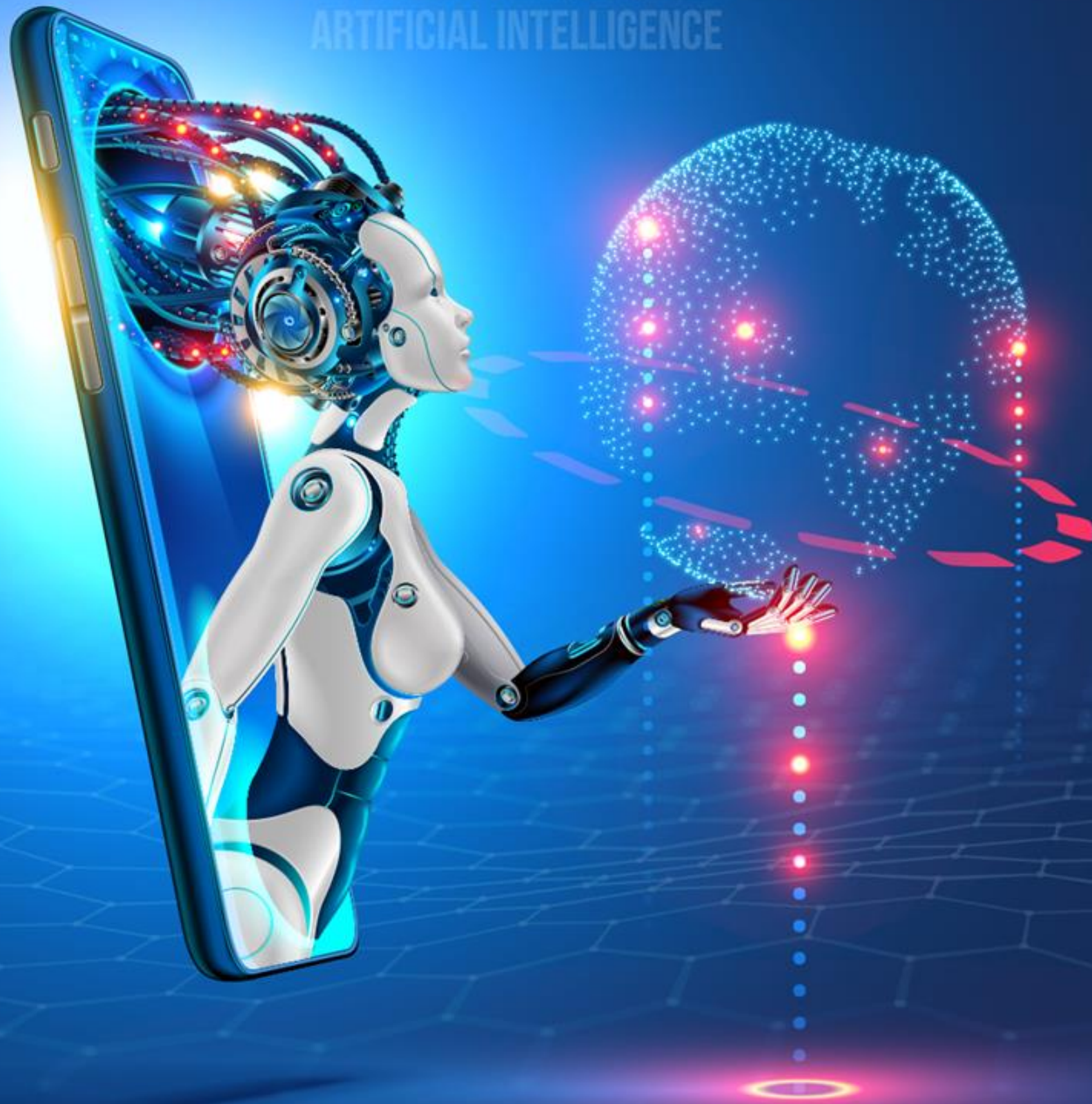


DATA AND ARTIFICIAL INTELLIGENCE



Data Manipulation and Reporting with Power BI



Publishing Dashboards

Learning Objectives

By the end of this lesson, you will be able to:

- 🕒 Publish and share dashboards using Power BI
- 🕒 Learn how to schedule data refresh
- 🕒 Describe the working of quick insights



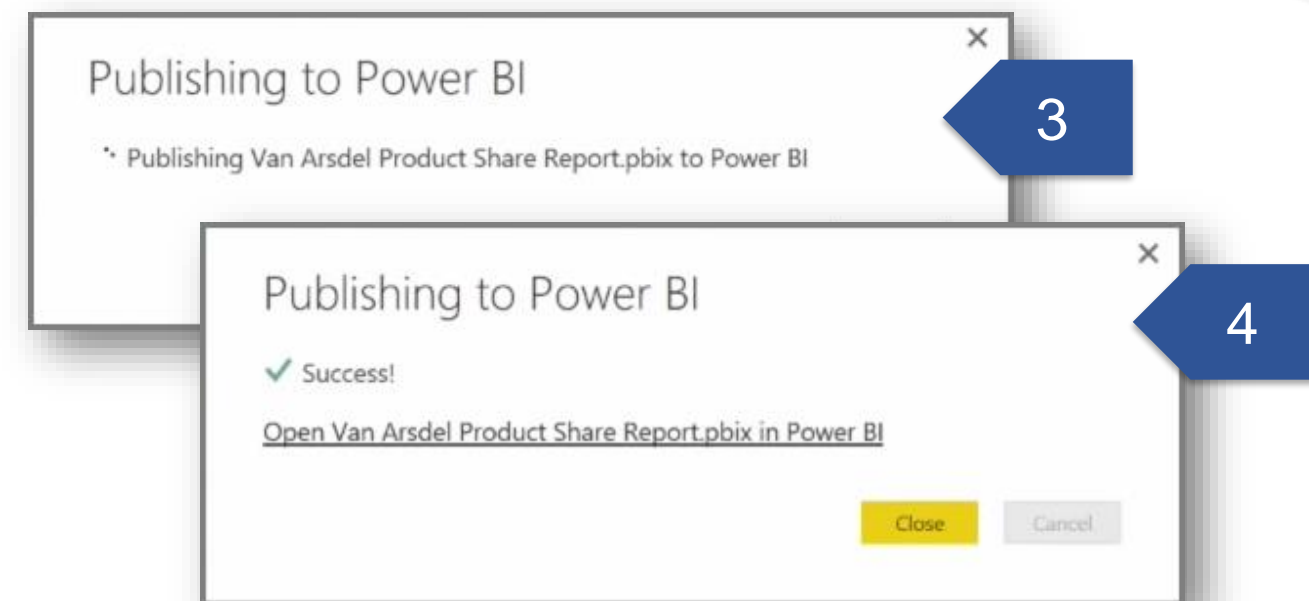
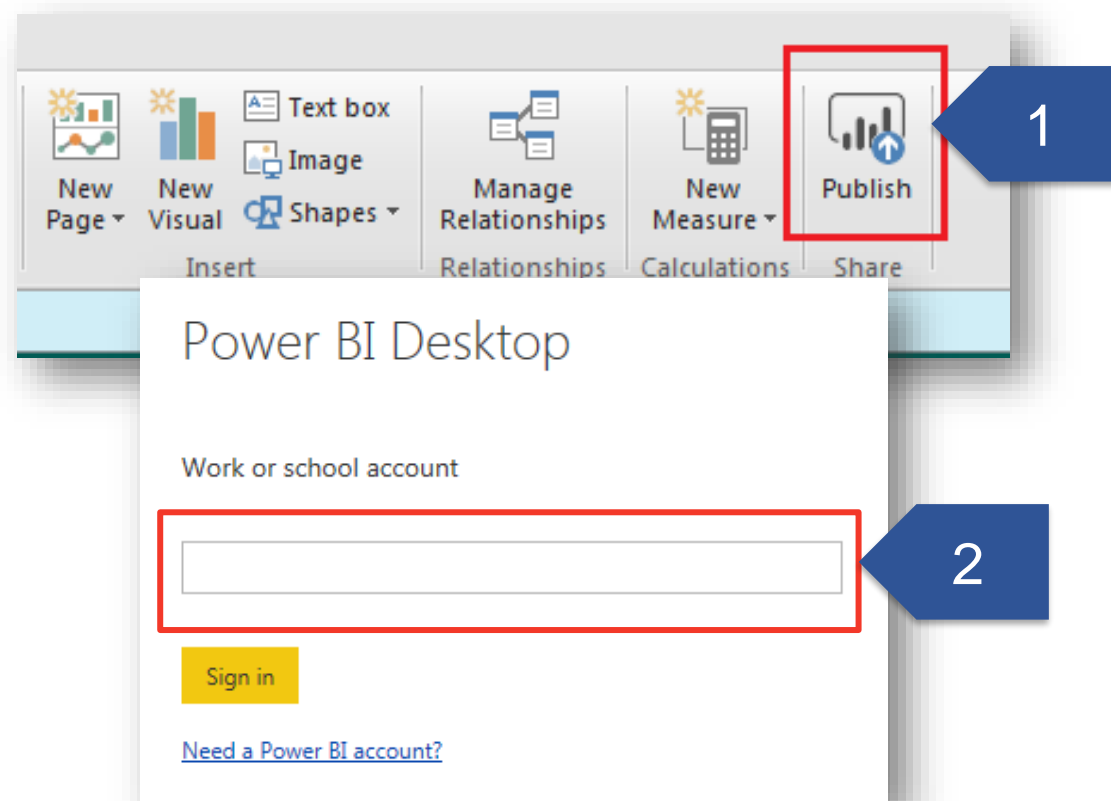
Publishing and Sharing Dashboards

Publishing Dashboard

Now that you have learned how to create visuals using the Power BI Desktop, you would likely want to share them with your co-workers which can be done easily with Power BI.

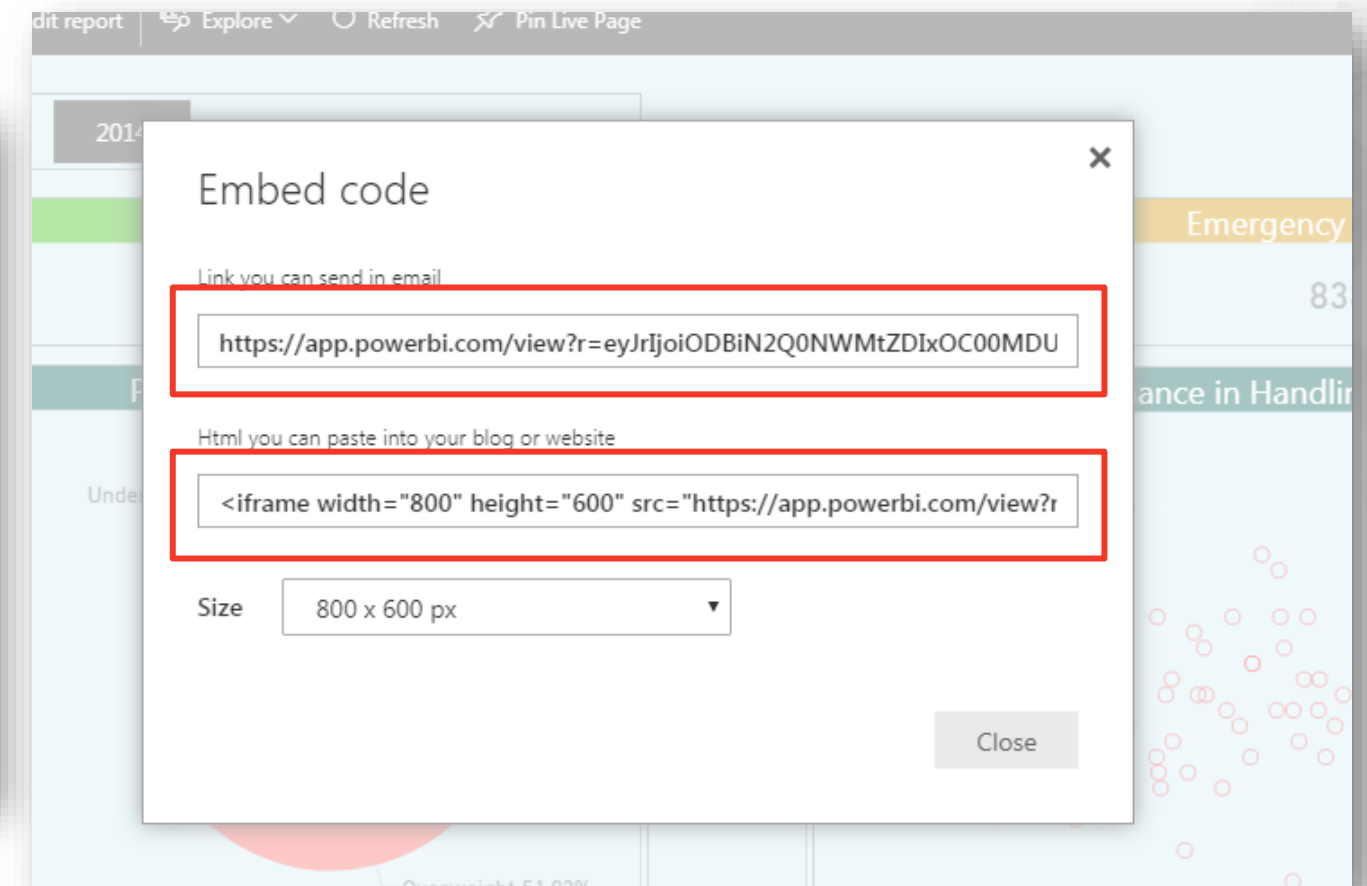
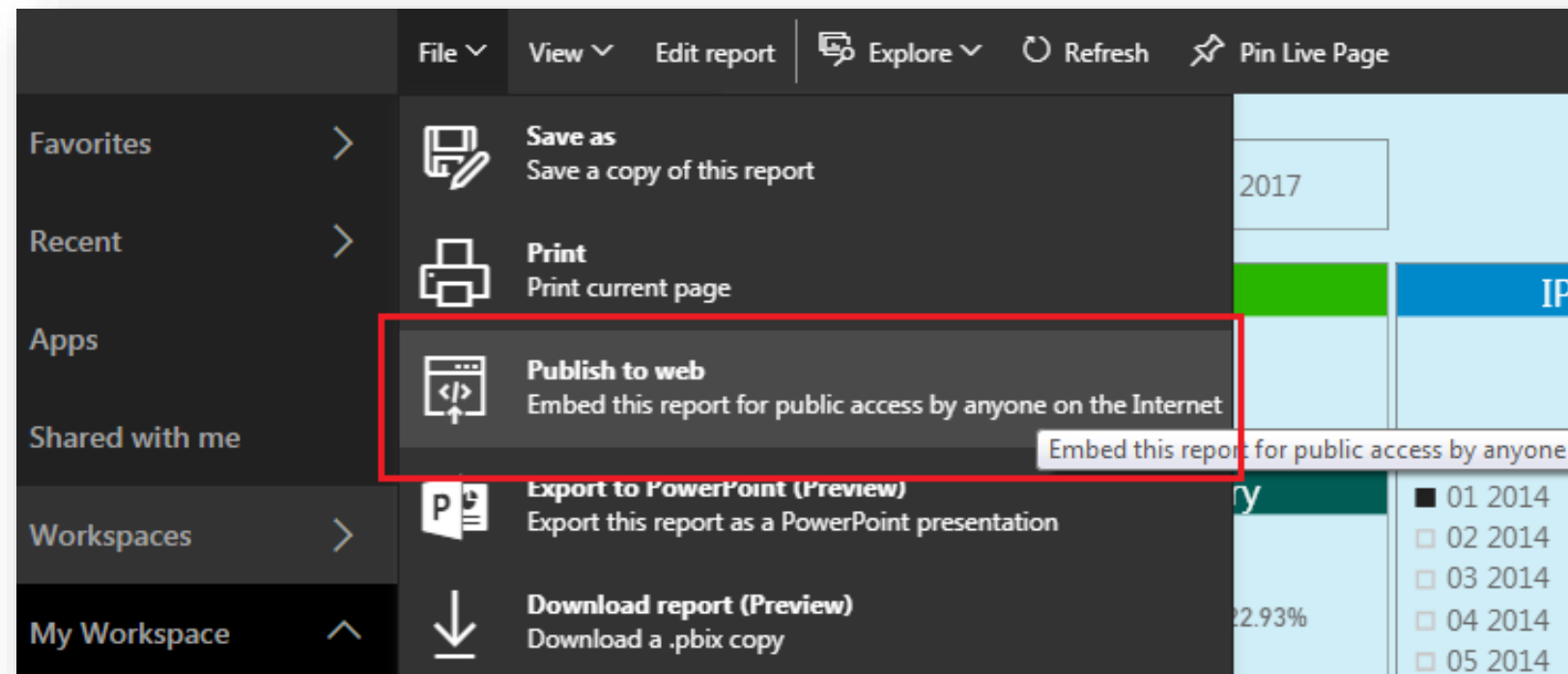
All you need is a Power BI service account which can be created using an official email address. Please note that personal Gmail accounts cannot be used in this case.

Click on “Publish” in the Power BI Desktop.



Sharing Dashboard

After publishing the dashboard to the Power BI service, you will get a workspace created for you where the published content (dashboard) gets saved. You can then share this dashboard with others either by, generating a shareable link, or by generating an embedder code.



Scheduled Refresh

Scheduled Refresh

Getting the latest data is often critical in making the right decisions. For many sources, (Salesforce or Marketo) you do not need to do anything at all. Similarly, in case of live connections, the data will be updated to date.

- But in other cases, like an Excel workbook, you will need to refresh manually or setup a refresh schedule.
- To setup a schedule data refresh, you need to first configure an “On-premises data gateway” or a “Personal” gateway.

The screenshot displays the 'Settings for Healthcare Dashboard for Web' interface. The 'Datasets' tab is selected in the top navigation bar. On the left, a sidebar lists 'Healthcare Dashboard for Web'. The main content area is divided into two sections, both highlighted with red boxes:

- Gateway connection:** This section includes instructions to ensure the computer is online and the data source is added in 'Manage Gateways'. It features two radio button options: 'Use your data gateway (personal mode)' (which is selected and shows '(online, running on NICESS-LP012)' with a 'Delete Gateway' link) and 'Use a data gateway'. 'Apply' and 'Discard' buttons are located below these options.
- Data source credentials:** This section lists five data sources with corresponding 'Edit credentials' links: 'fact tables.accdb', 'lookup tables.xlsx', 'patient medications.txt', 'patient procedures.txt', and 'patient tests.txt'.

Scheduled Refresh

- Once you have configured the gateway, you can schedule the data and refresh it either on a daily or weekly basis.
- You can also setup the system to send an email notification in case the data refresh fails to perform.

Scheduled refresh

Keep your data up to date

☒ On

Refresh frequency

Weekly ▼

Time zone

(UTC+05:30) Chennai, Kolkata, Mumbai, New De ▼

☒ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☒ Saturday

Time

[Add another time](#)

☒ Send refresh failure notification email to me

Quick Insights

Quick Insights

If you have a new dataset and you don't quite know your data but still want to build visualizations out of it, Power BI Quick Insights can help you to generate interesting interactive visualizations based on your data.

This feature is built on a set of advanced analytical algorithms developed in conjunction with Microsoft Research that helps users to find insights in their data in new and intuitive ways.

The screenshot illustrates the workflow for generating Quick Insights in Power BI. On the left, the 'DATASETS' section of the sidebar is visible, with 'QUICK INSIGHTS' highlighted by a red rectangle. A context menu is open over this option, showing actions like 'REMOVE', 'SCHEDULE REFRESH', 'REFRESH NOW', 'ANALYZE IN EXCEL', 'QUICK INSIGHTS', and 'DOWNLOAD .PBIX'. In the center, two notification pop-ups are shown: 'Searching for insights' and 'Insights are ready'. The 'Insights are ready' pop-up has a yellow 'View insights' button highlighted with a red rectangle. A blue arrow points from this button to the right, where a 'Quick Insights for Healthcare Dashboard for Web' report is displayed. This report contains two visualizations: a bar chart showing a distribution of values (100 to 800) and a horizontal bar chart titled 'Death Count BY AGE GROUP' showing counts for age ranges 11-30, 31-60, 61-90, 91-100, and 11-30. A 'CATEGORY OUTLIERS' section on the right notes that '31 - 60' and '11 - 30' have noticeably more Death Count for Price 800.

REPORTS
Healthcare Dashboard for Mobile
Healthcare Dashboard for Web

WORKBOOKS
You have no workbooks

DATASETS
Healthcare Dashboard for Mobile
Healthcare Dashboard for W...

REMOVE
SCHEDULE REFRESH
REFRESH NOW
ANALYZE IN EXCEL
QUICK INSIGHTS
DOWNLOAD .PBIX

Get Data

Searching for insights
Searching Healthcare Dashboard for Web. We will notify you

Insights are ready
You have insights for Healthcare Dashboard for Web.
View insights

Quick Insights for Healthcare Dashboard for Web
A subset of your data was analyzed and the following insights were found. [Learn more](#)

40%
20%
0%
100 200 300 400 500 600 700 800
500
550
600
650

Death Count BY AGE GROUP

11 - 30
31 - 60
61 - 90
91 - 100

CATEGORY OUTLIERS
'31 - 60' and '11 - 30' have noticeably more Death Count for Price 800.

DATA AND ARTIFICIAL INTELLIGENCE



Knowledge Check

Knowledge Check

1

What kind of email accounts can be used to create a Power BI service account?

- a. Personal (Gmail, Yahoo Domain)
- b. Official (Company Owned Domain)
- c. Both a and b
- d. None of the above



Knowledge Check

1

What kind of email accounts can be used to create a Power BI service account?

- a. Personal (Gmail, Yahoo Domain)
- b. Official (Company Owned Domain)
- c. Both a and b
- d. None of the above



The correct answer is **b.**

Official (Company Owned Domain) email accounts can be used to create a Power BI service account.

Knowledge Check

2

Is it possible to update data without scheduling a gateway?

- a. Yes
- b. No



Knowledge Check

2

Is it possible to update data without scheduling a gateway?

- a. Yes
- b. No



The correct answer is **a.**

Yes, it is possible to update data without scheduling a gateway.

Key Takeaways

You are now able to:

- 🕒 Publish and share dashboards using Power BI service
- 🕒 Learn how to schedule data refresh
- 🕒 Describe the working of quick insights

