Creating Dashboard

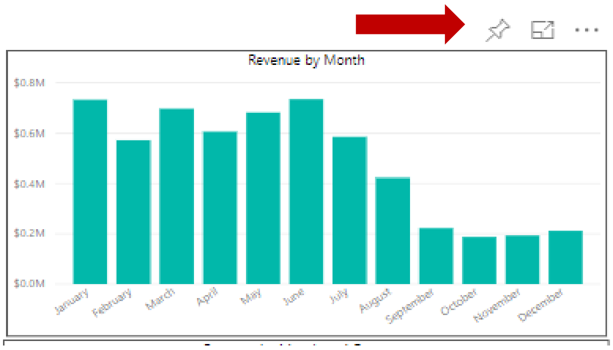
Read Me: This lab continues to build on the previous labs for our product sales project to publish a dashboard.

Lab Time: 30 minutes

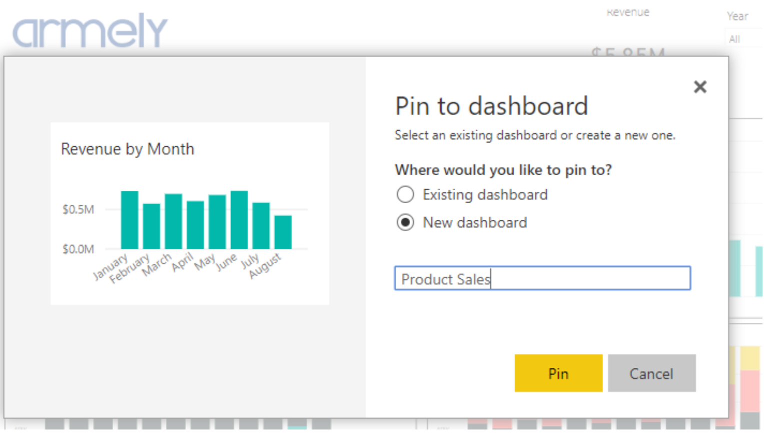
Exercise 1: Building Dashboard

In this exercise you create the Sales Revenue Breakdown report

1. Launch Power BI Service
    a. Open a browser and navigate to Power BI service at https://app.powerbigov.us
    b. Log in with your Office 365 credentials
    c. Expand the left navigation.
    d. You should be able to verify that you are running in the context of your personal workspace which is named **My Workspace**
2. Create **Product Sales** dashboard.
    a. Navigate to the Sales page in the **Product Sales** report.
    b. If you hover over the Card visual on the left with the mouse, you will notice three icon buttons appear in the upper-right corner. Click on the thumbtack icon button to pin the visual to display the **Pin to dashboard** dialog.

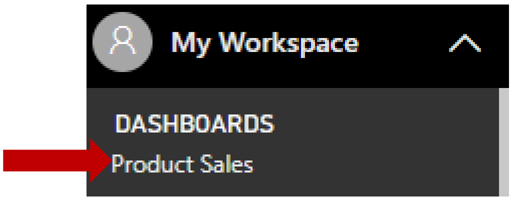


    c. The **Pin to dashboard** dialog prompts you to enter a name for a new dashboard name.

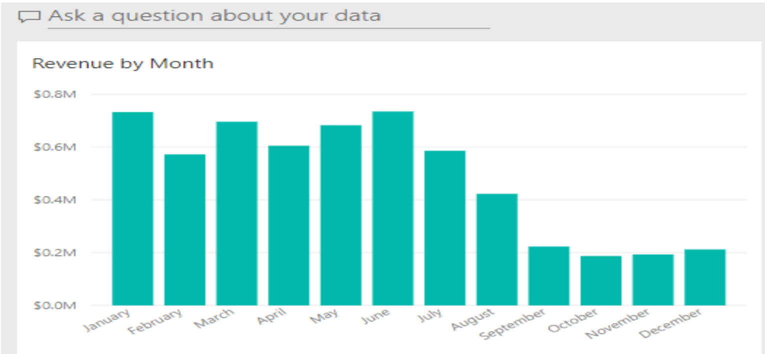


    d. Enter a value of **Sales** as the new dashboard name and then click the Pin button to create the new dashboard and pin the visual to it.

e. At this point, you should be able to see the new **Product Sales** dashboard in the Dashboards section.



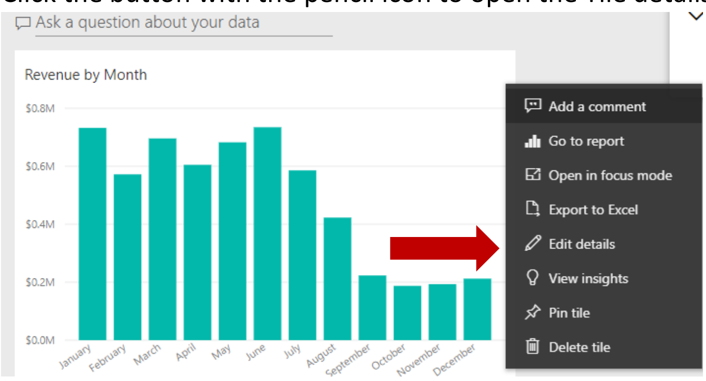
f. Click on the link for the Product Sales dashboard in the Dashboards section to examine the new dashboard.



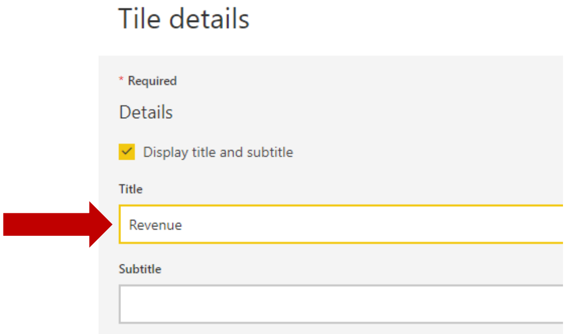
3. Modify the title for the tile with the Revenue by month card visual.

   a. Select the ellipse (…) menu tile for new Card visual.

   b. Click the button with the pencil icon to open the Tile details pane.



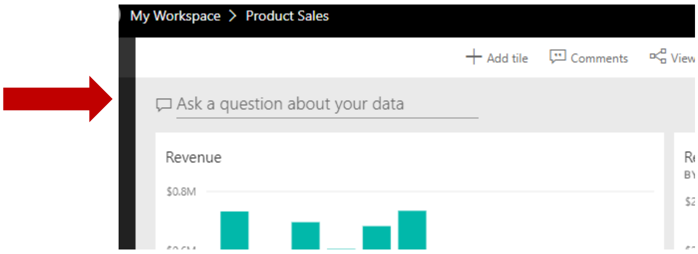
c. Enter a Title of Revenue



d. You should be able to see that the tile has been updated with a new title

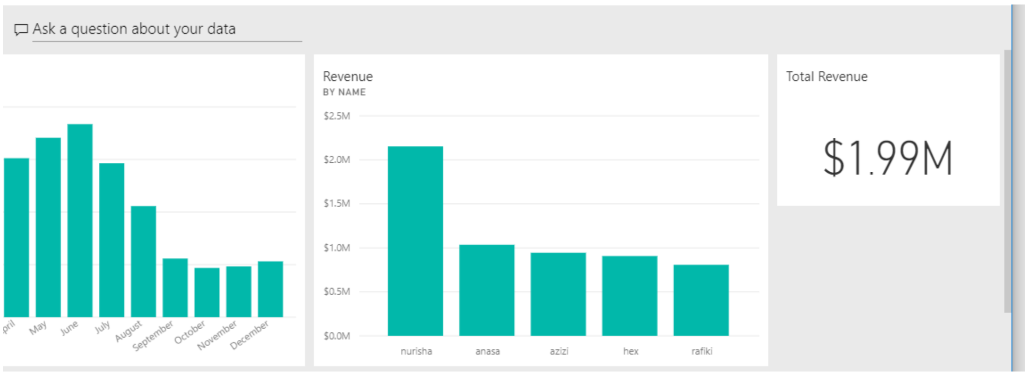
4. Repeat the above steps to pin **Revenue by Name** from **Sales** Page.

5. Q & A in Power BI
   a. Open **Product Sales** Dashboard
   b. You should see be able to see "ask a question about your data"



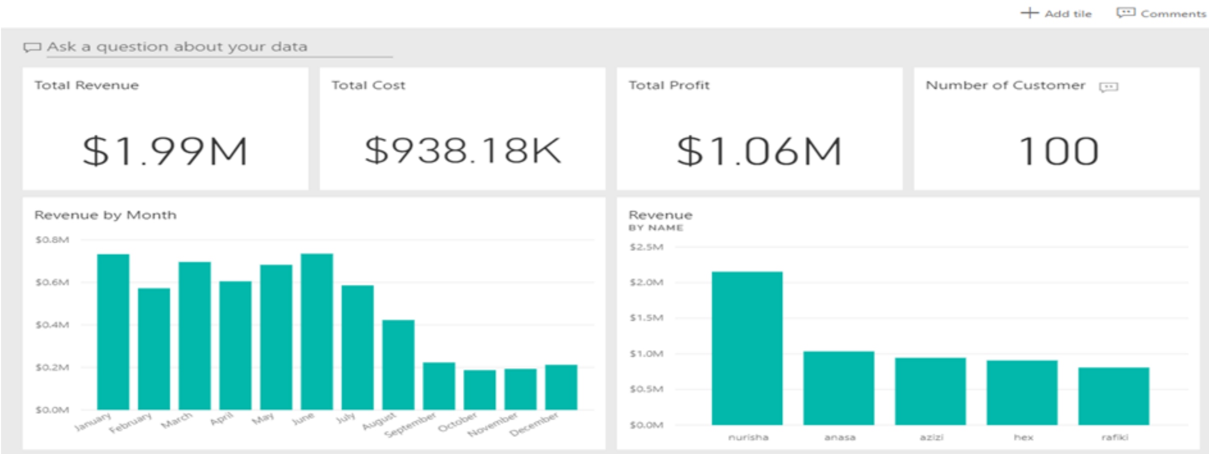
   c. On Q & A type **total revenue in 2018**

   f. Pin results to **Product Sales** Dashboard



g. Repeat above steps to obtain the following
   1. Total Cost in 2018,
   2. Total Profit in 2018
   3. Number of Customers in 2018

6. Product Sales Dashboard should look like the one shown below

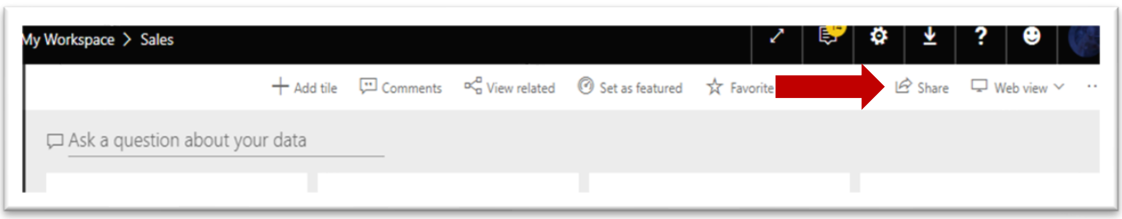


7. Save your Report

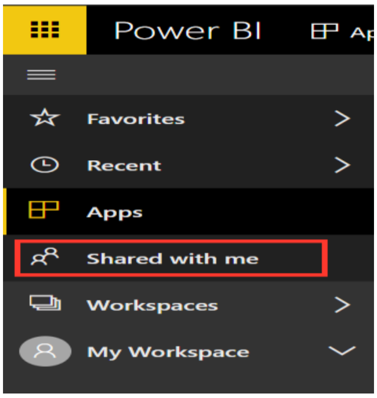
Exercise 2: Sharing Dashboard

In this exercise you will be sharing your dashboard

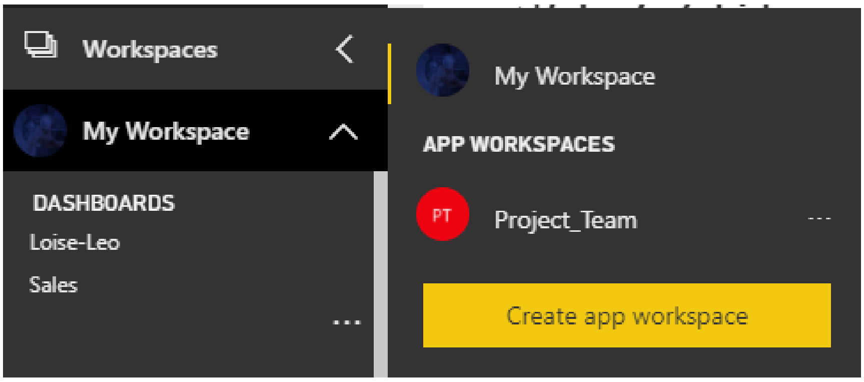
8. Sharing Dashboard using the Share method.
   a. You can share your dashboard by clicking on **Share**



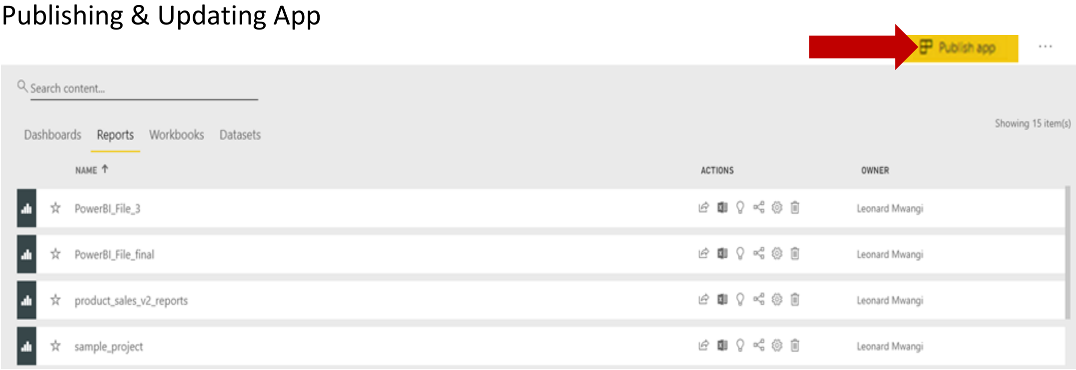
b. A dialog requesting for users' emails address is displayed
c. Add the email addresses for users you would like to share your dashboard with.
d. For the dashboards shared with your, they will appear in the **Shared with me** section



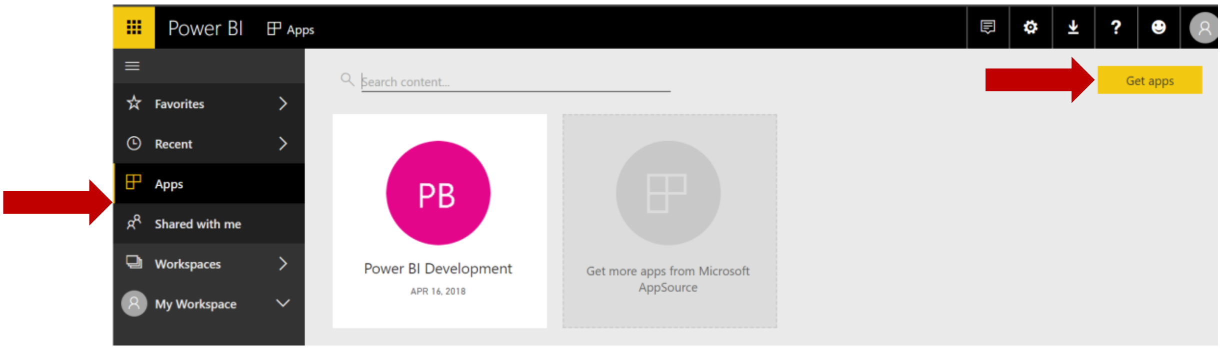
9. Sharing using App work Space
   a. To share a dashboard using workspace, users have to be members of the workspace.
   b. You can create a new workspace from **Create app workspace** button as shown below.
   NB: Creating app workspace creates an Office 365 group which will be usable with OneDrive for Business, SharePoint Online, Exchange amongst other O365 services



   c. Once a workspace is created, reports can be published to from Power BI Desktop.
   d. Reports and Dashboards belonging to a Groups can be published as Apps in Publishing & Updating App



e. End users can also access reports and dashboards from the Apps section of Power BI Service.



You have completed this lab for Dashboards and Sharing