100 XP

Introduction

1 minute

Through the course of this module, you explore using Power BI Desktop to create a mobile view, publish a report, create a workspace in the Power BI Service, and build a dashboard.

The following concepts are covered:

- Creating mobile views
- Publishing a report to the Power BI Service
- The Navigation pane in Power BI Service
- Creating a workspace
- Building and organizing a dashboard
- Pinning visuals to a dashboard
- Adding images from a URL

Next unit: Exercise – Create a mobile report view

Continue

100 XP

Exercise – Create a mobile report view

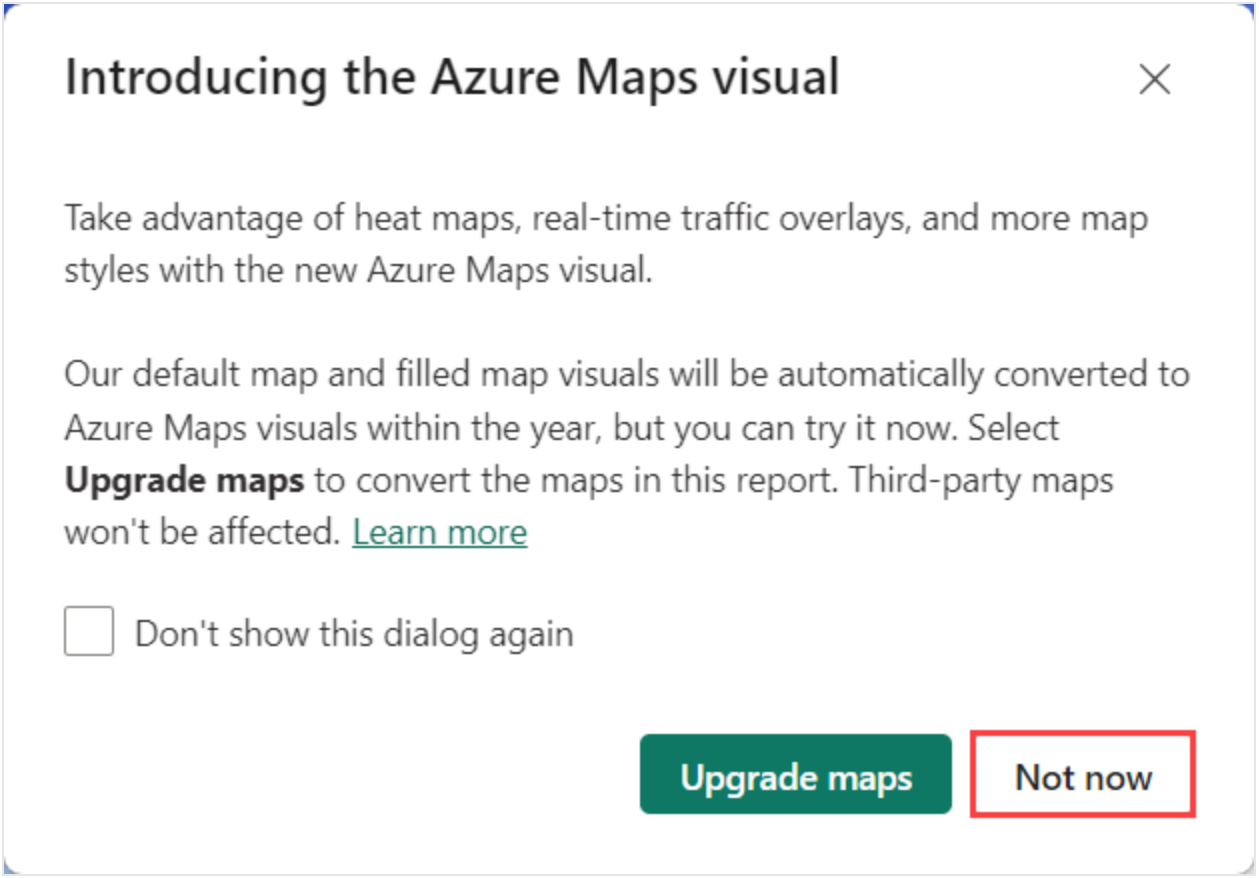
20 minutes

Start this module with the provided **DIAD Final Report.pbix** file located in the **Reports** folder.

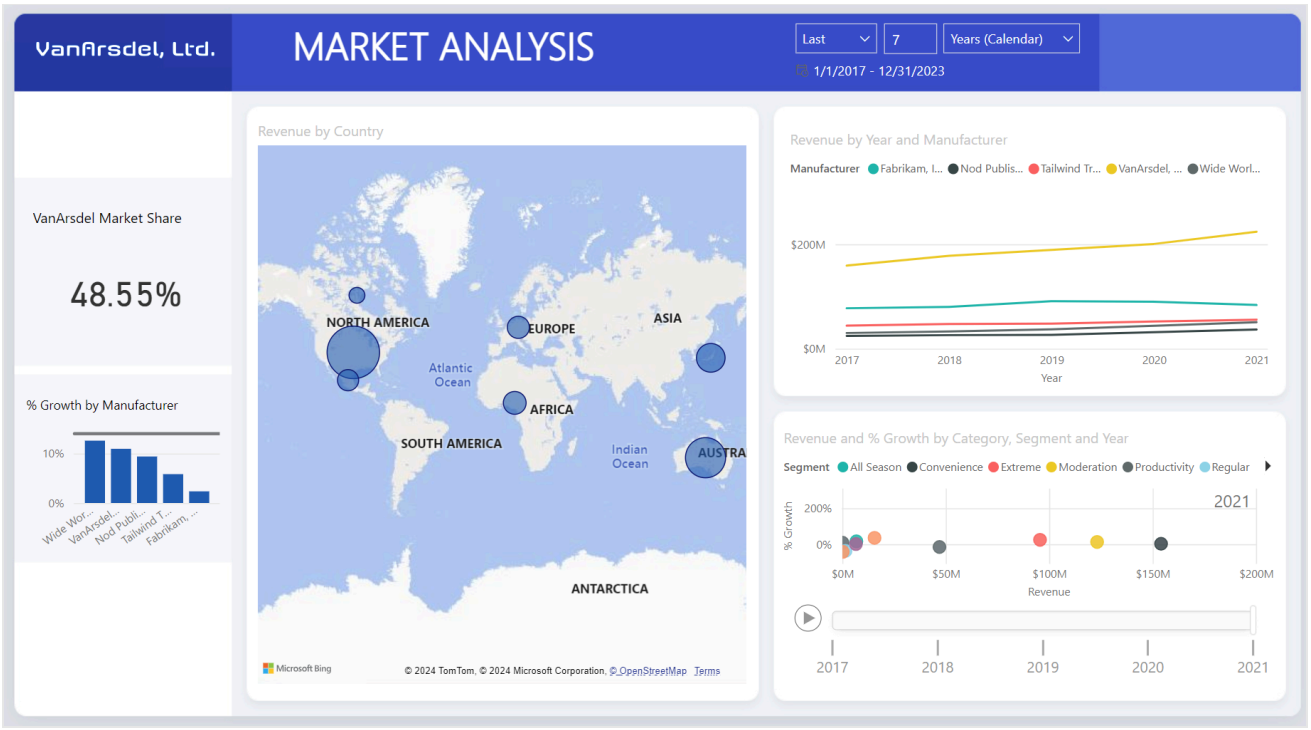
The flow of this Module includes screenshots to provide a visual aid for you and text descriptions of the steps you need to follow. In the screenshots, sections are highlighted with red boxes to indicate the action or area on which you need to focus.

Creating a mobile view

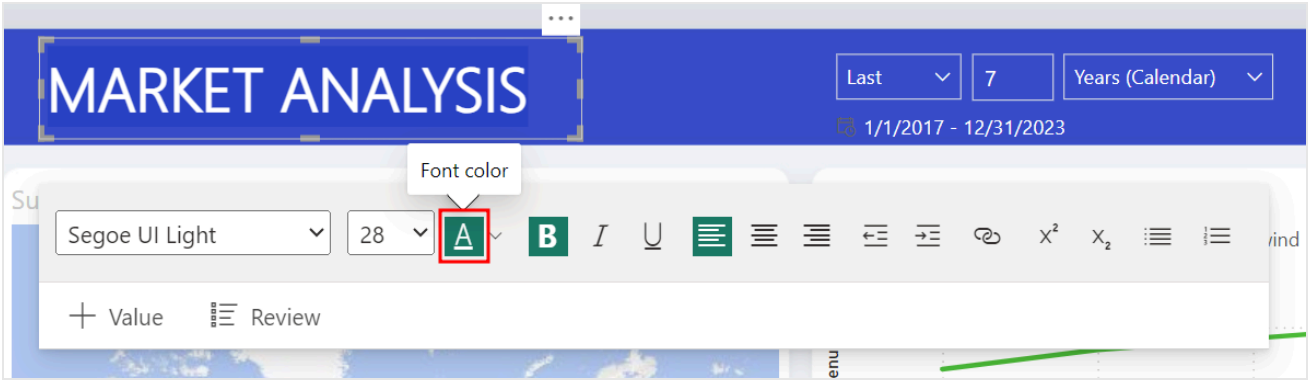
1. Navigate to the **DIAD** folder and then to the **Reports** folder (DIAD/Reports).
2. Open the **DIAD Final Report.pbix** file.
3. If a dialog box opens titled 'Introducing the Azure Maps visual' select **Not now**.



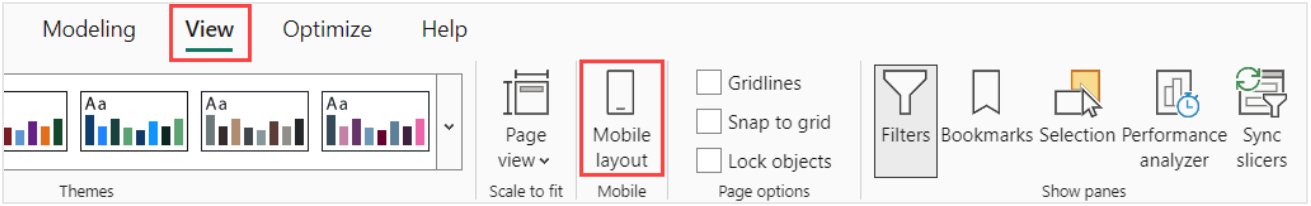
This file uses the same model that you used for previous Modules. We have added more visuals and performed other formatting in the report. Feel free to explore the report.



4. Highlight the **Market Analysis** title and change the text color to **black**.



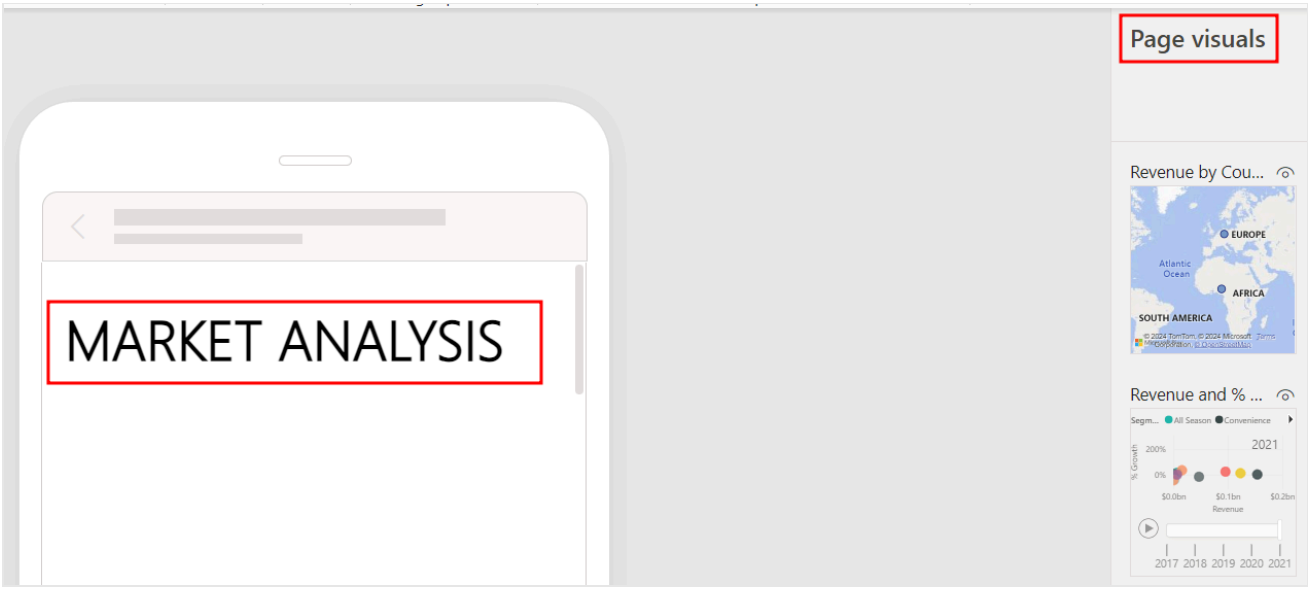
5. Select the **View** tab from the ribbon and then select **Mobile layout**.



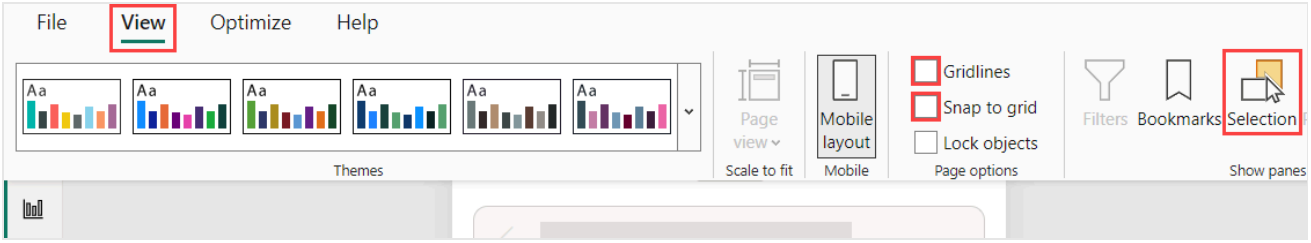
> **Note**

A small pop-up window might open introducing you to the mobile-only formatting. Select **Try it Out** to continue and close out the pop-up window.

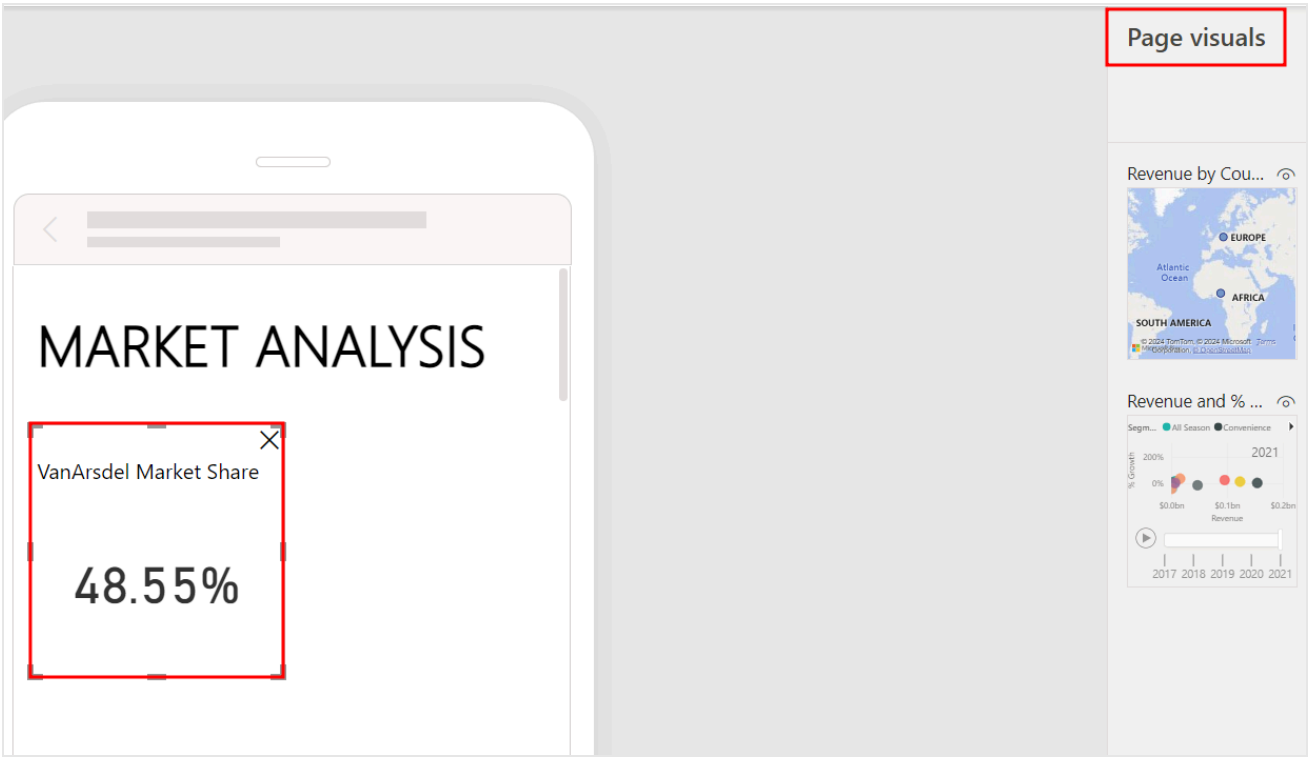
6. From the **Page visuals** pane, drag the **Market Analysis** title to the top of the phone layout.
7. Resize and move the title to look like the one in the figure below. If there are any other visuals on the mobile layout remove them by hovering over the graphic and selecting the **x** in the upper right corner.



8. Select the **View** tab, then uncheck the checkboxes next to **Gridlines** and **Snap to grid** (if selected) to turn them off.
9. Also, make sure that the **Selection** pane is turned off.

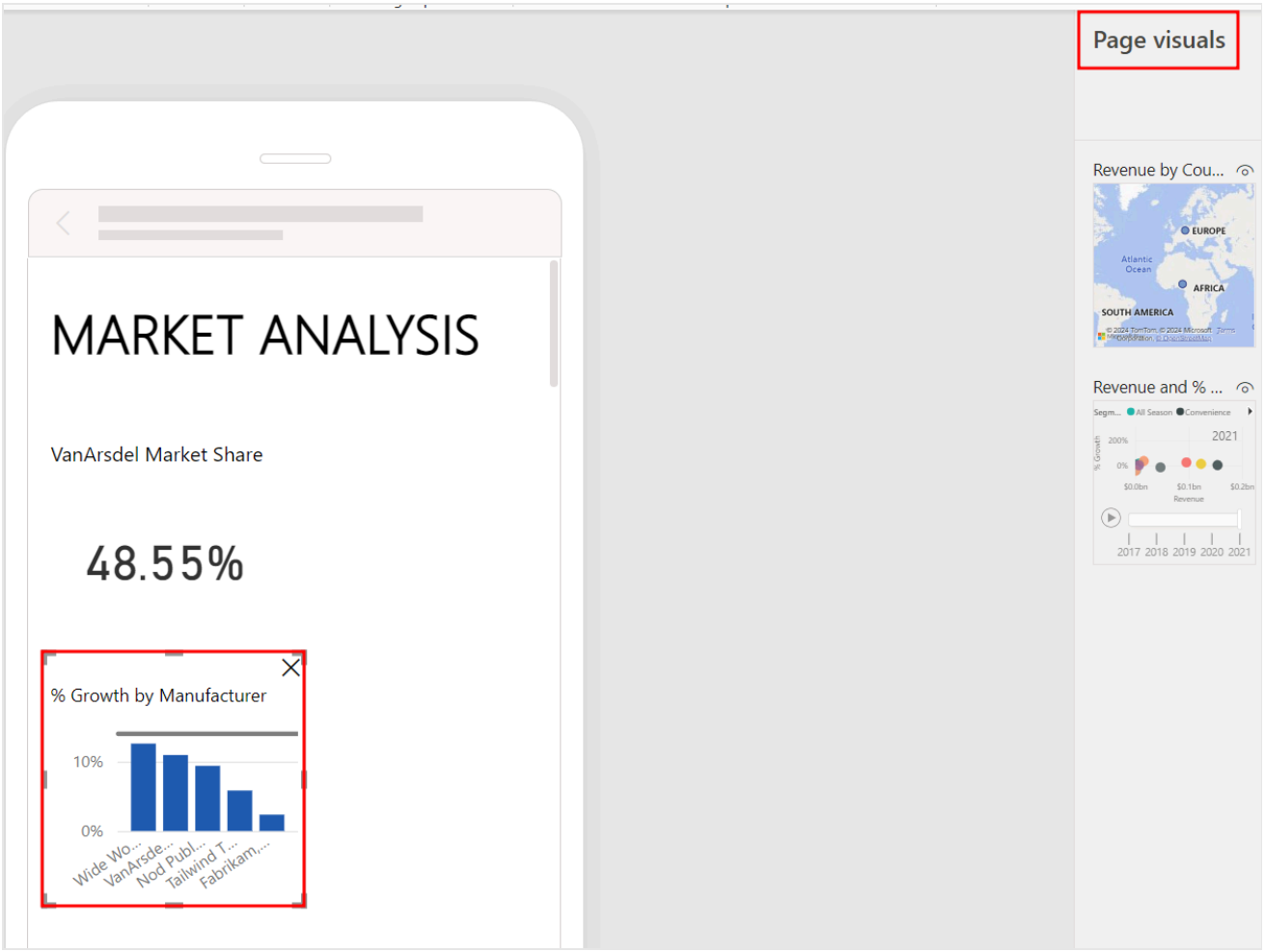


10. Drag the **VanArsdel Market Share** card from the **Page visuals** pane to below the **Market Analysis** title on the mobile layout.
11. Then, resize the **Market Share** card to look like the one shown in the figure below.



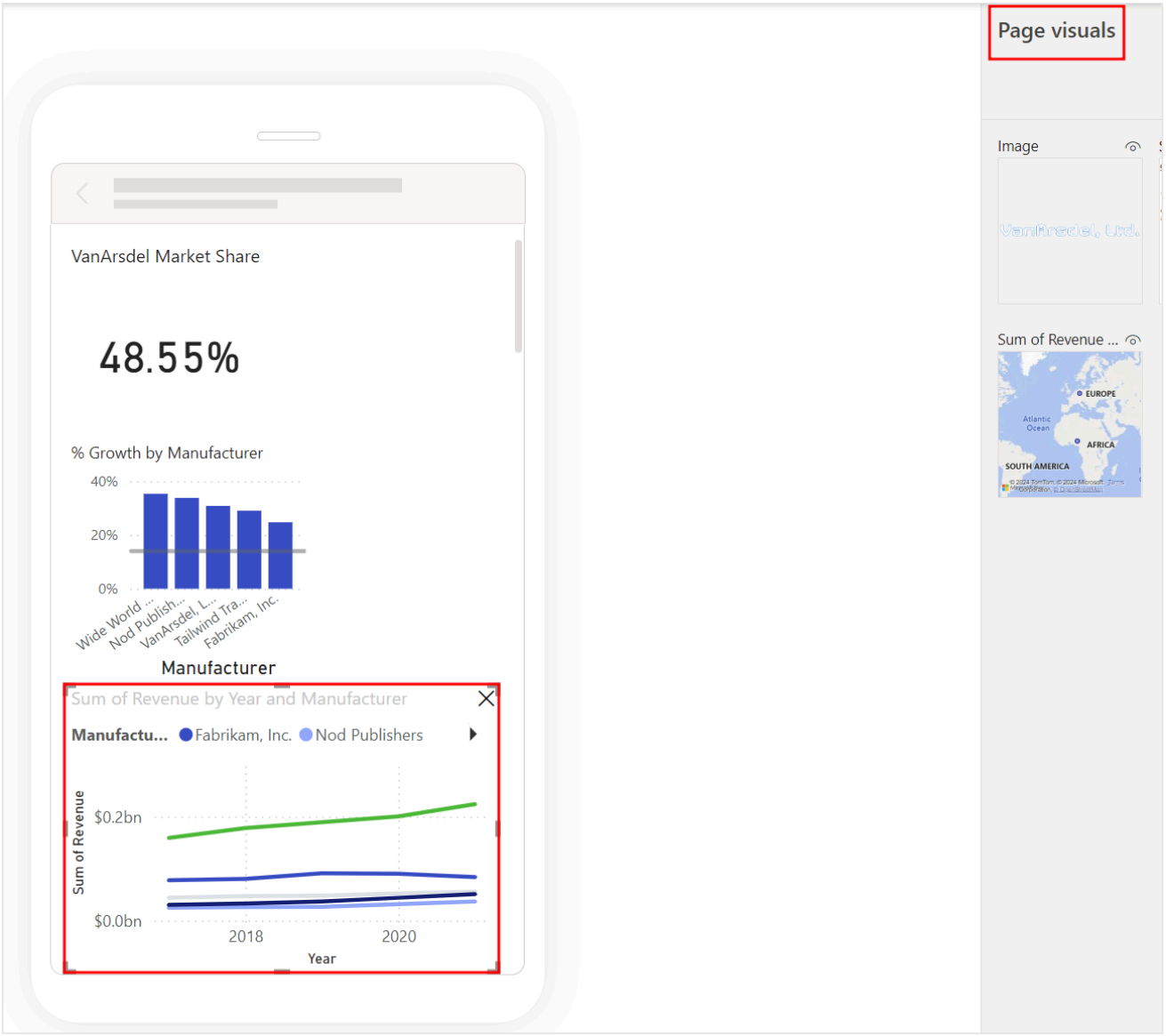
12. Drag the **% Growth by Manufacturer** column chart from the **Page visuals** pane to be placed below the **VanArsdel Market Share** card on the mobile layout.

13. Resize the chart to look like the one shown in the figure below.



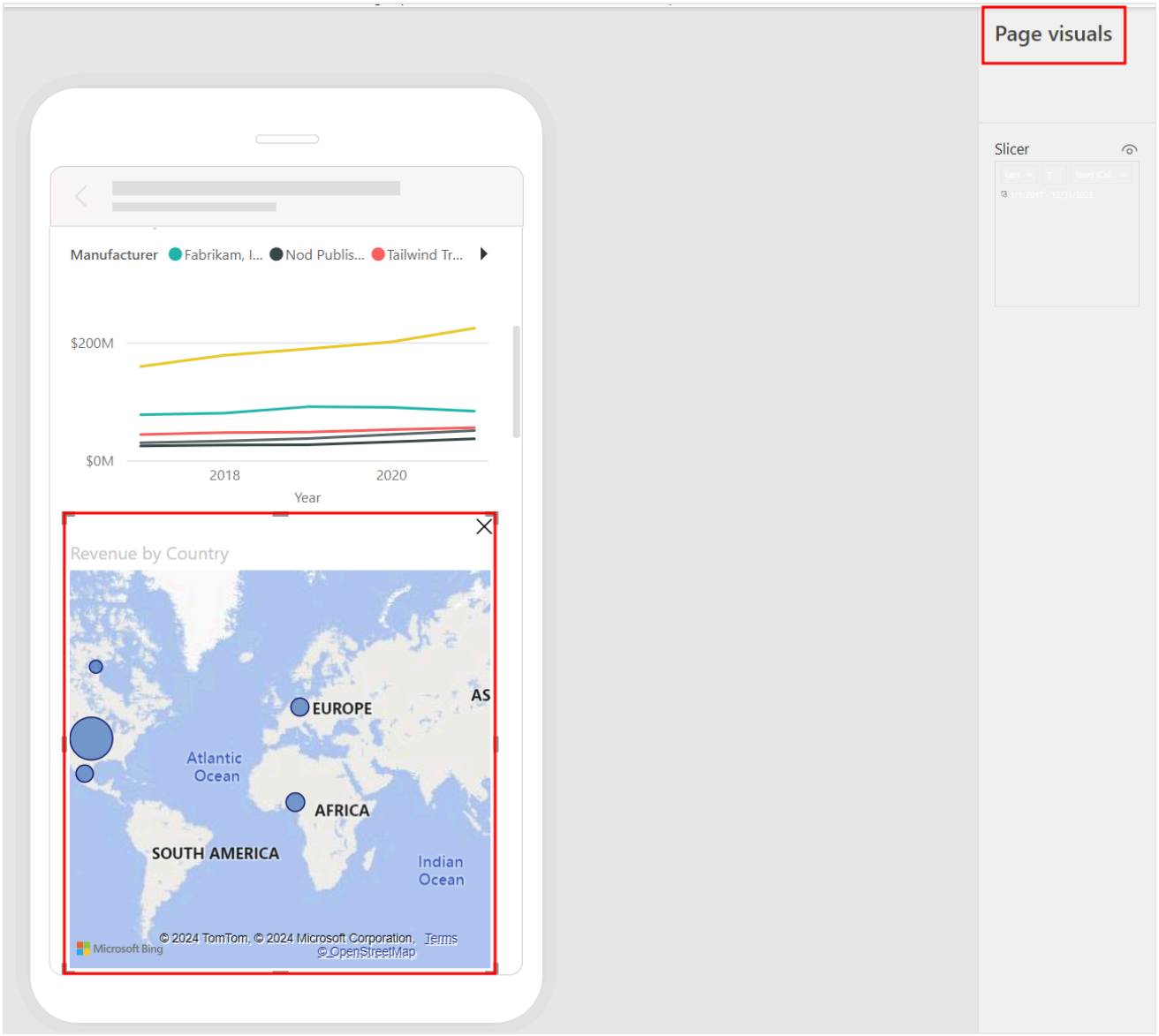
14. Drag the **Revenue by Year and Manufacturer** line chart from the **Page visuals** pane to below the **% Growth by Manufacturer** column chart on the mobile layout.

15. Resize the **Revenue by Year and Manufacturer** line chart to stretch across the phone layout to look like the one shown in the figure below.



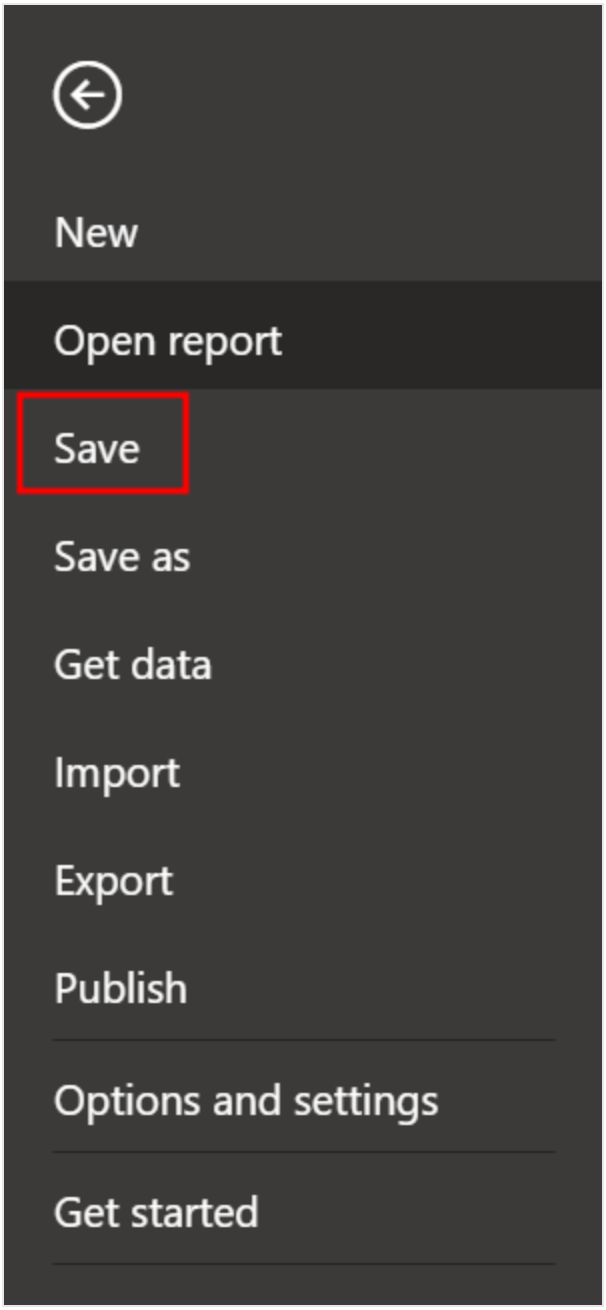
16. Drag the **Revenue by Country** map from the **Page visuals** pane to below the **Revenue by Year and Manufacturer** line chart on the mobile layout.

17. Resize the **Revenue by Country** map to look like the one shown in the figure below.



18. Select the **File** tab from the ribbon.

19. From the menu of options, select **Save** so that your workbook saves.



Now that we have a general layout for the Mobile view of our Power BI model, in the next unit we'll explore the Power BI Service and publish our report.

Next unit: Exercise – Publish a report to the Power BI service

Continue >

100 XP

Exercise – Publish a report to the Power BI service

20 minutes

You'll now use a report authored using Power BI Desktop to create a dashboard for the VanArsdel data analysis team and CMO (Chief Marketing Officer). A Power BI Desktop file with more reports and visuals titled **DIAD Final Report.pbix** is provided. Use this file for the next section of the Module.

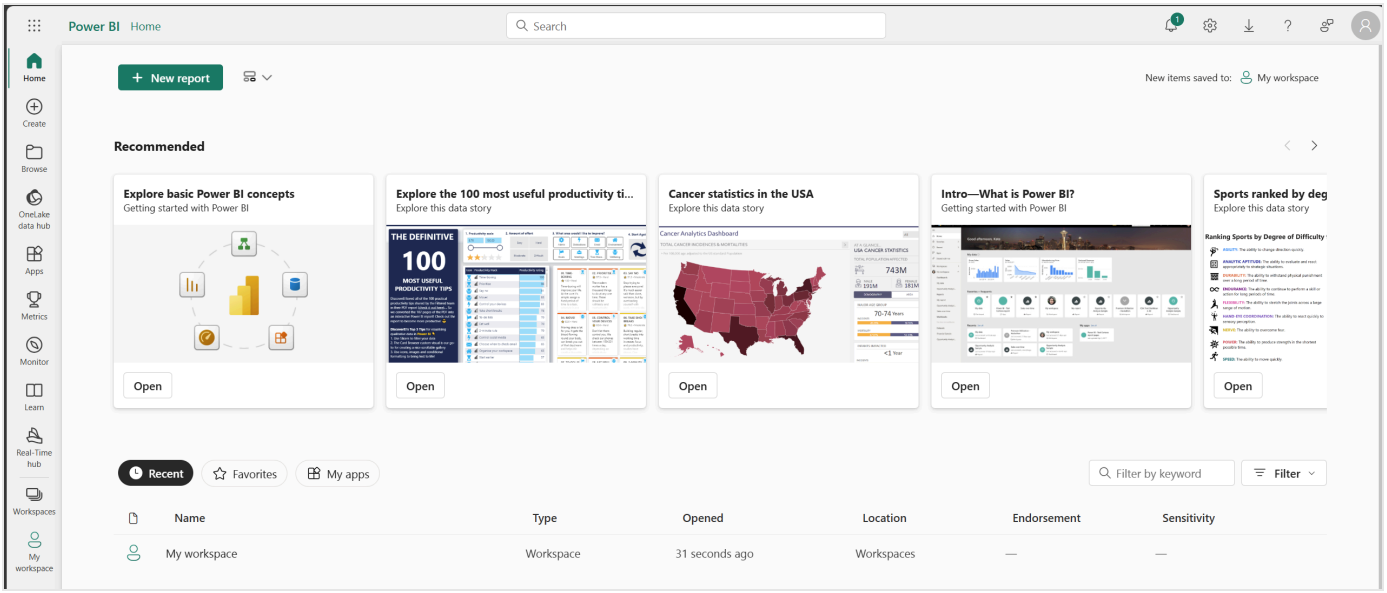
Publishing the report

If you haven't signed up for a Power BI account, go to https://aka.ms/pbidiadtraining and sign up for Power BI with a business email address.

If you haven't already opened the **app.powerbi.com** page, open a browser and navigate to https://app.powerbi.com .

> **Note**
>
> US Government customers should check here for the appropriate URL: **https://learn.microsoft.com/en-us/power-bi/enterprise/service-govus-overview#sign-in-to-power-bi-for-us-government**.

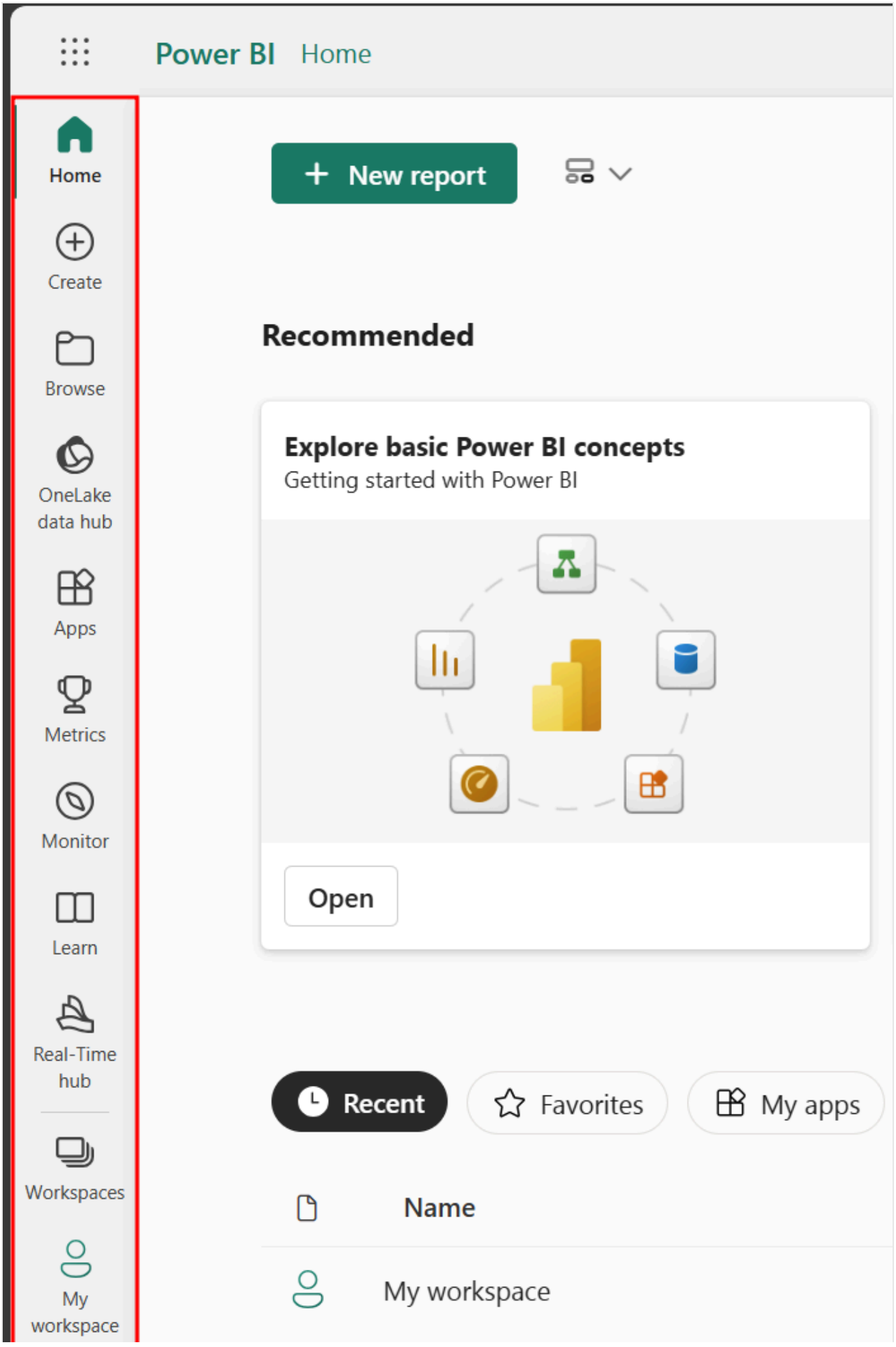
Sign-in to Power BI using your user account. Once logged in, you'll be taken to the **Home** screen.



Note

If you have previously signed into Power BI, then your **Home** screen will list your **Favorites**, as well as recent reports and dashboards.

1. Notice the navigation pane on the left. Let's review the items here:


Power BI
Home
Home
Create
Browse
OneLake data hub
Apps
Metrics
Monitor
Learn
Real-Time hub
Workspaces
My workspace
+ New report
Recommended
Explore basic Power BI concepts
Getting started with Power BI
Open
Recent
Favorites
My apps
Name
My workspace

The following options are listed in the navigation pane:

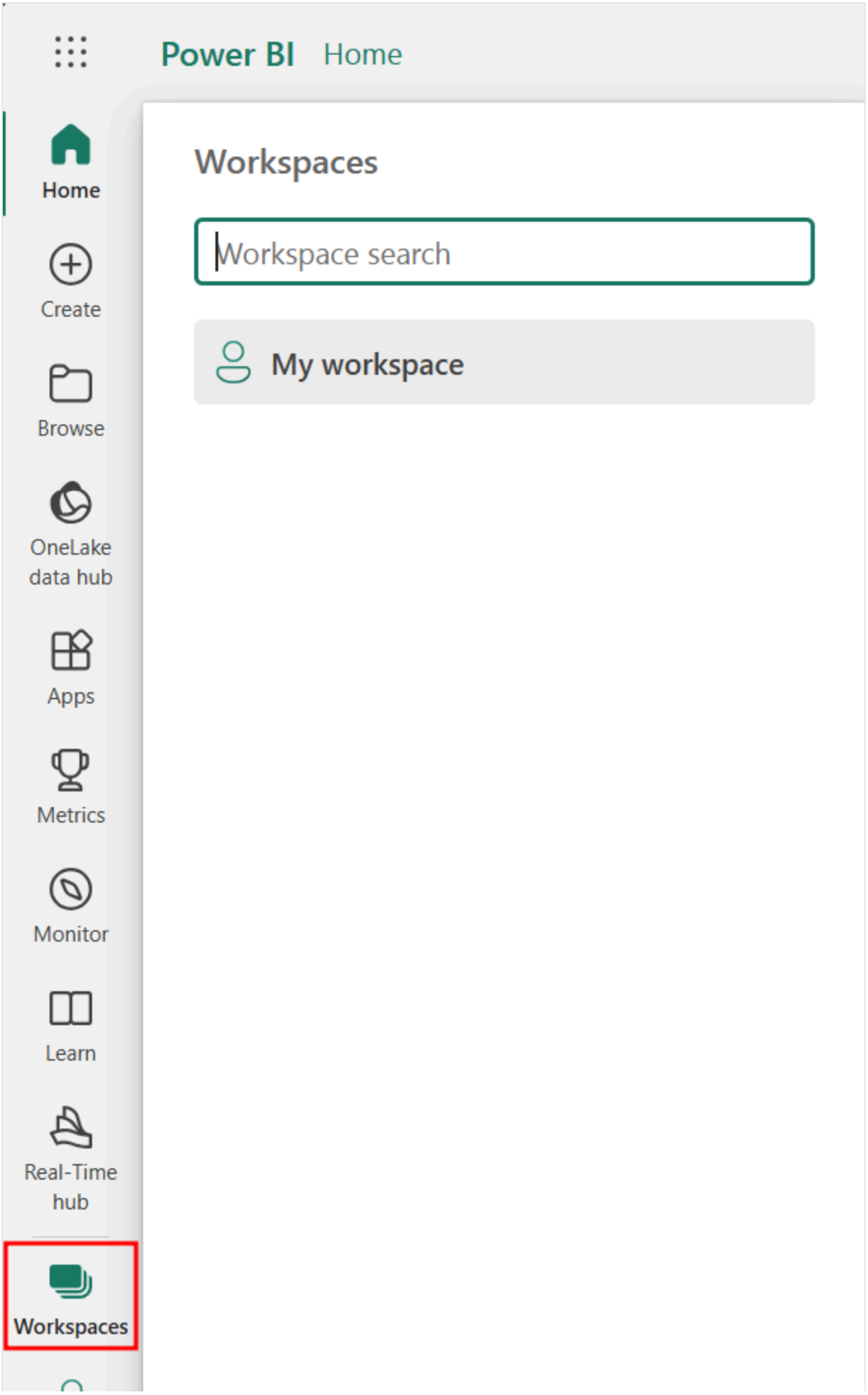
- **Home**: This is a one-stop-shop for all your content. It lists your favorite and recent content such as reports, dashboards, and apps. It also shows the most recent content that was shared with you.
- **Create**: Allows you to add data manually or use an already existing semantic model.
- **Browse**: Allows you to browse your recently viewed Power BI collateral.
- **OneLake Data hub**: Allows you to easily navigate to all datasets that you have either created or that have been shared with you.
- **Apps**: Lists all the Power BI apps you have installed.
- **Metrics**: Allows you to curate metrics and track them against key business objectives, in a single pane.
- **Learn:** Allows the user to have access to started content, samples, and links to videos.
- **Workspaces**: Lists all the workspaces you're assigned. By default, you're assigned to *My Workspace*.
- **My workspace**: Your personal repository for Power BI collateral that can only be viewed by you.

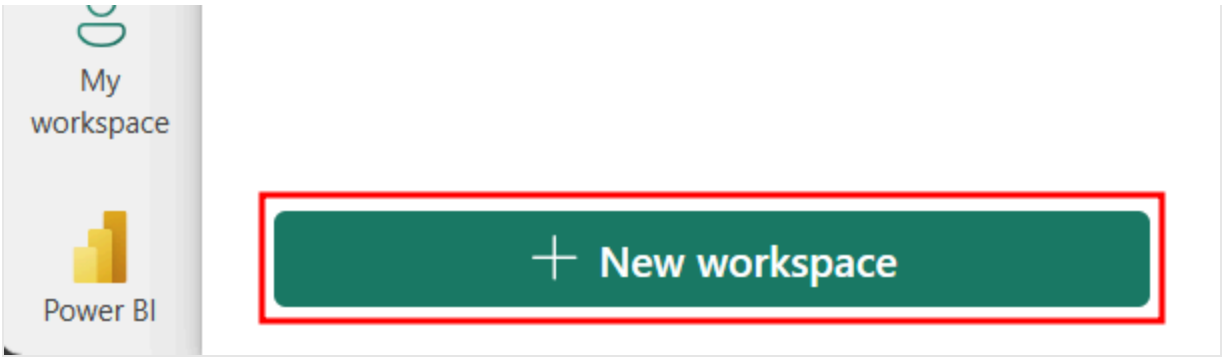
2. Select **My Workspace**.

   Notice the workspace is waiting for you to add content like Dashboards, Reports, Workbooks, and Semantic Models sections. Let's import a Power BI Desktop file and create dashboards.

   My Workspace is your personal workspace. We need to create a workspace where we can collaborate with team members and distribute content to end-users. To do this, we'll create a new workspace.

3. In the pane to the left, select **Workspaces** and then choose **+ New workspace**. The **Create a workspace** dialog box opens.


Power BI
Home
Home
Create
Browse
OneLake data hub
Apps
Metrics
Monitor
Learn
Real-Time hub
Workspaces
Workspaces
Workspace search
My workspace

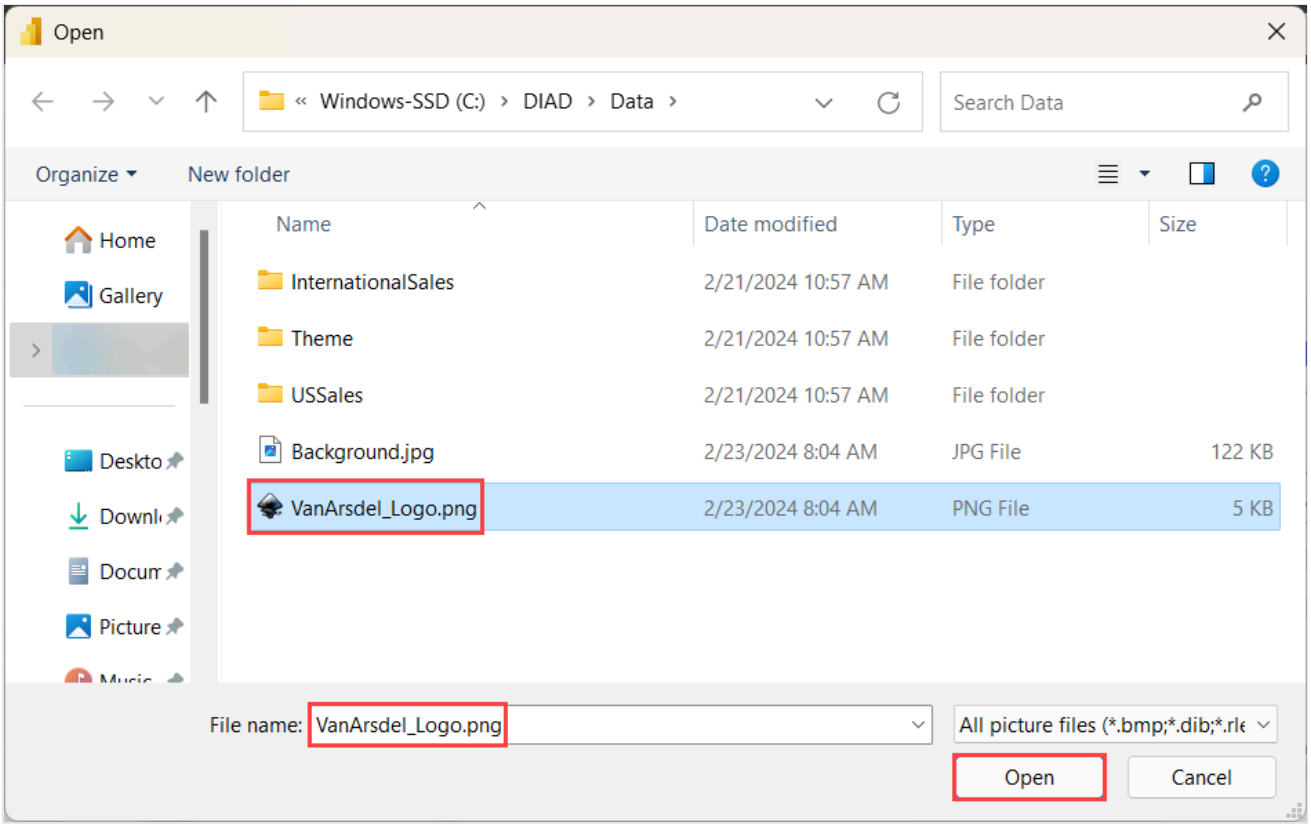


> **Note**
>
> Creating a workspace is a **Pro feature**. If you do not have a Pro license, please choose the trial option.

4. In the **Create a workspace** dialog box, select **Upload** to upload a Workspace image.

5. A file browser dialog box opens. Browse to the **DIAD** folder and then the **Data** folder (**DIAD/Data**).

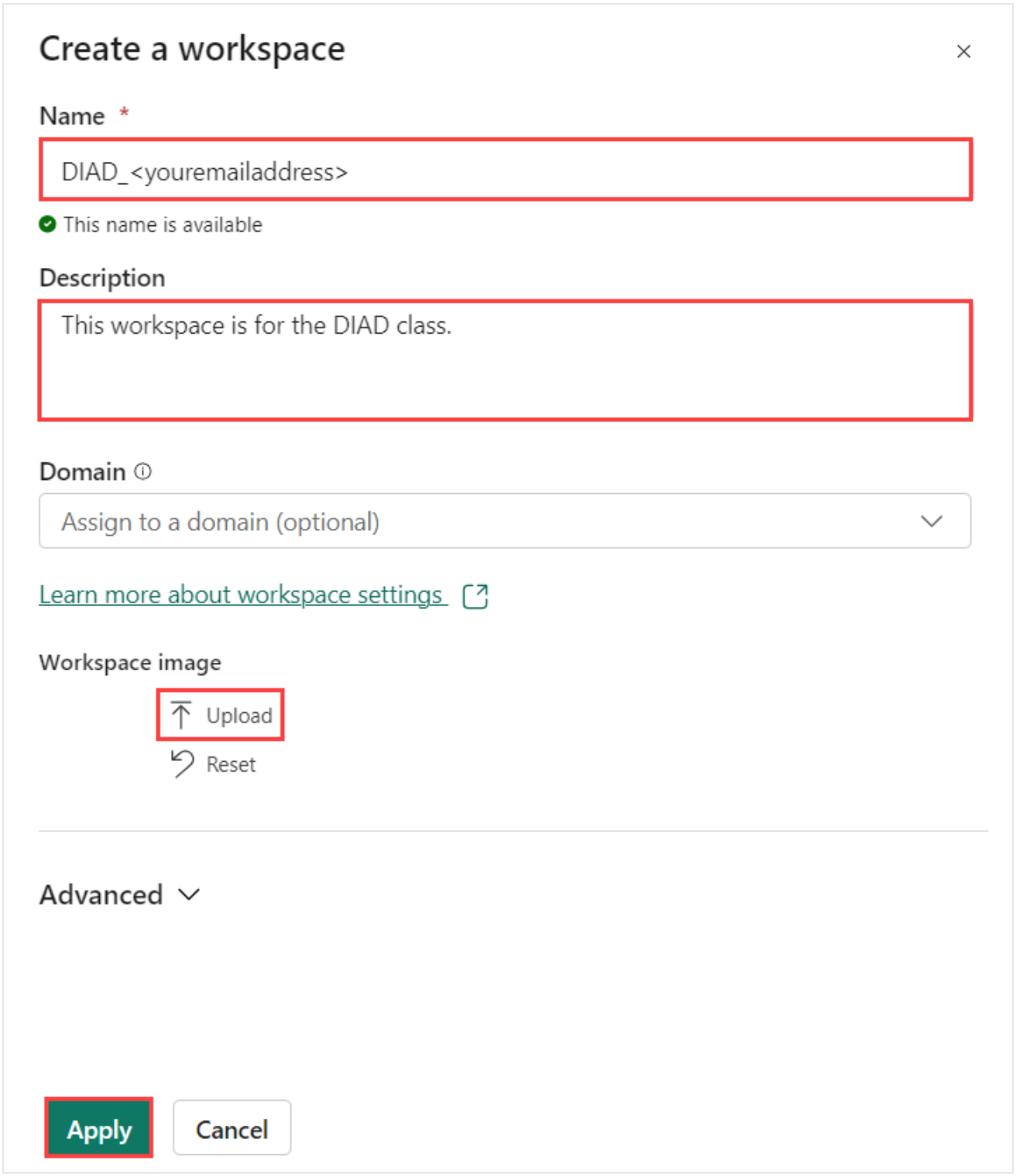
6. Select the **VanArsdel_Logo.png** file and then select **Open.**



7. In the **Name your workspace** text box, type **DIAD_`youremailaddress`** .

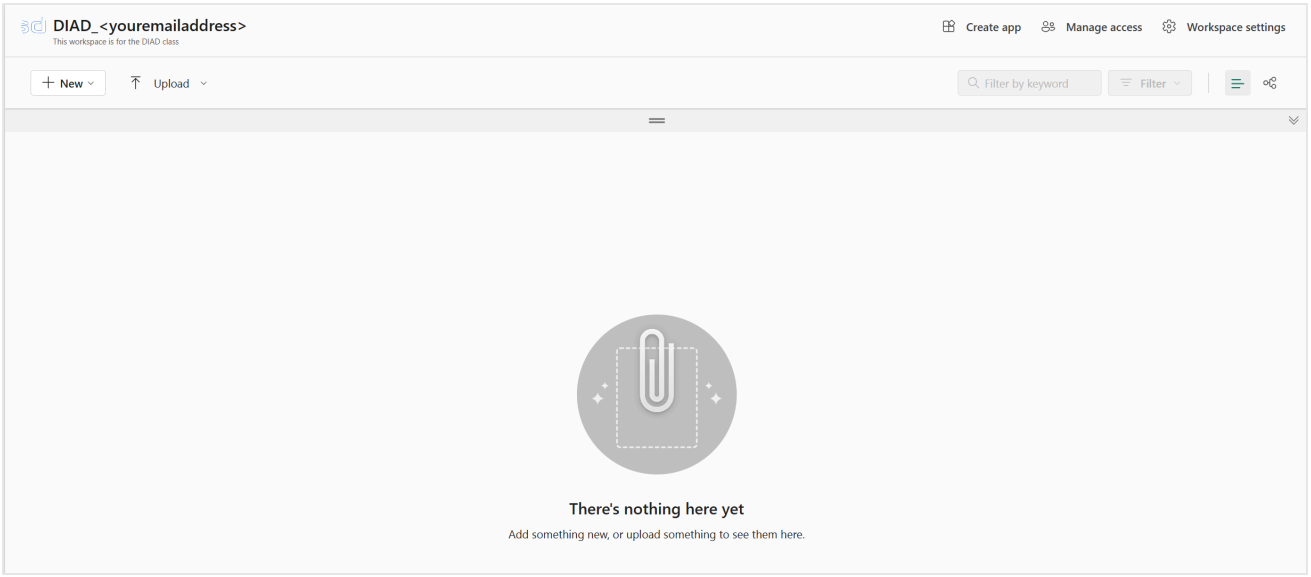
8. In the **Description** text box, type **This workspace is for the DIAD class**.

9. Select **Apply** to create the workspace.



> **Note**
>
> You are entering your email address as part of the workspace name to keep it unique.

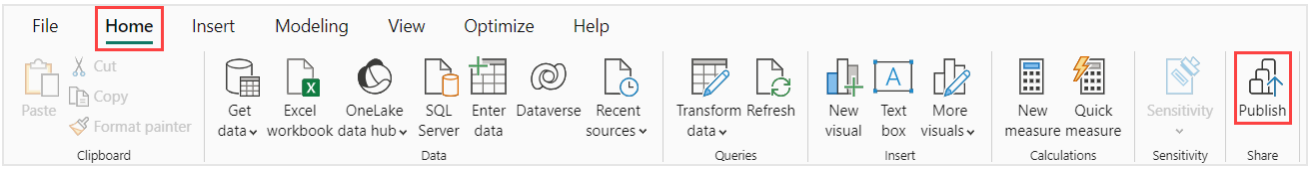
Notice that you have navigated from My Workspace to the workspace created.



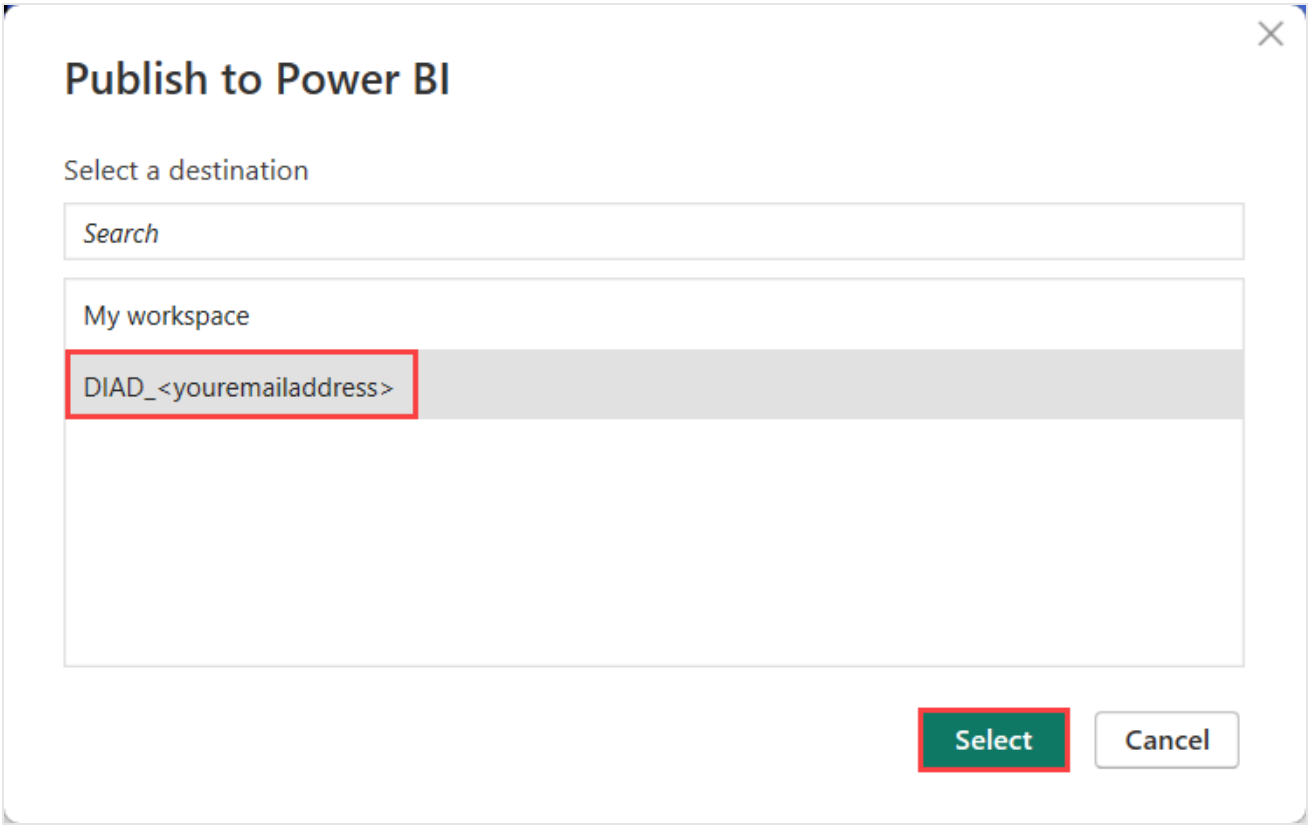
We're going to use the **Publish** from Power BI Desktop option.

Let's publish the report to Power BI Service and then we'll come back to the browser.

10. Navigate back to the **DIAD Final Report** in the Power BI Desktop that you saved earlier.
11. Check that the **Mobile View** is **off**.
12. From the **Home** tab, select **Publish**.

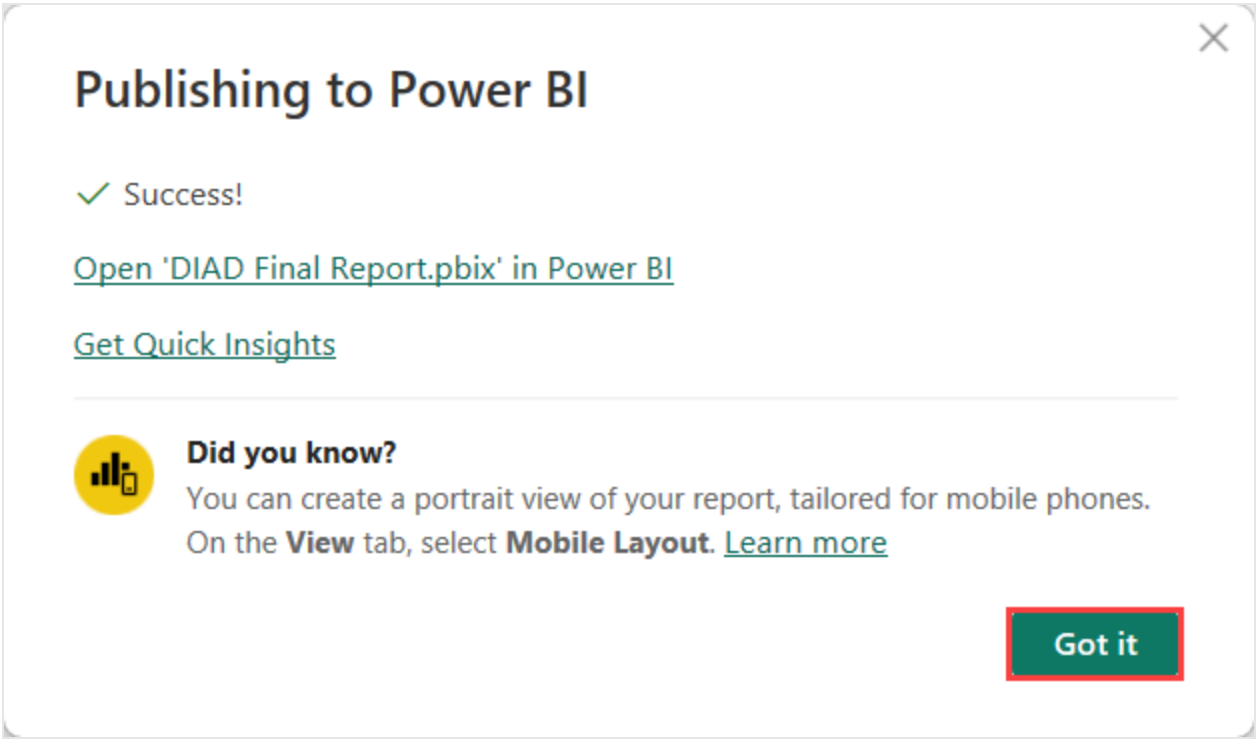


13. If you haven't already logged into Power BI, a **Sign in** dialog box opens. Please sign in.
14. Also, if you haven't already saved your changes to the document, a **Save Changes** dialogue box will open. Select **save** to save your changes.
15. Once you're signed in, the **Publish to Power BI** dialog box opens.
16. Select **DIAD_`youremailaddress`** in the dialog box.
17. Choose the **Select** button in the bottom right corner.



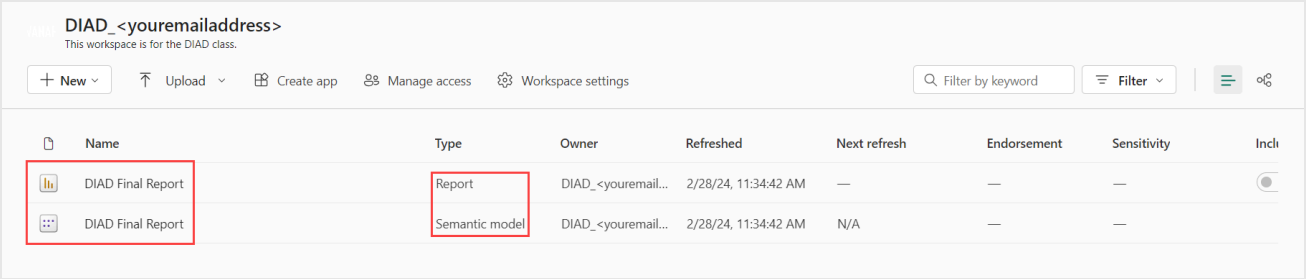
The **Publishing to Power BI** dialog box opens. Once the process is complete, a success message displays.

18. Select **Got it** to close the dialog box.



Now that we have published the report to the Power BI service, let's **navigate back to the browser** and start exploring.

19. Once you are in the browser, navigate to the DIAD_`youremailaddress` workspace, notice that the **DIAD Final Report** semantic model and report appear.



Now that we have our model and report published, we can start creating a dashboard through the Power BI Service.

Next unit: Exercise – Build a dashboard

Continue >

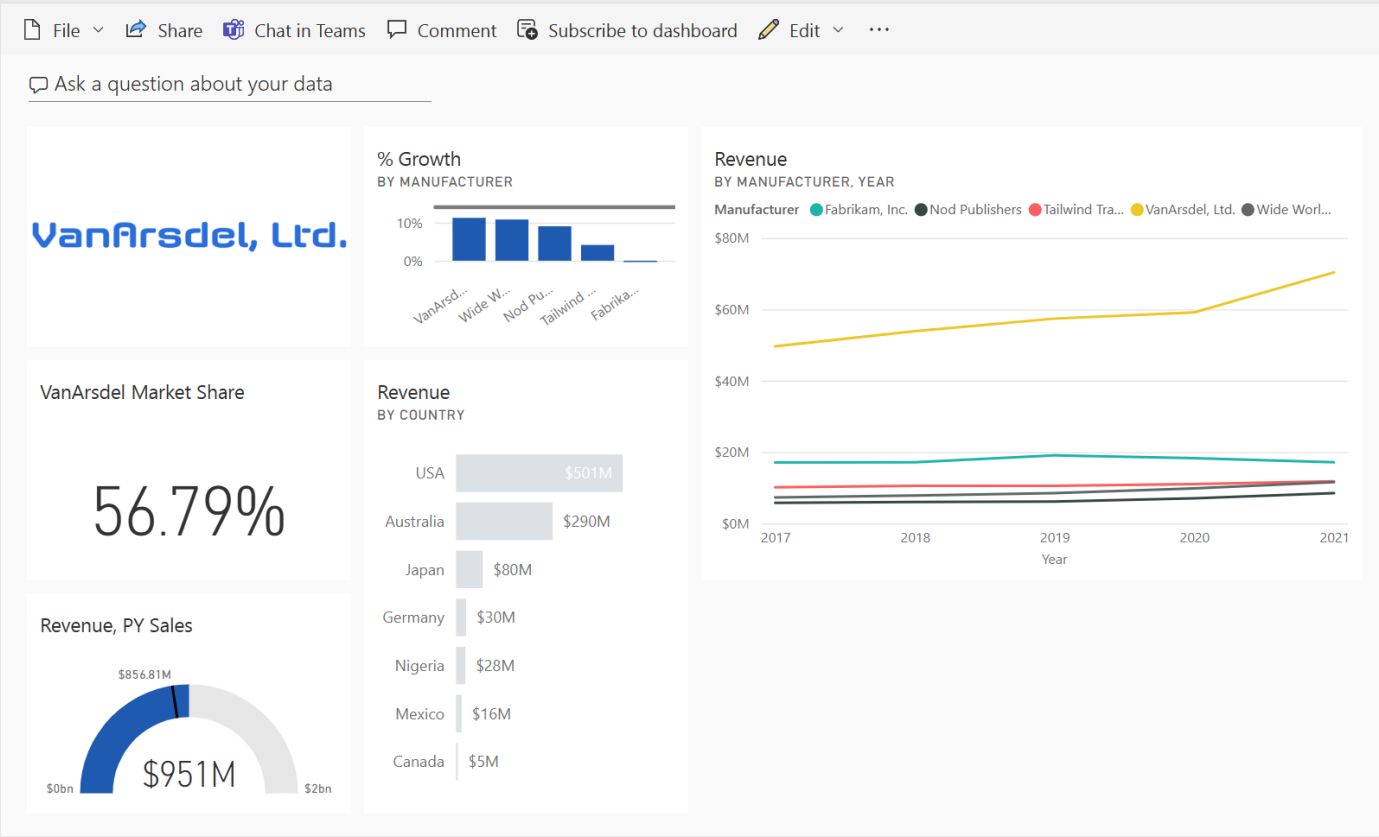
100 XP

Exercise – Build a dashboard

40 minutes

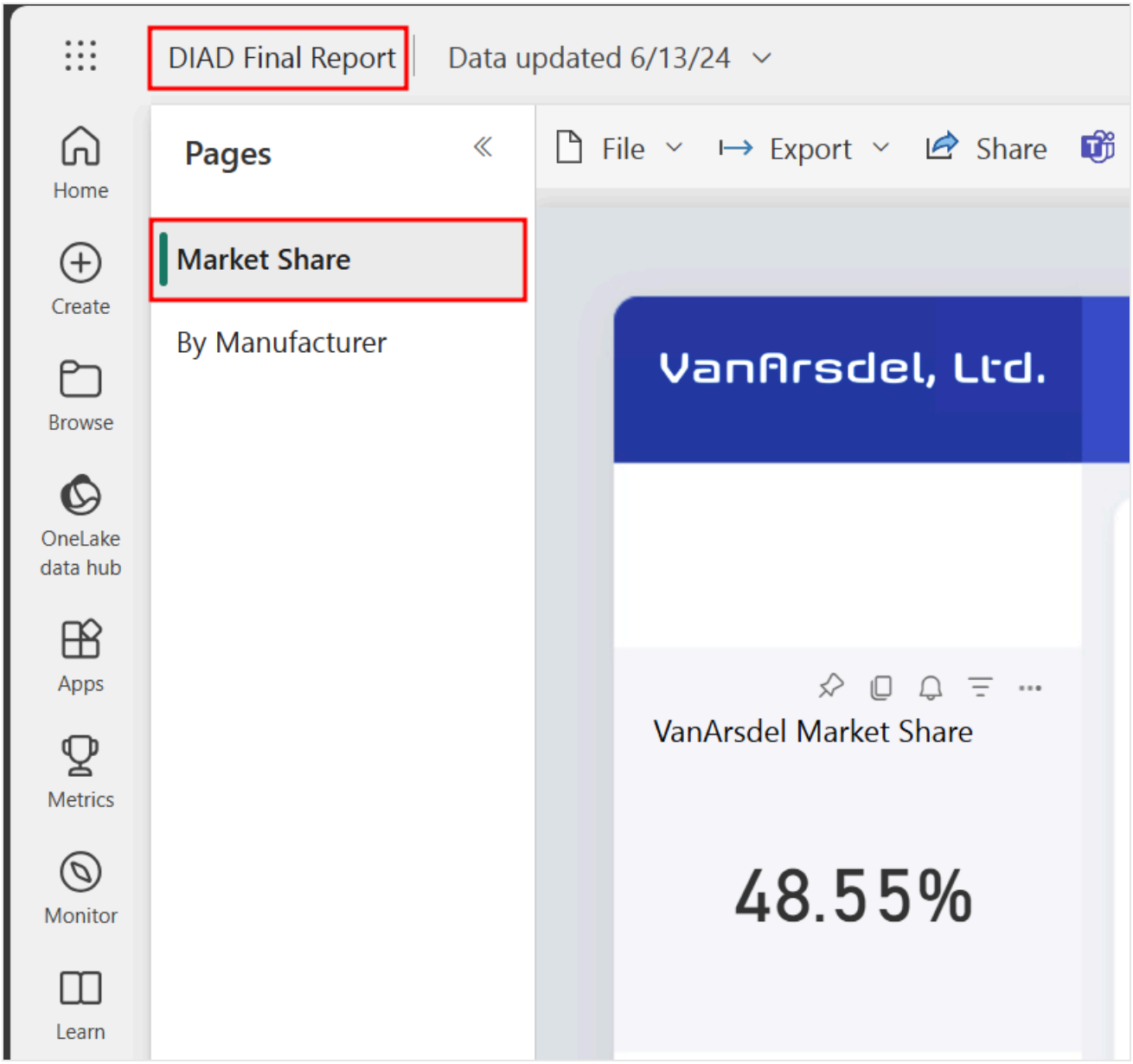
In this Unit, we'll create a dashboard that combines data from the **Market Share** report.

By the end of this Unit, we'll have created a dashboard that looks like the figure below.



Build a dashboard

1. From the newly created workspace select the report called **DIAD Final Report**. You'll then be taken to the **Market Share** page of the DIAD Final Report.



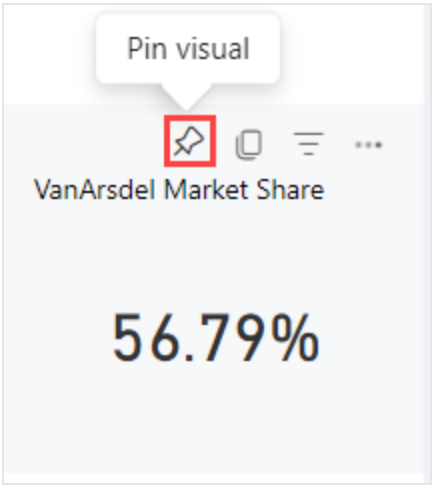
2. In the **map visual**, turn on the drill-down by **hovering** over the visual and selecting the down-arrow from the visual header.

3. Once you have selected the arrows, choose **Australia** to drill down to the **State** level.

Now let's pin visuals to the dashboard.

4. Hover over the **VanArsdel Market Share** card visual.

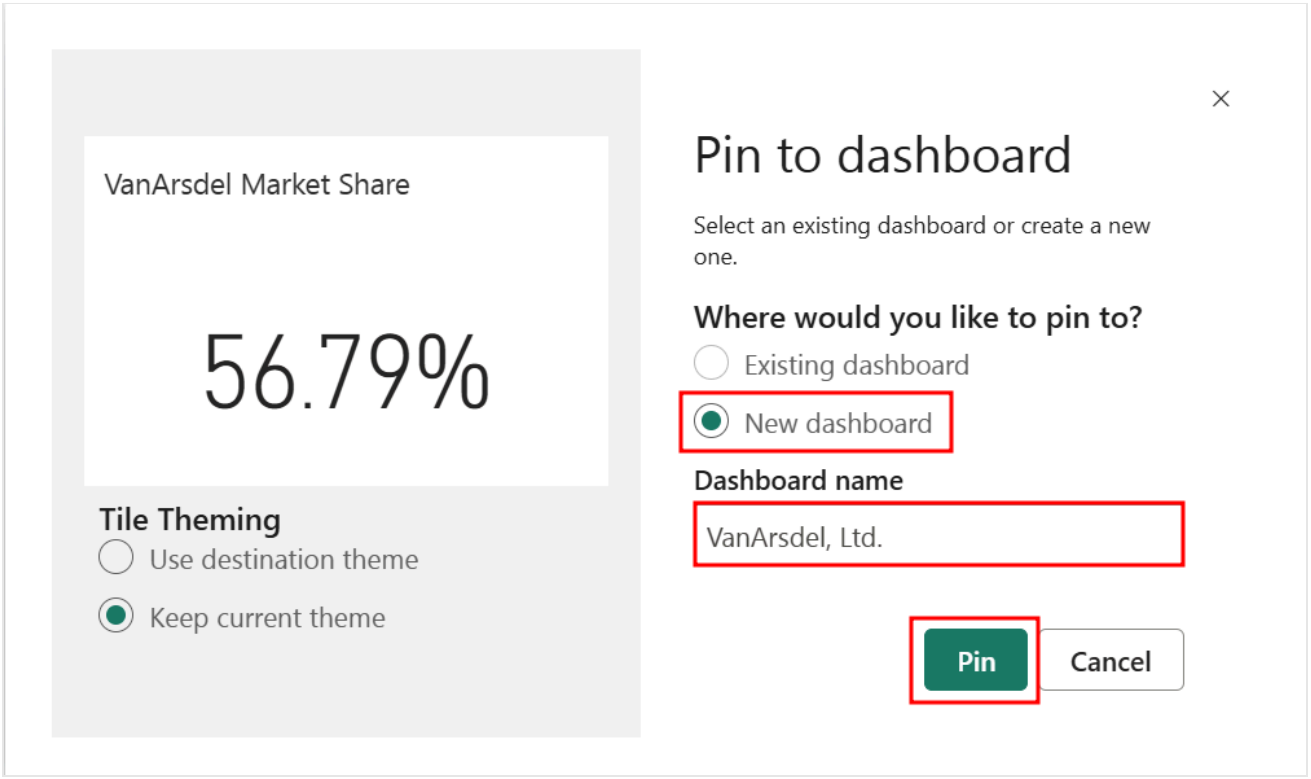
5. Select the **pin** icon in the header of the visual. The **Pin to dashboard** dialog box opens.



6. To create a dashboard, select **New dashboard**.

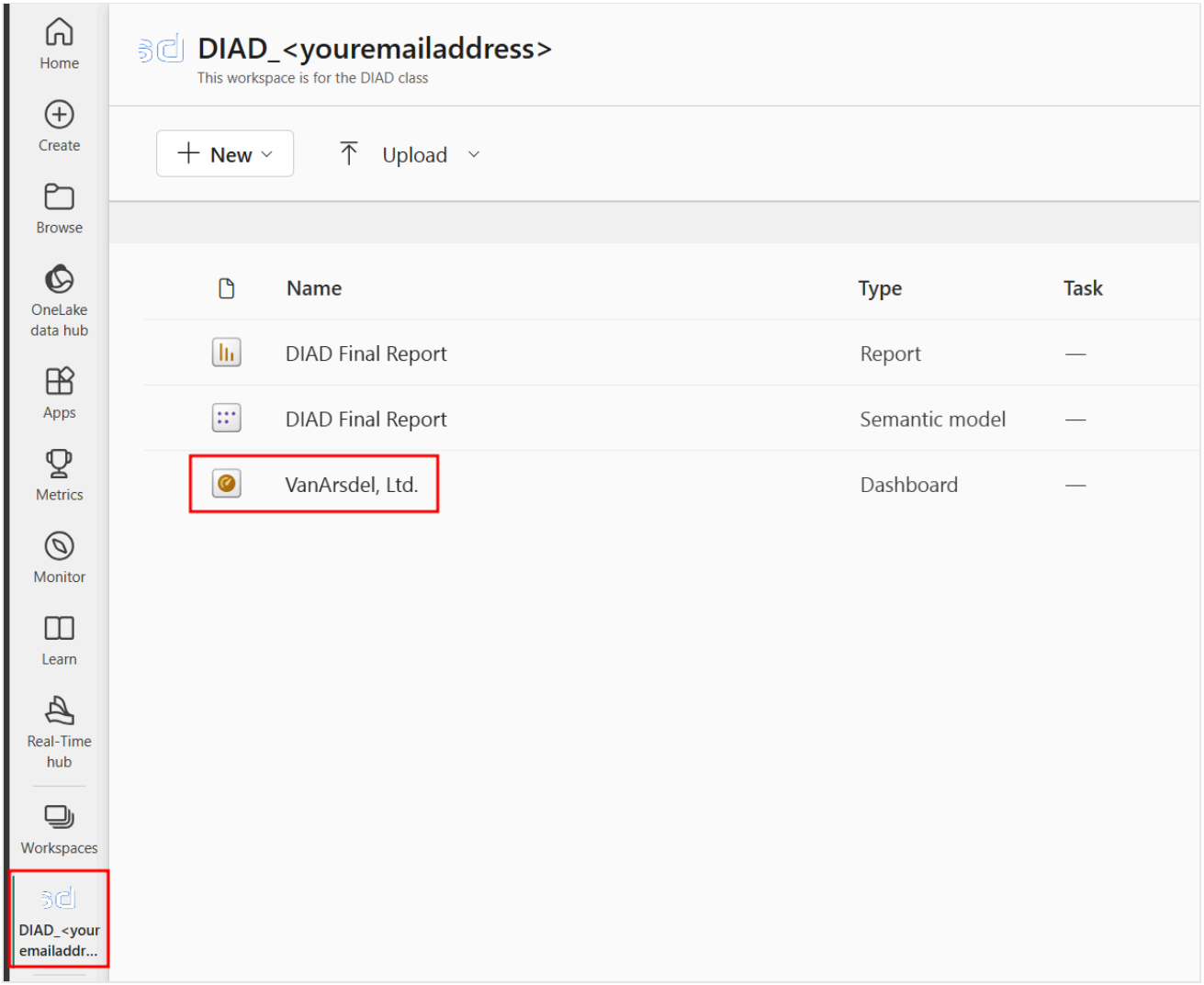
7. Then, enter **VanArsdel, Ltd.** in the **Dashboard name** text box.

8. Now, select **Pin**.

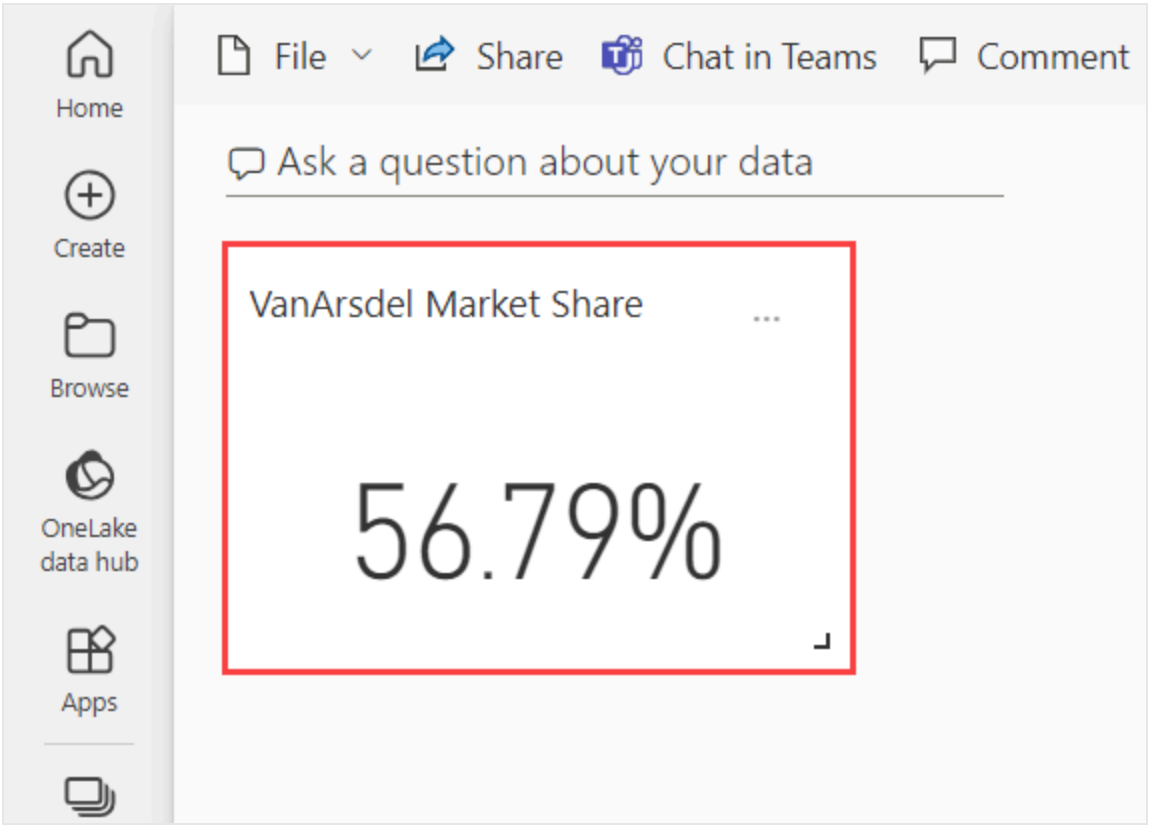


Notice that alert messages are displayed stating the dashboard is ready to view.

9. Navigate back to your workspace and select the **VanArsdel, Ltd.** Dashboard.



Notice the **VanArsdel Market Share** tile is pinned to the dashboard.



10. Select the **VanArsdel Market Share** tile. Notice that you're sent to the **DIAD Final Report**.

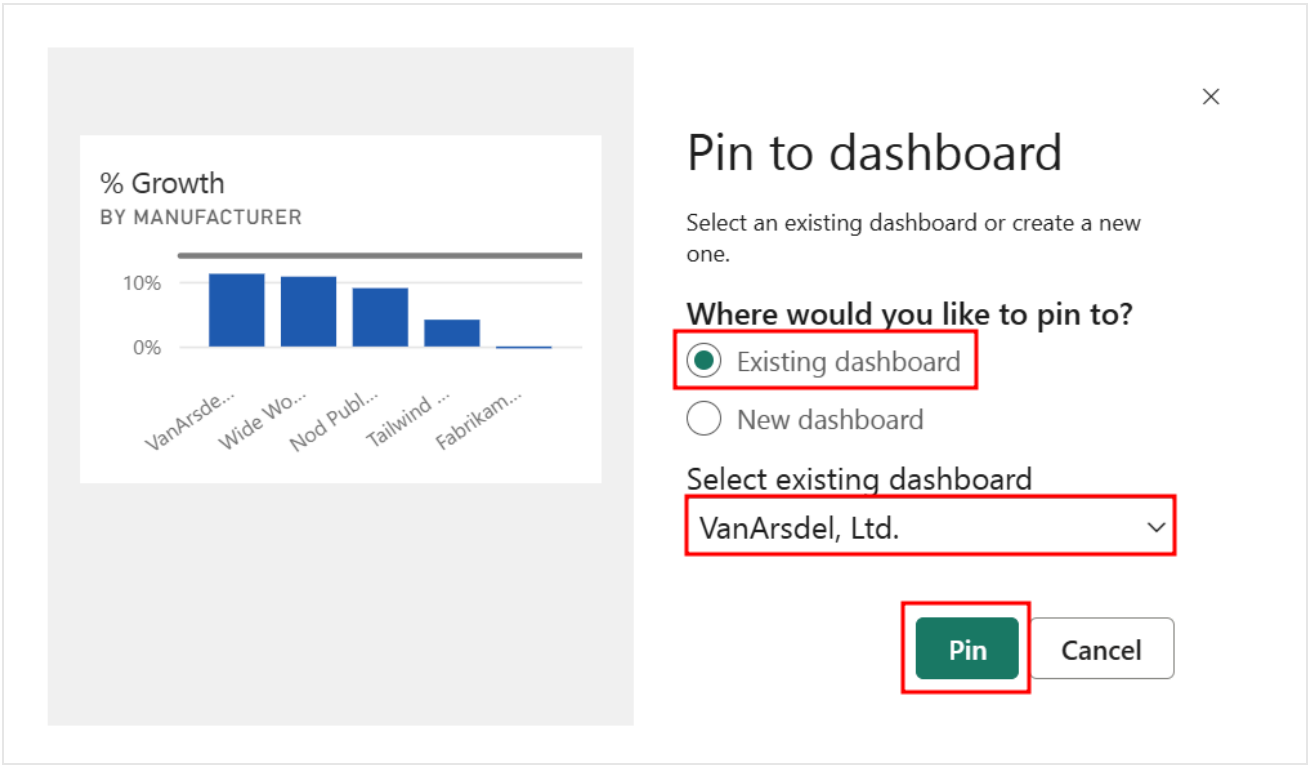
> **Note**
>
> Dashboard Tiles are not interactive like report visuals we've learned about so far. You also cannot pin things like Slicers to a dashboard since the main purpose of the Slicer is to be interactive.

11. In the navigation pane to the left of the screen, select the **DIAD Final Report** again to find more items to pin to your dashboard.

12. Hover over the **% Growth by Manufacturer** column chart visual.

13. Select the **pin** icon within the header of the visual. The **Pin to dashboard** dialog box opens.

14. Make sure that **Existing dashboard** and **VanArsdel, Ltd.** are both selected, then select **Pin**.

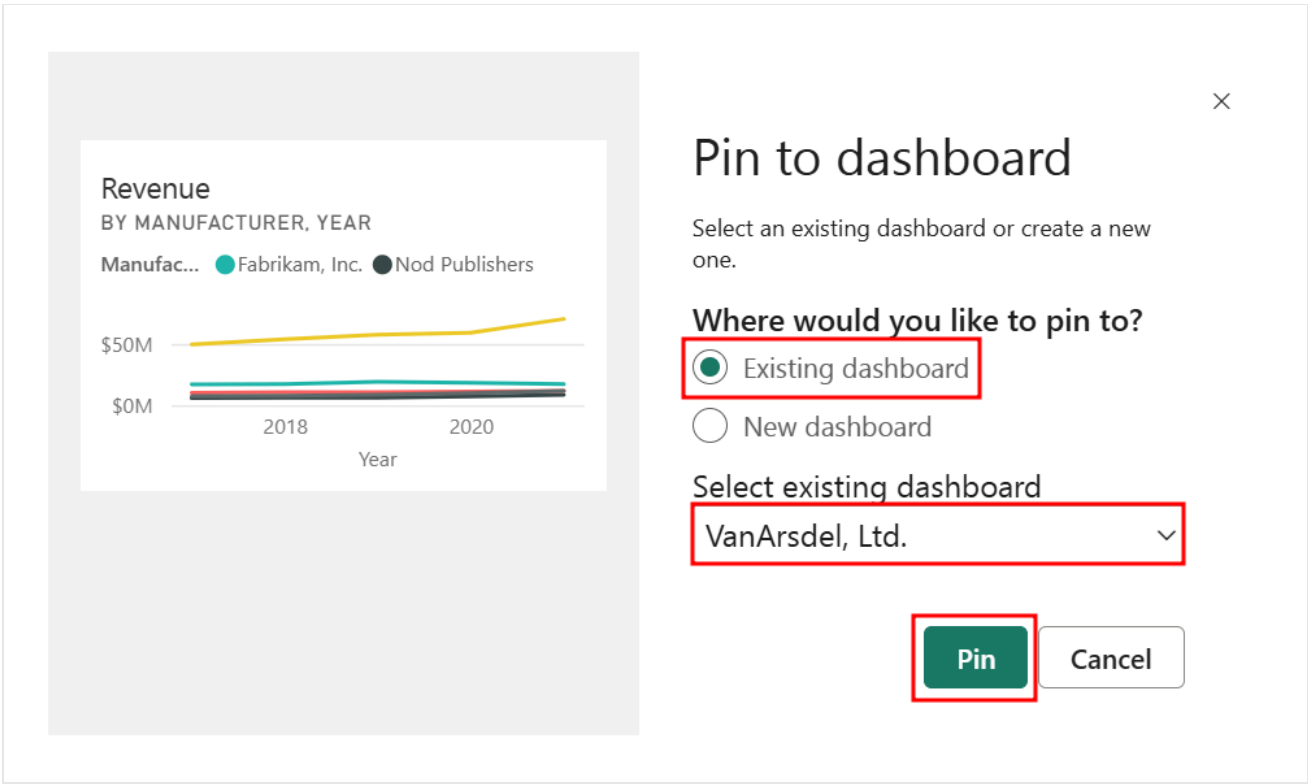


15. Close out the alert notification boxes in the top right corner of the screen.

16. Hover over the **Revenue by Year and Manufacturer** visual.

17. Select the **pin** icon from the header of the visual.

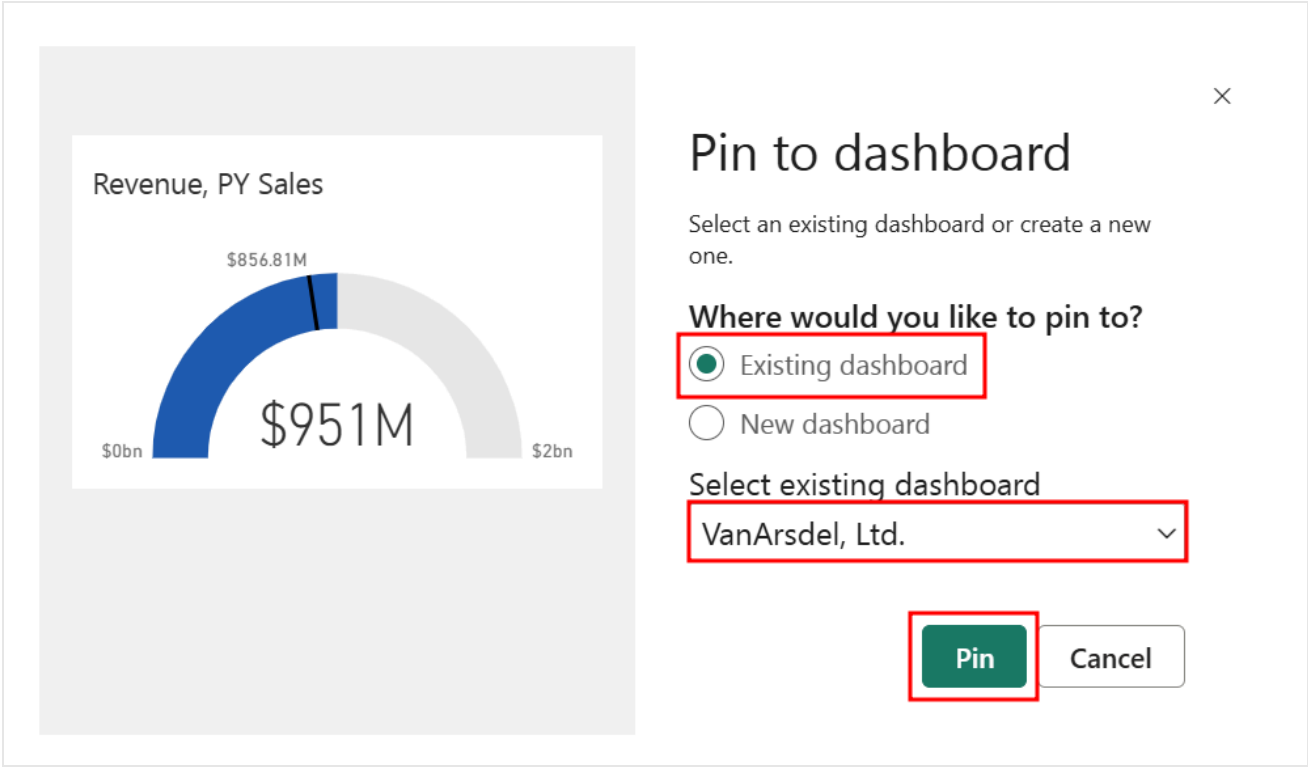
18. Repeat the steps to pin it to the existing **VanArsdel, Ltd.** dashboard.



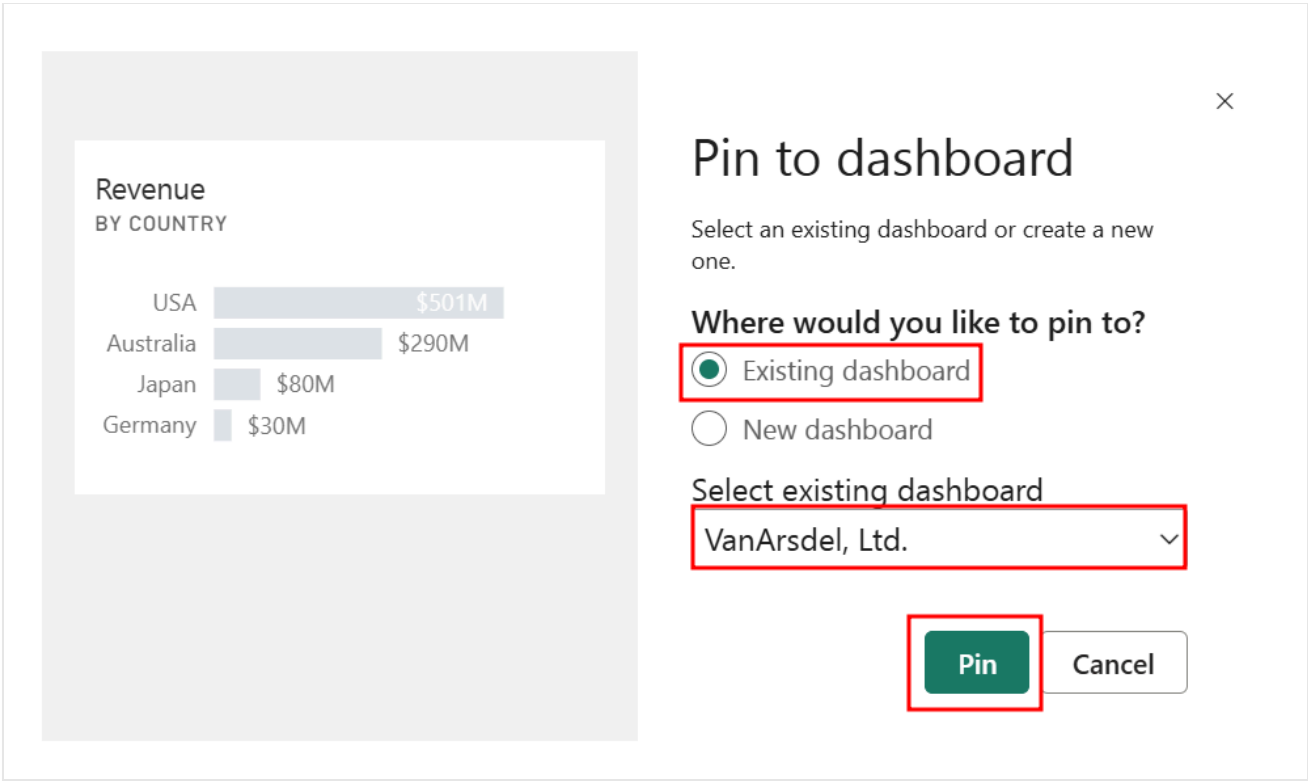
19. Close out the alert notification boxes in the top right corner of the screen.

20. Go to the **By Manufacturer** page using the **Pages** menu/pane to the left of the screen.

21. **Pin** the **Revenue and PY Sales** gauge visual to the existing **VanArsdel, Ltd.** dashboard.



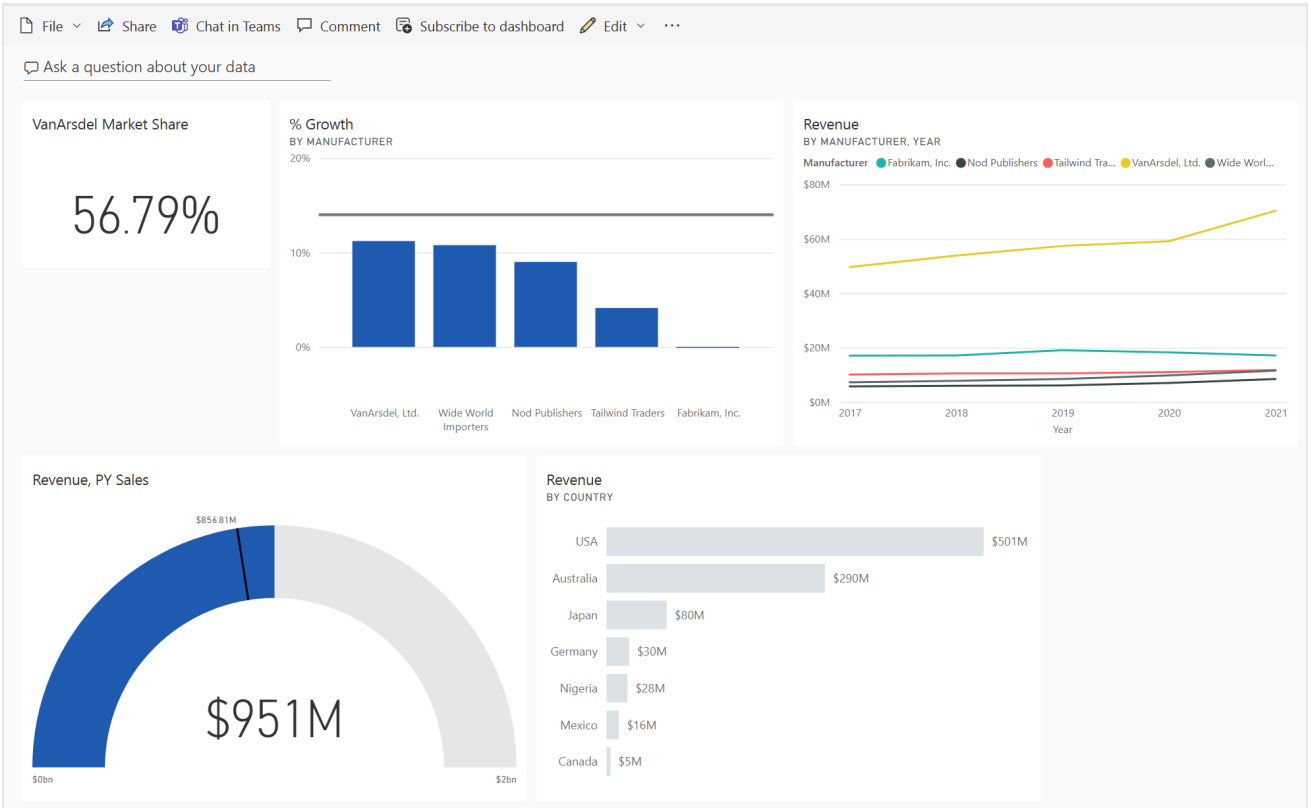
22. **Pin** the **Revenue by Country** bar chart visual, from the By Manufacturer page, to the **VanArsdel, Ltd.** dashboard.



23. Close out the alert notification boxes in the top right.

24. Go back to the workspace entitled **DIAD_`youremailaddress`**.

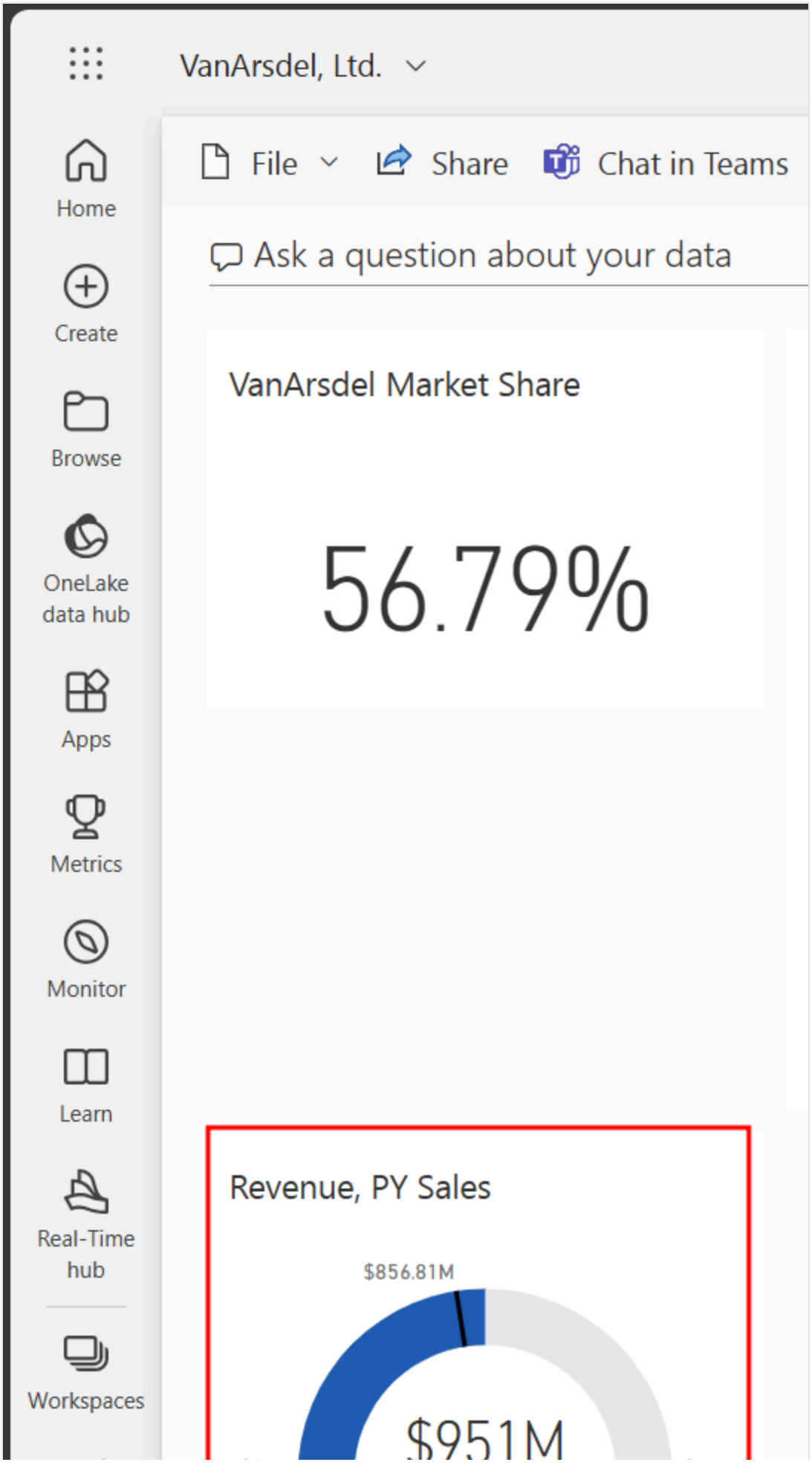
25. Then, choose the **VanArsdel, Ltd.** dashboard again. Notice that all the visuals are pinned as tiles to the dashboard.

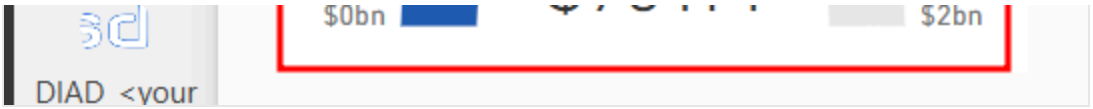


You'll see the visuals on the dashboard like in the figure above. Each visual on the dashboard is called a **tile**. The tiles represent selected data and update as the data model updates. Tiles aren't interactive.

Let's organize the dashboard.

26. Resize and move the **gauge** tile as shown in the figure below. To resize the visual, select the bottom right-hand corner and drag to the desired size. Tiles can be of various sizes (1x1 to 5x5).


VanArsdel, Ltd.
Home
Create
Browse
OneLake data hub
Apps
Metrics
Monitor
Learn
Real-Time hub
Workspaces
File
Share
Chat in Teams
Ask a question about your data
VanArsdel Market Share
56.79%
Revenue, PY Sales
$856.81M
$951M

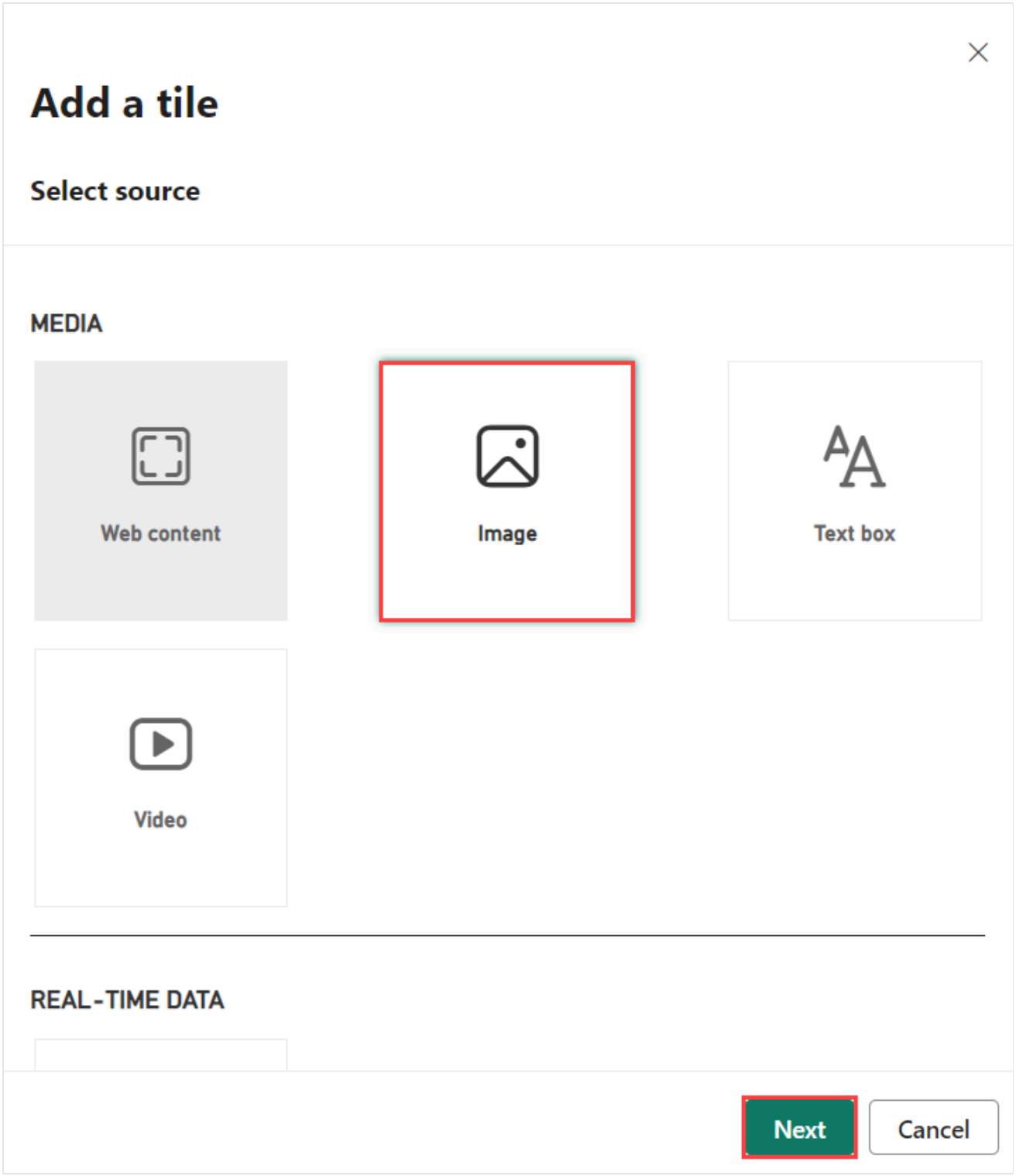


As you're dragging, note the gray shadow, which indicates the size of the tile when you stop dragging.

27. Select the **Edit** dropdown from the ribbon at the top of the screen and choose **Add a tile**. The **Add tile** dialog box opens.

28. Select **Image** as the source.

29. Choose **Next**.



30. In the **URL** text box of the **Add image tile** dialog, type the following URL:

    `https://raw.githubusercontent.com/PragmaticWorksTraining/DIAD/main/Logos/VanArsdel.png`

> ⓘ **Note**
>
> The URL is case sensitive.

31. Then, select **Apply** at the bottom of the dialog.

Add image tile

* Required

Details

Display title and subtitle

Title

Subtitle

Content

URL

://raw.githubusercontent.com/PragmaticWorksTraining/DIAD/main/Logos/VanArsdel.png

Functionality

Set custom link

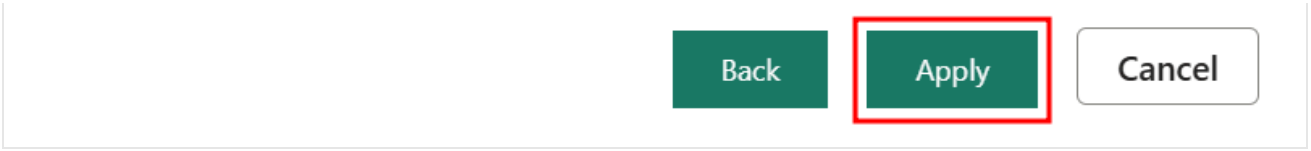
Link type

External link

Link to a dashboard or report in the current workspace

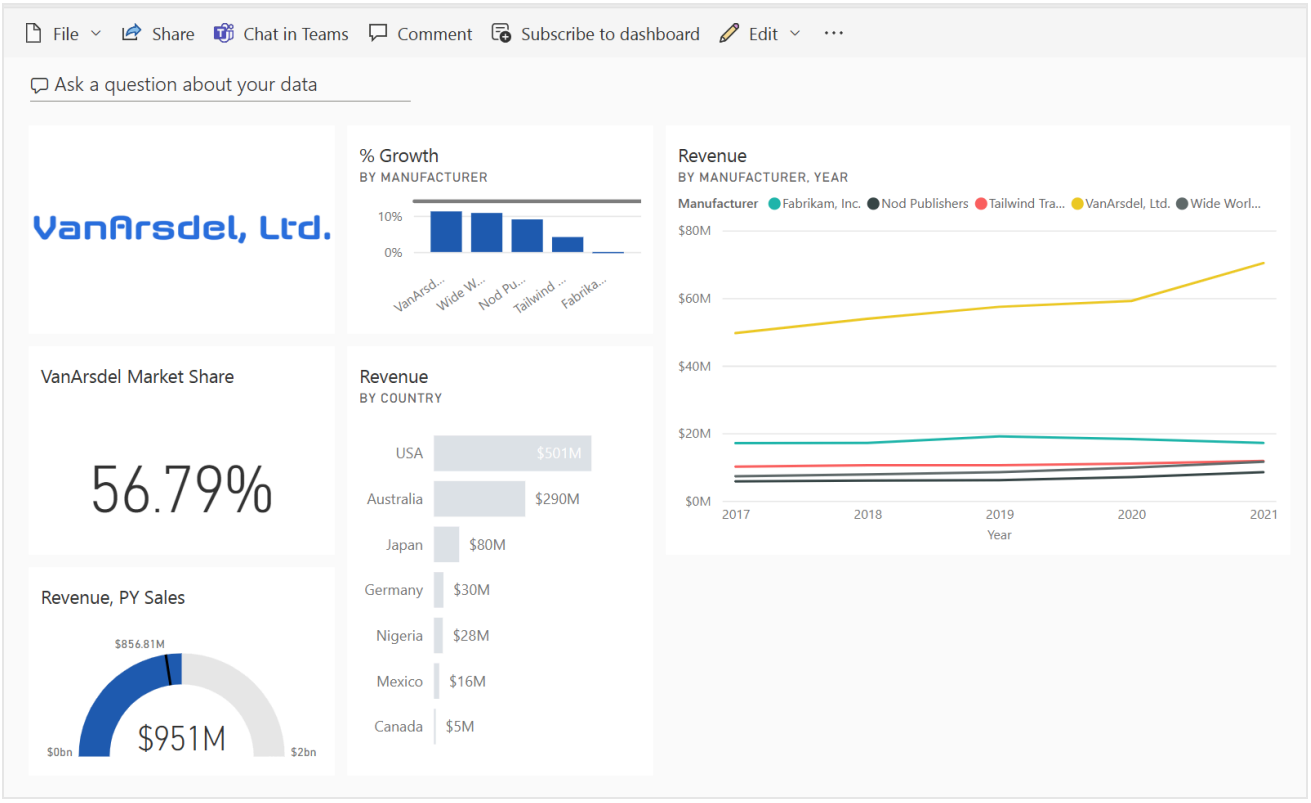
Restore default

Technical Details



Notice that a new tile with the **VanArsdel, Ltd.** logo is added to the dashboard.

32. Resize and rearrange the tiles as shown in the figure below.

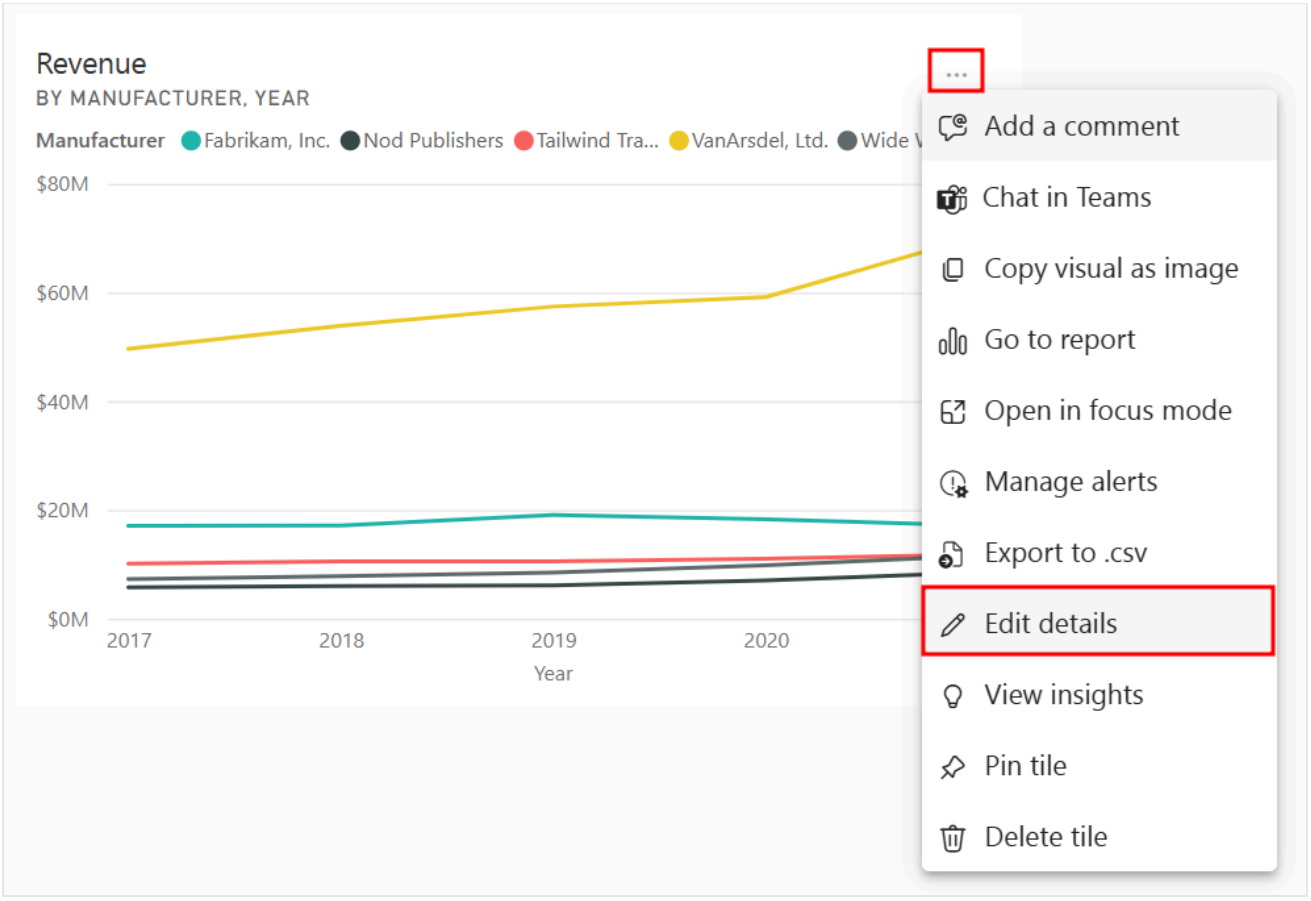


The **Revenue by Country** tile shows data for Revenue by Country for VanArsdel, Ltd. Let's **rename** it.

33. Hover over the **Revenue by Country** tile.

34. Select the **ellipsis** in the top right corner of the tile.

35. Select **Edit Details**. The **Tile Details** dialog box opens.



36. Change the **Title** to **VanArsdel, Ltd. Revenue**.

37. Select **Apply**.

Tile details

* Required

Details

Display title and subtitle

* Title

VanArsdel, Ltd. Revenue

Subtitle

by Year, Manufacturer

Functionality

Display last refresh time

Set custom link

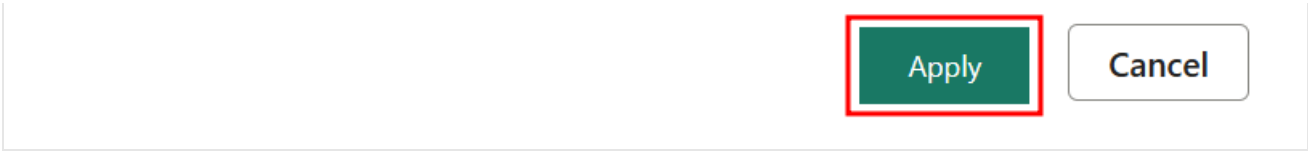
Link type

External link

Link to a dashboard or report in the current workspace

Restore default

Technical Details



Now that we have a dashboard in Power BI Service, in the next unit we'll show you different interactions and personalization options you can use for your report.

Next unit: Check your knowledge

Continue >

100 XP

Summary

1 minute

Through the course of this module, we explored using Power BI Desktop to create a mobile view, published a report, created a workspace in the Power BI Service, and built a dashboard.

Learned concepts:

- Creating mobile views
- Publishing a report to the Power BI Service
- The Navigation pane in Power BI Service
- Creating a workspace
- Building and organizing a dashboard
- Pinning visuals to a dashboard
- Adding images from a URL

Module incomplete:

Go back to finish