

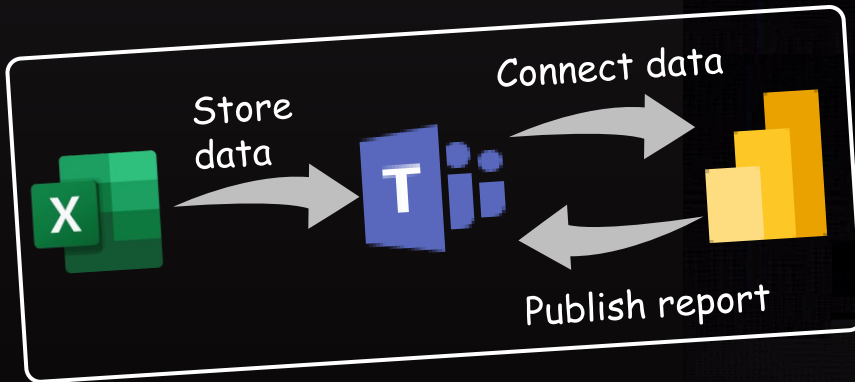
## Patou Tips #22

Start with PowerBI

"From Rookie to Rock"



# PowerBI projects with Teams



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## About this method

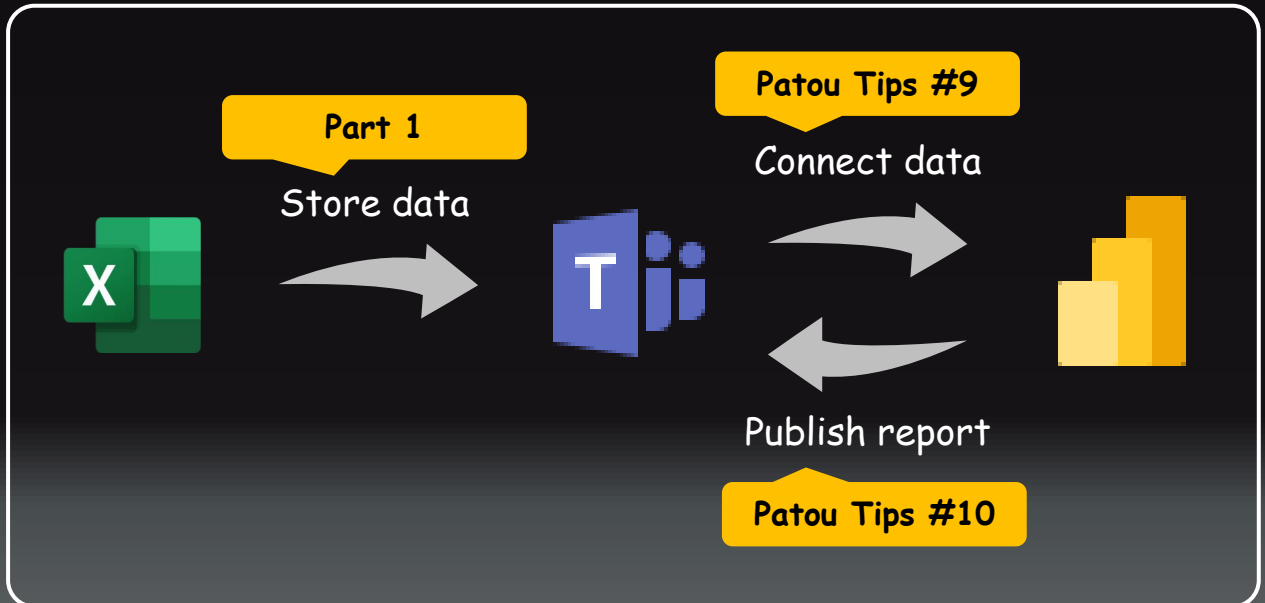


### Why to manage your PowerBI project with Teams?

- ✓ For small activities or small teams
- ✓ Effective for collaborative work
  - Everyone, in the team, can update the PowerBi file
- ✓ Easy management of authorizations
- ✓ Finally, you get a large storage space!



### And for which process?



0

## About data set...



Data set come from the fictitious company based on Paris "IceCream' Macaron" created for my book "Story of a point"

Folder contains the **fact data**

Folder data IceCream & Macaron

DimIncomeStatement.xlsx

DimProduct IceCream & Macaron.xlsx

Two **dimensions** **table**; Income Statement and Product

202401 Data IceCream & Macaron.xlsx

202402 Data IceCream & Macaron.xlsx

202403 Data IceCream & Macaron.xlsx



**To practice**  
downloadable free  
resources in GitHub

Start with PowerBI

"From Rookie to Rock"

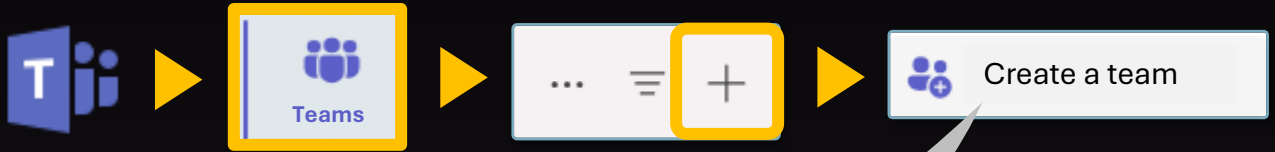


Part 1: Store data



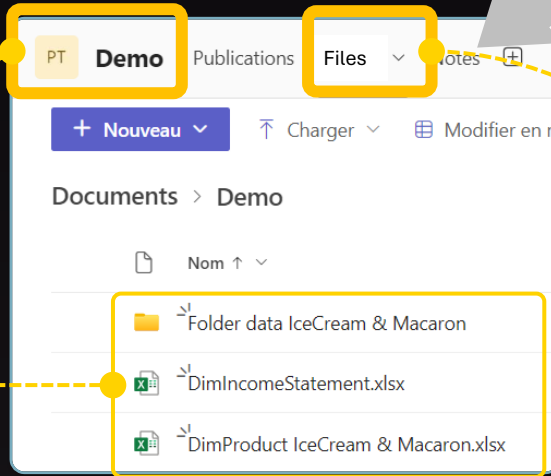
1

## Create a « Team » in Microsoft Teams

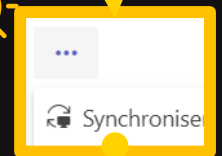


A team called "Patou Tips" (PT) with a "Demo" folder were created

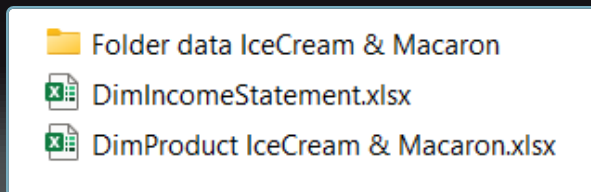
Datas were stored by drag and drop



To display files in a "Windows" mode



Open "Windows" to find the datas in another mode

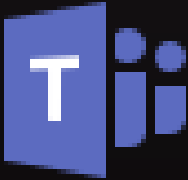


Start with PowerBI

"From Rookie to Rock"



## Part 2: Connect data





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## 2 types of connection

To have the best connectors with data stored in folder « Microsoft Teams » we must to use:

To connect  
PowerBI...



**PowerBI  
Connectors**



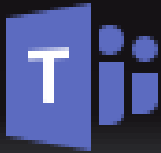
Web



SharePoint folder

...with an Excel file

...with a folder of files

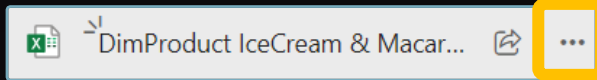




1

## Connect Power BI to an Excel file in Teams (1/3)

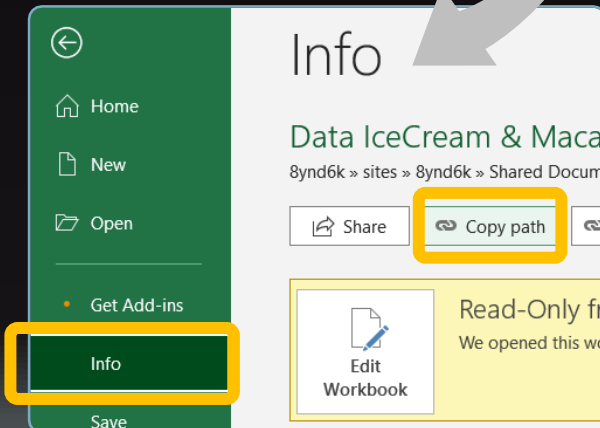
Really usefull for « dimensions table »



Open



Open in the application



When the Excel file is open, click on "copy path" in the panel info.

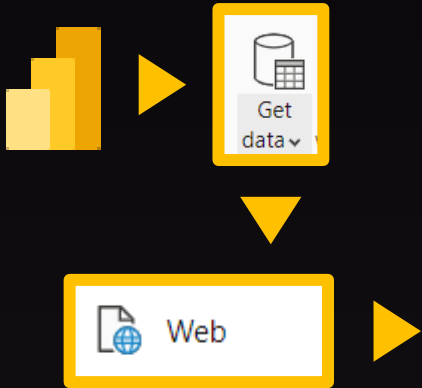






1

## Connect Power BI to an Excel file in Teams (2/3)



Paste the link from Excel file (see previous step)

### From Web

☒ Basic ☐ Advanced

URL

Documents/Demo/DimProduct%20IceCream%20&%20Macaron.xlsx?web=1

❌

⚠️ Don't forget to delete the end of the link → ?web=1

### From Web

☒ Basic ☐ Advanced

URL

ed%20Documents/Demo/DimProduct%20IceCream%20&%20Macaron.xlsx

✅



Note: It could happen that a pop-up appear to ask your Microsoft account sign in.

Anonymous

Windows

Microsoft account

### SharePoint

https://8ynd6k.sharepoint.com/sites/8ynd6k

You aren't signed in.

Sign in

Select which level to apply these settings to

https://8ynd6k.sharepoint.com/

Back

Connect

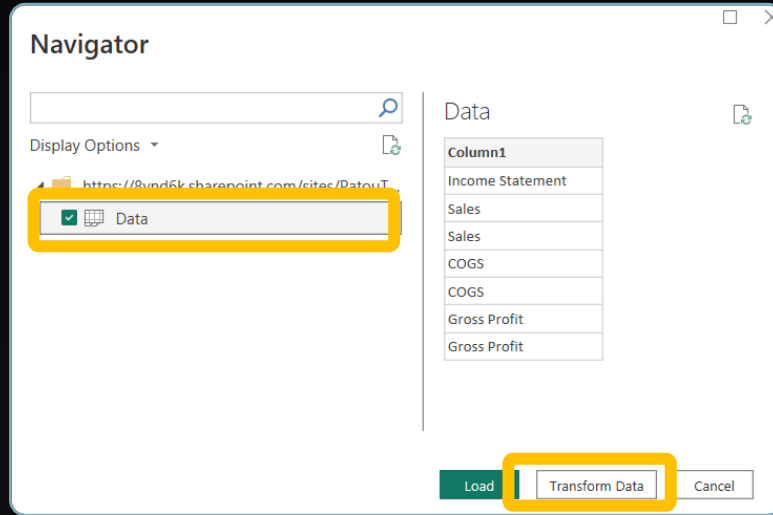
Cancel



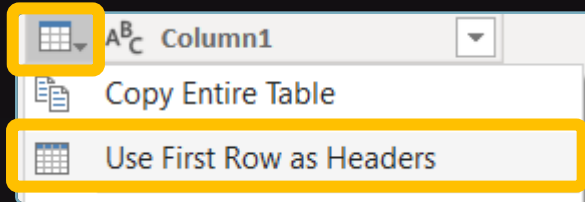
1

## Connect Power BI to an Excel file in Teams (3/3)

A pop-up appear, select the name of the Excel sheet "Data", then the "Transform Data" command.



In the corner of the Power Query window request, select "Use First Row as Headers" command.

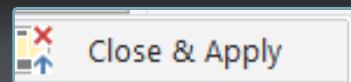
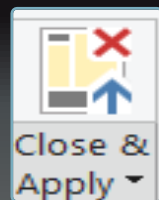


ABC	Product
Valid	100 %
Error	0 %
Empty	0 %

2 distinct, 2 unique

1	IceCream
2	Macaron

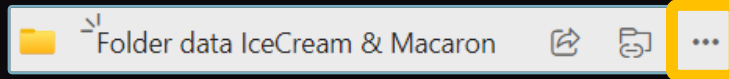
Close Power Query to work in PowerBI



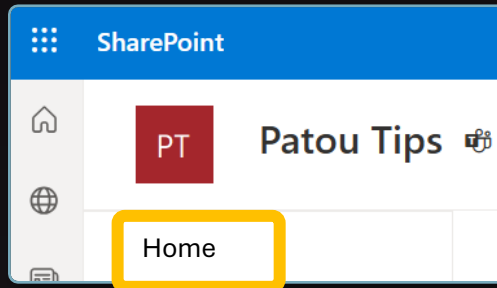
That's all folks!

2

## Connect PowerBI to a folder of files in Teams (1/5)



Open in SharePoint



Right click

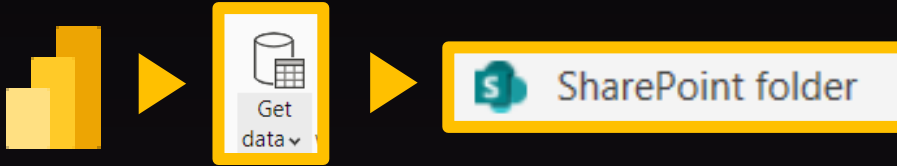


Copy path



2

## Connect PowerBI to a folder of files in Teams (2/5)



Paste the link from Sharepoint (see previous step)

### SharePoint folder

Site URL <sup>①</sup>

<https://8ynd6k.sharepoint.com/sites/PatouTips2>

Files that we need.

<https://8ynd6k.sharepoint.com/sites/PatouTips2>

Content	Name	Extension	Date accessed	Date modified	Date created	Attributes	
Binary	202403 Data IceCream & Macaron.xlsx	.xlsx	null	15/09/2024 10:57:16	15/09/2024 10:57:16	Record	<a href="https://8ynd6k.sharepoint.com/sites/PatouTips2/202403%20Data%20IceCream%20&amp;%20Macaron.xlsx">https://8ynd6k.sharepoint.com/sites/PatouTips2/202403%20Data%20IceCream%20&amp;%20Macaron.xlsx</a>
Binary	202401 Data IceCream & Macaron.xlsx	.xlsx	null	15/09/2024 10:57:16	15/09/2024 10:57:16	Record	<a href="https://8ynd6k.sharepoint.com/sites/PatouTips2/202401%20Data%20IceCream%20&amp;%20Macaron.xlsx">https://8ynd6k.sharepoint.com/sites/PatouTips2/202401%20Data%20IceCream%20&amp;%20Macaron.xlsx</a>
Binary	202402 Data IceCream & Macaron.xlsx	.xlsx	null	15/09/2024 10:57:16	15/09/2024 10:57:16	Record	<a href="https://8ynd6k.sharepoint.com/sites/PatouTips2/202402%20Data%20IceCream%20&amp;%20Macaron.xlsx">https://8ynd6k.sharepoint.com/sites/PatouTips2/202402%20Data%20IceCream%20&amp;%20Macaron.xlsx</a>
Binary	DimIncomeStatement.xlsx	.xlsx	null	15/09/2024 10:57:19	15/09/2024 10:57:19	Record	<a href="https://8ynd6k.sharepoint.com/sites/PatouTips2/DimIncomeStatement.xlsx">https://8ynd6k.sharepoint.com/sites/PatouTips2/DimIncomeStatement.xlsx</a>
Binary	DimProduct IceCream & Macaron.xlsx	.xlsx	null	15/09/2024 10:57:21	15/09/2024 10:57:21	Record	<a href="https://8ynd6k.sharepoint.com/sites/PatouTips2/DimProduct%20IceCream%20&amp;%20Macaron.xlsx">https://8ynd6k.sharepoint.com/sites/PatouTips2/DimProduct%20IceCream%20&amp;%20Macaron.xlsx</a>

Select "Transform Data".

Combine

Load

Transform Data

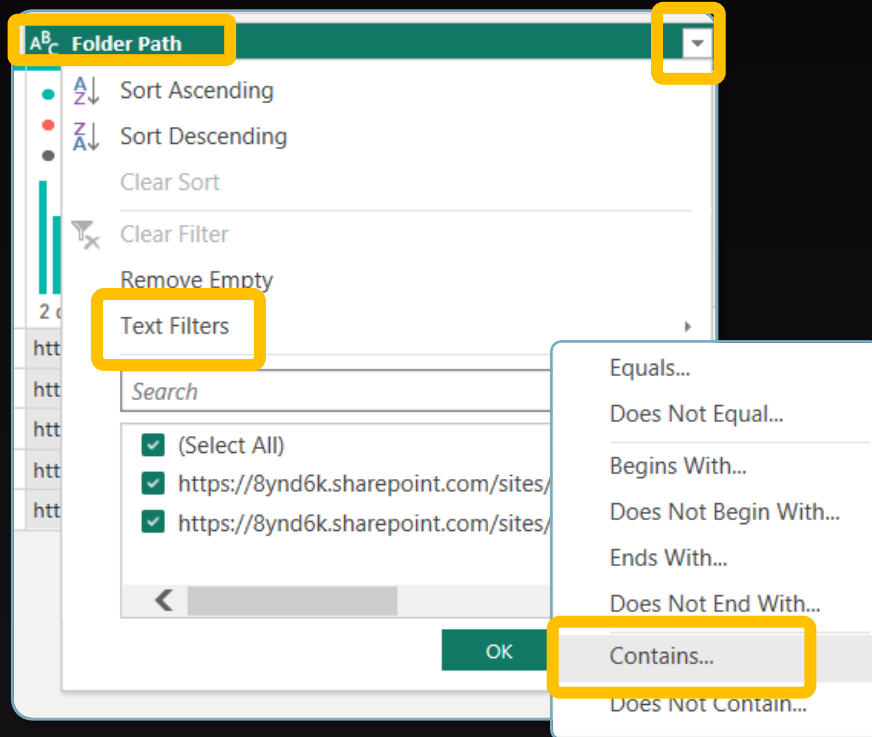
Cancel

2

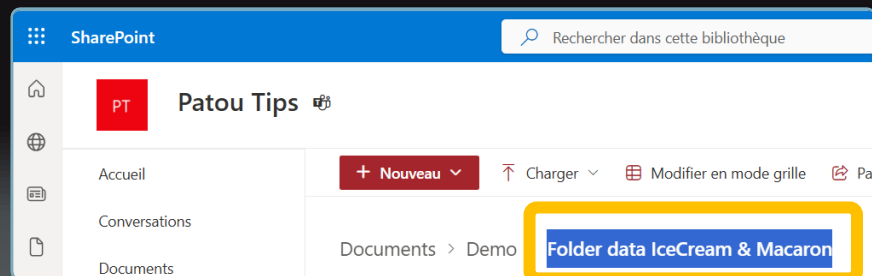
## Connect PowerBI to a folder of files in Teams (3/5)



In PowerQuery, select the last column "Folder Path", then Text Filters and "contains" command.



Copy the name of the folder in Sharepoint (or Teams) that we need.



2

## Connect PowerBI to a folder of files in Teams (4/5)



Paste the name of the folder in Sharepoint.

**Filter Rows**

Apply one or more filter conditions to the rows in this table.

☒ Basic ☐ Advanced

Keep rows where 'Folder Path'

contains data IceCream & Macaron

Select the first column "Content")

**Content** ⬇

A pop-up appear, select the name of the Excel sheet "Data"

**Combine Files**

Select the object to be extracted from each file. [Learn more](#)

Sample File: First file

Display Options ⬇

Parameter1 (1)

Data

☐ Skip files with errors

OK Cancel

Income Statement	Product	Period	Value
Sales	IceCream	01/03/2024	1280
Sales	Macaron	01/03/2024	768
COGS	IceCream	01/03/2024	640
COGS	Macaron	01/03/2024	576
Gross Profit	IceCream	01/03/2024	640
Gross Profit	Macaron	01/03/2024	192



Note about "Combine Files" command: For Power Query, it's really better that all the Excel files from the folder have the structure and also that the sheets have the same name.

2

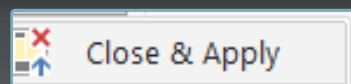
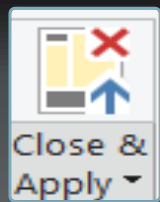
## Connect PowerBI to a folder of files in Teams (5/5)



Now all the Excel files are together in a same request

	Source.Name	Income Statement	Product	Period	Value
	<ul style="list-style-type: none"> <li>Valid 100 %</li> <li>Error 0 %</li> <li>Empty 0 %</li> </ul> <p>3 distinct, 0 unique</p>	<ul style="list-style-type: none"> <li>Valid 100 %</li> <li>Error 0 %</li> <li>Empty 0 %</li> </ul> <p>3 distinct, 0 unique</p>	<ul style="list-style-type: none"> <li>Valid 100 %</li> <li>Error 0 %</li> <li>Empty 0 %</li> </ul> <p>2 distinct, 0 unique</p>	<ul style="list-style-type: none"> <li>Valid 100 %</li> <li>Error 0 %</li> <li>Empty 0 %</li> </ul> <p>3 distinct, 0 unique</p>	<ul style="list-style-type: none"> <li>Valid 100 %</li> <li>Error 0 %</li> <li>Empty 0 %</li> </ul> <p>15 distinct, 12 unique</p>
1	202403 Data IceCream & Macaron.xlsx	Sales	IceCream	01/03/2024	1280
2	202403 Data IceCream & Macaron.xlsx	Sales	Macaron	01/03/2024	768
3	202403 Data IceCream & Macaron.xlsx	COGS	IceCream	01/03/2024	640
4	202403 Data IceCream & Macaron.xlsx	COGS	Macaron	01/03/2024	576
5	202403 Data IceCream & Macaron.xlsx	Gross Profit	IceCream	01/03/2024	640
6	202403 Data IceCream & Macaron.xlsx	Gross Profit	Macaron	01/03/2024	192
7	202401 Data IceCream & Macaron.xlsx	Sales	IceCream	01/01/2024	1000
8	202401 Data IceCream & Macaron.xlsx	Sales	Macaron	01/01/2024	600
9	202401 Data IceCream & Macaron.xlsx	COGS	IceCream	01/01/2024	500
10	202401 Data IceCream & Macaron.xlsx	COGS	Macaron	01/01/2024	450
11	202401 Data IceCream & Macaron.xlsx	Gross Profit	IceCream	01/01/2024	500
12	202401 Data IceCream & Macaron.xlsx	Gross Profit	Macaron	01/01/2024	150
13	202402 Data IceCream & Macaron.xlsx	Sales	IceCream	01/02/2024	1140
14	202402 Data IceCream & Macaron.xlsx	Sales	Macaron	01/02/2024	684
15	202402 Data IceCream & Macaron.xlsx	COGS	IceCream	01/02/2024	570
16	202402 Data IceCream & Macaron.xlsx	COGS	Macaron	01/02/2024	513
17	202402 Data IceCream & Macaron.xlsx	Gross Profit	IceCream	01/02/2024	570
18	202402 Data IceCream & Macaron.xlsx	Gross Profit	Macaron	01/02/2024	171

Close Power Query  
to work in PowerBI



That's all  
folks!

Start with PowerBI

"From Rookie to Rock"



## Part 3: Publish report



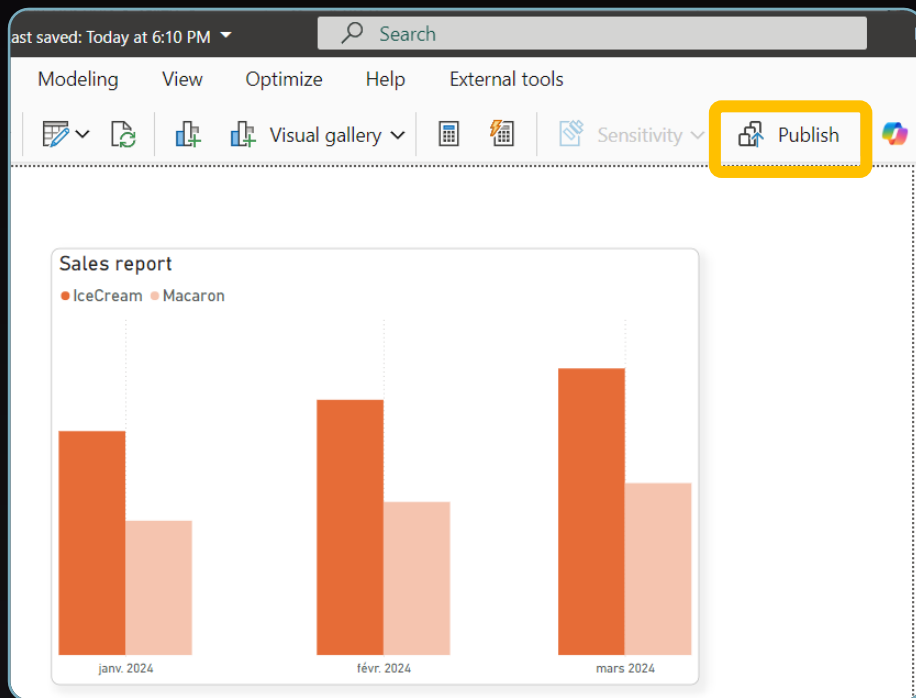


1

# Publish the report on the PowerBI Service



In PowerBI  
desktop, select  
Publish

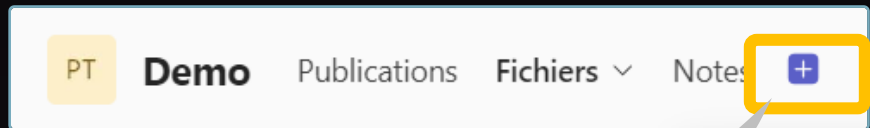


Publish it  
in a  
workspace

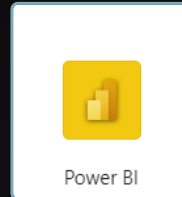
Publish to Power BI		
Search	My workspace	
My workspace	Name	Type
All	Demo PowerBI	Semantic model
Admin monitoring	Demo PowerBI	Report
Custom Visuals Exploration Tool 14/...		

2

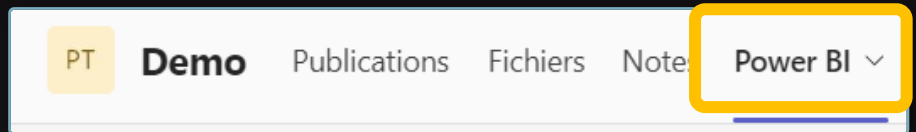
## Publish the report on Microsoft Teams (1/2)



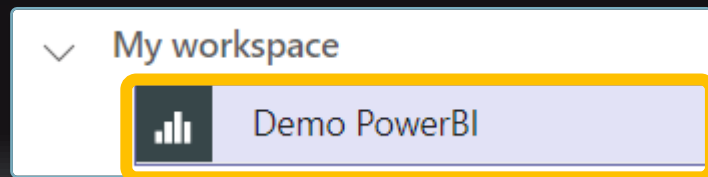
In Microsoft Teams, add the PowerBI applications



A "Power BI" menu is created



Search the PowerBI report to publish inside Teams

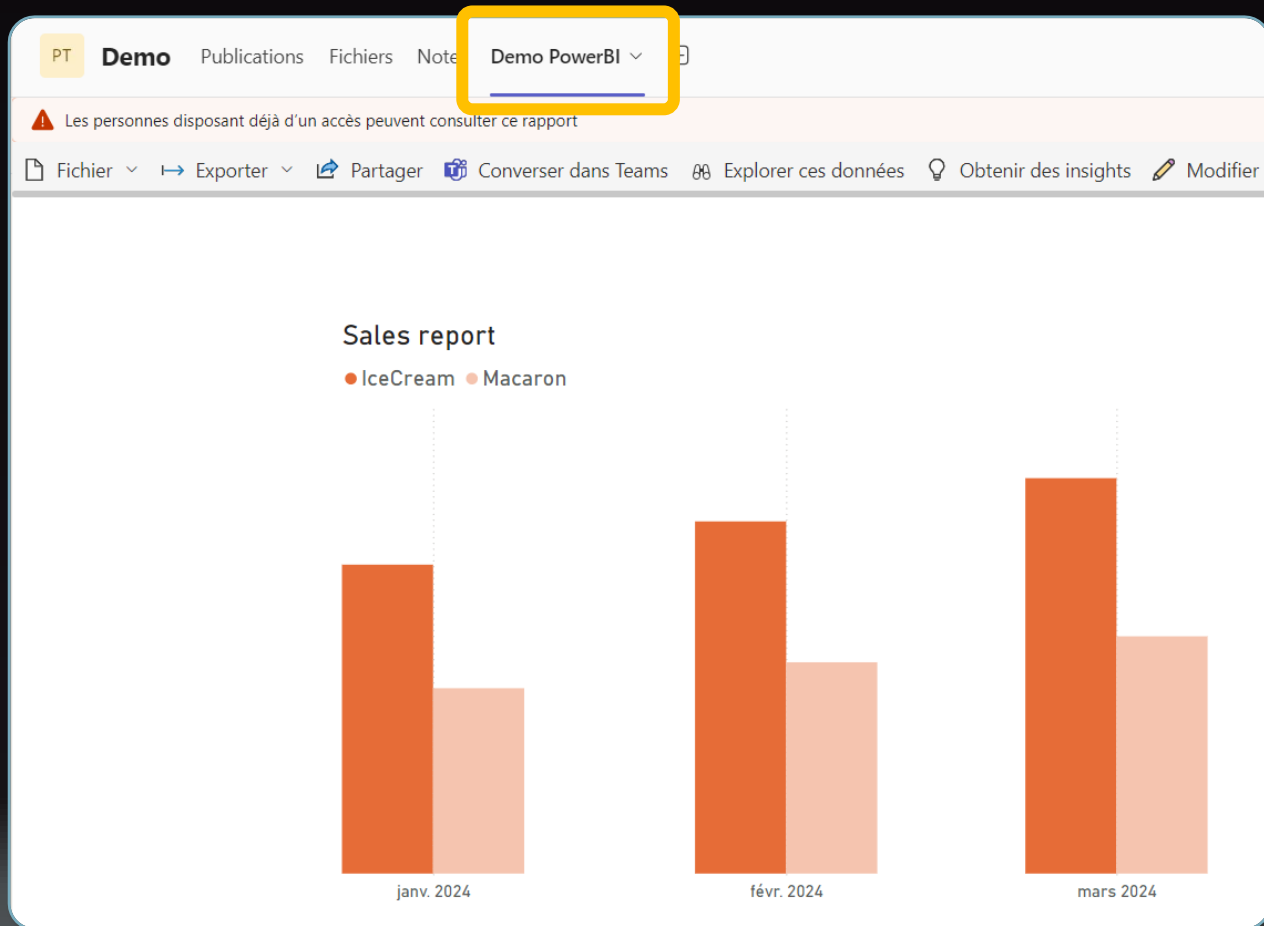


2

## Publish the report on Microsoft Teams (1/2)



The PowerBI report is ready to share from « Microsoft Teams » to your team!



Don't forget!  
This isn't the truth, it's just my truth!

## Patou Tips



Follow me  
Like me  
Share me

