

Publishing Reports and Dashboards

Setup a Workspace (Premium Per User)

Skip this Section (steps 1 to 11).

1. Go to **PowerBI.microsoft.com/en-us**.
2. Click **Sign In** and follow the steps of the sign in procedure using your credentials.
3. Click **Workspaces**.
4. Click **New Workspace**
 - a. Click **Upload** to upload an image file for the workspace.
5. Click in the **Workspace Name Box** and type the workspace name.
6. Click in the **Description Box** and type a description.
7. Click **Advanced**.
8. In **Contact List** area
 - a. Either leave **Workspace Admins** selected or,
 - b. Click **Specific Users and Groups**.
9. In the **License Mode** area, click **Premium Per User**.
10. Click **Save**
 - a. Notice workspace is created and displays homepage.
 - b. You can click **Upload** to start adding content to the workspace.
11. Take a screenshot.

Exercise Asking Questions About the Data

1. Open the **Askquestions.pbix** file.
2. Click **Build Visual**.
3. Click **Q&A**, Q&A visual appears on the Canvas.
4. Click on **Visual**, selection handle appears, drag to increase size.
5. Click **Ask A Question About Your Data**.
6. Type your question, use **Sum Of Sales By Country**
 - a. Suggestions are displayed, click a suggestion to display the related visual.
 - b. **Sum Of Sales Ranked By Country** is displayed.
7. Select the text you typed and then type **Sum of Sales By Country By Segment Matrix**
 - a. Visual appears on the canvas.
8. **Take a screenshot.**
9. Click **Save**.
10. Close.

Exercise Publish Report to Power BI Service

1. Open the PracticeEx2.pbix file from last class.
2. Verify you are signed in to your Power BI account.
3. Click **Save**.
4. Click **Home**.
5. Click **Publish**, the publish to Power BI dialog box appears
6. Click an appropriate workspace.
7. Click **Select**. Notice the following (*Do not click any of the options*):
 - a. The **Publish to Power BI** dialog box closes.
 - b. The **Publishing to Power BI** dialog box opens displaying a progress read out as report is being published.
 - c. **Success!** is displayed when the report has been published.
 - d. **Open**, opens report in a browser.
 - e. **Get Quick Insights** displays list of quick insights from the report.
8. Take a screenshot.
9. Click **Got It**.
10. Click **Close**.
11. **Remember** the Workspace you published the report, it will be needed in upcoming exercises

Row-Level Security

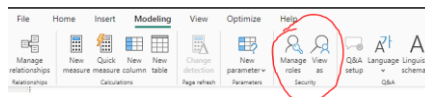
When you share a report with members of a workspace, by default, they would have full access to all the data the report has. However, if you need to restrict this access Row-Level security has to be implemented. Row-Level security creates customized view for each user.

To setup row-level security on a table, you need the following:

1. Users' ID
2. A key column that defines the restrictions to be applied.

Exercise Set up Row-Level Security

1. Open **Security.pbix** file
2. Click **Modeling** on the menu ribbon.



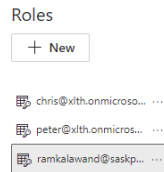
3. Click **Manage Roles**, **Manage Security roles** dialog box appears.



4. Click **New**.

- a. Under the Roles heading, a new role, named **Untitled** appears.

5. Replace **Untitled** by Typing the **email address (use your Saskpoly email)** for the new role
 - a. Email address must be associated with your organization.



- b.

6. Under the Select **Tables**, Click on **TransactionTable**.

7. Under Filter Data, Click **New**

- a. The Rule menu appears



8. Click **[Country]**
9. Click **Value** to select it, and then type **Canada**, creating the filter expression **[Country] = "Canada"**.
10. Click **Save**
11. Take a screenshot for 9, 11, 12, 13, 14.
12. Repeat Steps 4 to 9, this time adding another email address.
 - a. In the DAX expression specify **[Country] = "France"**
13. Repeat Steps 4 to 9, this time adding another email address.
 - a. In the DAX expression specify **[Country] = "Germany"**
14. Repeat Steps 4 to 9, this time adding another email address.
 - a. In the DAX expression specify **[Country] = "Mexico"**
15. Repeat Steps 4 to 9, this time adding another email address.
 - a. In the DAX expression specify **[Country] = "United States of America"**
16. Click **Save**, to apply the row-level changes.
17. Click **Home**
18. Click **Publish**, dialog box opens.
19. Click the **destination**.
20. Click **Select**.
 - a. The Publishing to Power BI dialog box opens.

21. Take a **screenshot**.
22. Click **Got it**.
23. Click **Close**.
24. **Use saved file for next exercise**

Exercise How to test what another would see on a Report with Row-Level security

1. Open the file with Row-Level security (**Security.pbix**)
2. Click **Modeling** on the Tab menu, displays the Modeling Tab ribbon menu.
3. Got to the **Security Group** in the ribbon tab



- a.
4. Click **View as** this opens the **View as Roles** dialog box.
5. Click the Role you want to view.
6. Then click OK.
7. Try creating a Stacked bar chart visual for Country and Sales under the role selected
8. Take a screenshot.
9. Delete the visual
10. Click **Save**

Note: Any report created under the Role selected will be restricted accordingly

Dashboards using Power BI Auto-Create Report feature.

Dashboards are a single page that uses visuals to present a quick view of a dataset. Power BI's Auto-Create Report assembles a dashboard for you automatically. Allowing you to quickly pin and add tiles and snapshots to the dashboard.

Exercise Add Tiles to a Dashboard

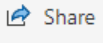
1. Go to **powerbi.microsoft.com/en-us**.
2. **Sign in** to the Power Bi service using the credentials created previously.
3. Click Workspace.
4. Click the Workspace to which you published the report in the previous section above **"Publish report to Power BI service"**.
 - a. Workspace tab appears.
5. Move the cursor over the dataset you published.
 - a. Extra controls should appear.
6. Click More Options ellipses (...).
7. Click **Auto-Create report**.

- a. **Creates** a complete report with tiles based on the data you uploaded.
8. Click **Save**
9. **Take a screenshot.**
10. Click **Enter a name for your report.**
 - a. Type a name for the report such as **AutoGeneratedReport**.
11. Select a destination **workspace** to save your report to.
12. **Take a screenshot.**
13. Click **Save**.
14. Use for **next exercise. (Do not close file)**

Share a Dashboard

To share dashboards, you must have a **Power BI pro user license** or a **premium per user license**. After creating a dashboard, you can share it using the Power BI service to send each user a link to it. You can either share the dashboard freely allowing other users to share it with other people or you can restrict either sharing or report building.

Exercise Share a Dashboard

1. Click **Workspaces**.
 - a. The Workspaces pane opens.
2. Click the workspace to which you published the report in the section “**Publish a Report to the Power BI Service.**”
 - a. The workspace appears in a new tab.
3. Click the **AutoGeneratedReport** report.
4. Click **Share** 
 - a. The **Send Link** dialog box opens.
5. Click **Enter a name or email address.**
6. Type the name or email address of each recipient in turn, clicking to accept the names or addresses after Power BI verifies them.
7. Click **Add a message** and type a message to the recipients.
8. Click **Send**.
 - a. Power BI sends the link to the recipients and displays a message saying it has done so.
9. **Take a screenshot.**
10. Click **Close**.
 - a. The Send Link dialog box closes.

Exercise How can I restrict the users with whom I share a link?

1. Click **Share** to open the Send Link dialog box.
2. Click **People in your organization with the link can view and share** to display more controls in the dialog box.
3. In the Settings section,

- a. Select **Allow recipients to share this report** if you want them to share report with others.
 - b. Select the **Allow recipients to build content with the data associated with this report**, this controls whether recipients can use the report data to build content.
4. **Take a screenshot.**
5. Click **Apply**.
6. Enter the recipients, add a message.
7. Click **Send**.

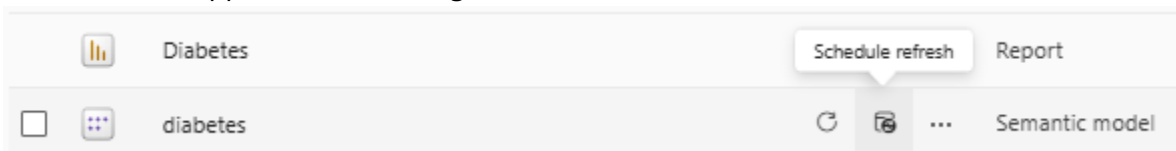
Schedule Data Refreshes

Power BI service enables you to refresh a data set either manually or automatically via the Schedule Refresh function. Automatic updates save time and effort and are usually the best refresh option in most cases. To schedule automatic refreshes, **you must use valid credentials** for the data source from which you will refresh the data.

If you published the data source as in the following exercise, your credentials should be valid.

Exercise Schedule Data Refreshes

1. Click **Workspaces**.
 - a. The Workspace panes opens.
2. Click the workspace to which you published the report in the section “**Publish a Report to the Power BI Service.**”
 - a. The workspace appears.
3. Move pointer over the row for the **dataset** you published (File Type – **Semantic Model**).
4. Two icons now appear on the row e.g.



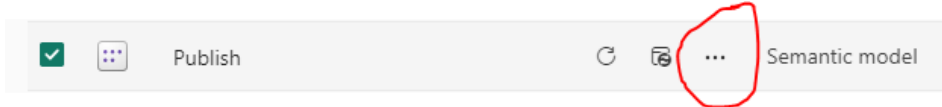
- a. The Settings screen for the dataset appears.
5. Click **Schedule refresh** (if greyed out, see note on gateway connection setup below).
6. Click **Refresh**.
 - a. The Scheduled Refresh section expands.
7. Set the **Keep your data up to date** switch to On.
8. Click **Refresh frequency** and click **Daily** or **Weekly**.
9. Click **Time zone** and click the time zone.
10. Click **Add another time** and use the resulting controls to set the refresh time.
11. Select **Semantic model owner** to receive notifications of refresh failures.
12. **Take a screenshot.**

13. Click **Apply**.

- a. Power BI schedules data refreshes for the dataset.

Gateway Connection setup

1. Select the **Publish dataset or any other that you created** (i.e. Semantic Model)
2. Click the ellipsis (...) for more options



3. Click **Settings**
4. Click **Gateway and Cloud connections**.

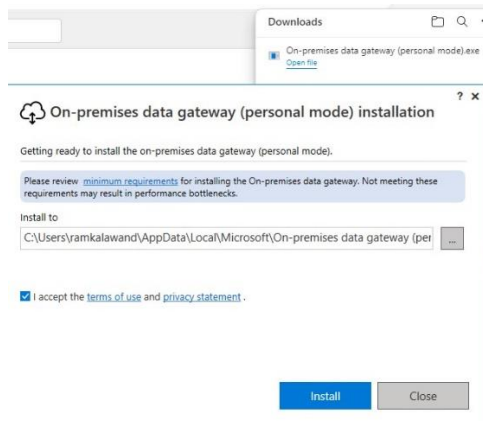
Cloud connections

No cloud connections

⚠ You have no personal gateways installed. [Learn more](#)

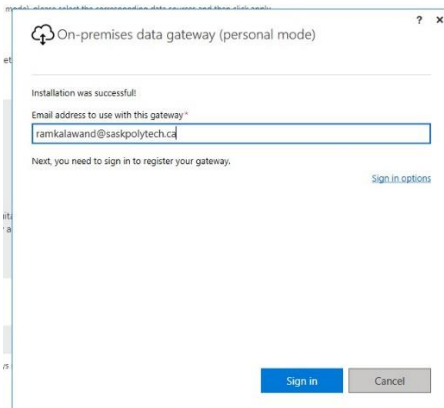
Install now

5. Click **Install now**
6. On-premises data gateway (personal mode) begins to download
7. Click **open file** to launch installer.
8. Click **Install** and accept the **terms of use** (Note: you may see “Upgrade” if previously installed)



a.

9. Enter your email address



a.

10. Click Sign-In and follow the process.
11. **Take a screenshot.**
12. Click **Close**
13. Return to the **workspace** with the **Dataset (semantic model)** published or any other you created.
14. Select the Dataset (Semantic model), click (...) for options.
15. Select **settings**.
16. Click **Data source credentials, Configure Publish** dialog box appears.
 - a. Click Privacy level setting and select **private**.
17. Go back to [Schedule Data Refreshes](#) above and to [step 2](#).

Publish a Report to the Web

To share a report on the web, you need a Power BI premium subscription as well as the right to distribute the material contained in the report.

Power BI enables you to publish the report to the web so that anyone who has internet access can read it. To let others know about a publicly shared report, you can do either:

1. Email a link to the report on the Power BI service, or
2. Paste/embed HTML code into a page on your website to enable access from there.

Why does the Publish to Web (public) command does not appear on the embedded report continuation menu?

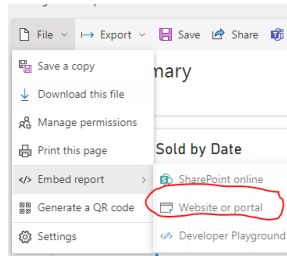
Power BI cannot publish reports in the following cases:

1. using low level security
2. reports shared with you by others.
3. reports from a workspace in which you do not have edit privileges.
4. report level DAX measures.
5. reports containing Q&A visuals.
6. reports containing Python visuals or R-language visuals.

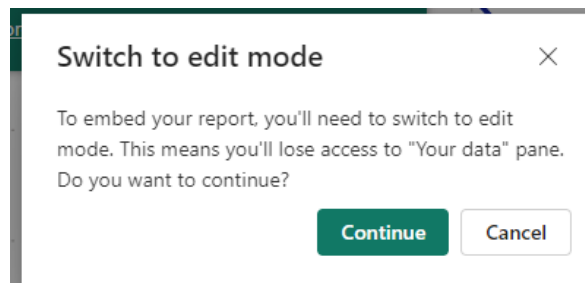
Exercise Publish a Report to the Web

1. In a web browser, go to powerbi.microsoft.com/en-us
 - a. The Data Visualization: Microsoft Power BI web page appears.
2. Click **Sign in**, and then follow the steps of the sign-in procedure using your credentials for Power BI
 - a. Once you have signed in, your Power BI Home page appears.
3. Click **Workspaces**.
4. Click the workspace to which you published the report in the section “Publish a Report to the Power BI Service.”
 - a. The workspace opens.
5. Click the report you want to publish.
 - a. The report opens.

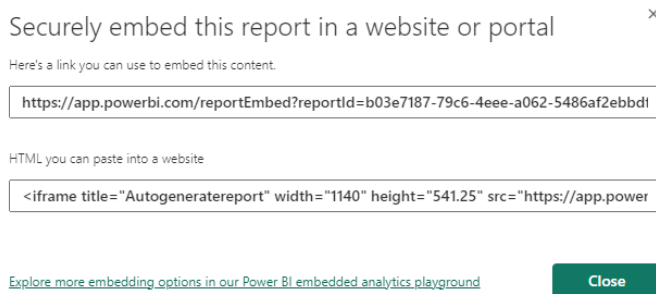
6. Click **File**.
7. Click or highlight **Embed report**.



8. Click **Website or Portal**.
 - a. Switch to edit Mode screen opens, click **Continue**.



9. Screen **Securely embed this report in a website or portal** appears.



- a. You can click **Copy** to copy the link to share via email.
 - b. You can click **Copy** to copy the HTML for pasting into a web page.
10. Copy **https link** and email to self.
11. Open email with the link
12. **Take a screenshot.**