Excel Virtually Global 2024

Session Details
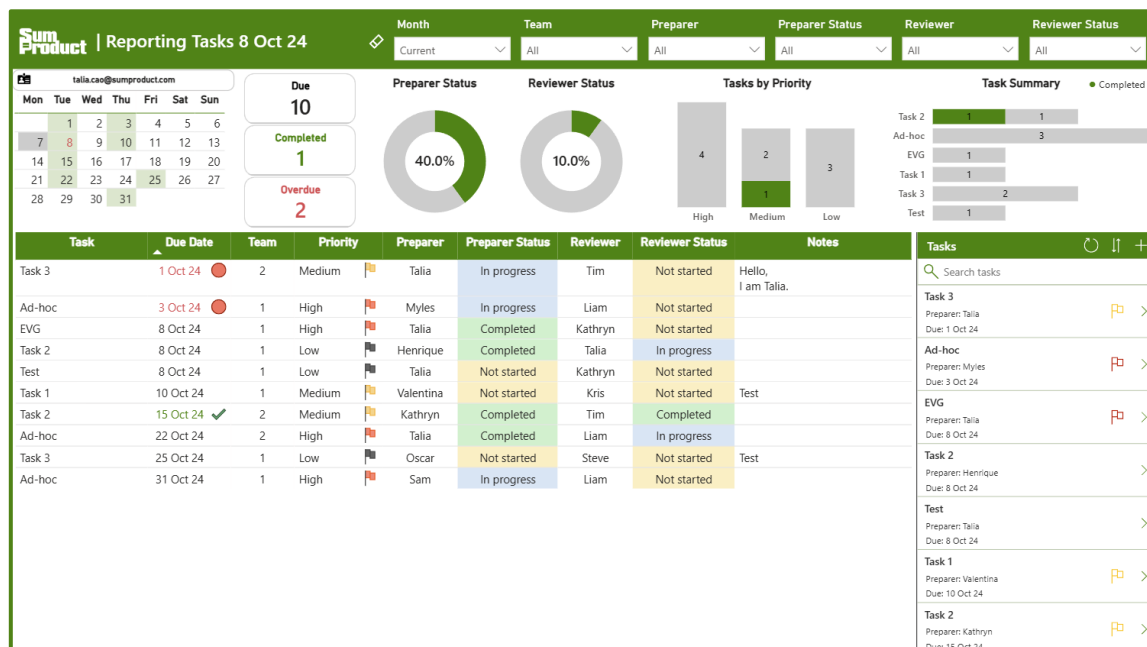
Presenter: **Talia Cao, CPA** – Manager @ SumProduct | Consultant

Topic: **From Dashboards to Action: Elevate your Power BI reports with Power Apps & Power Automate Integration**

Outline: Discover how to take your static Power BI reports to the next level by integrating write-back capabilities with Power Apps and automated refresh & notifications with Power Automate. Learn how to turn your dashboards into interactive platforms where users can update and manage data directly from the reports. This session will show you how to enhance your reporting and decision-making processes, making your dashboards not just informative, but dynamic and responsive to real-time needs.

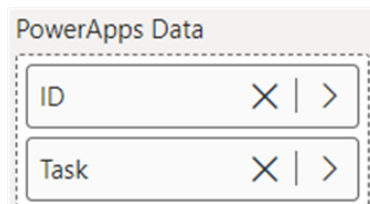**Contact me:**   [LinkedIn](#) | [Email](#)

1. Power BI

Data Source – SharePoint Online List

- Site URL: https://xxxxx.sharepoint.com/sites/xxx/
- Implementation: 2.0
- View Mode: Default

2. Power Apps

PowerApps Data
ID
Task

i. Gallery1
a. Data
Task

b. Items
Search(*PowerBIIntegration*.Data, "", Task)
or
PowerBIIntegration.Data

ii. EditForm1
a. DataSource
Task

b. Item
LookUp(Task, ID = *Gallery1*.Selected.ID)

c. OnSuccess (Need to add Power BI connector)
PowerBI.RefreshDataset("<Workspace GUID>","<Semantic Model GUID>");
Notify("Task saved successfully!", NotificationType.Success, 3000);

Navigate(*Screen1*); Notify("Refreshing data. Please wait!", NotificationType.Information, 7000);

d. IconCancel1 – OnSelect
ResetForm(*EditForm1*); Back();

iii. Screen1
a. OnVisible
PowerBIIntegration.Refresh();

b. Gallery1 – OnSelect
Navigate(*EditForm1*);

3. Power Automate

i. Automated flow
Trigger: When an item is created or modified

ii. Trigger condition: created by Filter Array step in old designer mode
@equals(triggerOutputs()?['body/Progress/Value'], 'Completed')

iii. Send an email (V2)
To: Reviewer's email
Subject: A task is ready to review: Task

Body:
Hi Reviewer,

Preparer has done task 'Task'.
Please see and review it here.

From Dashboards to Action:
Elevate your **Power BI** reports with **Power Apps** & **Power Automate** Integration

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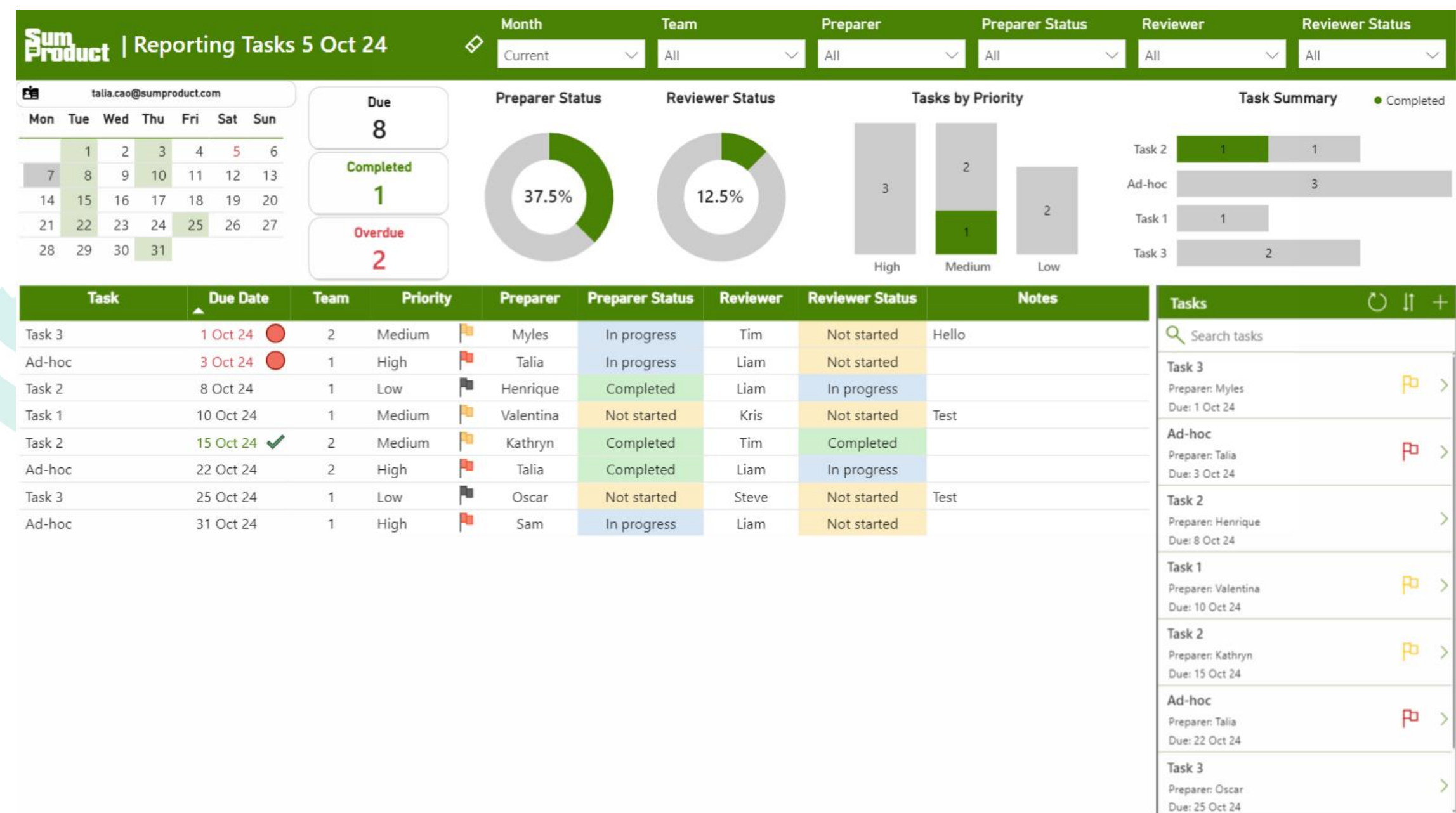- Financial Modelling, Automation, Visualisation

- Tools:

From Dashboards to Action:
Elevate your Power BI reports
with **Power Apps** & **Power Automate**
Integration

Demo: Building a Task Management Dashboard

Real-life Applications

- To do list / checklist

- Task / project planner

- Stock management

- Invoice tracker

- Budget / forecast form

- Etc.

Data Source

- Tables stored in cloud services that Power Automate & Power Apps can access via Connections.

- Examples:

Demo License Requirements

SharePoint List
(Data Source)

- Microsoft 365

- Per User plan

Power BI

- **Pro**: up to **8** scheduled & API daily refreshes per semantic model

- **Premium capacity**: from **48** to **unlimited** refreshes per semantic model per day
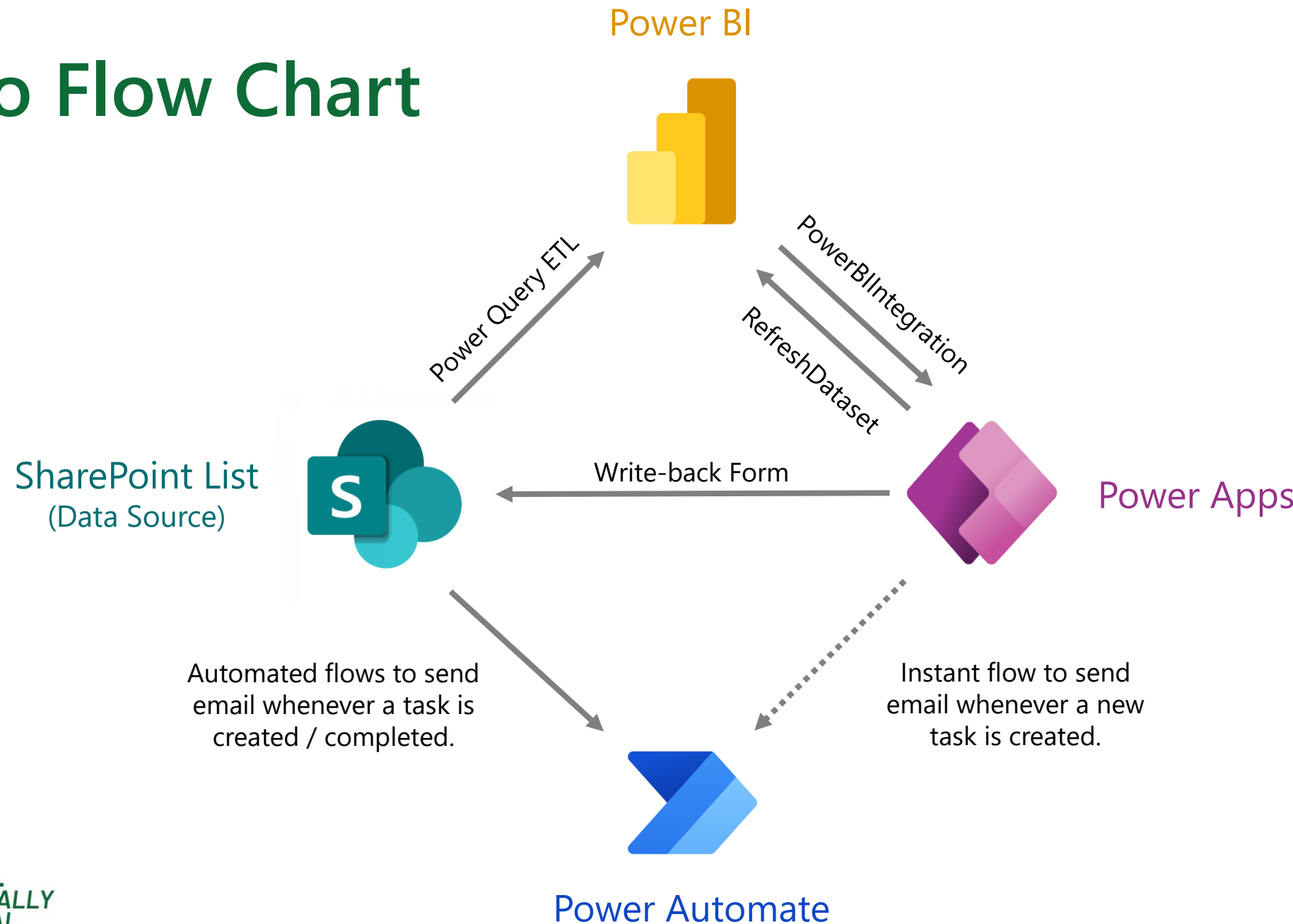
Power Apps

- Microsoft 365

- Free Trial

- Per User plan

- Per App plan

Power Automate

- Microsoft 365

- Free Trial

- Per User plan

- Per Flow plan

Reference: Data refresh in Power BI - Power BI | Microsoft Learn

Demo Flow Chart

Power BI

Power Query ETL

PowerBIIntegration

RefreshDataset

SharePoint List
(Data Source)

Write-back Form

Power Apps

Automated flows to send email whenever a task is created / completed.

Instant flow to send email whenever a new task is created.

Power Automate

Summary

SharePoint List	Power BI	Power Apps	Power Automate
• Column Types: Date, Choice, Lookup • Internal Name vs Display Name	• SharePoint Online List v2 connector • Schedule refresh • Power Apps visual	• Create a basic app • PowerBIIntegration. Refresh vs PowerBI. RefreshDataset • Update SharePoint data	• SharePoint trigger • Trigger condition • Send an email with link to item

Thank you! 😊

Evaluations!

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Thank you for your time and consideration,
Microsoft Excel Team

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