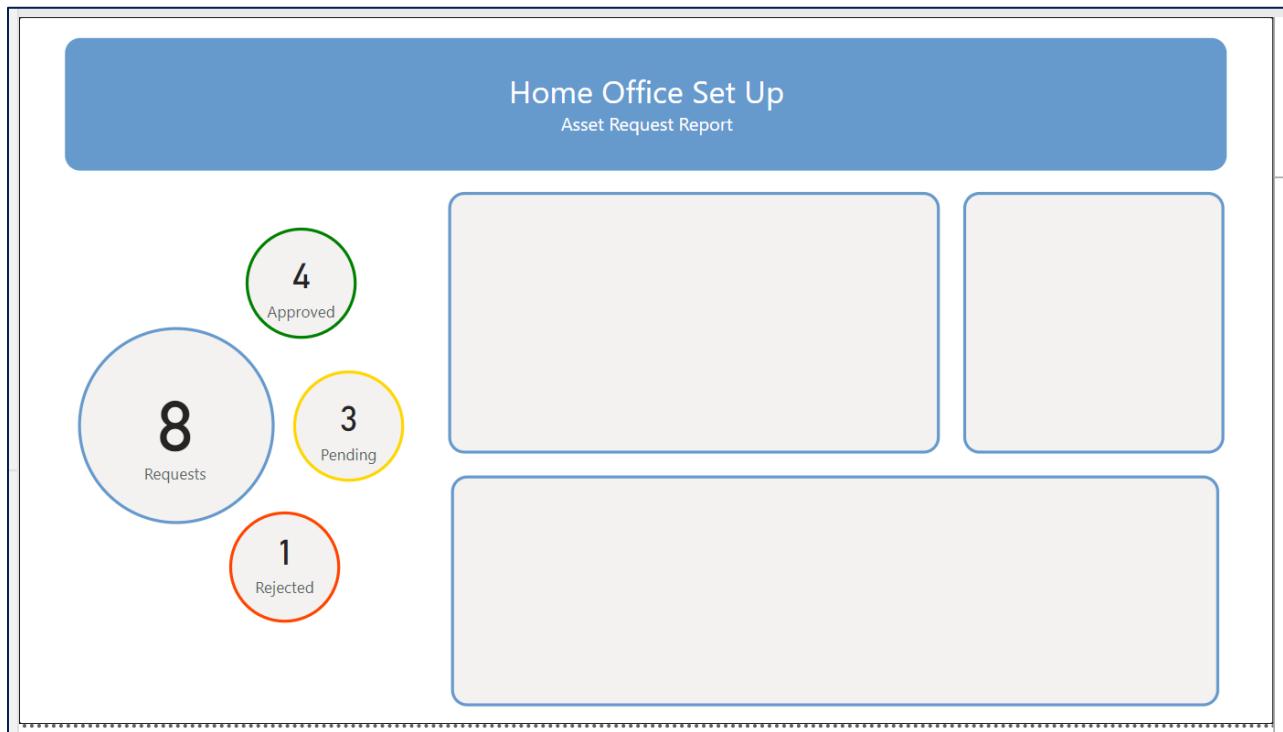
11. You will create 2 more card visuals so that you have a card to display the number of rejected requests, and the number that are pending. Use shortcuts to copy and paste the Approved card visual 2 times. Click on one of the copies, and rename the field to **Rejected**. Change the **Approval Status filter** to **Rejected** only.

The screenshot shows the Power BI 'Filters' pane open on the right side of the interface. The 'Approval Status' filter is selected, with the 'Rejected' option checked. The 'Basic filtering' dropdown is open, showing the count of items for each status: Approved (4), Pending (3), and Rejected (1). A red box highlights the 'Rejected' checkbox. The main report area on the left displays three cards: one green card with a value of 8, one yellow card with a value of 1, and one blue card with a value of 4. The blue card has a small icon indicating it is a copy of the original Approved card.

12. On the remaining copy, rename the field to **Pending**. Change the **Approval Status filter** to **Pending** only.

The screenshot shows the Power BI 'Filters' pane open on the right side of the interface. The 'Approval Status' filter is selected, with the 'Pending' option checked. The 'Basic filtering' dropdown is open, showing the count of items for each status: Approved (4), Pending (3), and Rejected (1). A red box highlights the 'Pending' checkbox. The main report area on the left displays three cards: one green card with a value of 8, one yellow card with a value of 1, and one blue card with a value of 3. The blue card has a small icon indicating it is a copy of the original Approved card.

13. Rearrange the 4 card visuals so that they appear on your report canvas as shown below.

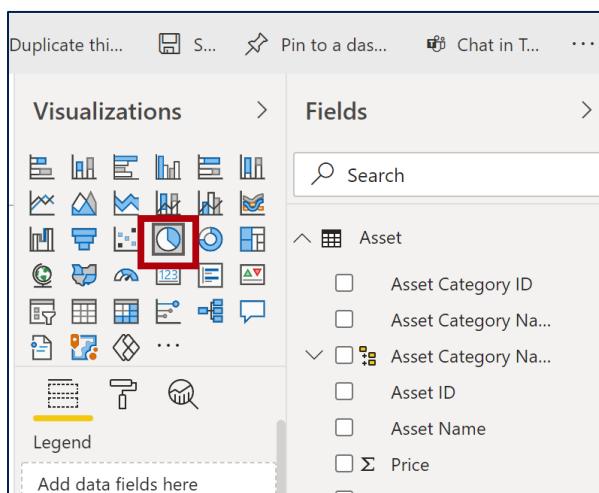


14. Save the report.

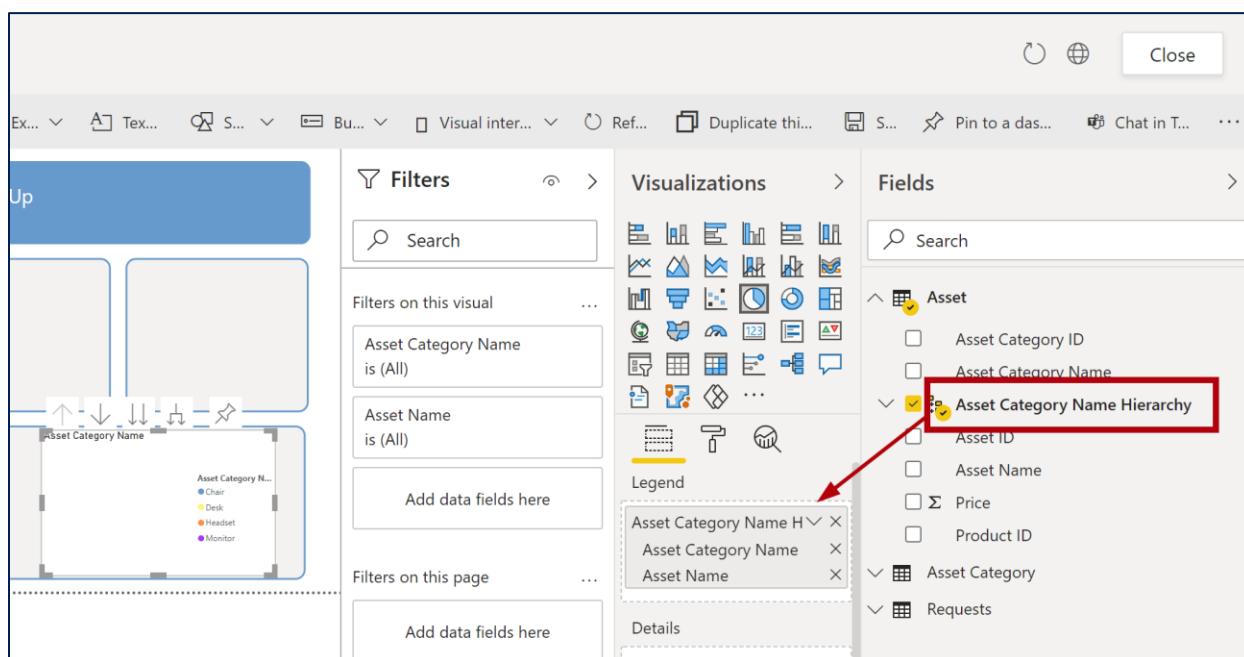
Task 4: Create pie chart visual for number of requested assets

You will create a pie chart visual to display the number of assets that have been requested based on asset category, which you can drill down to see the asset name. You will use the Asset Category hierarchy created earlier in the lab to enable this drill down.

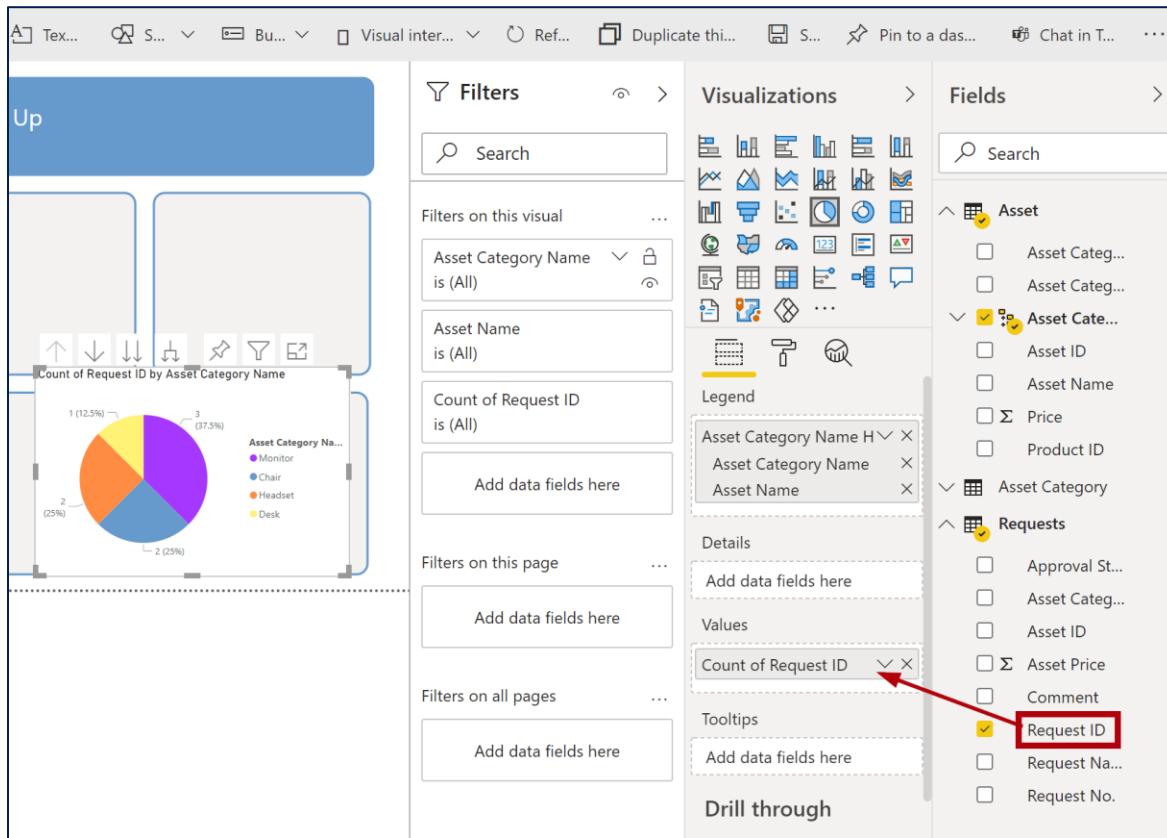
1. From the Visualizations pane, click on the **pie chart** visual to insert it into the report canvas. Before you insert it, make sure that no other visual on the screen is selected.



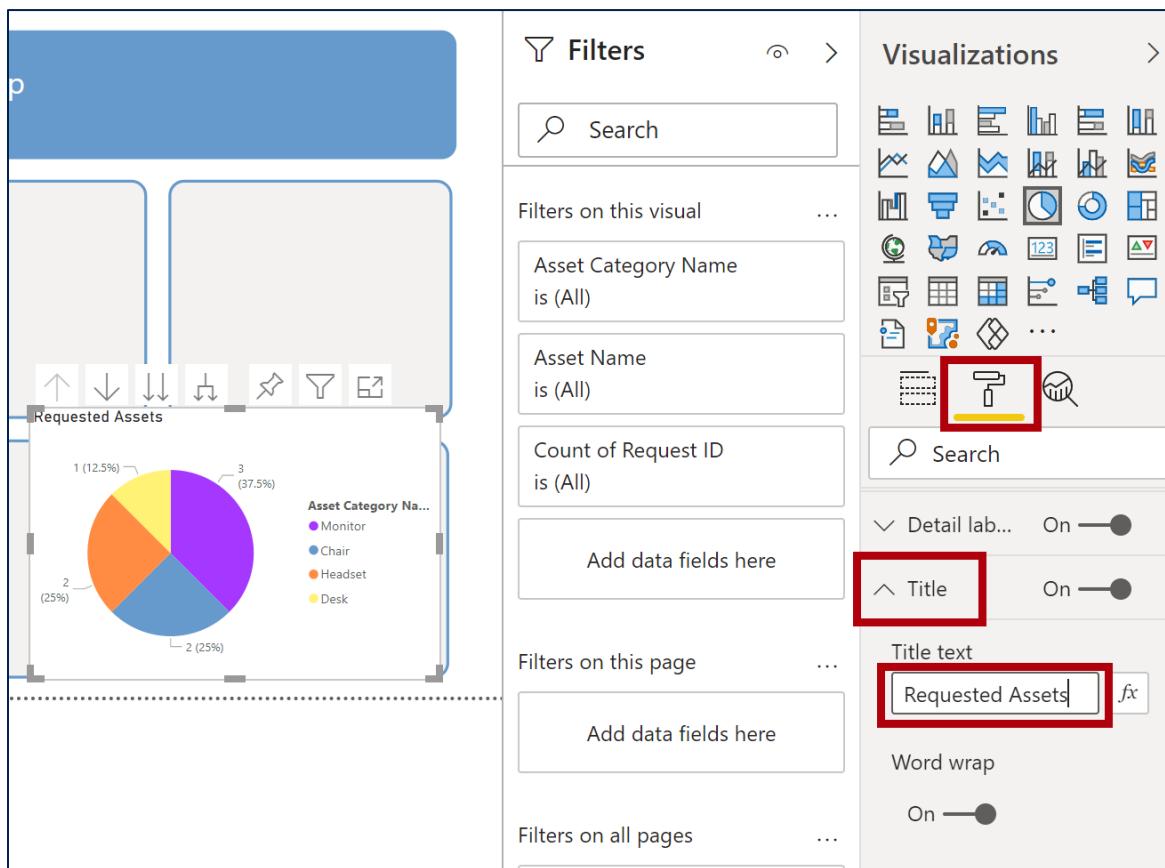
2. From the Fields pane, expand the Asset table. Click on **Asset Category Name Hierarchy**, and drag and drop it into the **Legend** well of the Visualizations pane.



3. From the Fields pane, drag the **Request ID** field from under the Requests table in to **Values** well of the Visualizations pane of the pie chart.

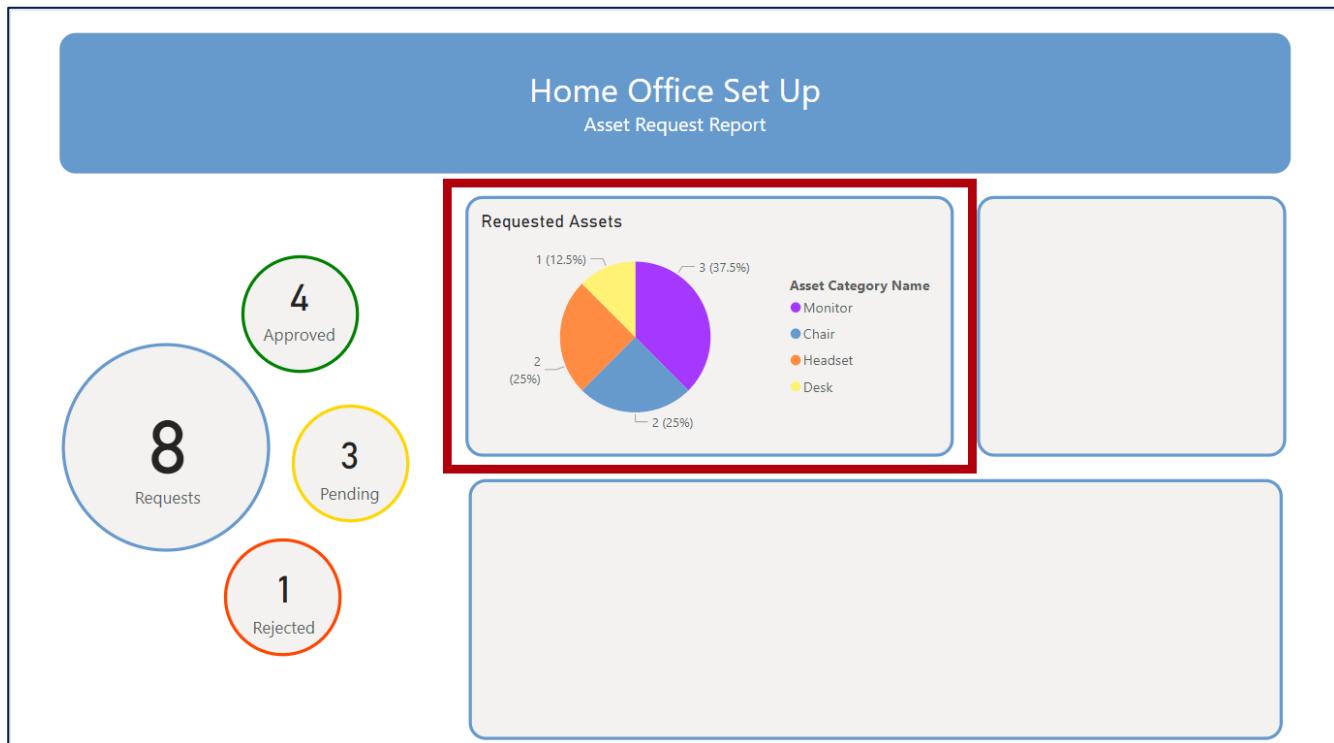


- Where it says **Count of Request ID** in the Values well, click on the arrow next to the field.
- Click on the paint roller icon in the Visualizations pane. Expand **Title**, and change the **Title text** to **Requested Assets**.

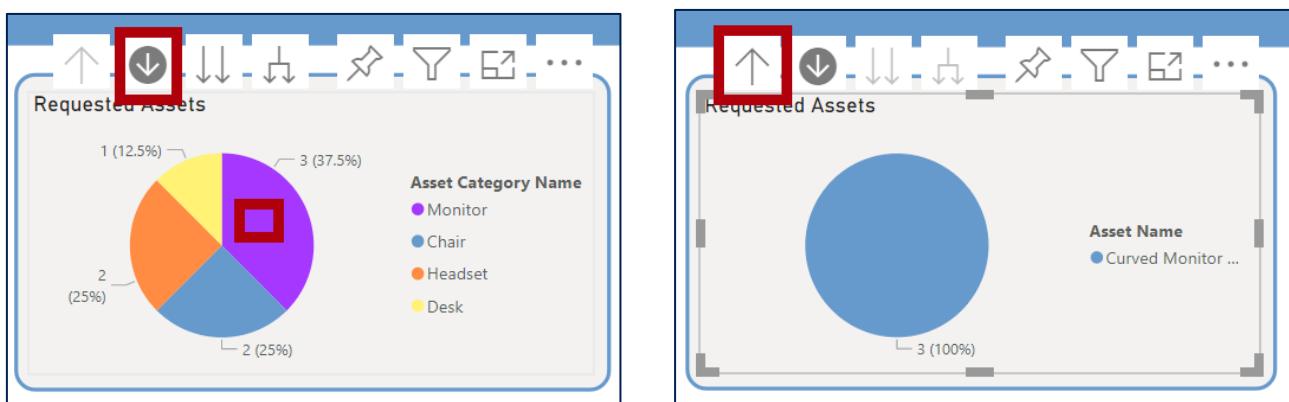


- From the Visualizations pane, click on the paint roller icon, and switch the toggle for **Background** to **Off**.

7. Move and resize the pie chart so that it is positioned on your report as shown below.



8. Test out interacting with the pie char visual. On the pie chart visual, click on the icon to turn on drill down. Click on a segment within the pie chart visual, and the visual will be drilled down into the asset names of the selected asset category. To return to the top level of the heirarchy, click on the .

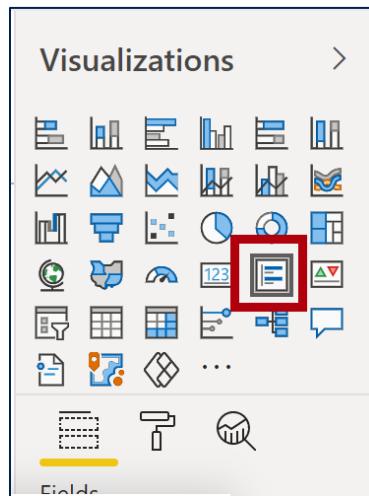


9. Save the report.

Task 5: Create multi-row card to display top requested assets

You will create a multi-row card visual to display the top 3 assets that are requested and the number of requests.

1. From the Visualizations pane, click on the multi-row card visual to insert it into the report canvas. Before you insert it, make sure that no other visual on the screen is selected.



2. From the Fields pane, drag the **Asset Name** field of the Asset table and the **Request No.** field of the Requests table into the **Fields** well of the Visualizations pane.

A screenshot of the Microsoft Power BI interface. On the left, there is a preview of a multi-row card visual showing asset names and request numbers. In the center, the 'Filters' pane shows filters for 'Asset Name' and 'Request No.'. On the right, the 'Visualizations' pane is open, and the 'Fields' pane is visible. Two fields are selected: 'Asset Name' from the 'Asset' table and 'Request No.' from the 'Requests' table. Red arrows point from the 'Asset Name' and 'Request No.' checkboxes in the Fields pane back to their respective table entries in the Fields list.

3. From the Fields well, click on the arrow next to **Request No.** and set it to **Count**. Then, rename the field to **Requested**.

The screenshot shows the Power BI Fields井 (Fields) feature. On the left, there is a list of assets with their names and request numbers. In the center, there are two filter boxes: 'Asset Name is (All)' and 'Request No. is (All)'. Below them are sections for 'Filters on this page' and 'Filters on all pages'. On the right, the 'Fields' section is open, showing a list of fields: Asset Name, Request No., Asset Category, Asset ID, Asset Name (with a checked checkbox), Price, and Product ID. A context menu is open over the 'Request No.' field, with the 'Count' option highlighted. Other options in the menu include 'Remove field', 'Rename for this visual', 'Move', 'Don't summarize', 'First', 'Last', 'Count (Distinct)', and 'Show items with no data'.

This screenshot shows the same Fields井 (Fields) feature after the changes were made. The 'Request No.' field has been renamed to 'Requested'. The 'Count' option is still highlighted in the context menu. The other fields listed are Asset Name, Asset Category, Asset ID, Asset Name (with a checked checkbox), Price, and Product ID. The 'Cross-report' and 'Drill through' settings remain the same as in the previous screenshot.

4. In the Filters pane, expand the **Asset Name filter**, and set the Filter type to **Top N**. Set the filter to show the Top 3 items. From the Requests table, drag the **Request No.** field into the By value well.

The screenshot shows the Power BI Filters pane on the right side of the interface. On the left, there is a visual representation of asset requests, likely a card or summary table, showing items like 'Curved Monitor 24"' (3 requested), 'Ergonomic Chair - Black' (2 requested), 'Standing Desk - White' (1 requested), and 'USB Headset' (2 requested).

In the Filters pane:

- Asset Name** is (All)
- Filter type** is set to **Top N**.
- Show items:** Top 3
- By value:** First Request No.
- Apply filter** button (with a red arrow pointing to it from the text below)
- Requested** is (All)
- Add data fields here**
- Filters on this page**
- Add data fields here**

In the Visualizations pane (top center):

- Various visualization icons are listed.

In the Fields pane (right side):

- Asset** group:
 - Asset Categ...
 - Asset Categ...
 - Asset ID
 - Asset Name** (checkbox checked)
 - Σ Price
 - Product ID
- Asset Category** group
- Requests** group:
 - Approval St...
 - Asset Categ...
 - Asset ID
 - Σ Asset Price
 - Comment
 - Request ID
 - Request Na...
 - Request No.** (checkbox checked)

5. Where the field says **First Request No.**, click the arrow next to it, and change it to **Count**. Then, click **Apply filter**. Your visual should now display the top 3 requested assets. Note, your visual may display more than 3 assets if the same amount has been requested.

The screenshot shows a multi-row card visual on the left and its corresponding filter settings on the right. The visual displays four items: 'Curved Monitor 24'' (3 Requested), 'Ergonomic Chair- Black' (2 Requested), 'Standing Desk- White' (1 Requested), and 'USB Headset' (2 Requested). The filter settings are as follows:

- Asset Name**: is (All)
- Filter type**: Top N
- Show items**: Top 3
- By value**: First Request No. (with a dropdown menu open, showing 'App', 'First', 'Last', 'Count (Distinct)', and 'Count'). The 'Count' option is highlighted with a red box.
- Requested**: is (All)

6. Click on the ... icon of the multi-row card visual. Choose **Sort by > Requested** and **Sort Descending**.

The screenshot shows the context menu for the multi-row card visual, with the '...' icon highlighted. The 'Sort by' option is selected, and the 'Requested' field is chosen. The 'Sort descending' option is also highlighted with a red box. Other options in the menu include 'Sort ascending', 'Chat in Teams', 'Export data', 'Remove', 'Spotlight', and 'Count of Requests'.

7. Click on the paint roller icon to change the formatting of the multi-row card visual. Switch the **Background** toggle to **Off**. Turn the **Title** toggle **On**, and enter the **Title text** as **Top 3 Assets Requested**.

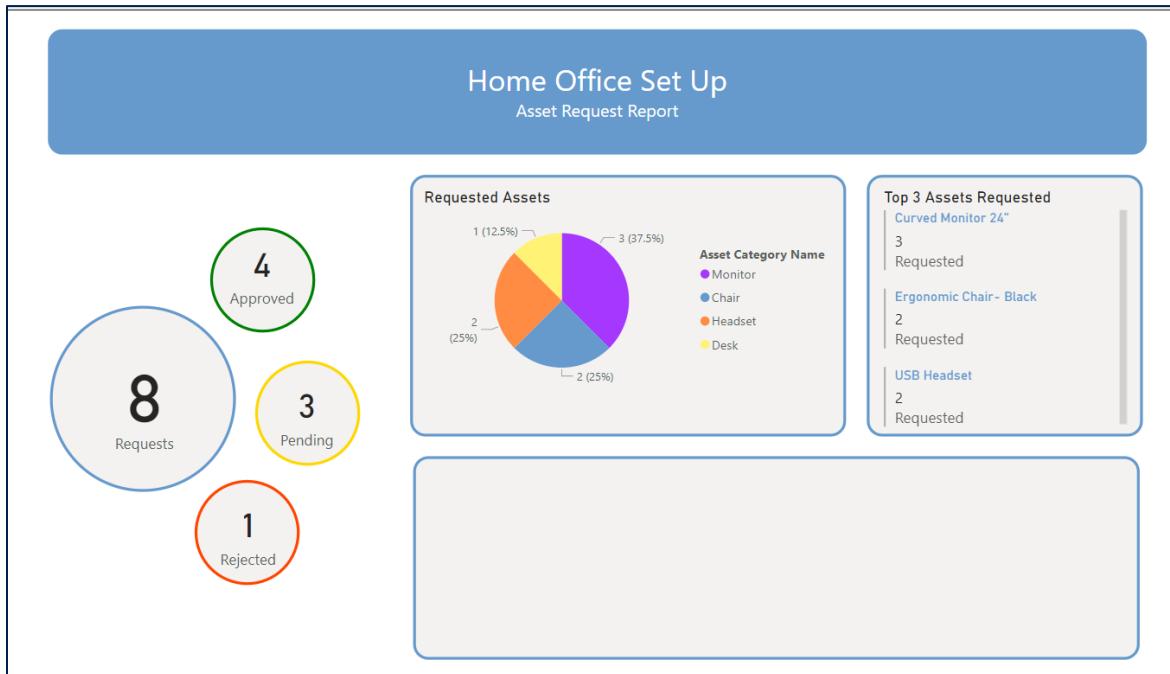
The screenshot shows the Power BI report editor with a multi-row card visual selected. On the right, the visualization pane displays the following settings:

- Filters on this visual:**
 - Asset Name:** top 3 by Count of Req...
 - Filter type:** Top N
 - Show items:** Top 3
 - By value:** Count of Request No.
 - Apply filter**
- Requested:** is (All)
- Add data fields here**
- Filters on this page:** ...

On the far right, the visualization tools pane shows various chart types. The 'Card' tool is selected, and its properties are shown on the right:

- Title:** On (switch is on)
- Title text:** Top 3 Assets Requested (text box is highlighted with a red border)
- Word wrap:** On (switch is on)
- Font color:** (color swatches)

8. Move and resize the multi-row card so that it is positioned on your report as shown below.

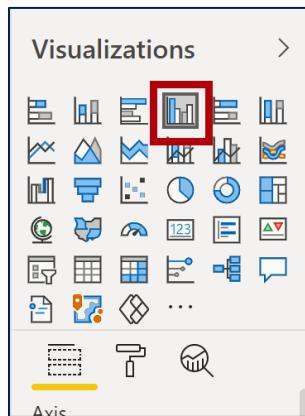


9. Save your report.

Task 6: Create column chart to display total amount spent based on asset categories

You will create a clustered column chart visual to display the total cost of all the asset requests that have been approved, based on the asset category.

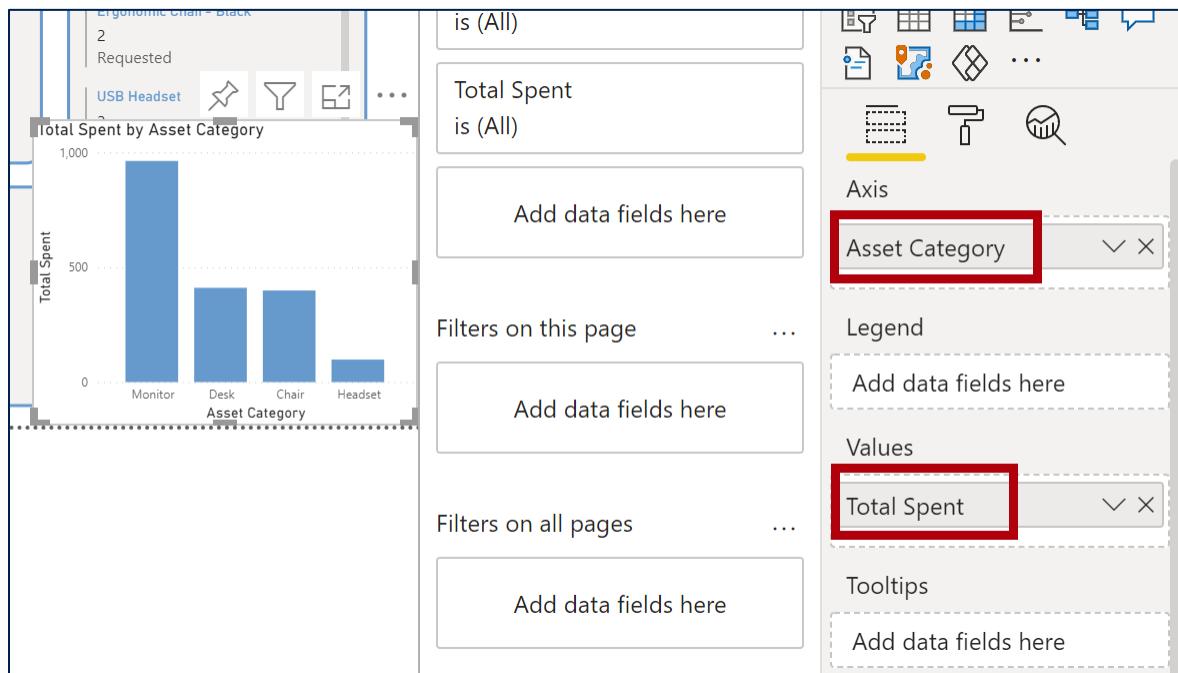
- From the Visualizations pane, click on the **clustered column chart** visual to insert it into the report canvas. Before you insert it, make sure that no other visual on the screen is selected.



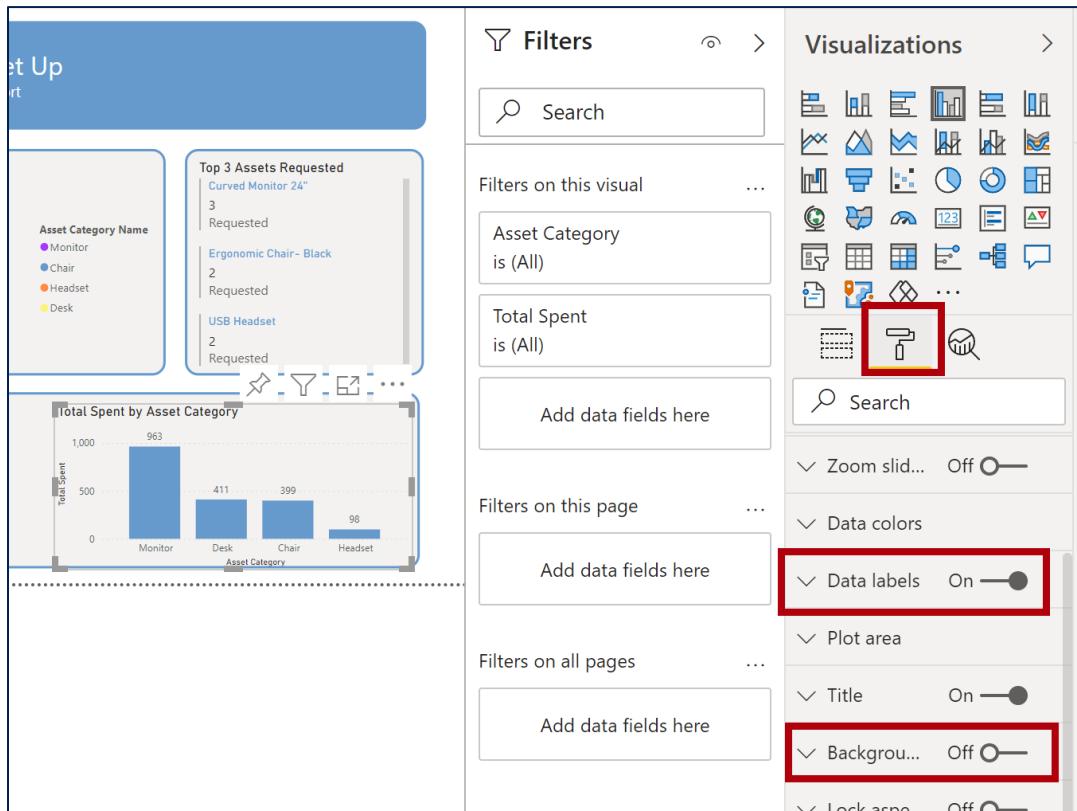
- From the Asset table, drag the **Asset Category Name** field into the **Axis** well. From the Requests table, drag the **Asset Price** field into the **Values** well.

A screenshot of the Microsoft Power BI report canvas. On the left, there is a clustered column chart titled 'Asset Price by Asset Category Name'. The chart shows four bars representing different asset categories: Monitor, Deck, Chair, and Headset. The Y-axis is labeled 'Asset Price' and ranges from 0 to 1,000. To the right of the chart is the 'Visualizations' pane, which contains several sections: 'Filters', 'Visualizations', 'Fields', and 'Drill through'. In the 'Fields' section, under the 'Asset' table, 'Asset Category Name' is selected and mapped to the 'Axis' well of the chart. Under the 'Requests' table, 'Asset Price' is selected and mapped to the 'Values' well of the chart. Red arrows point from the checked boxes in the 'Fields' pane to their respective wells in the chart's settings. The 'Visualizations' pane also includes sections for 'Filters on this visual', 'Filters on this page', 'Filters on all pages', 'Legend', 'Values', 'Toolips', 'Drill through', and 'Cross-report'.

3. Rename the field in the Axis well to **Asset Category**. Rename the field in the Values well to **Total Spent**.



4. Click on the paint roller icon to change the formatting of the visual. Switch the **Background** toggle to **Off**. Switch the toggle for **Data labels** to **On**.



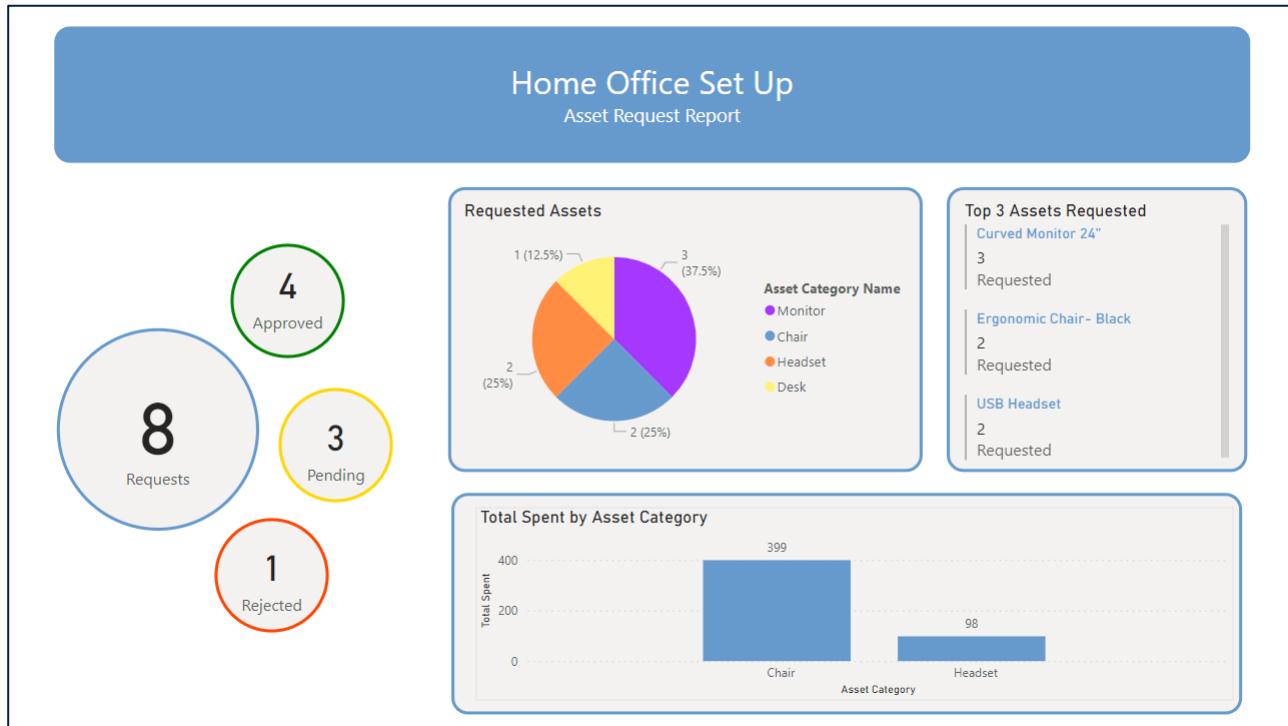
5. We will add a filter to the visual so that it only displays the price based on the assets that have been approved. From the Requests table, drag the **Approval status** field and place it in the Filter pane for **Filters on this visual**.

The screenshot shows the Power BI desktop interface. On the left is a bar chart titled 'Total Spent by Asset Category' with data for Monitor, Desk, Chair, and Headset. To the right of the chart is a 'Top 3 Assets Requested' card. At the top is a 'Filters' pane with a search bar and a 'Filters on this visual' section containing 'Asset Category is (All)' and 'Total Spent is (All)'. Below that is a box labeled 'Add data fields here' with a red border. To the right is a 'Visualizations' pane showing various chart icons. On the far right is a 'Fields' pane with a search bar and a tree view of fields. Under 'Requests', the 'Approval Status' checkbox is selected and highlighted with a red box. A red arrow points from this red box in the Fields pane to the 'Add data fields here' box in the Filters pane.

6. In the filter, tick the **Approved** checkbox.

The screenshot shows the Power BI desktop interface after applying the filter. The 'Filters' pane now shows 'Approval Status is Approved' under 'Basic filtering'. The 'Approved' checkbox is checked and highlighted with a red box. Other options like 'Pending' and 'Rejected' are also listed but not checked. The visual on the left shows the same data as before, but the filter has been applied.

7. Move and resize the column chart visual so that it is positioned on your report as shown below.



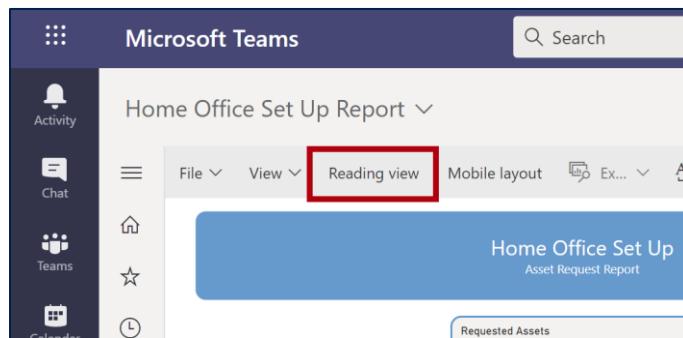
8. Save your report.

Exercise 3: Using the Report

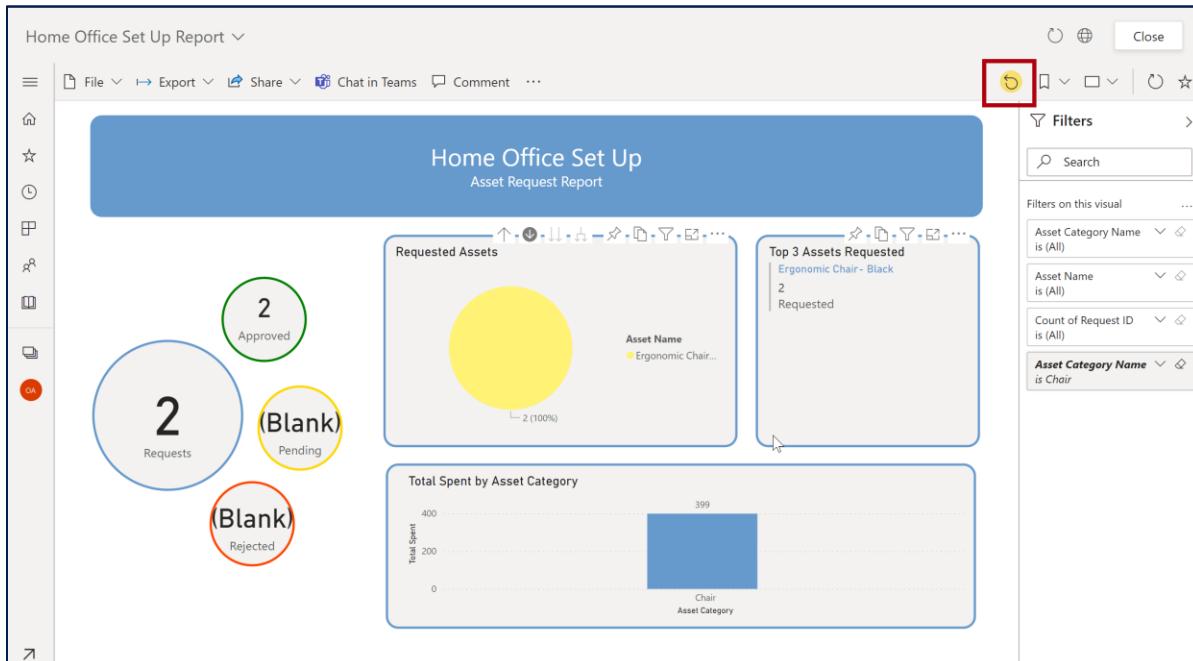
The report is now ready to be used and embedded within Teams. In Teams, you can access Power BI reports and dashboards via the Power BI app, i.e. the tool you have just used to build the report. The Power BI app is a Teams-embedded version of Power BI Service. For easier accessibility to the reports, you can embed the report in a channel for members to view and interact with.

Task 1: Test out the report

1. Now that you have finished editing the report, you can switch back to Reading view. Click on the **Reading view** button.



2. Test out interacting with the report. Notice that if you click on a data area of the pie chart or column chart, the other visuals are filtered to the selection. Click the arrow indicated to reset the filters.



Task 2: Embed the report in a Teams channel

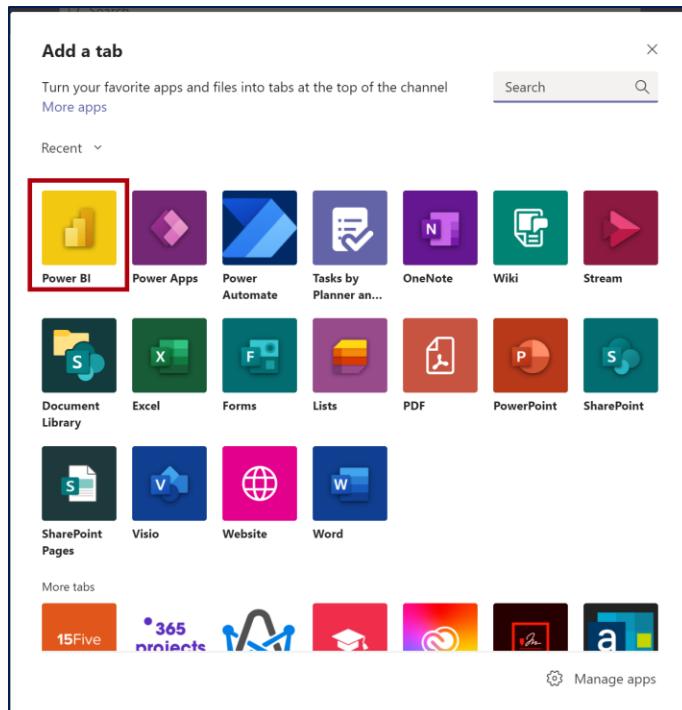
1. Navigate to the **Office -<your name>** team where you have been building out your solution. Click on the + button shown to add a new tab to the channel.

The screenshot shows the Microsoft Teams interface. On the left is the sidebar with various icons for Activity, Chat, Teams, Calendar, Calls, Files, Power Automate, Apps, and Help. The main area shows the 'General' channel under the 'Your teams' section. Two messages from 'Alex Hunter' are visible:

- Message 1: 'Please update your list of assets' with a note: 'Please remember to update the details of any assets you have in your home office by Friday this week. Thanks'. It includes a 'Reply' button and was posted on December 14, 2020.
- Message 2: 'Hi everyone, please join me in welcoming Sam Williams, who will be joining as a Sales Manager, and will sit in Seattle. Please stop by to say hello.' It includes a 'See more' link and a 'Reply' button.

At the bottom of the channel, there is a 'New conversation' button.

3. Select **Power BI**.



4. Change the **Tab name** to **Asset Request Report**. From the list of workspaces, expand the team where you have just created your Power BI report, and select the **Home Office Set Up Report**. Then, click **Save**.

The screenshot shows the configuration dialog for a Power BI tab in a Microsoft Teams channel. At the top left is the Power BI logo. Top right buttons include 'About' and a close 'X'. Below the logo, the 'Tab name' is set to 'Home Office Set Up Report', which is highlighted with a red box. A descriptive text below says 'Select a Power BI report that will show up in this Teams tab'. Underneath are three tabs: 'Workspaces' (underlined), 'Apps', and 'Shared with me'. A search bar follows. The 'Name' section lists several workspace names with arrows: 'All Company', 'Contoso', 'Human Resources', 'Issue Reporting- Admin', 'Office - Admin' (which is expanded, showing its contents), and 'Sales'. The 'Home Office Set Up Report' report is selected and highlighted with a red box. Below this, a note says 'Make sure this team has been given access to this report in Power BI.' At the bottom left is a checked checkbox for 'Post to the channel about this tab'. At the bottom right are 'Back' and 'Save' buttons, with 'Save' also highlighted with a red box.

5. You should now see your report embedded into the team.

The screenshot shows the Microsoft Teams interface. On the left is the sidebar with various icons for Activity, Chat, Teams, Calendar, Calls, Files, Power Auto., Apps, and Help. The main area shows the 'General' channel of a team named 'General'. At the top, there's a search bar and a red box highlights the tab 'Home Office Set Up R...'. Below the tabs are three circular summary cards: '8 Requests' (blue), '4 Approved' (green), '3 Pending' (yellow), and '1 Rejected' (red). To the right of these cards is a pie chart titled 'Requested Assets' showing distribution by asset category. Below the pie chart is a bar chart titled 'Total Spent by Asset Category'. A sidebar on the right is titled 'Filters' with a search bar and a message stating 'There aren't any filters to display.'

Home Office Set Up
Asset Request Report

Requested Assets

Asset Category Name	Count	Percentage
Monitor	3	37.5%
Chair	2	25%
Headset	2	25%
Desk	1	12.5%

Top 3 Assets Requested

Asset Name	Count	Status
Curved Monitor 24"	3	Requested
Ergonomic Chair - Black	2	Requested
USB Headset	2	Requested

Total Spent by Asset Category

Asset Category	Total Spent
Chair	399
Headset	98

Filters >

Search

There aren't any filters to display.

Summary

In this lab, you have seen how you are able to connect to your Dataverse tables to Power BI to gather insights on your data. You have used Power BI Desktop to transform your data, then have published it to Power BI app for Teams for collaboration on report building. This can be accessed by users via the Power BI app for Teams, or embedded into a Teams channel.

Lab Survey

We would appreciate your feedback on this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience. Please use the survey at <https://aka.ms/TeamsPPSurvey> to share your feedback. You may provide feedback for each module as you complete it or at the end once you've completed all the modules. Thank you!

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