

# Introduction

2 minutes

In this module, you learn how to interact with your Power BI Dashboard. You also learn how to share and to collaborate with other team members, publish your first Power BI App through the Power BI Service, and view dashboards on the Power BI Mobile App.

Concepts covered:

- Using Q&A
- Generating insights and using Quick Insights
- Setting alerts
- Managing user access, and the four levels of permission:
  - Contributor
  - Member
  - Admin
  - Viewer
- Building and Publishing a Power BI App
- Editing the Audience of a Power BI App
- Finding Apps in the Power BI Service
- Viewing a report on the Power BI Mobile App

✓ 100 XP



# Exercise – Power BI service interaction and personalization (Bookmarks, alerts, Q&A)

30 minutes

Make sure you're in the VanArsdel, Ltd. dashboard for the Final Report in your DIAD workspace on Power BI Service.

Let's create a visual that represents **Market Share by country**.

## Section 1: Using Q&A

Notice on the top of the dashboard, there's an option to **Ask a question about your data**. This is like **Ask a question** in the desktop.

1. Select the **Ask a question about your data** text box at the top of the page. You'll then be taken to a Q&A page.
2. Type **VanArsdel market share** in the text box at the top of the page. Notice that a card visual is created.
3. Type **VanArsdel market share by country**. Notice that a bar chart is created.
4. Type **VanArsdel market share by country as treemap**. Notice that a treemap visual is created.

< Exit Q&A

VanArsdel Market share by country as treemap

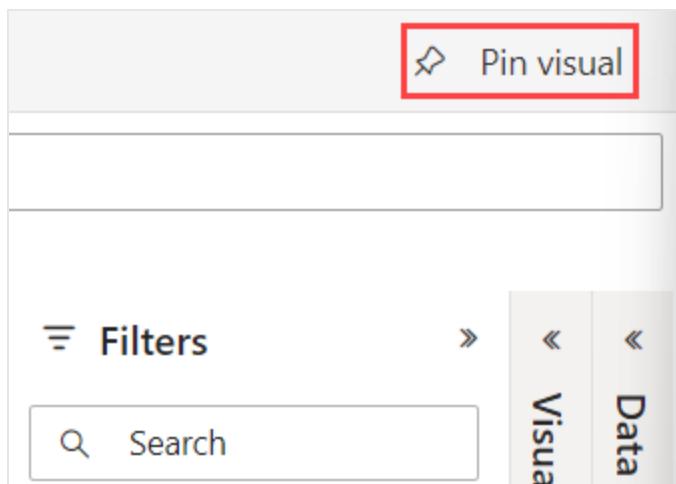
Showing results for Sale country and VanArsdel market share as treemap



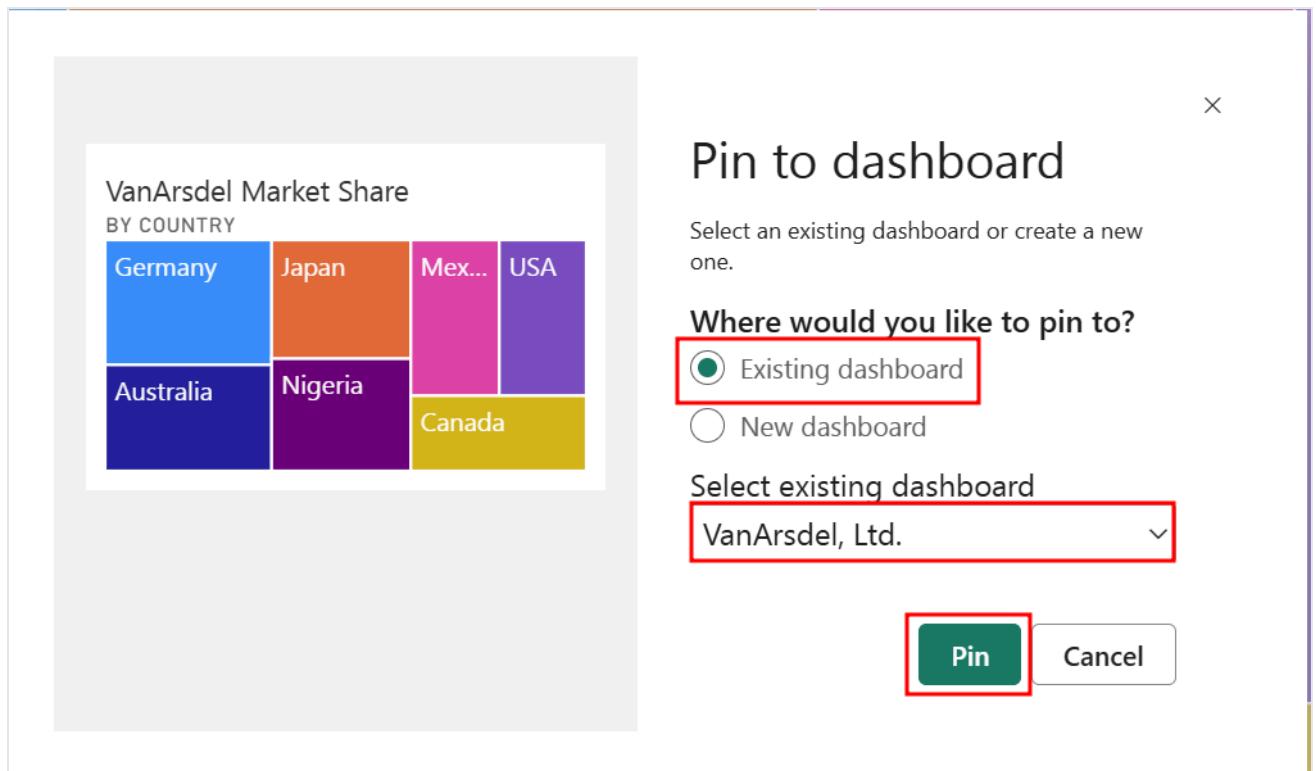
### ⓘ Note

Remember that we renamed our tables.

5. In the top right corner of the screen, select **Pin Visual**.



6. The **Pin to dashboard** dialog box opens. Make sure that **Existing dashboard** is selected, then select **Pin to pin** the visual to the **VanArsdel, Ltd.** dashboard.



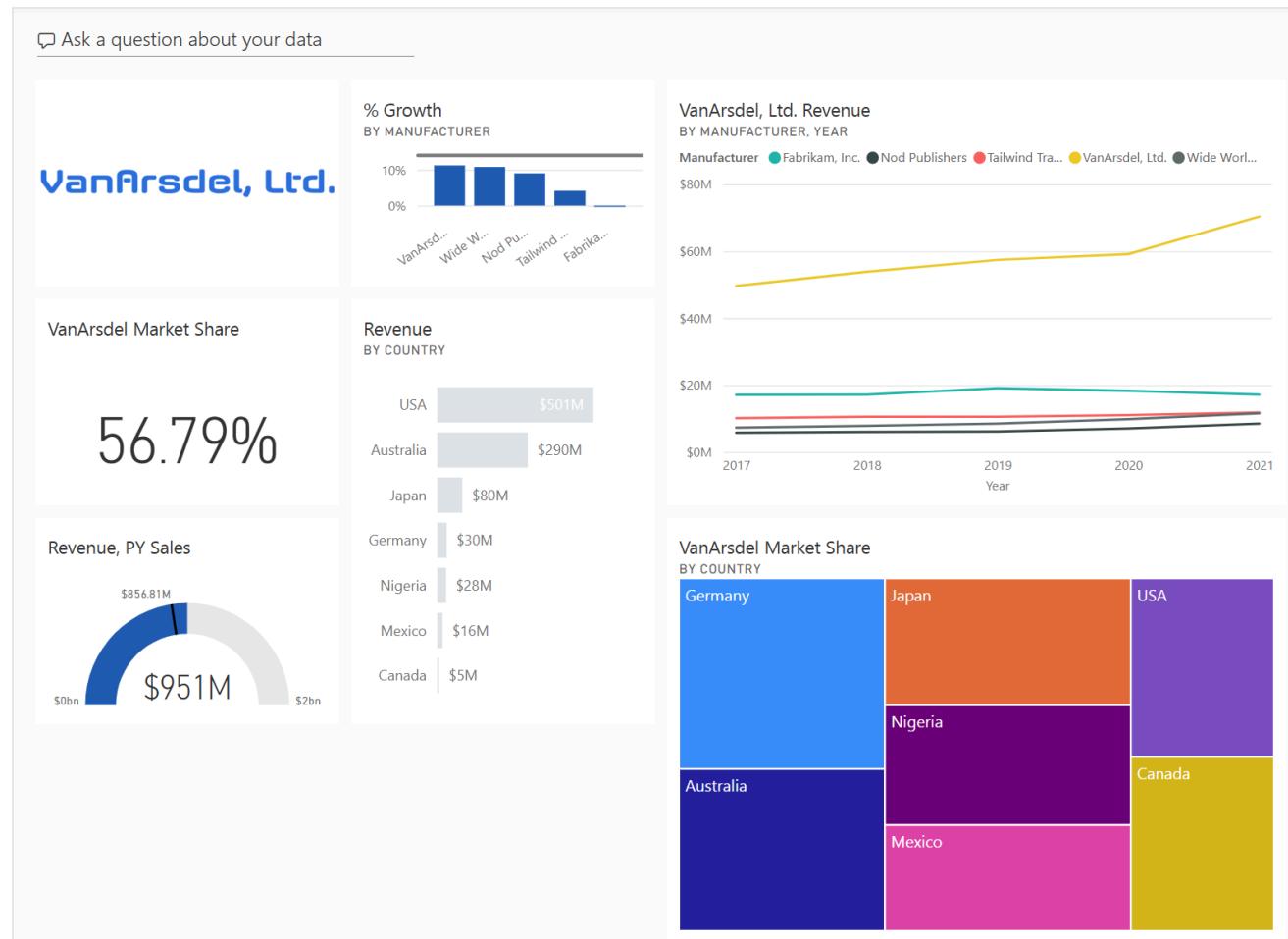
7. Close the alert dialog boxes.

8. Select **Exit Q&A** in the top left corner of the page to go back to the dashboard.

A screenshot of a dashboard page. In the top left corner, there is a "Exit Q&A" button, which is highlighted with a red box. Below it, a search bar contains the text "Vanarsdel Market share by country as treemap". Underneath the search bar, a message says "Showing results for Sale country and VanArsdel market share as treemap". A large treemap visualization is displayed, showing the market share of various countries. The largest segment is Germany (blue), followed by Japan (orange).

Notice that the treemap visual is added as a tile to the dashboard. Selecting the treemap visual will take you back to the Q&A section.

Ask a question about your data

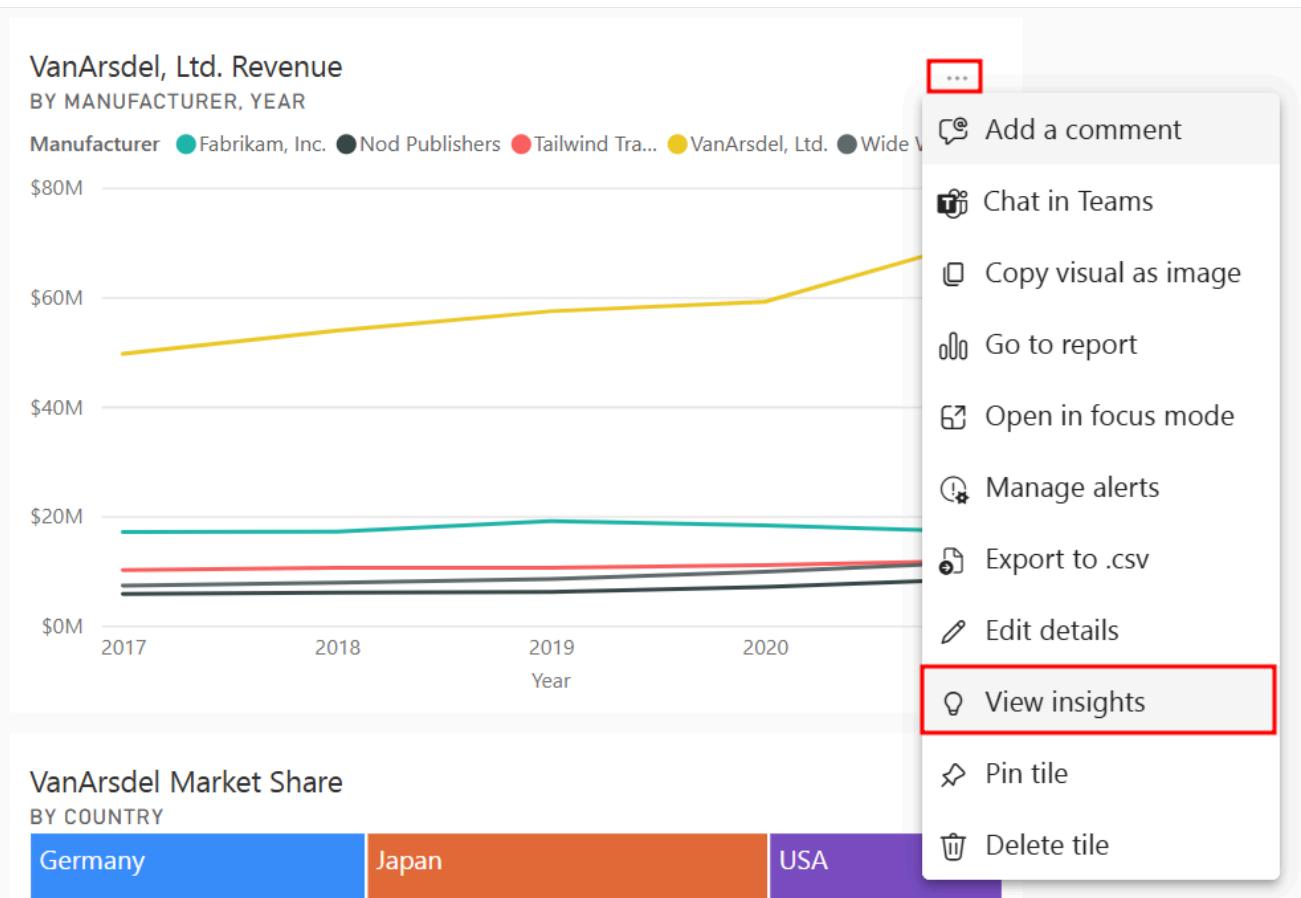


Power BI quickly searches different subsets of your model while applying a set of sophisticated algorithms to discover potentially interesting insights. You can run insights against a model or a dashboard tile.

## Section 2: Generate insights

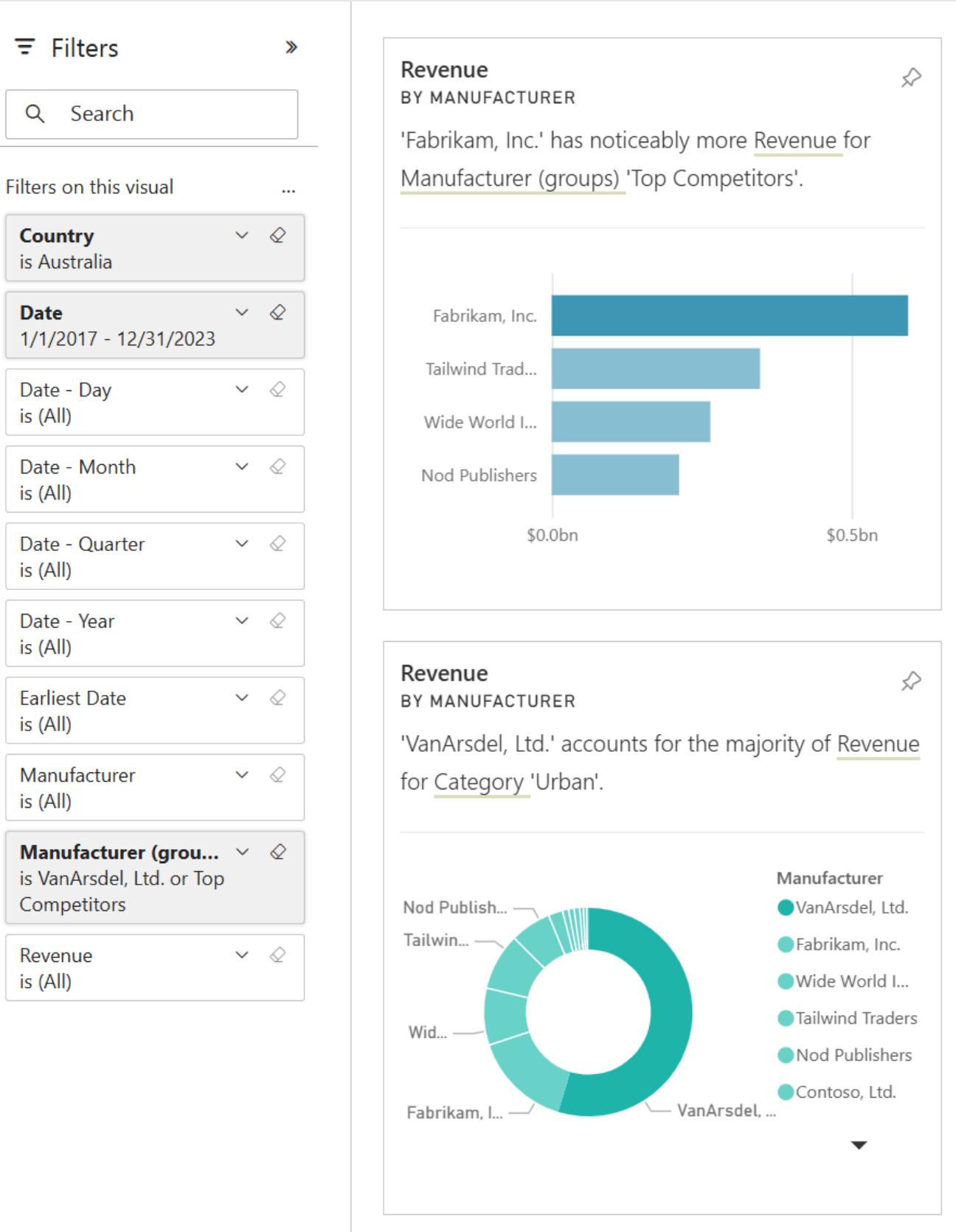
Let's generate **insights** on a dashboard tile. When we run insights on a dashboard tile, instead of searching for insights against an entire model, the search is narrowed to the data used to create a single dashboard tile. This is called scoped insights.

1. Hover over the **Revenue by Manufacturer** line chart on the dashboard.
2. Select the ellipsis on the top right corner of the line chart.
3. Choose **View Insights**.

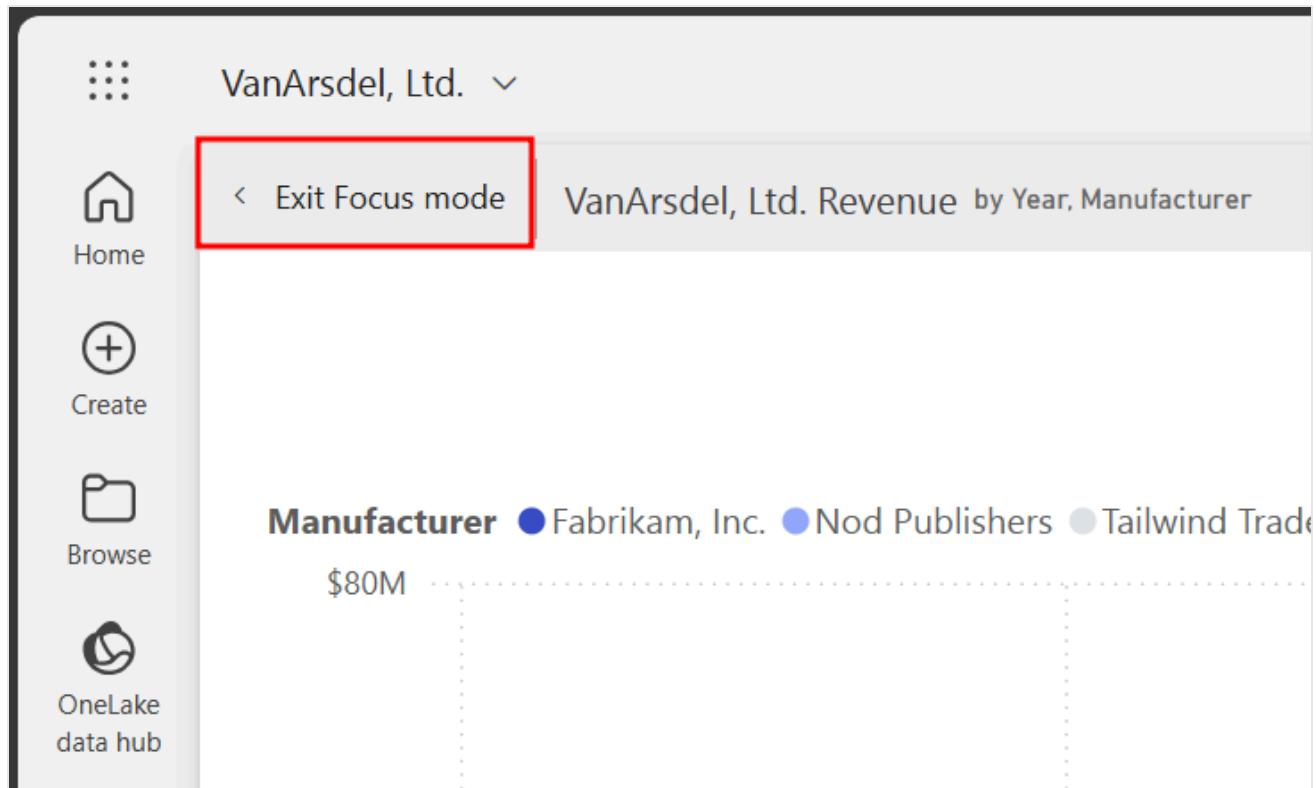


You'll be taken to **Focus mode** for the line chart.

4. Scroll on the Insights pane to the right of the screen to review the various insights Power BI can generate. Notice that there's an option to pin insight visuals to the dashboard.



5. Select **Exit Focus mode** in the top left corner of the page to go back to the dashboard.



## Section 3: Setting alerts

We want to be notified when **VanArsdel's Market Share** goes above or below a threshold. We can set up **alerts** to do this.

1. Hover over the **VanArsdel Market Share** card tile.
2. Select the **ellipsis** in the top right corner of the tile.
3. Choose **Manage alerts**. The **Manage alerts** dialog box opens.

Ask a question about your data

**VanArsdel, Ltd.**

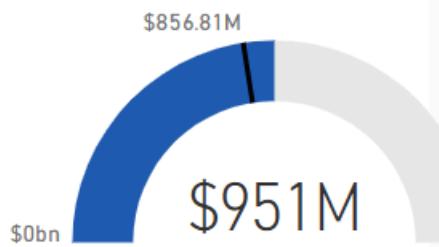
% Growth  
BY MANUFACTURER



VanArsdel Market Share

56.79%

Revenue, PY Sales



Revenue

Add a comment

Chat in Teams

Copy visual as image

Go to report

Open in focus mode

Manage alerts

Export to .csv

Edit details

View insights

Pin tile

Delete tile

4. Select **Add alert rule**.

## Manage alerts

+ Add alert rule



No alerts set currently



Use [Data Activator](#) to trigger action based alerts



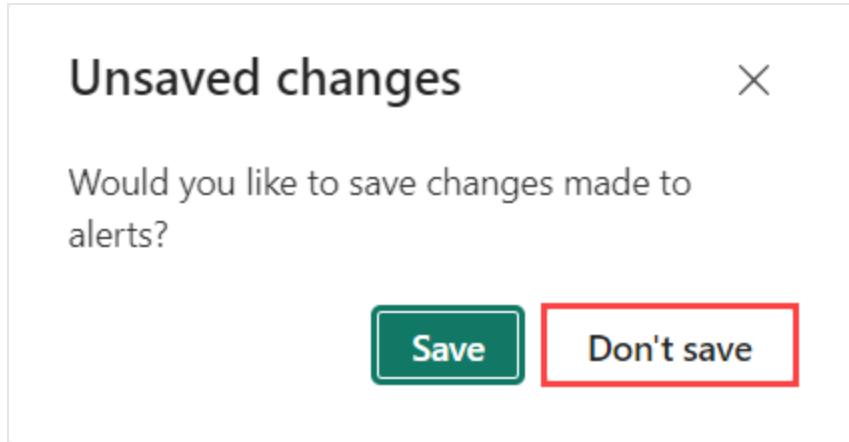
Use [Power Automate](#) to trigger additional actions

Save and close

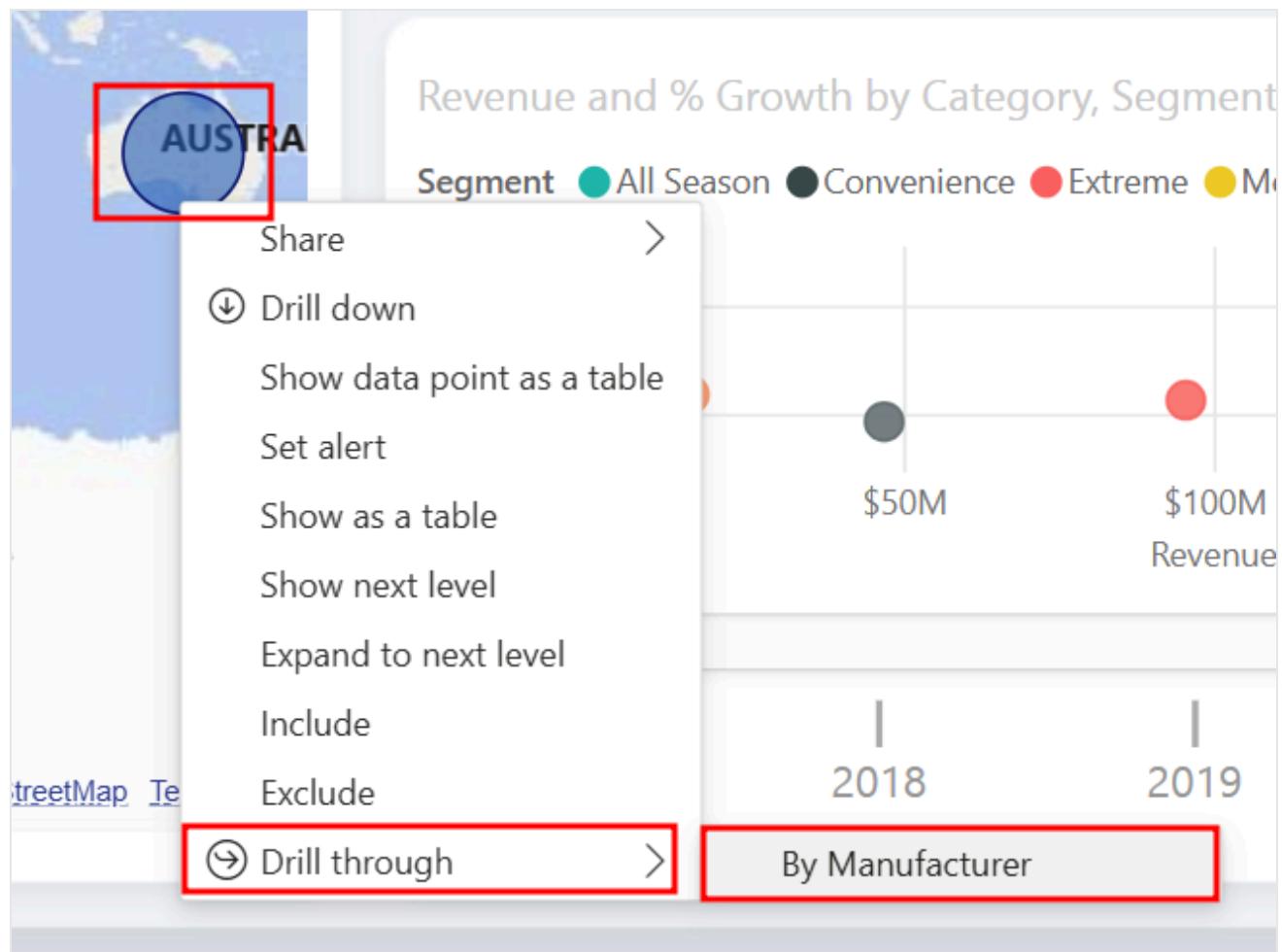
Cancel

Notice that you can add **Above** or **Below threshold**. You can also set the notification frequency.

5. Select **Cancel** to close the dialog box.
6. From the **Unsaved changes** alert dialog box, select **Don't Save**.



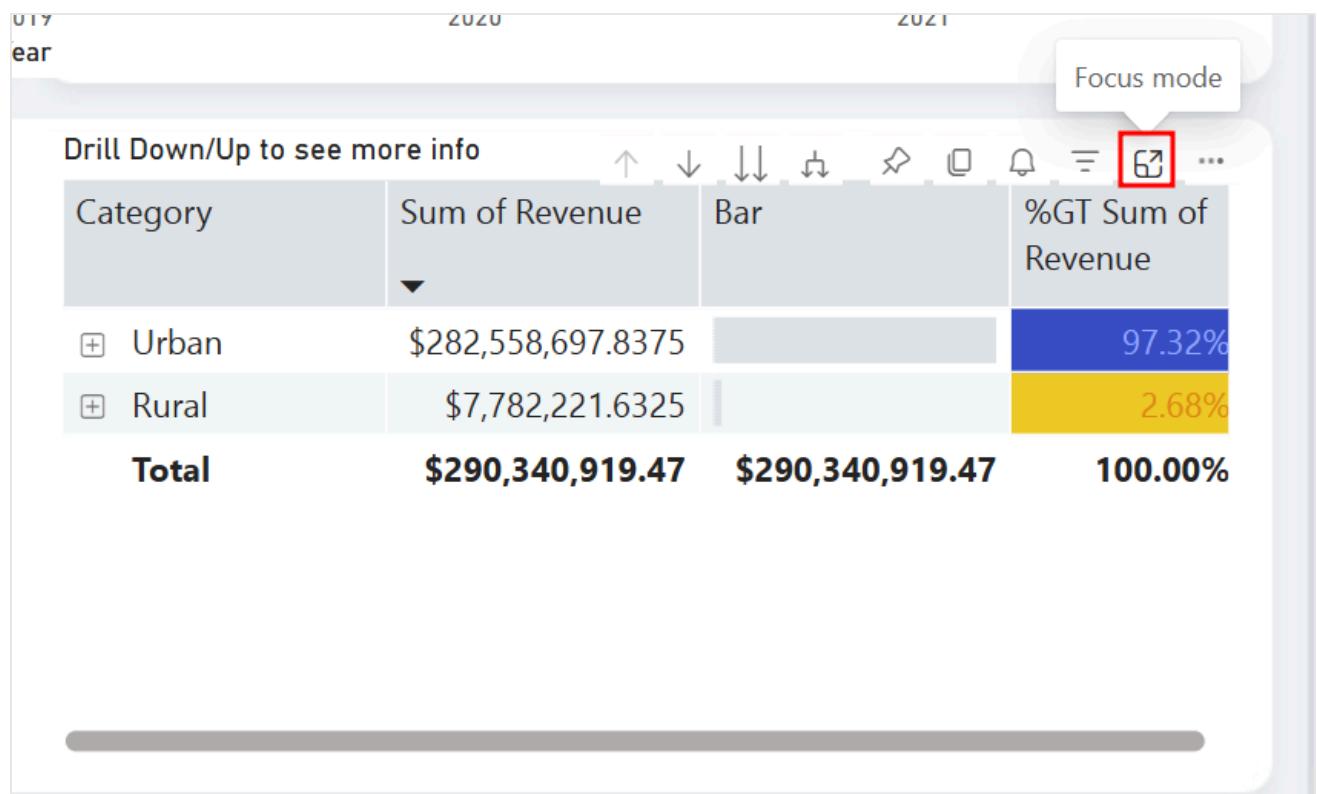
7. Select the **VanArsdel Market Share** card visual tile to navigate to the report.
8. In the **Revenue by Country and State** map visual, check that it's at the **Country** level (you might need to drill up from the State level to the Country level).
9. Right-click on the **Australia** bubble in the map, then choose **Drill through**.
10. Then, select **By Manufacturer**.



You'll then go to the **By Manufacturer** page of the report with the **Australia** filter applied to the report page.

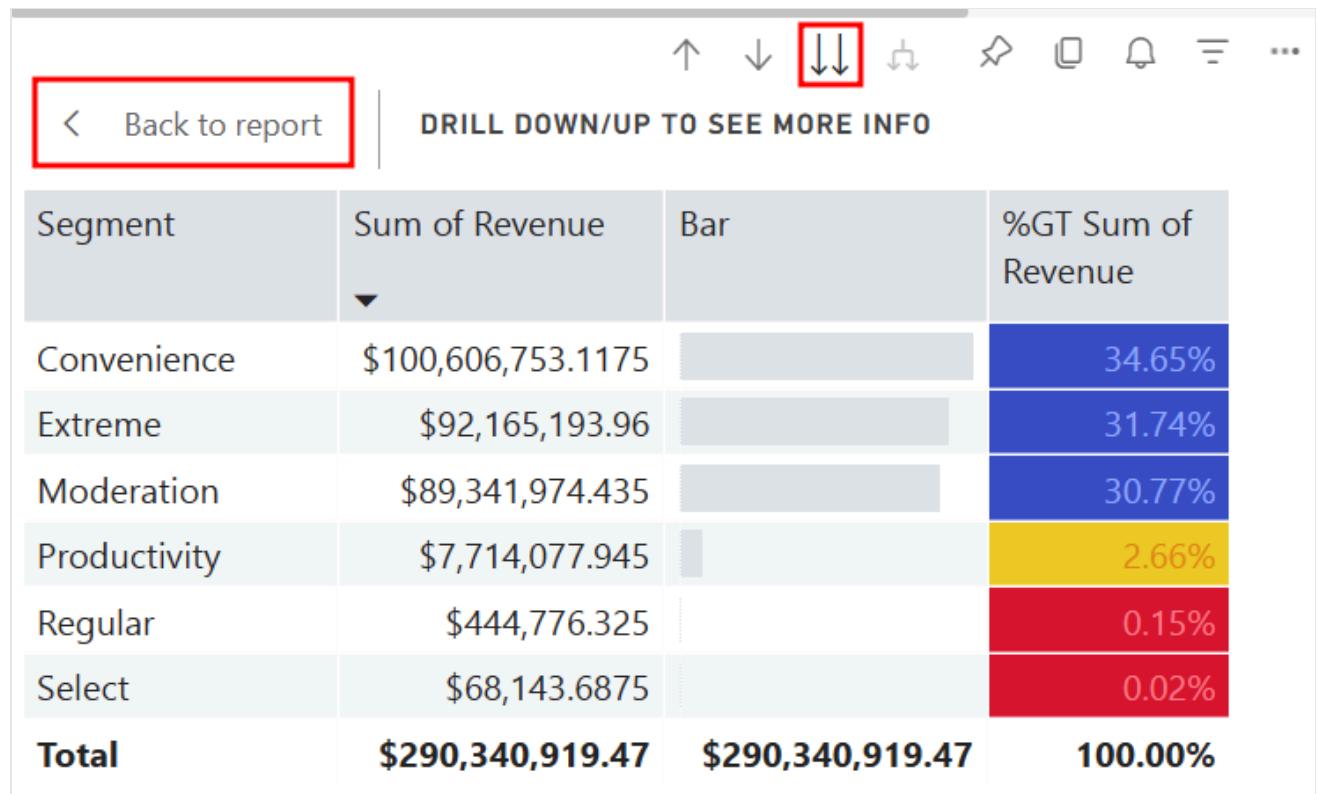
11. Hover over the **matrix** visual.

12. Select the **focus mode** icon on the top right corner of the visual.

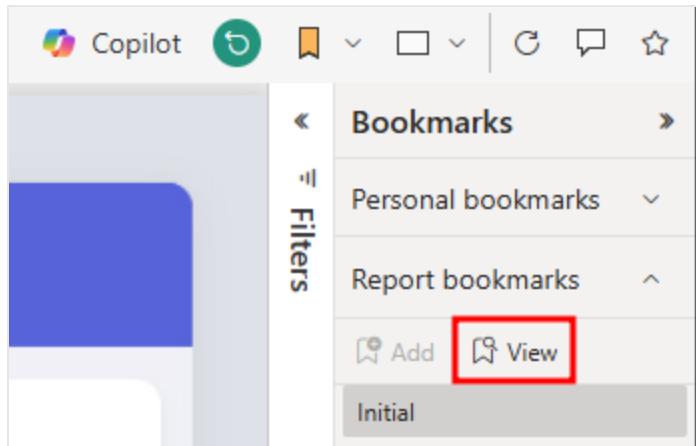


13. Select the double-down arrow to drill down.

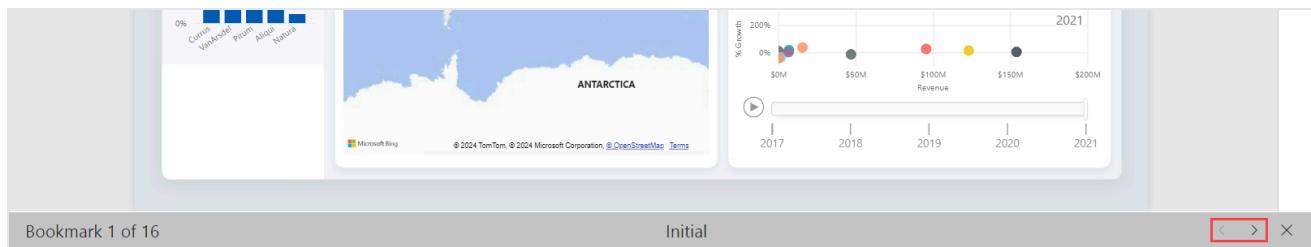
14. Then, select the **Back to report** button in the top left-hand corner of the page.



15. Open the **Bookmark** panel on the right-side of the report, and select **View** to open the bookmark viewing interface.



Notice that you can view and move through the bookmarks using the arrow at the bottom of the screen. This behavior is like in Power BI Desktop. You can test this out on your own.



16. Select **Exit** under the **Report bookmarks** section of the pane to close it.

## Section 4: Quick insights

Power BI provides an option to get quick insights into the complete dataset or Semantic model.

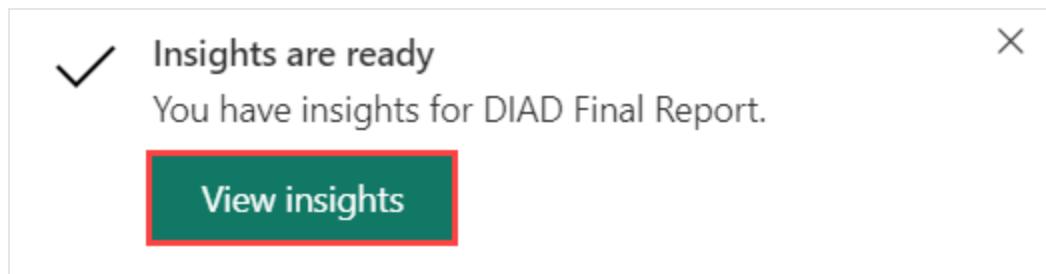
1. Go back to the workspace you created earlier in the lab using the navigation pane to the left of the screen.
2. Once in the workspace, find the semantic model called **DIAD Final Report** and select the ellipsis (...).
3. From the menu, select **Get quick insights**.

Name	Type	Task
DIAD Final Report	Report	—
DIAD Final Report	...	Semantic model
VanArsdel, Ltd.	Explore this data (preview)	—

A context menu is open for the second row, showing options: C, ... (highlighted with a red box), Semantic model, Explore this data (preview), Analyze in Excel, Create report, Auto-create report, Create paginated report, Delete, Get quick insights (highlighted with a red box), Security, and Rename.

It might take a few minutes for the insights to be created. Once the insights are ready, a message appears in the top right corner.

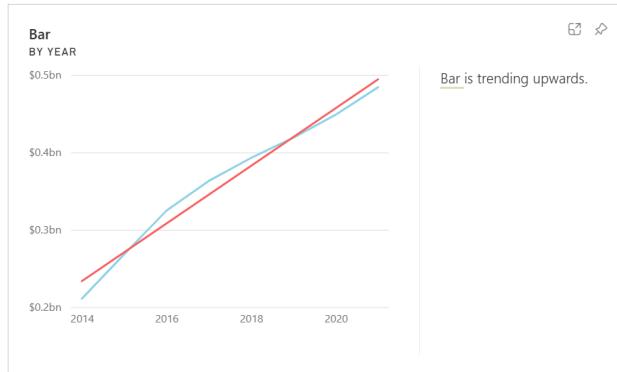
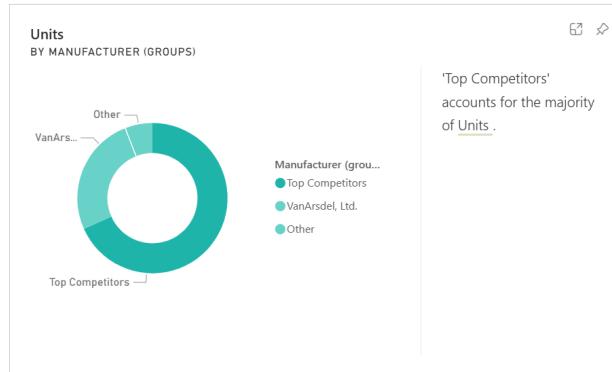
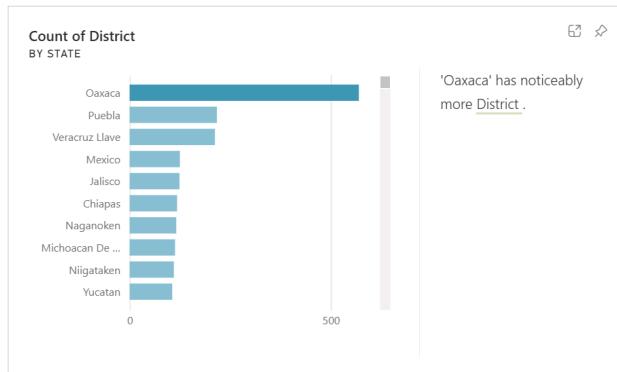
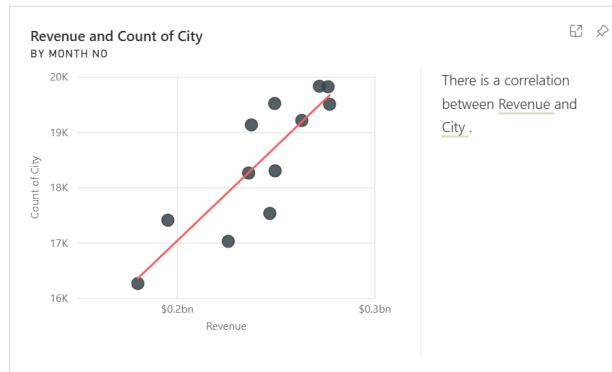
4. From the **Insights are ready** alert dialog box, select **View insights**.



A quick insights report is displayed based on the model. This provides insights into data you might have missed and helps to get a quick start on creating dashboards. Hovering over each report provides an option to **Pin it** to a dashboard.

## Quick Insights for DIAD Final Report

A subset of your data was analyzed and the following insights were found. [Learn more](#)



Now that you've published your report and built your dashboard, the required portion of this Module is complete.

In the next optional unit, we'll show you the process of sharing your dashboard and collaborating with other team members and see how you can create storytelling presentations within PowerPoint using data from Power BI.

## Next unit: Exercise – Share your work with Power BI apps

[Continue >](#)

✓ 100 XP

# Exercise – Share your work with Power BI apps

30 minutes

This is the final module of 8 total modules.

Continue to use your file after completing Module 7. If you're joining the DIAD at this point or were unable to complete previous modules, start this module with the provided **DIAD Final Report.pbix** file located in the Reports folder.

At the end of this Module, you'll have learned how to share your dashboard and collaborate with other users. You'll also have learned how to access your dashboard on your mobile device.

This module includes steps for the user to follow-along together with matching screenshots that provide a visual aid. In the screenshots, sections are highlighted with red boxes to indicate the area the user needs to focus on.

## Collaboration and distribution

You have built the dashboard and are now ready to get feedback and collaborate with your team members.

1. Sign in to <https://app.powerbi.com> to access your workspace.
2. From the navigation pane to the left of the screen, select **Workspaces**.
3. Select the workspace **DIAD\_youremailaddress** that you created previously.
4. Select **Manage Access** at the top of the page.

The screenshot shows the Microsoft Teams workspace settings interface. At the top, there are several icons: a bell with a green badge containing the number '4', a gear, a downward arrow, a question mark, a person icon, and a profile picture. Below these are three main tabs: 'Create app', 'Manage access' (which is highlighted with a red box), and 'Workspace settings'. There is also a 'Filter by keyword' search bar, a 'Filter' dropdown, and a settings icon. The main content area displays a table with four columns: 'Next refresh', 'Endorsement', 'Sensitivity', and 'Incl.' (partially visible). The table has three rows. The first row contains three dashes and a toggle switch that is off. The second row contains 'N/A', three dashes, and a toggle switch that is off. The third row contains three dashes and a toggle switch that is off.

After the **Manage Access** dialog opens, select the **+ Add people or groups** button. Enter the email addresses of colleagues you want to collaborate with. Each user can belong to one of four roles:

Contributor:

- Add/edit/delete content within a workspace.

Member:

- Add/edit/delete content within a workspace.
- Reshare, Publish, and update Apps.

Admin:

- Everything a member can do.

- Change/delete a workspace.
- Add Admins.

Viewer:

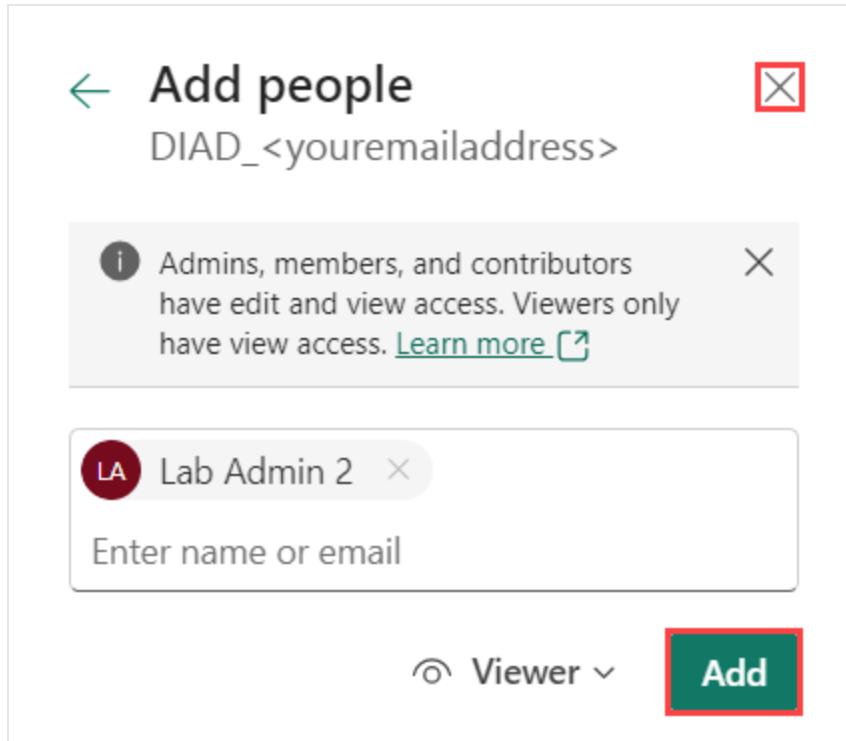
- View/interact
- Read data stored in workplace Data Flows

5. Select the appropriate role and then select **Add**.

6. Once you have finished adding your colleagues, select **Close** at the top right.

**① Note**

If you don't have a colleague's email, please close without submission. If you do have a colleague's email, enter it in the box, and after you have selected the **Add** button, you can ask your colleague to login and access the workspace.



Now let's share the content we have created with report viewers and consumers. To start, we need to publish an App. An App can include multiple dashboards and reports.

7. Navigate back to your workspace called **DIAD\_<youremailaddress>**.

8. On the **Workspace** page, notice there's an option named **Included in app** which can be selected to include the Dashboard in the App. Once we have created the App, the **Included in app** toggle will turn on.

The screenshot shows the 'Workspace' page interface. At the top, there is a navigation bar with icons for notifications (4), settings, download, help, and user profile. Below the navigation bar are three main buttons: 'Create app', 'Manage access', and 'Workspace settings'. Underneath these buttons is a search bar labeled 'Filter by keyword' and a 'Filter' dropdown menu. The main content area displays a table with three columns: 'Endorsement', 'Sensitivity', and 'Included in app'. The 'Included in app' column contains two rows, each with a toggle switch. The second row of the 'Included in app' column is highlighted with a red box. Both toggle switches are currently set to 'No'.

If you have reports and dashboards included in your workspace that you don't want to share with report viewers, an option will appear later to exclude these items.

9. In the top part of your screen, select the **Create app** button.

The screenshot shows the Microsoft Power BI workspace settings interface. At the top, there are several icons: a bell with a '4' notification, a gear, a download arrow, a question mark, a share icon, and a user profile icon. Below these are three main navigation links: 'Create app' (with a red box around it), 'Manage access', and 'Workspace settings'. There is also a search bar labeled 'Filter by keyword' and a 'Filter' dropdown. The main content area has a header with columns: 'Endorsement', 'Sensitivity', and 'Included in app'. Under 'Included in app', there are two rows, each with a toggle switch set to 'No'.

10. On the **Build your app** page, under the **Setup** tab, rename the App **DIAD**.
11. Then, type **This is a DIAD app** in the **description** field.
12. Select the **Next: Add content** button located in the bottom right corner of the Setup page.

① Setup ② Content\* ③ Audience\*

Build your app

App name \*  
DIAD

Description \*  
This is a DIAD app.

182 characters left

App logo

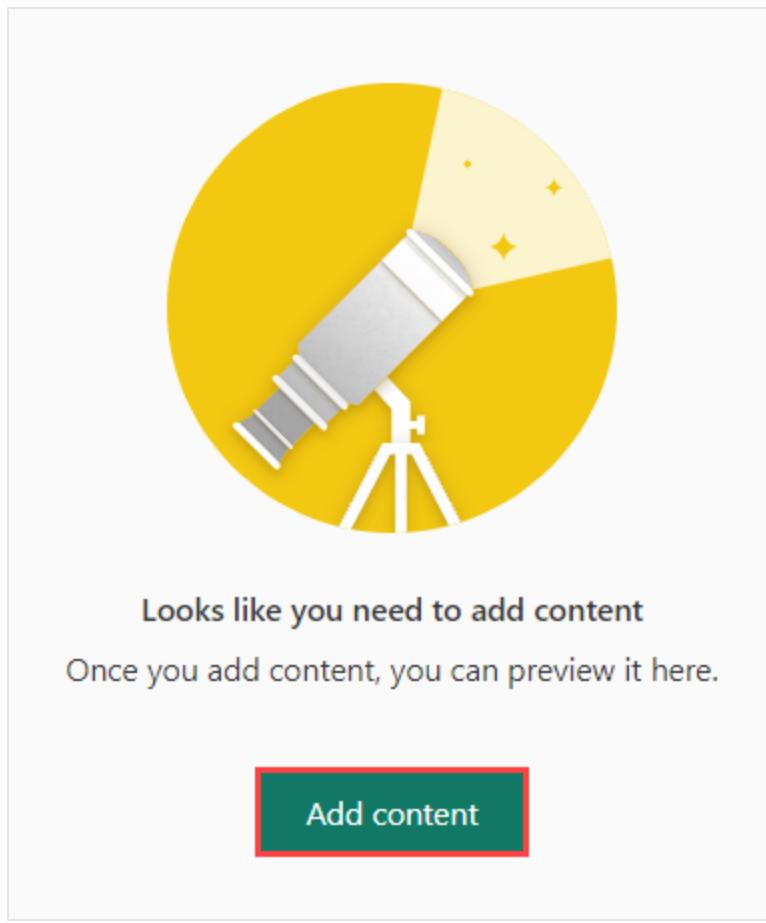
App theme color

Contact information  
 Show app publisher  
 Show items contacts from the workspace  
 Show specific individuals or groups

Advanced settings ▾

Cancel

13. Select the green colored **Add content** button located in the middle of the screen.



14. In the **Add content** dialog box that appears, select **DIAD Final Report (report)** and **VanArsdel, Ltd. (dashboard)**.

15. Then, select the **Add** button located in the bottom right corner of the dialog box.

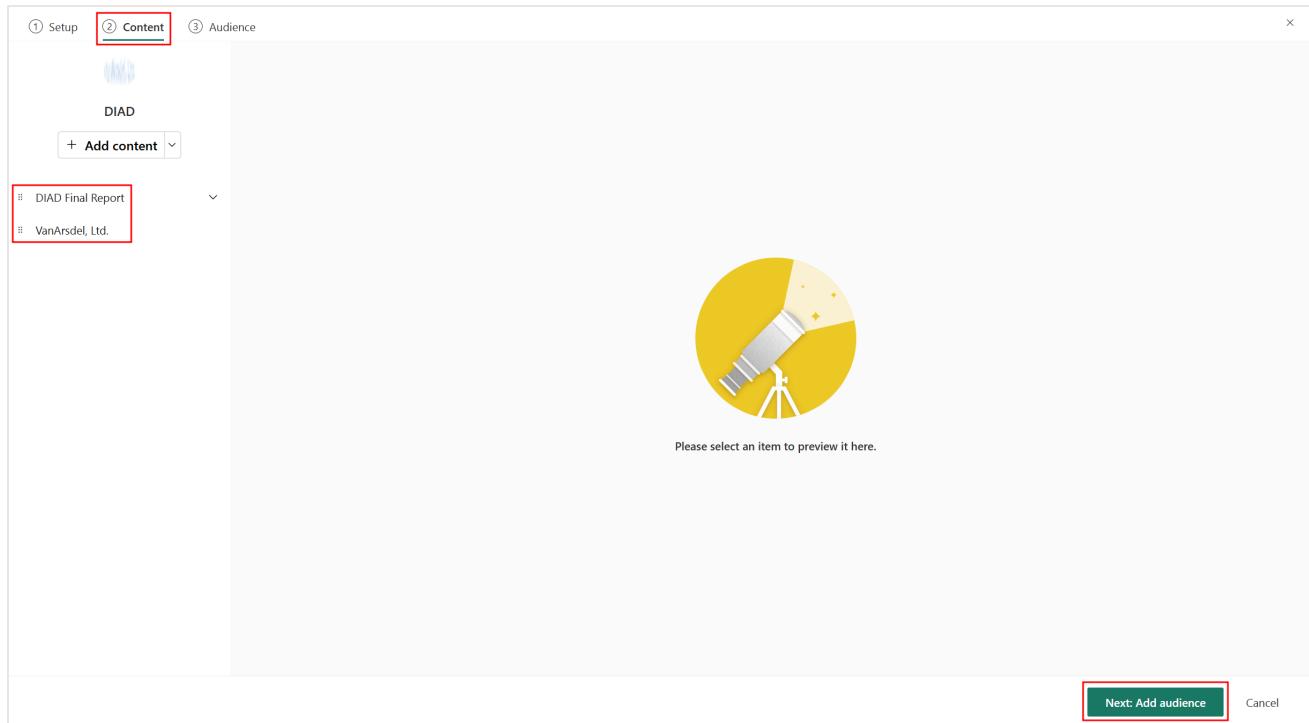
The screenshot shows the 'Add content' dialog box. At the top, there's a header 'Add content' and a close button 'X'. Below the header, a descriptive text says 'Insert reports, dashboards, and workbooks directly from your workspace. You can also add website links.' There are two buttons at the top left: 'Add from workspace' and 'Add a link'. The main area is a table with columns: Name, Type, Owner, and Refreshed. Two items are listed:

	Name	Type	Owner	Refreshed
<input checked="" type="checkbox"/>	DIAD Final Report	Report	DIAD_<youremail...>	6/11/24, 2:58:53 PM
<input checked="" type="checkbox"/>	VanArsdel, Ltd.	Dashboard	DIAD_<youremail...>	—

At the bottom right of the dialog box, there are two buttons: 'Add' and 'Cancel'. The 'Add' button is highlighted with a red box.

16. Notice that the newly added dashboard and report have been added to the list in the **Content** pane to the left.

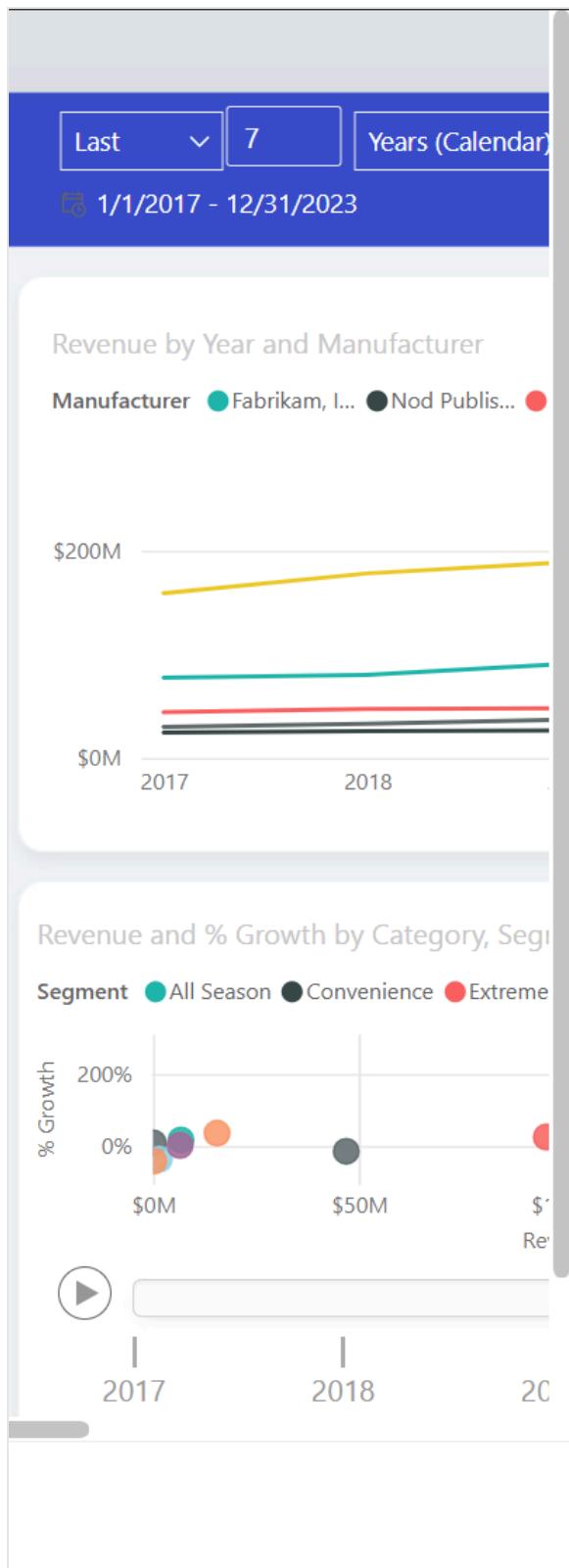
17. Next, select the **Next: Add audience** button located in the bottom right corner of the Content page.



### ➊ Note

When continuing to the **Audience** tab by completing step 17, a dialog box may pop up giving information about what audiences are and how to utilize them within Power BI. Select **Next** and then **Got it** to close this pop up.

18. In the **Edit Audience** pane, enter the emails to whom you want to give access in **Specific users or groups** text box.
19. Then, select the **Publish app** button located in the bottom right corner of the pane.



## Edit Audience

DIAD

### Grant access to

Entire organization [Learn more](#)

Specific users or groups

Enter a name or email address

> Advanced

Workspace users ①

**Publish app**

Cancel

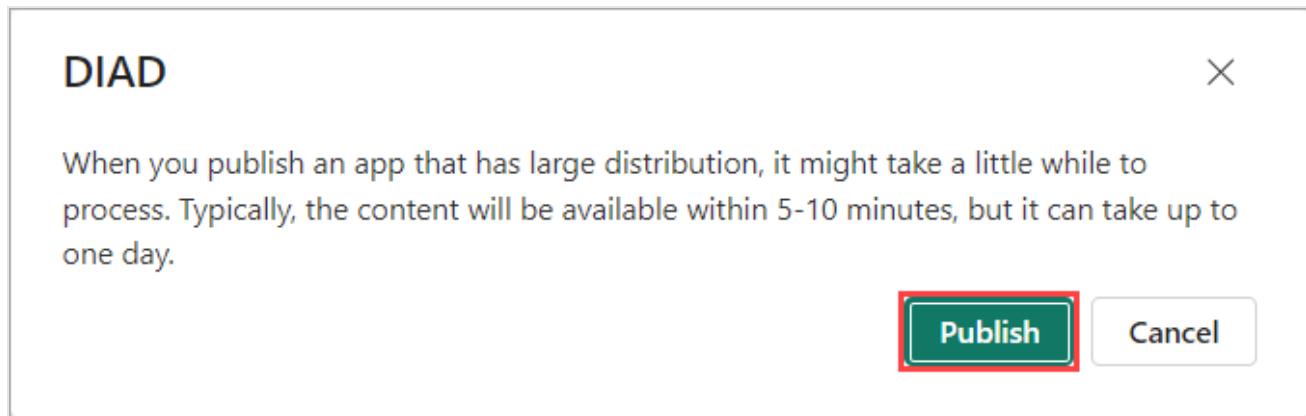
### ⓘ Note

If you do not have an email to share the App with, continue by selecting the Publish app button.

With Audiences, the authors can decide which content can be shared with specific audience groups using a single workspace. This allows access control for the App users based on their group permissions and minimizes overhead for the App authors.

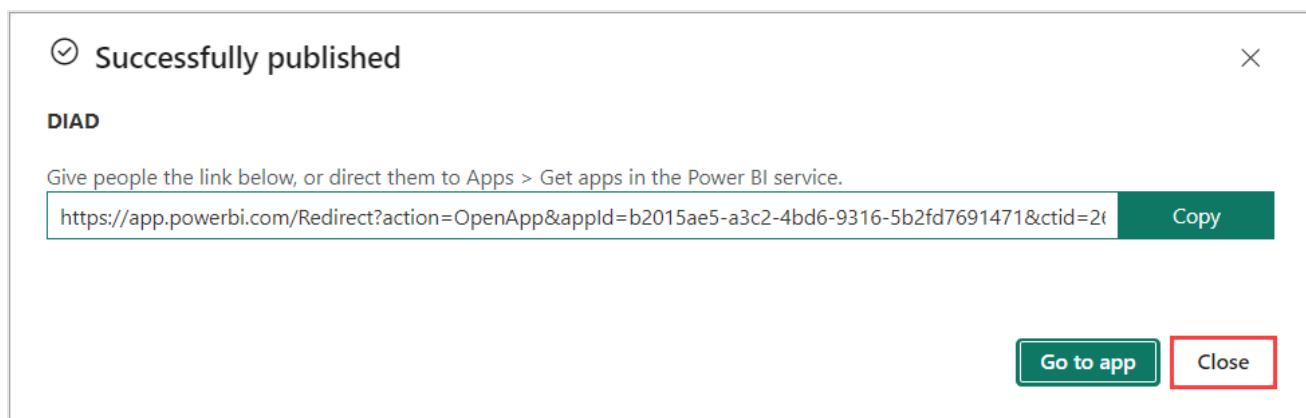
20. The **Ready to publish** dialog will appear, select **Publish**.

21. Once the App is published, a success dialog will appear.



22. In the **Successfully published** dialog box, you can copy the link to the App and share it with individuals via email.

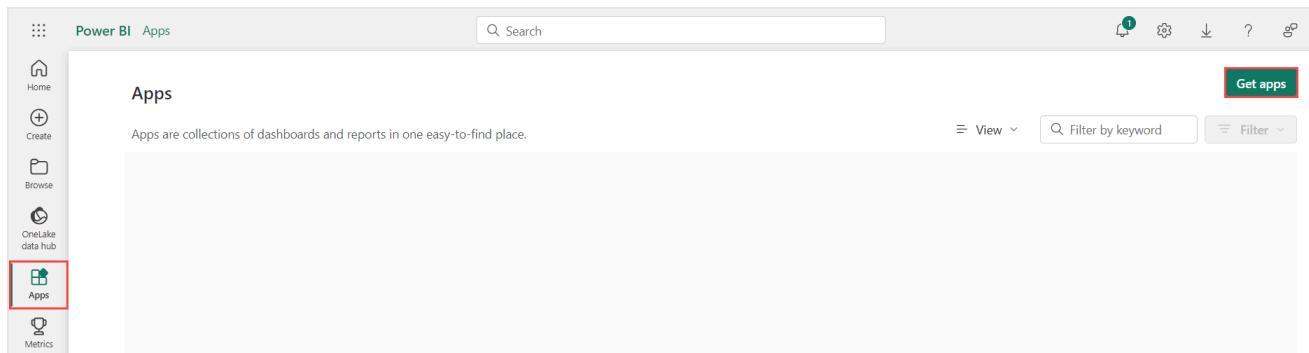
23. Select the **Close** button.



A better way for report viewers to see the App is by logging on to Power BI Service and registering the App. Let's impersonate a report viewer.

24. From the navigation pane to the left, select **Apps**.

25. Then, select **Get apps**.



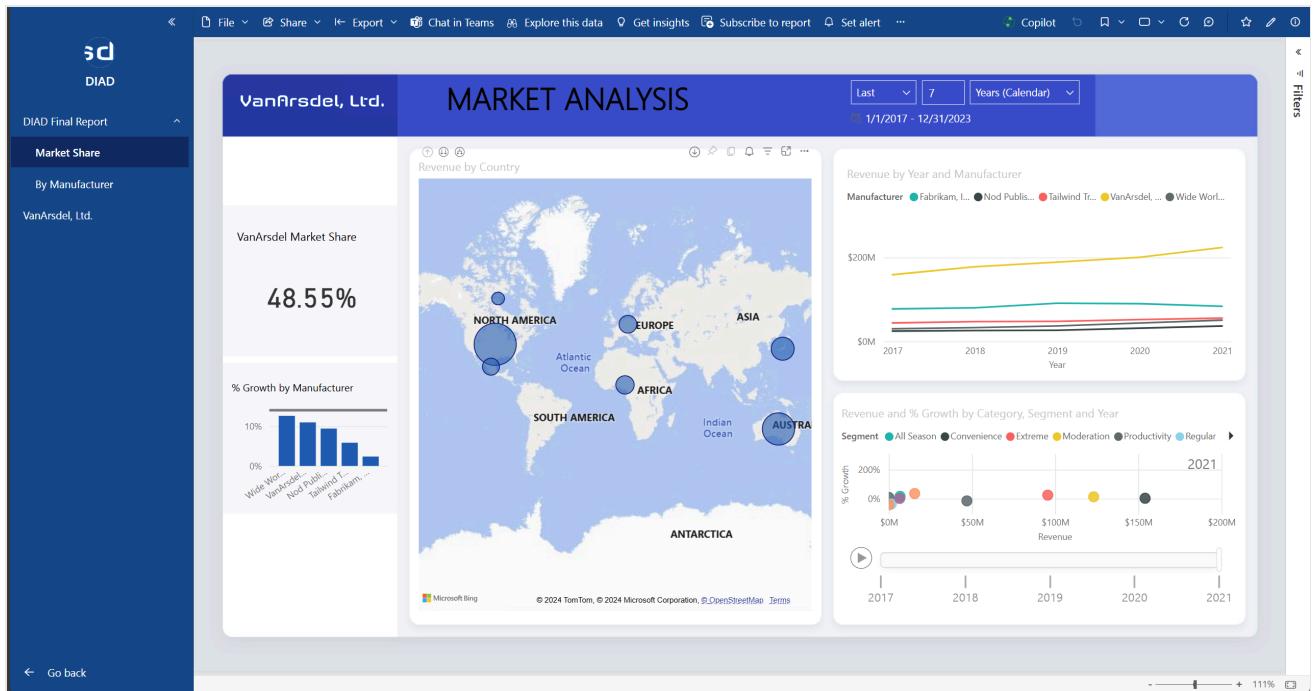
26. The **Power BI apps** dialog box opens. You'll notice the **DIAD App** is listed under the **All apps** tab.
27. Select the newly added **DIAD App**.

The screenshot shows the 'Power BI apps' interface with the 'All apps' tab selected (highlighted with a red box). The interface includes a search bar and filter options. Below the tabs, there are several app cards:

- DIAD** (Lab Admin1): This card has a red box around it. It contains the text "This is a DIAD app." and a "Get it now" button.
- COVID-19 US Track...** (Microsoft): Five-star rating (7 reviews).
- Google Analytics R...** (Havens Consulting Inc): Five-star rating (39 reviews).
- Github Repository ...** (Microsoft): Five-star rating (31 reviews).
- Microsoft 365 Usag...** (Microsoft Corporation): Five-star rating (142 reviews).
- Microsoft Sample -...** (Microsoft retail analysis sa...): Five-star rating (15 reviews).

This is a one-time registration. Going forward, when you select **Apps** in the left pane, you'll see the **DIAD App** in the list of Apps you have registered.

Your newly created DIAD App should look similar to the figure below:



Now that we've published our App and sent it to our teammates, in the next unit, we'll cover the process of accessing the report from a mobile device.

## Next unit: Exercise – Access the report from your mobile device

[Continue >](#)

✓ 100 XP

# Exercise – Access the report from your mobile device

10 minutes

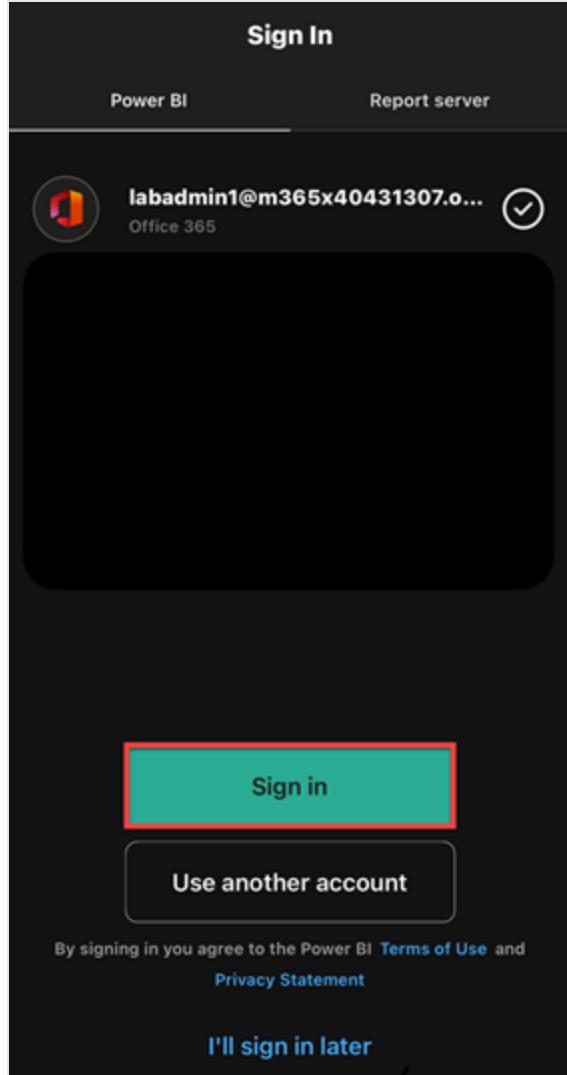
In this unit, we'll go through the Power BI Mobile App and cover the steps needed to access the DIAD Final Report we have been working on.

## Mobile app

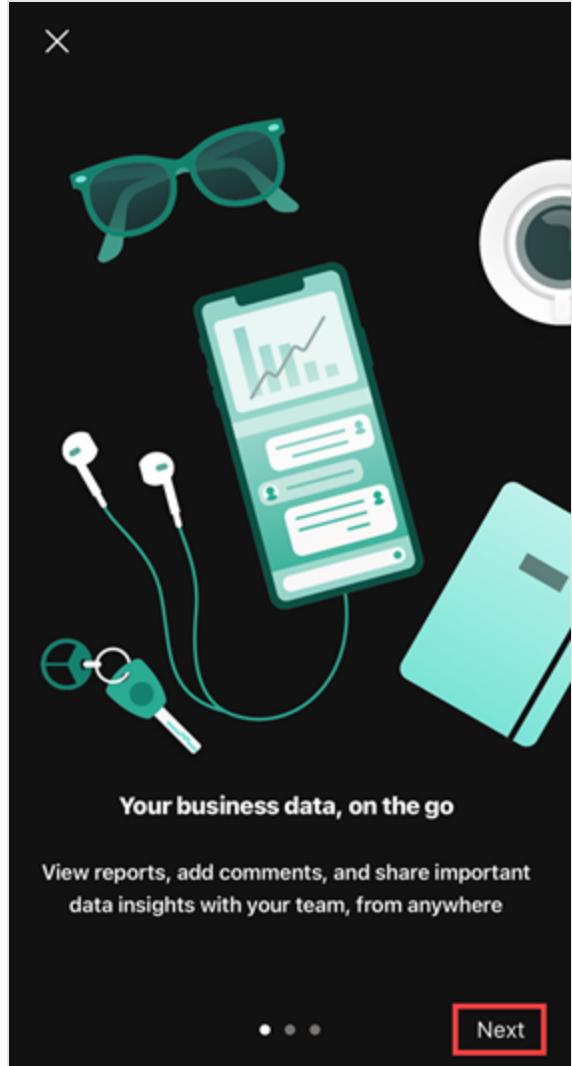
1. Open the Power BI Mobile App on your mobile device.



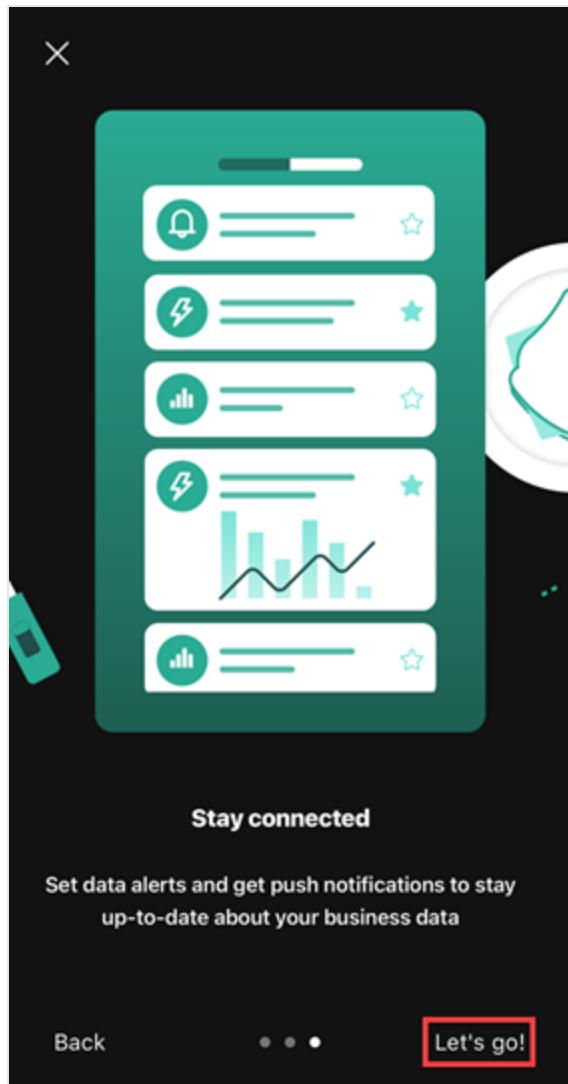
2. Select **Sign in** and follow the steps for entering your credentials.



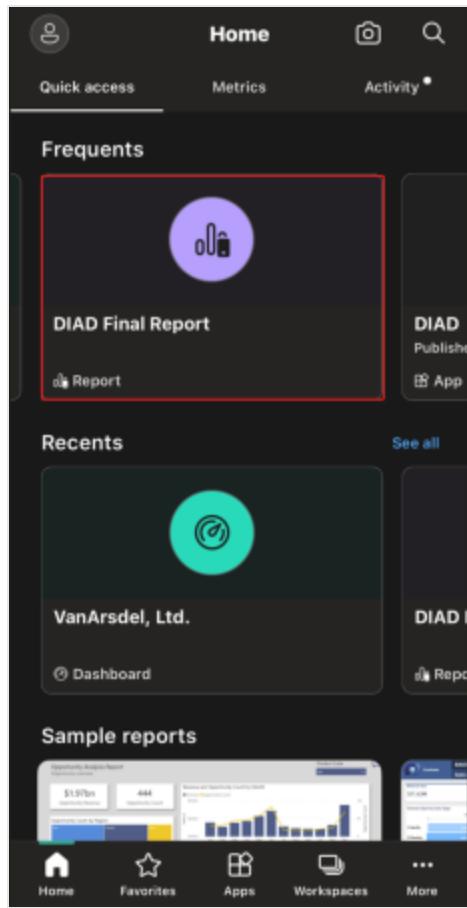
3. Once you have signed in, you'll be prompted through a walk-through of the App. Select **Next** to continue through the App walk-though.



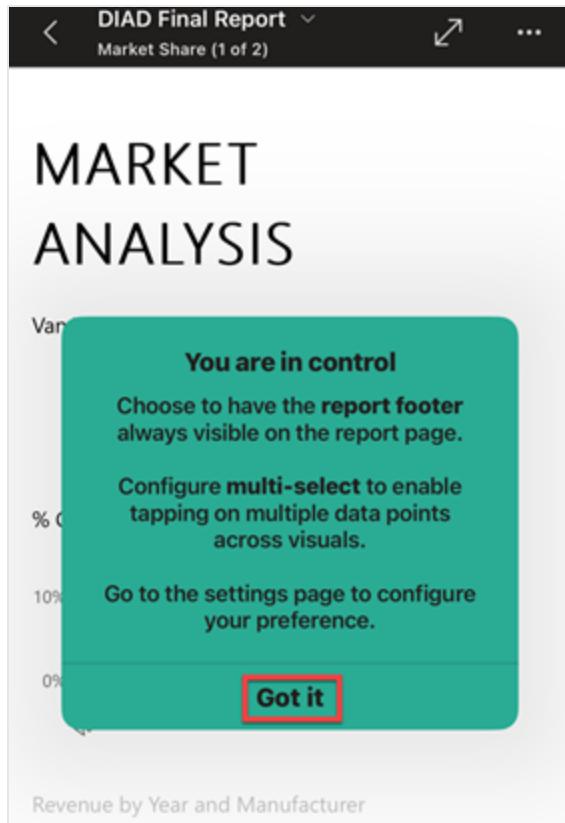
4. On the last page of the walk-through, select **Let's go!** to navigate to the **Home** screen of the Mobile App.



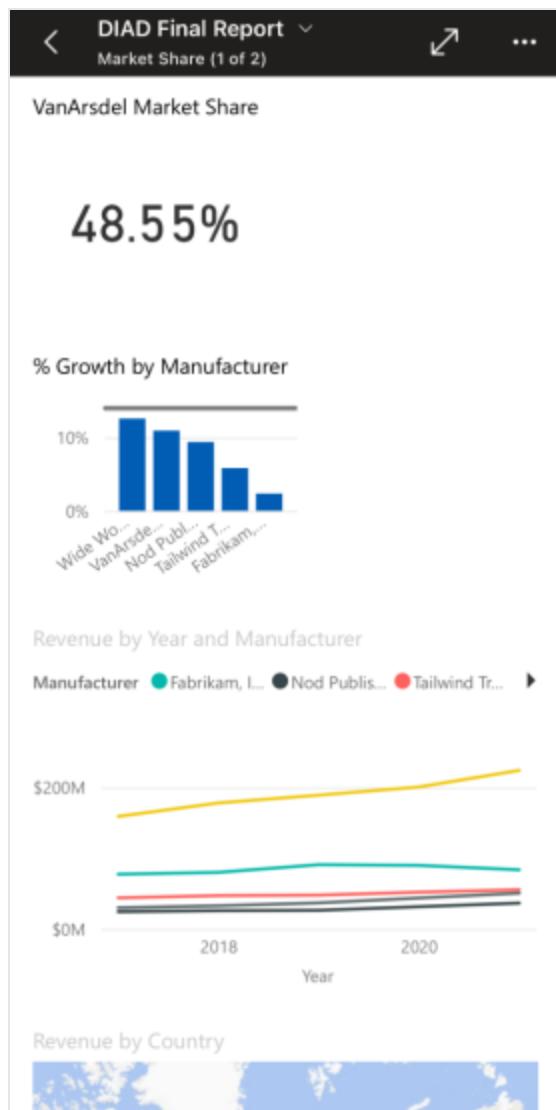
5. A dialog box will appear asking if you want to allow notifications from Power BI on your mobile app. Select **Allow** or **No, thanks**.
6. Once you've made the choice to allow notifications or not, you'll see the main home screen of the Power BI Mobile App. Under the **Frequent** section, select the **DIAD Final Report** (report).



7. Once you have selected the DIAD Final Report, a You are in control dialog box will appear. Select Got it.



8. Lastly, you should see the Mobile view you published from Power BI Desktop



Next unit: Check your knowledge

Continue >



# Summary

2 minutes

In this module, you learned how to interact with your Power BI Dashboard. You also learned how to share and to collaborate with other team members, published your first Power BI App through the Power BI Service, and learned how to view dashboards on the Power BI Mobile App.

Learned concepts:

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- Managing user access, and the four levels of permission:
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**Module incomplete:**

[Go back to finish >](#)

