

## What is Workspace?

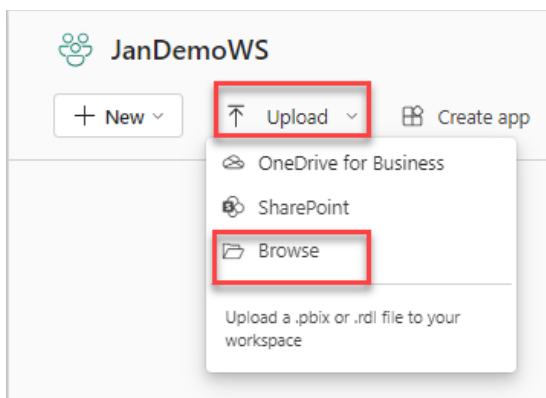
- Workspaces are the way to collaborate and share reports and configure security and permissions.
- Workspace contains Reports, Datasets and Dashboard
- **My Workspace** is Default workspace.
- You can create your own workspace

### Lab1: Create Workspace and Publish Report

1. Power BI Service → Left menu bar → Workspaces → Click on New Workspace
2. In create workspace window provide  
**Name:** JanDemoWS (You can provide your own name for workspace)  
**Workspace image** → Upload → C:\PowerBI Learn\ClassLabs\Logo.jpg → Apply
3. Open C:\PowerBI Learn\ClassLabs\Lab -Solutions\AdworksSales.pbix file in PowerBI Desktop → Home Ribbon → Publish → Select the workspace for publishing (JanDemoWS) → Select
4. You can Observe Report and Semantic model (previously referred as dataset)

### Publish Report using PowerBI Service

- You can also Publish Report by Uploading Existing pbix file using PowerBI Service.
- PowerBI Service → Select your workspace → **Upload** → Browse → Select AdworksSales.pbix



### Lab2: Create a new Report Page in Existing Report

1. To open Report → Click on Report in Workspace
2. Observe on menu items in Report → Click on Edit
3. Observe the environment like Desktop
4. You can create New page or modify existing pages

## Dashboard and Tile

- Power BI dashboard is a feature that is only included in Power BI service.
- Dashboards can be comprised of **pinned visuals** that are taken **from different reports**.
- It can also include complete report page using **pin live option**
- You can't create new visuals in Dashboard but You can generate visual using Q&A feature

- Dashboard should contain carefully curated visuals which can guide users to get the they need quickly and efficiently

### Dashboards vs. reports

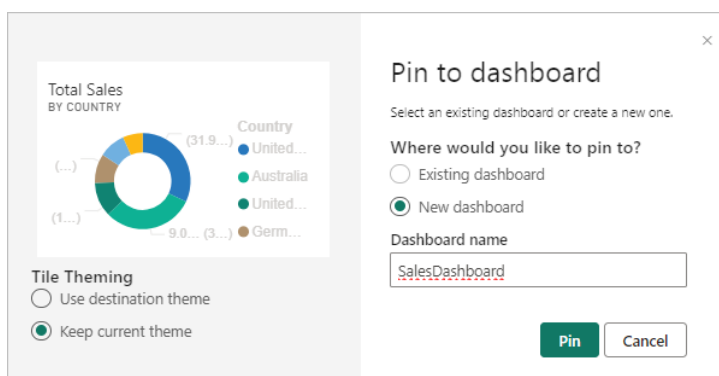
- Dashboards can be created from **multiple datasets or reports** whereas Power BI report uses data from a single dataset
- Dashboard can be created in Power BI Service only where as reports can be created in PowerBI Desktop as well as in service.
- Dashboards do not have the **Filter**, **Visualization**, and **Fields** panes that are in Power BI Desktop, meaning that you can't add new filters and slicers, and you can't make edits.
- Dashboards can only be a **single page**, whereas reports can be multiple pages.
- You can't see the underlying dataset directly in a dashboard, while you can see the dataset in a report under the **Data** tab in Power BI Desktop.
- Both dashboards and reports can be refreshed to show the latest data.

### Tile:

- A tile is a snapshot of your data, pinned to the dashboard. A tile can be created from a report, dataset, dashboard, the Q&A box, Excel, (SSRS) Report.
- You can have Standalone tiles include: text boxes, images, videos, streaming data, and web content.

### Lab3: Create DashBoard, pin tiles

1. Go to Group Visuals Page
2. Hover Mouse on Total Sales by Country Chart → Observe small pin icon on Right top of visual.
3. Click on pin Visual → Window for dashboard pops up → Specify name for New Dashboard → Click on pin



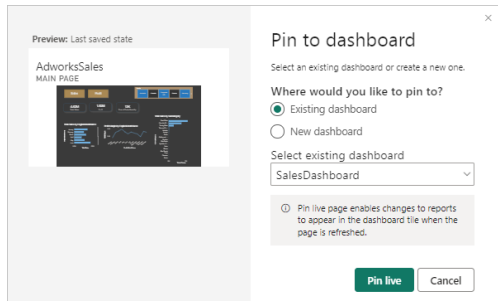
### Pin a live report page to a dashboard:

- Pinning a live page is a simple way to pin all visuals in report page.
- The tiles are *live*; you can interact with them right there on the dashboard.
- **Changes made to any visualization in page, like adding a filter or changing the fields used in the chart, are reflected in the dashboard tile as well.**

- you can ensure that you aren't using old data and the visuals on your dashboards reflect changes live.

#### Lab4: Pin live page

1. Go to main page in report → Click on ... (more options) near Edit Menu → Pin to dashboard → pin live



#### Add standalone Tile:

You can add standalone tile in Dashboard to place an image, text box, video, streaming data, or web code

#### Lab5: Add an image tile to Dashboard

1. SalesDashboard → Menu bar → Click on edit → +Add a tile → select image → Next
2. Configure the window as follows

**Name:** AdventureWorks

**URL:** <https://th.bing.com/th/id/OIP.ZnAmOzJ5QDK0iSKcUIJBLQAAAA?rs=1&pid=ImgDetMain>

3. Click on Apply and Observe the Image in your Dashboard

#### Q & A feature:

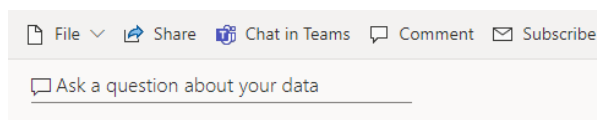
Q&A is a Power BI tool for exploring your data by using natural language.

Ask a question about your data, and receive an answer in the form of a visualization.

- You can explore data by asking questions

#### Lab6: Add a Tile using Q&A

1. SalesDashboard → Top Left →



2. → Click on this

3. Type Question like **Total Sales by Category**
4. You can observe a Visual
5. At top right observe **Pin Visual** → Click → **Pin to your dashboard**
6. Apply Theme to Dashboard

#### Quick Insights:

Power BI can automatically produce some insights from your dataset. Some might make sense for your report.

1. Go to Your Workspace→Semantic model→ More options→Get Quick Insight
2. You can pin **required insight** to Dashboard.

## Dashboard Other Options

### Add Dashboard Theme:

1. Edit menu→Dashboard Theme→Select Theme

You can also upload your own JSON theme or download the current theme.

### Dashboard for mobile View:

You can also optimize your dashboards for mobile view in Power BI service.

Edit Menu→mobile layout

### Configure Alert:

It can be used to notify you when data on a dashboard change above or below limits you set.

Can be configured for gauges, KPIs and cards

When triggered it shows notification in Power BI Service.

Once notified, you can choose to send to your account.

1. Dashboard→Select Tile Visual→More(...)→Manage alerts

*Note: This option will be available only on gauges, KPIs, and cards.*

## Sharing Dashboard

Dashboard is used to share most important metrics within your reports to single view.

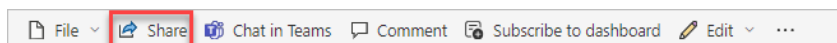
End Users can quickly find the required information.

### Sharing Options:

1. Share Dashboard: You can specify Email address/User Name of Person in your organization.
2. Email Subscription: Deliver content to User Inbox.
3. Microsoft Teams: Share links to our dashboards.
4. Power BI Apps: Can Easily Distribute multiple reports and dashboards

### Lab7: Share Dashboard

SalesDashboard →Click on Share Menu

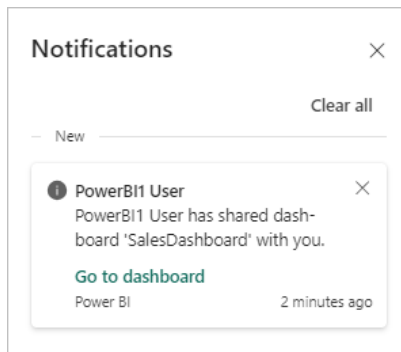


Enter Email address: [PBI-USER2@DECCANSOFTSTUDENTS.ONMICROSOFT.COM](mailto:PBI-USER2@DECCANSOFTSTUDENTS.ONMICROSOFT.COM)

pbi-user2 can see one alert in Home page

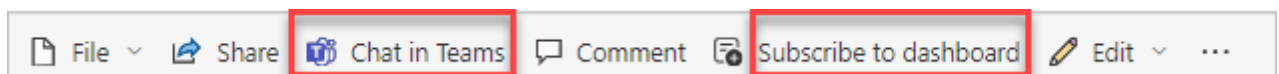


→User2 can see Dashboard By clicking on it.



**Note:** It can be viewed in inbox if configured so.

**You also have Following Options:**



## DashBoard Security

Dashboards can be secured by giving limited permissions to the user.

Roles let you manage who can do what in a workspace, so teams can collaborate.

There are Four Roles

### 1. Admin:

- Have Full control over all assets in workspace.
- Can add or remove users.
- Allow contributor to update app.
- This Role should be given to few users.

### 2. Member:

- Can add new member to workspace with permission lower than member.
- Manage workspace apps.

### 3. Contributor:

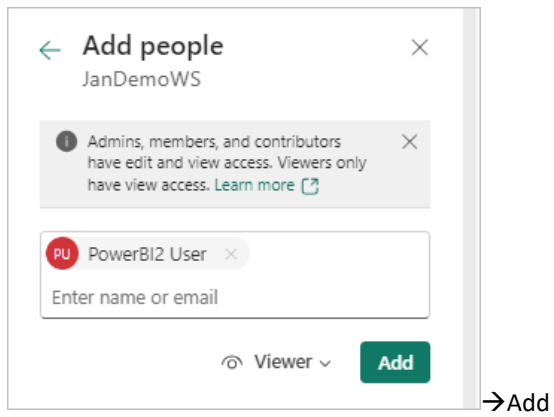
- Create content (Report/Dashboard) within workspace.
- Can update app if allowed.

### 4. Viewer:

- Can view Reports.
- No modifications are permitted.
- Access given to Reports and tiles in Dashboard.
- No contain can be pinned to existing or new dashboard.

## Lab8: Manage Access to Workspace

1. Open your Workspace (JanDemoDb)→Menu Manage access→+Add people or Group
2. Enter Name/Email of user→Specify Viewer Role



3. You can observe that PowerBI2 User has Read Only Access.