Power BI Desktop Advanced

Power BI is a suite of business analytics tools to analyse data and share insights. Power BI Desktop transforms your company's data into rich visuals for you to monitor your business and get answers quickly with rich dashboards available on every device.

Target student: This course is intended for people who want to use all the capabilities of the Power BI platform to build self-serviced business intelligence solutions.

Duration: 3 Day

Timings: 09:30 – 16:30

Max number of delegates: 8

Students will learn:

- Power BI Desktop Features
- Power BI Concepts and Terms
- Manage Data Visualizations
- Manage DAX formulas
- Publish and Share Power BI

Module 7: Sharing Content

- Power BI Service
- Sharing Dashboards with internal and External users
- Sharing content with Office 365 groups
- Using Publish to Web with Dashboards

Module 8: Power BI Workspaces

- Understanding Workspaces
- Creating Workspaces
- Personal vs Workspace Permissions and Roles

Module 9: Power BI App

- Supported Platforms
- Creating Dashboards for Mobile devices
- Accessing Reports and Dashboards from Mobile

We can improve the way people work

Increase productivity

Cut costs

Drive revenue

Improve satisfaction

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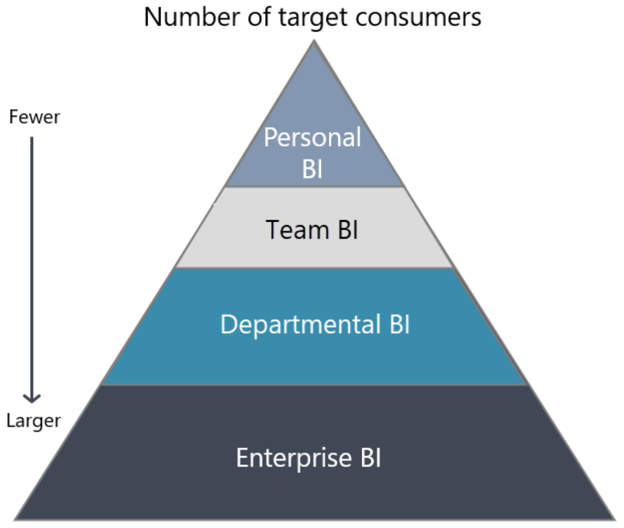
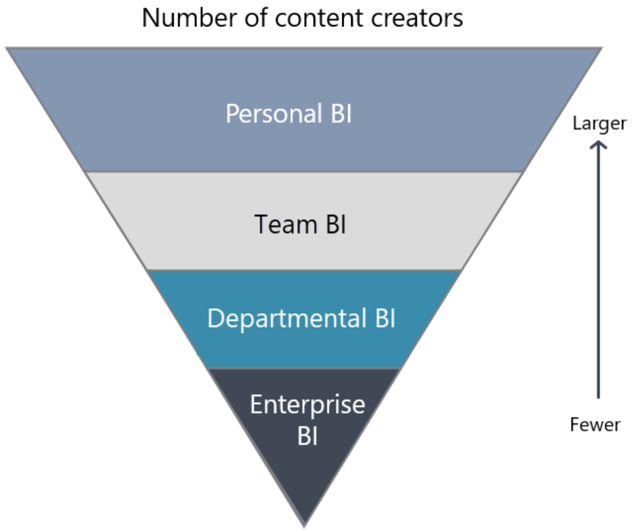
Module 7: Sharing Content





Target Consumers

The four scopes of content delivery shown in the above diagram include:

- **Personal BI:** As the name implies, intended for use by the creator. Sharing content with others isn't an objective. Therefore, personal BI has the fewest number of target consumers.
- **Team BI:** Collaborates and shares content with a relatively small number of colleagues who work closely together.
- **Departmental BI:** Delivers content to a large number of consumers, who can belong to a department or business unit.
- **Enterprise BI:** Delivers content broadly across organizational boundaries to the largest number of target consumers. Enterprise content is most often managed by a centralised team and is subject to additional governance requirements.

Content Creators

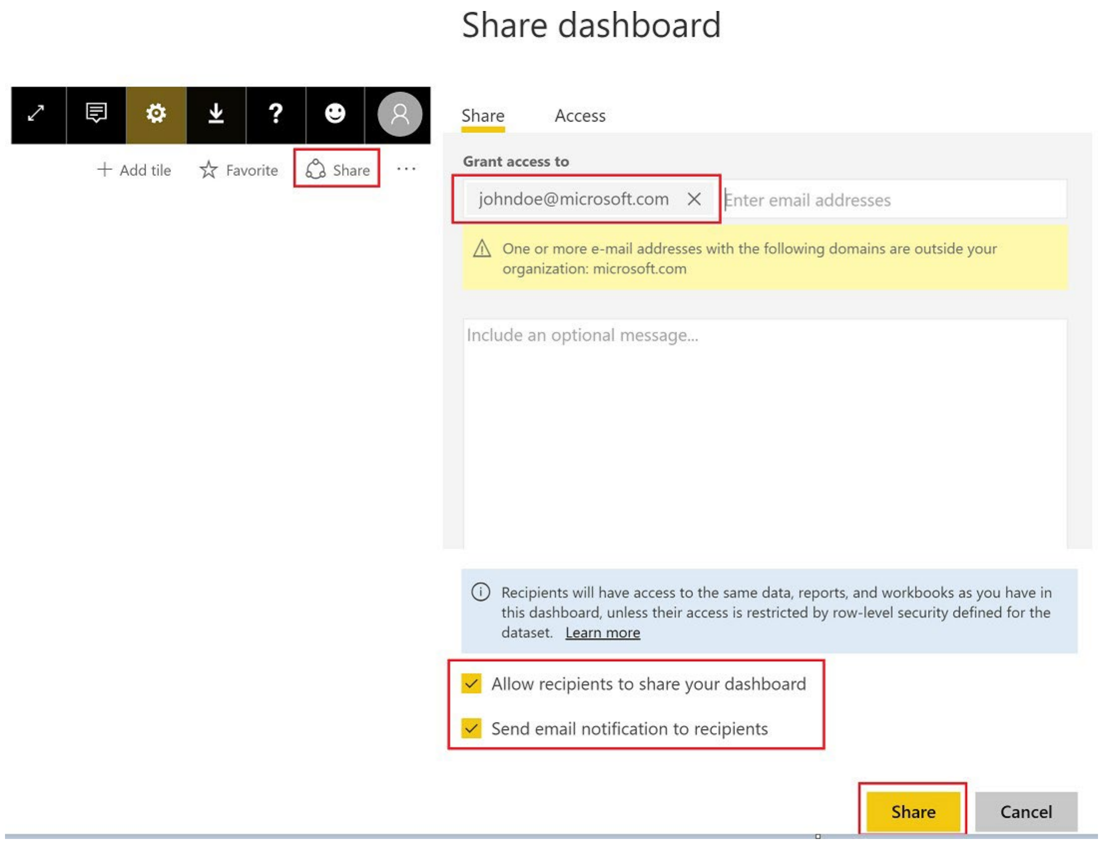
The four scopes of content creators shown in the above diagram include:

- **Personal BI:** Represents the largest number of creators because any user can work with data using business-led self-service BI methods. Although managed self-service BI methods can be used, it's less common with personal BI.
- **Team BI:** Colleagues within a team collaborate and share with each other using business-led self-service BI patterns. It has the next largest number of creators in the organization. Managed self-service BI patterns may also begin to emerge as skill levels advance.
- **Departmental BI:** Involves a smaller population of creators. They're likely to be considered power users who are using sophisticated tools to create sophisticated solutions. Managed self-service BI practices are very common and highly encouraged.
- **Enterprise BI:** Involves the smallest number of content creators because it typically includes only professional BI developers who work in the BI team, the COE, or in IT.

Sharing Dashboards

Now that you have a dashboard built, let's share it with your colleagues.

1. Select **Dashboards ->** then **Select the Dashboard you want to share** to navigate back to the dashboard.
2. You can share your dashboard with your team using their email address. Click on the **Share** in the top right of the screen.
3. Enter **email address** of the members of your team separate by "**;**". Power BI is connected to Azure Active directory.
4. Enter appropriate **message** in the text box below the email addresses.
5. You can **allow recipients to share these dashboards** with other team members. If you do not want the users to re-share, please deselect the checkbox and then **Share** the dashboard.



Power BI service will send out email notification if the option is selected. Once the recipient accepts the invite the user will get a read only copy of the dashboard and will see any changes to the dashboard you make periodically.

If the dashboard is backed by tiles from on premise SSAS then the recipients' credential is flown through to SSAS and the Power BI service retrieves the data that can be accessed by the recipient.

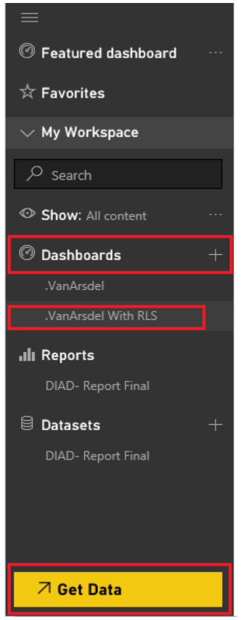
Row-Level Security

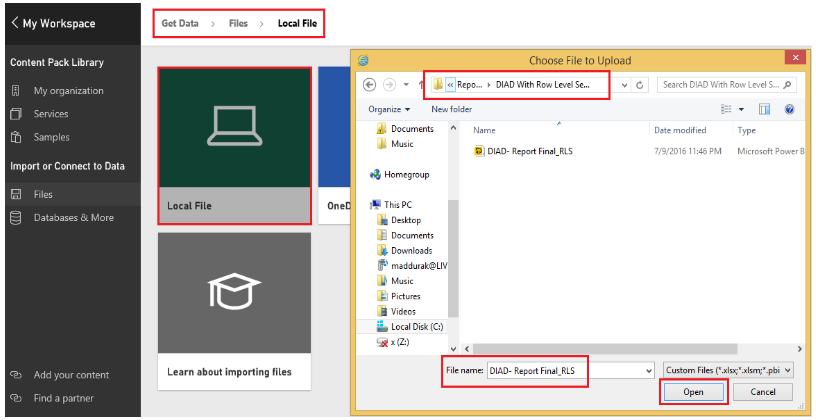
Row-level security with Power BI can be used to restrict data access for given users. Remember we have created various roles in the Power BI Desktop model. Using Power BI Service, we will add users to these roles.

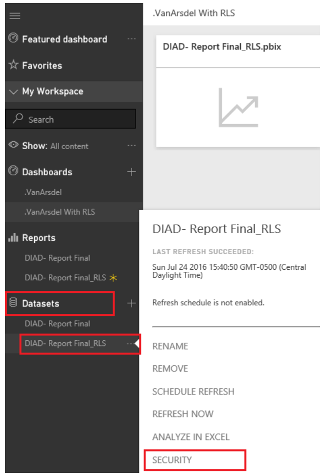
For dashboards with row-level security enabled, you can publish a different Power BI Desktop file which has row-level security created.

1. From the left-hand pane, select the Dashboard you wish to publish and share.
2. Navigate to the selected dashboard by clicking on **Dashboards -> Selected dashboard**
3. Click on the **+** sign next to **Dashboards** to create a new dashboard.
4. Rename the dashboard as with a “ **With RLS”** suffix.
5. From the left panel, select **Get Data**.

6. Select **Files** in **Get Data** page.
7. Select **Local File** in the next page.
8. Browse to .pbix file with the “ **With RLS”** suffix and select **Open**.
9. Once the data is imported, a notification appears on the top right corner.
10. In the left panel, **hover** over to .pbix file under **Datasets** section. Click on the **ellipsis**.
11. Click on **SECURITY**. Row-Level Security page is displayed. You can create and configure roles.



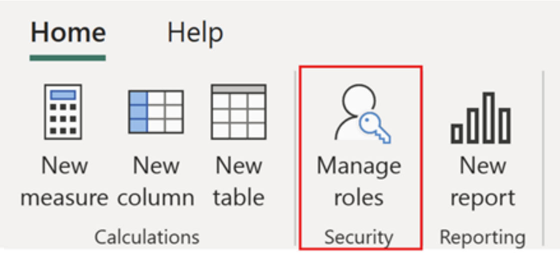




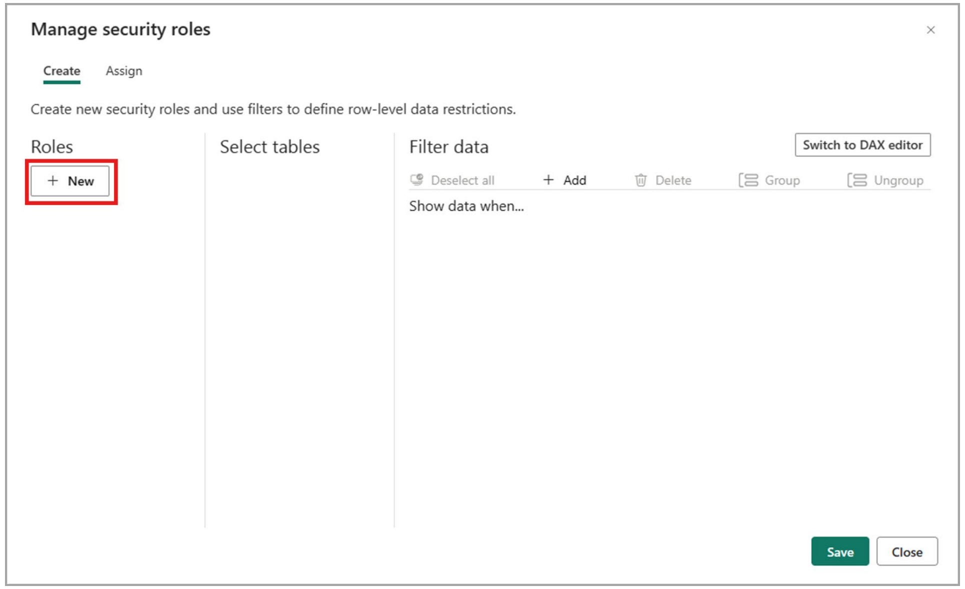
Define row-level security roles and rules

You can define security roles by taking the following steps:

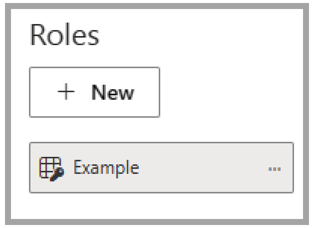
1. From the ribbon, select **Manage roles.**



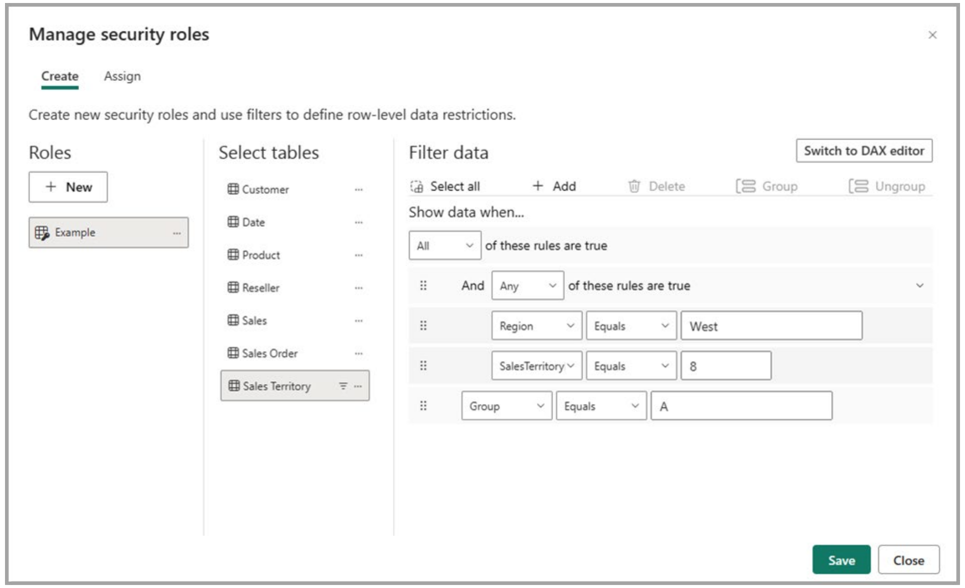
2. From the **Manage roles** window, select **New** to create a new role.



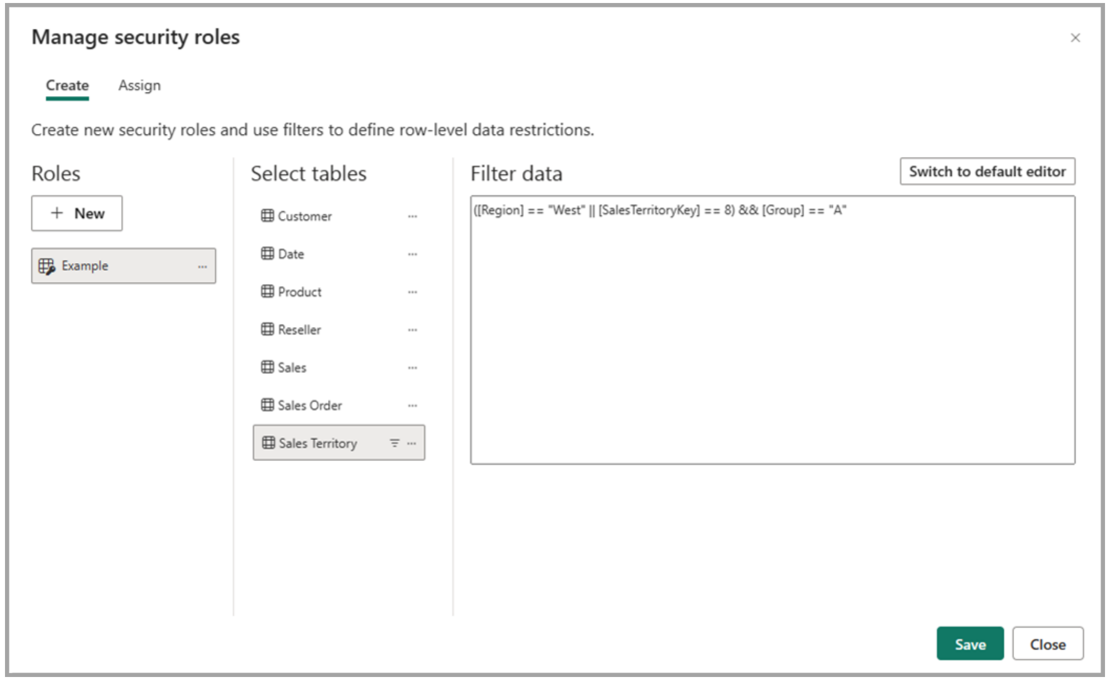
3. Under **Roles**, provide a name for the role and select enter.



4. Under **Select tables**, select the table to which you want to apply a row-level security filter.
5. Under **Filter data**, use the default editor to define your roles. The expressions created return a true or false value.



6. Optionally select **Switch to DAX editor** to use the DAX editor to define your role. You can switch back to the default editor by selecting **Switch to default editor**. All changes made in either editor interface persist when switching interfaces when possible.

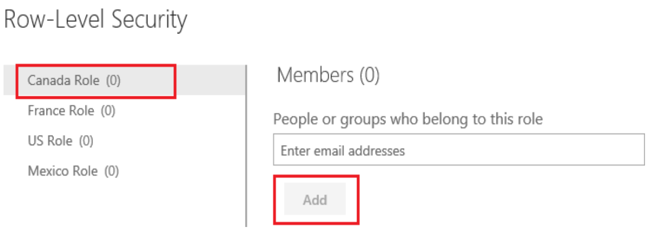


When defining a role using the DAX editor that can't be defined in the default editor, if you attempt to switch to the default editor you'll be prompted with a warning that switching editors may result in some information being lost. To keep this information, select **Cancel** and continue only editing this role in the DAX editor.

7. Select **Save** to save the role.

8. Once the role is saved, select **Assign** to add users to the role. Once assigned, select **Save** to save the role assignments and close the RLS settings modal.

9. Click on each role, and enter members **email address.**
10. Click on **Add** to add users.



11. We will add users to these roles once we **publish the model to Power BI Service**.

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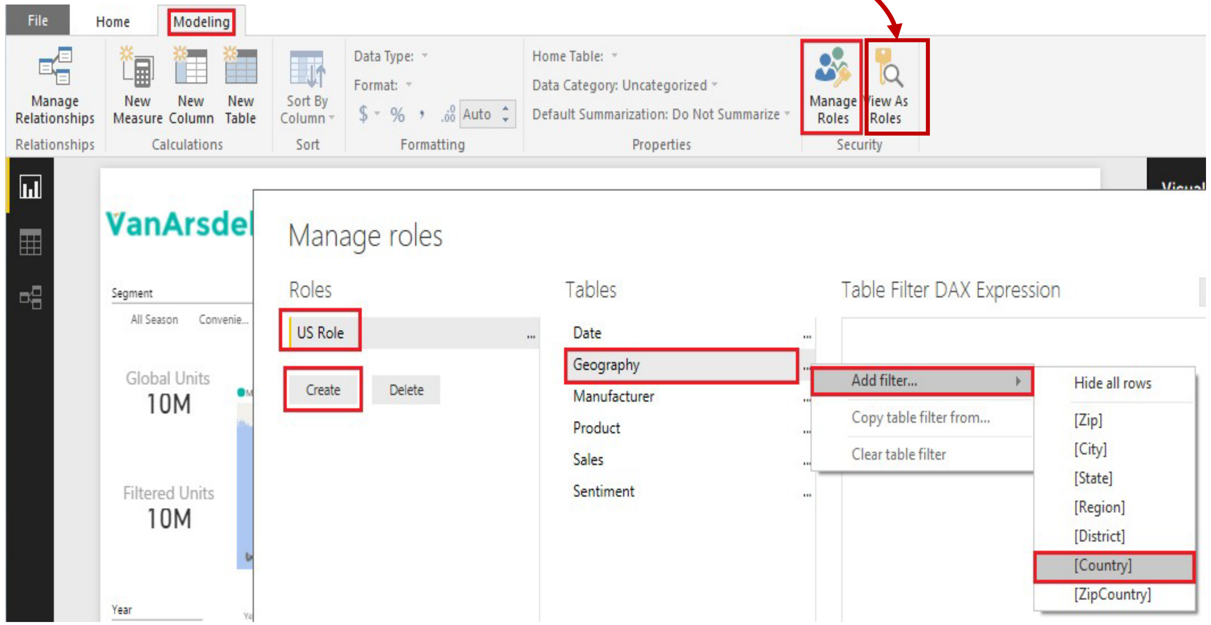
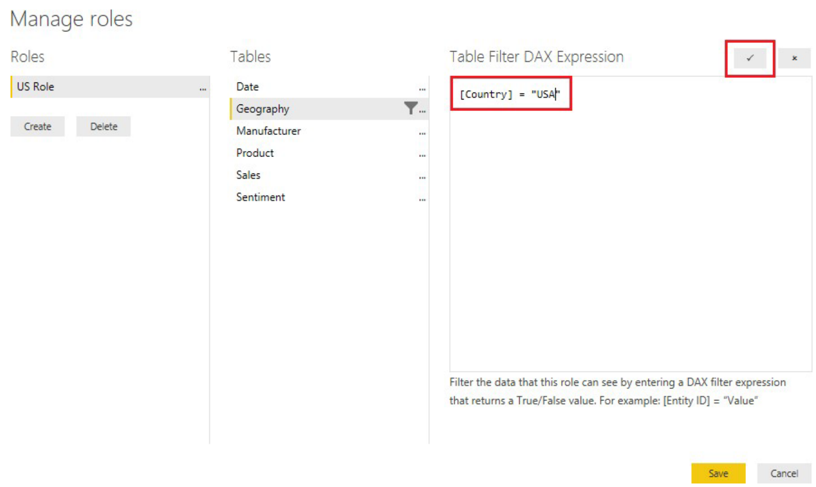
Viewing Model as Roles

1. From the ribbon, select **Modelling -> View As Roles**.
2. Select Role.
3. Click OK.
4. Click on Stop viewing to **exit Role view**.



Worked Example:

Now we have the model and report ready, we want to add security around it, so that individuals from a USA view only USA data and individuals from Mexico view only Mexico data and so forth.

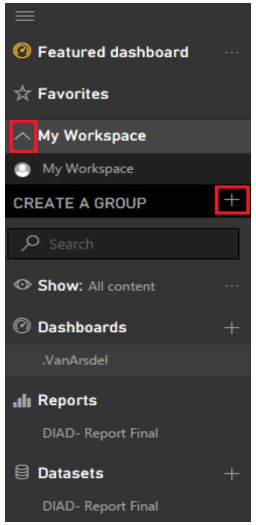


1. From the ribbon select **Modelling -> Manage Roles.**
2. Manage roles dialog opens. Click on **Create** button.
3. Name the role as **US Role.**
4. Click on the **ellipsis** next to **Geography.**
5. Select **Add Filter -> [Country].**
6. Notice a DAX Expression appears in the text area.
7. Edit the DAX Expression to **[Country] = "USA".**
8. Click on the **check mark** on the top right corner. This will validate the DAX expression.

Collaboration via Office 365 Groups

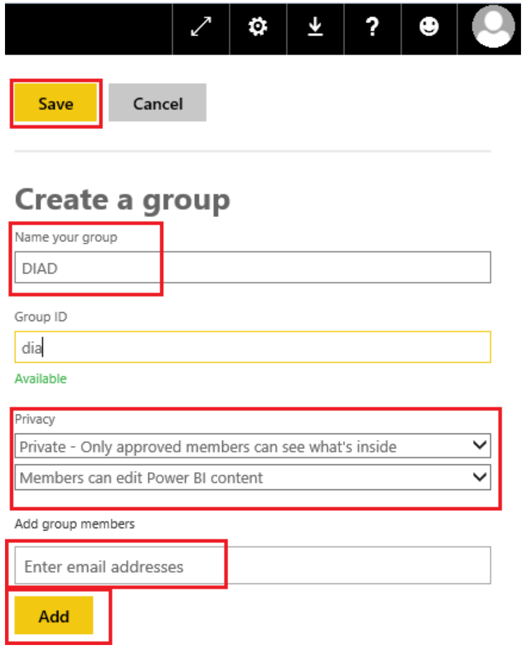
Power BI Service - Creating a Group

1. Log into your http://app.powerbi.com or the URL provided by your instructor using your organisational credential.
2. Expand the left panel.
3. Select the drop down next to **My Workspace.**
4. Click the **+** sign next to **CREATE A GROUP**. If you are part of other groups those groups will be show here as you can see from the figure.



This will the allow you to pair up with a co-worker from your organisation.

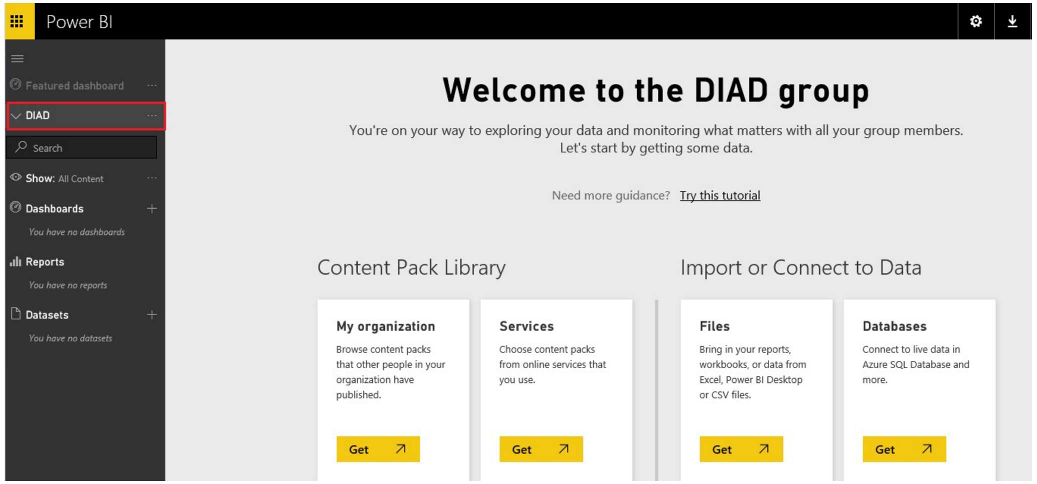
5. Notice Create a Group panel opens on the right side of the screen.
6. Enter a name for your group.
7. Select if you want the group to be private or public. We recommend using **private**.
8. Select if you want the members of the group to have the ability to edit content.
9. Enter the email addresses of users of your organizational who need to be part of this group as shown in the figure.
10. Click **Add** to add the members.
11. Save button is enabled at the top of the screen. Click on **Save**.



You will now have a group created.

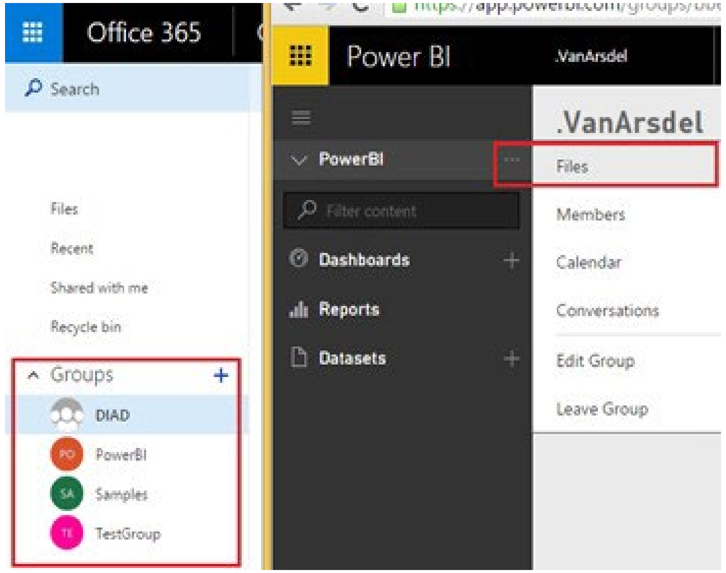
Notice that you are now navigated to the new group workspace you just created. In this example we created a group called DIAD.

In DIAD workspace, you have separate set of Dashboards, Reports and Datasets that are part of the group. You and your co- workers can bring content into the group, create dashboards together and package the set of dashboards, reports and datasets and **share them as content pack**.



When you create a group, there is a separate OneDrive account created for the group. You can have all your assets of Excel and Power BI Desktop files stored in the groups OneDrive.

You can get to the groups OneDrive account by **clicking on the ellipsis** next to the group name and selecting Files or logging into Office 365 and selecting the appropriate group.



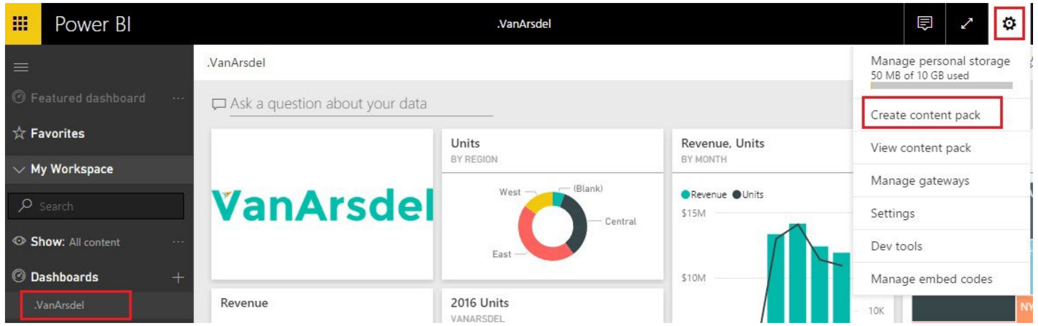
Please wait for automated email about creation of groups to see all the functionality about groups.

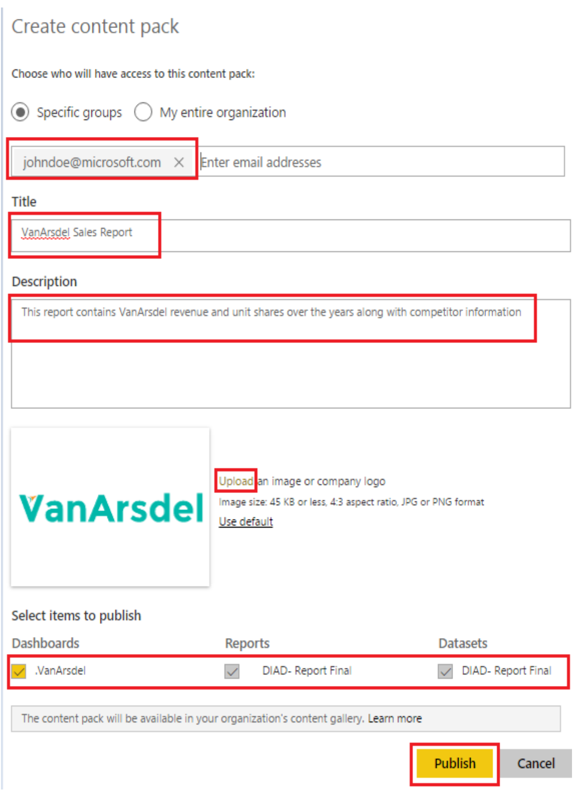
Power BI Service Part II - Sharing content to your organization

Distributing content to larger audiences for them to customise

To create a dashboard for your team so that they can customise it on their own follow the steps below:

1. Go to the **Selected Dashboard**.
2. Click on the settings icon on the top right and select "**Create content pack**" as shown in the figure.





3. Enter a valid **email address** with whom you want to share the content pack.
4. In the create content pack page enter the **Content Pack Title** and **Content Pack Description** as shown in the figure.
5. Select the **Upload text below Image** and assign the **Company Logo**.
6. You can select the set of Dashboards, reports and datasets to be shared.
7. Finally, you will be choose if you want to share this to a group of users or to entire organisation which is your entire company. **Follow the instructions from the instructor on what group to share your content pack**.
8. Click on **Publish**

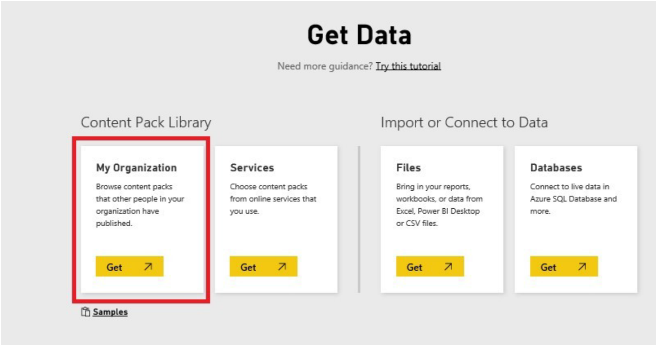
Notice that you are now navigated to the new group workspace you just created. In this example we created a group called DIAD.

9. You should see a notification that content pack creation was successful as shown in the figure.

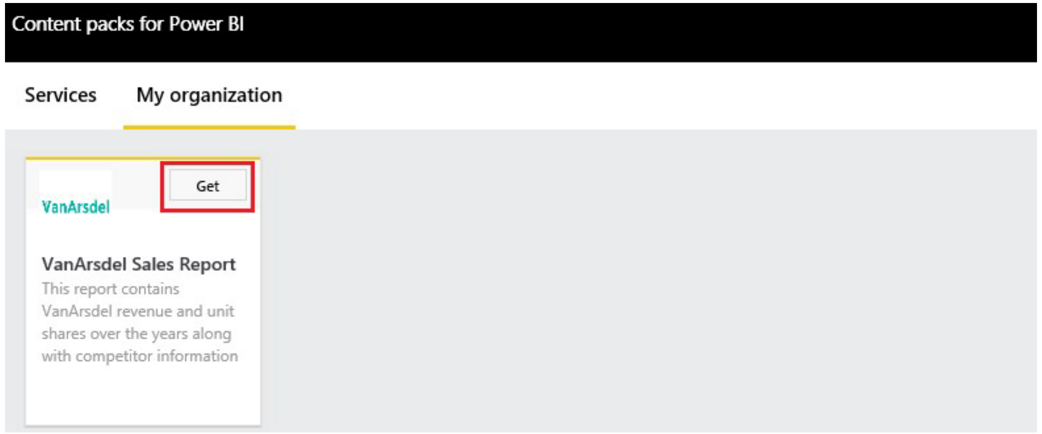
Identify a user from your company to whom you shared the content pack.

NOTE: This user can be you as well.

10. Click on **Get Data** on the Power BI Service.
11. In the Get Data page click on **Get** under **My Organization** as shown in the figure.



12. In **My Organization page** you will see the VanArsdel content package as shown in the figure.
13. Request the end user to click on **Get.**

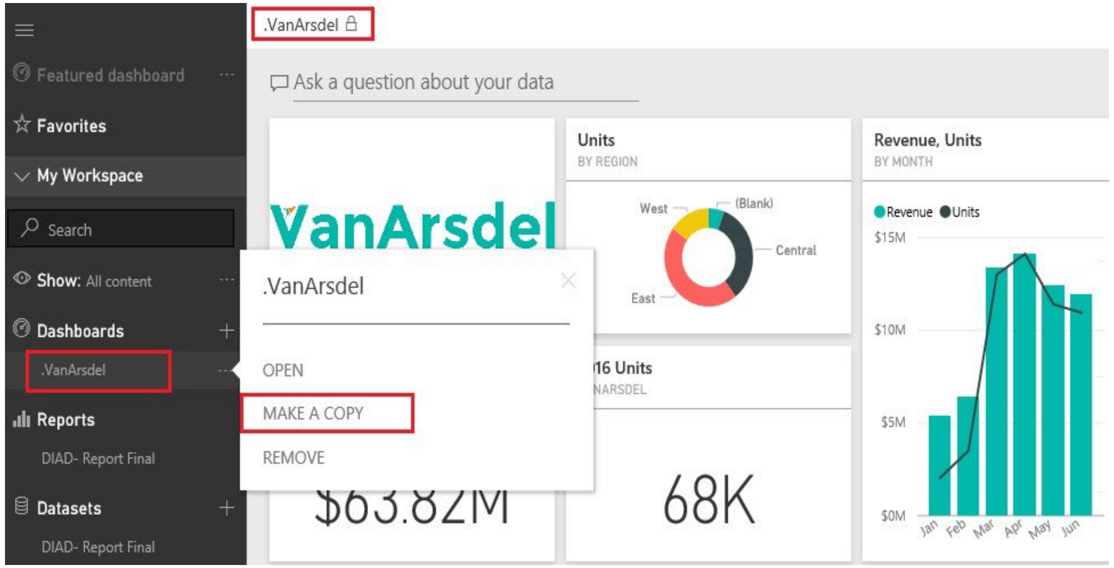


A new dashboard is created for the end user as shown in the figure.

NOTE: By default, the dashboard is a **read only dashboard** for the end user and any updates made to the content packs will be seen by the end user.

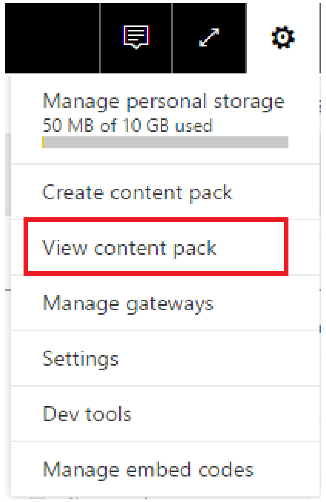
14. If the user wants to personalize (rearrange the tiles, add additional tiles from his/her reports) **then the user needs to make a copy** of the dashboard. Request your co-worker to click on the **ellipsis** next to Selected Dashboard and select **MAKE A COPY**.

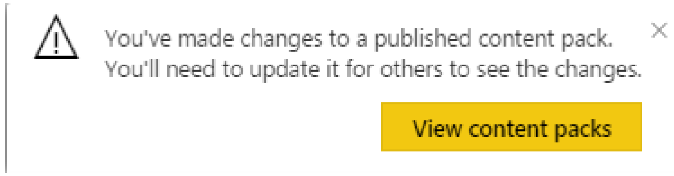
This creates a copy of the dashboard with edit capability.



Power BI Service Part III - Updating a content pack

- After publishing your content pack, you receive requests from key members of your team to organise and add additional content (tiles to the dashboard, new reports using the same data as well as additional data).
- After you update a content pack you will notice warning about changes to the content pack is displayed.
- You will see a warning on the top right stating that the dashboard that was published as content pack has changed. You do need to republish for your end users to see the changes
- Now that you have made all the changes, you do need to update the content pack. Click on the **Settings** and click on **View Content Pack.**
- In the View Content Packs page, you get to see all the content packs you have published, to whom you have published as well as date it was published.
- Notice there is a warning icon next to any content pack amended. Hover over the warning icon and warning details is displayed.
- You can edit or delete content pack to make changes. Click **Edit**.





- Make any changes to description you want to inform your users and click **Update** to republish your content pack. A dialog is displayed confirming the update.

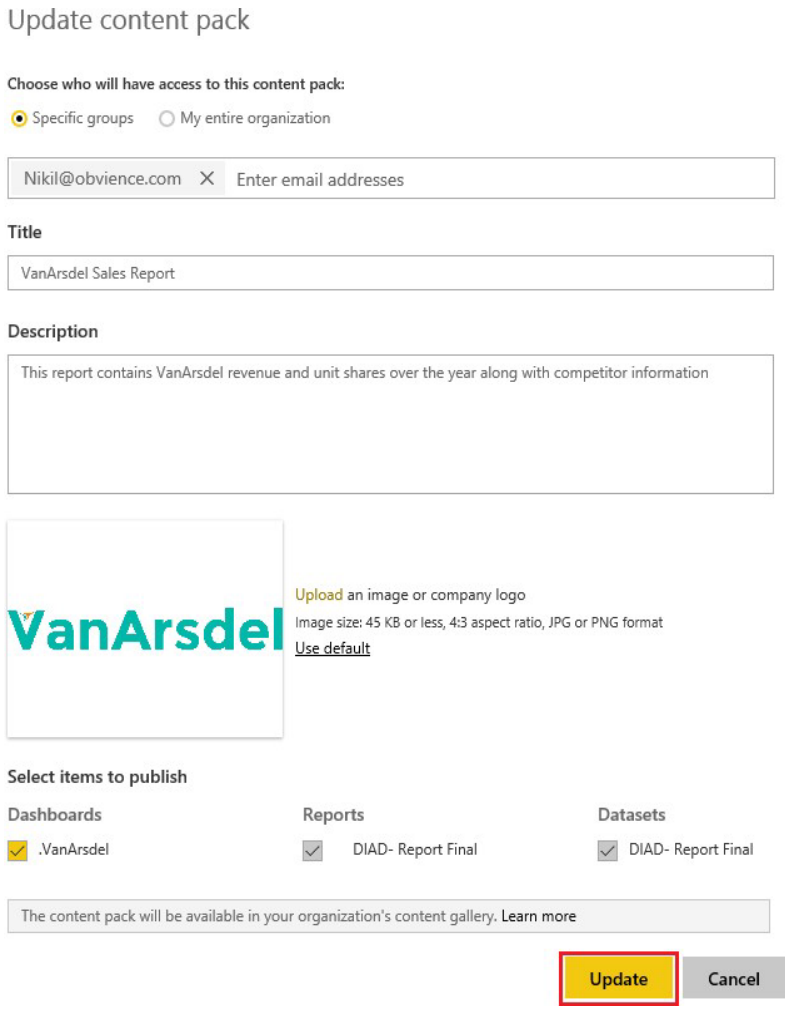
- **If your end-users DID NOT personalise the content pack**, they see the changes to the dashboard. No user action required.

- **If end-users have personalized the content pack**, they will see a warning that a new version of the content pack has been published. They can choose to get the updated content pack.

- Delivering the dashboards as content pack helps you in formatting the right content on the dashboard before your end-users can see the changes.

- The users will not see new data at random times.

- You can establish a rhythm in your organisation that changes will get published on a regular cadence that the users can expect. In addition, you can also manage this efficiently for large user group via security group.



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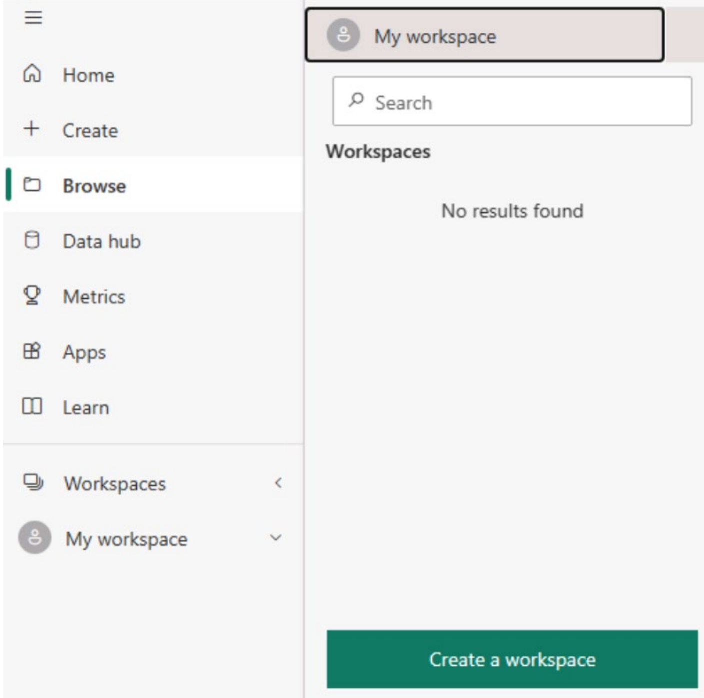
Module 8: Power BI Workspaces

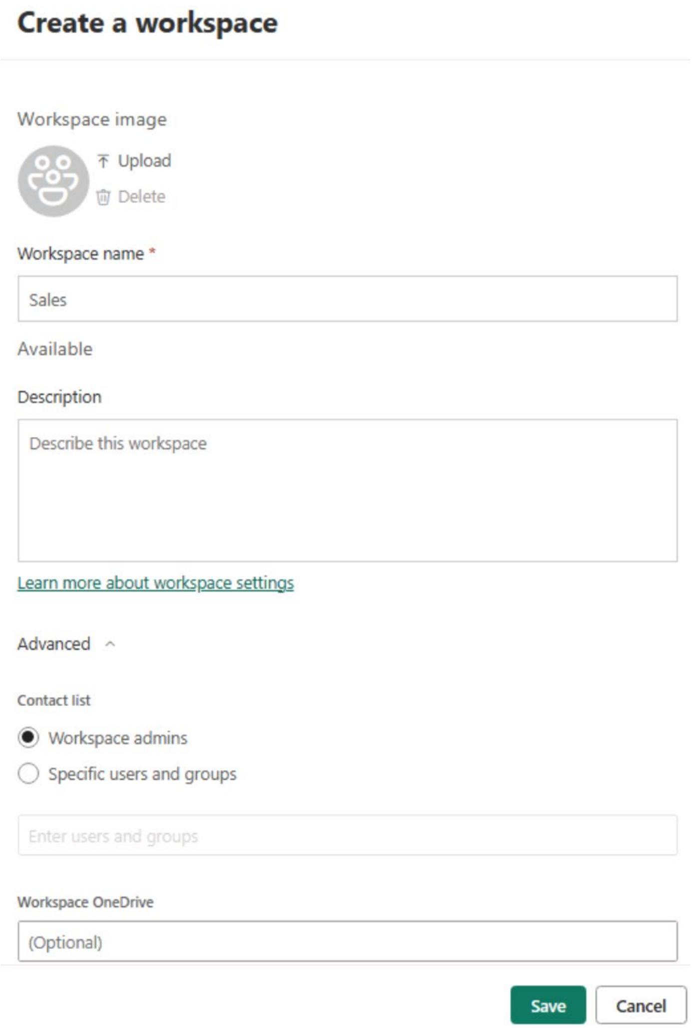
Distribute a report or dashboard

Create a workspace

Your first task is to create a workspace by following these steps:

1. In Power BI service, select the **Workspaces** menu from left navigation menu.
2. Select the **Create a workspace** button at the bottom of the resulting panel.





4. In the **Create a workspace** window, enter information in the **Workspace name** and **Description** fields and then upload a **Workspace image**.

5. In the **Advanced** drop-down menu, you can create a **Contact list** of users who will receive notifications if issues with the workspace occur.

   By default, these users are the workspace admins, but you can also add specific users. **You can also add this workspace to a specific OneDrive** and then choose whether this workspace will be a part of a dedicated capacity or not. Dedicated capacities are Power BI Premium features that ensure that your workspace will have its own computational resources as opposed to sharing resources with other users.

6. After you have filled out pertinent fields on the **Create a workspace** window, select **Save**.

Assign workspace roles

Now that you've successfully created a workspace, other users can collaborate with other teams to build additional dashboards and reports.

As the workspace owner, you want to ensure that appropriate access is given to. **Workspace roles** allow you to designate who can do what within a workspace. There are **four roles for workspaces**, and it's advised that you grant the minimum access necessary to collaborators.

The four roles are listed below, in order of most permissive to least, along with select permissions.

Admin

- Update and delete the workspace
- Add or remove people, including other admins

Member

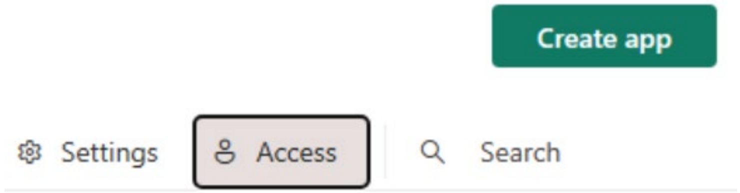
- Add members or others with lower permissions
- Publish, unpublish, and change permissions for an app

Contributor

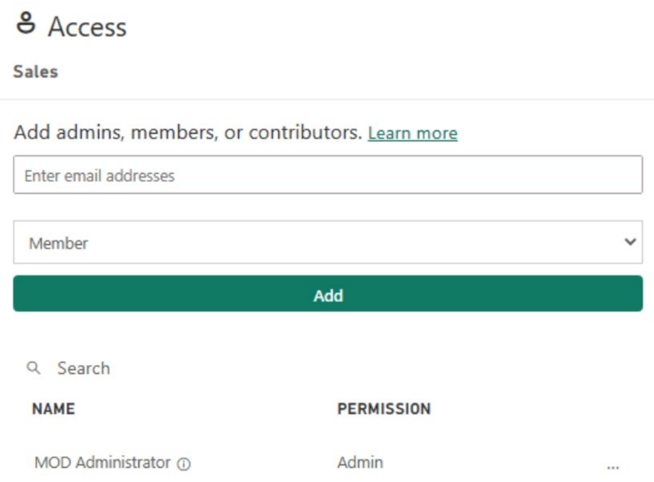
- Create, edit, and delete content, such as reports, in the workspace
- Publish reports to the workspace

Viewer

- View and interact with an item
- Read data that's stored in workspace dataflows



To assign these roles to users, go to the workspace that you've created and, in the upper-left corner of the ribbon, select **Access**.



In the resulting **Access** window, you can add email addresses of individual users, mail-enabled security groups, and distribution lists. You can also change the user's assigned role at the bottom of the page and delete the user from the workspace by selecting the ellipsis (**...**) next to their name.

Edit data models in the Power BI service (preview)

Power BI allows users to modify existing data models in the Power BI service using actions such as editing relationships, creating DAX measures and managing RLS. In this experience, users can work and collaborate simultaneously on the same data model.

Enable the preview feature

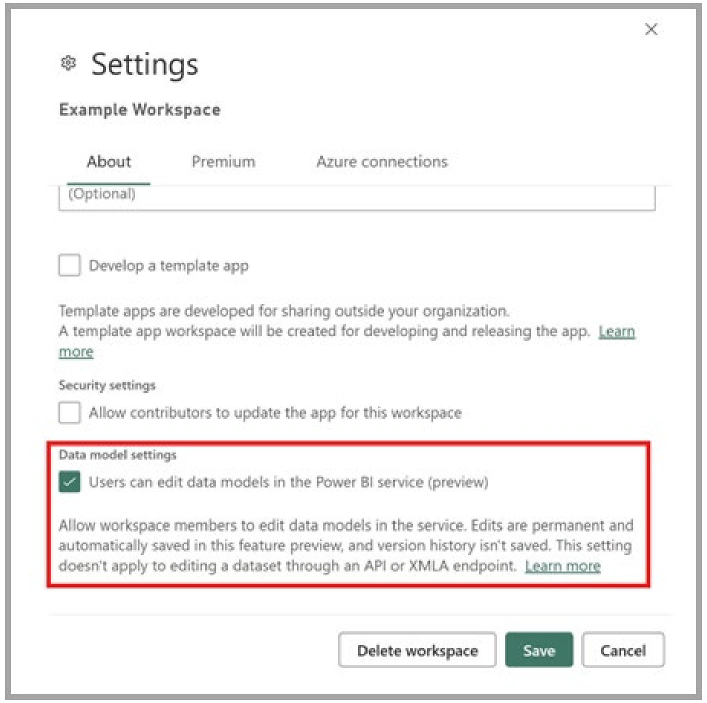
Editing data models in the Power BI service is automatically enabled for datasets stored in My Workspace. To open the data model for datasets stored in collaborative workspaces, you must turn on the preview feature for that workspace by completing the following steps:

Editing data models in the Power BI service is automatically enabled for datasets stored in *My Workspace*. To open the data model for datasets stored in collaborative workspaces, you must turn on the preview feature for that workspace by completing the following steps:

1. In the Power BI service, select **Settings** for the workspace where you want to enable the preview feature

2. Select **Advanced > Data model settings > Users can edit data models in the Power BI service (preview)**

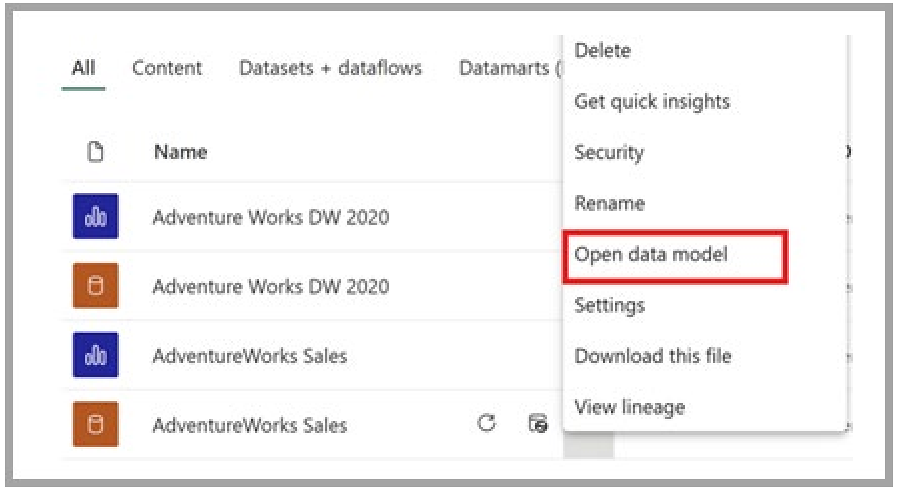
3. Select **Save** to see the new experience for datasets in your workspace.



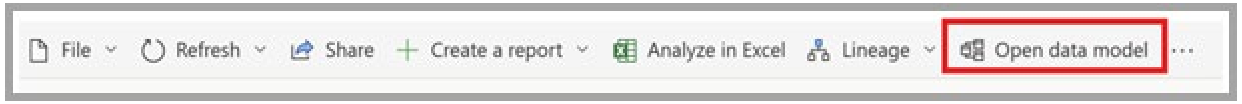
Open the data model

You can open the data model for your dataset in the following ways:

•From the workspace content list, select **More options (...)** for the dataset and select **Open data model**.

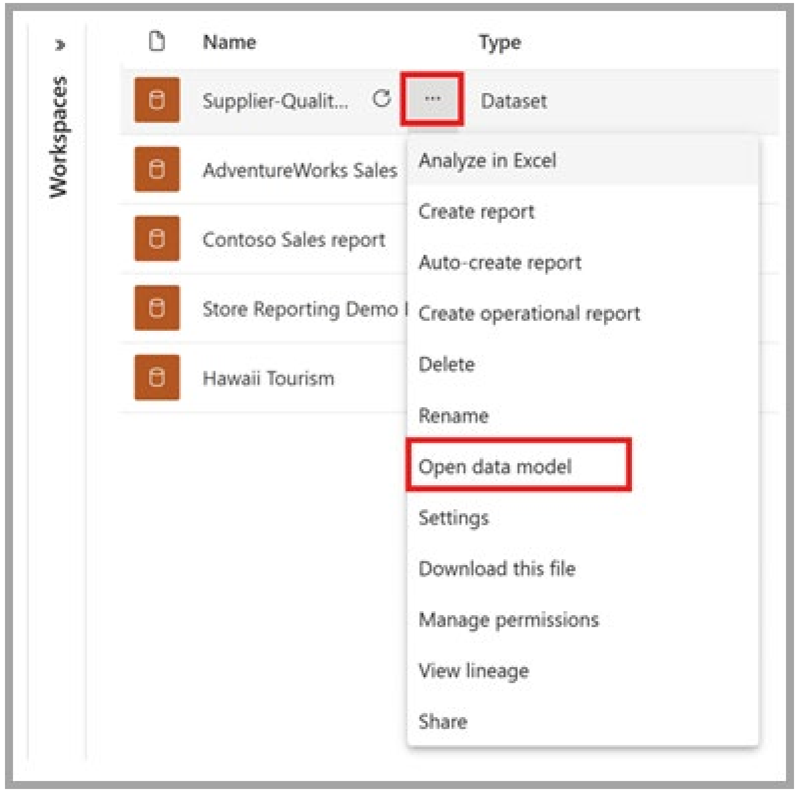


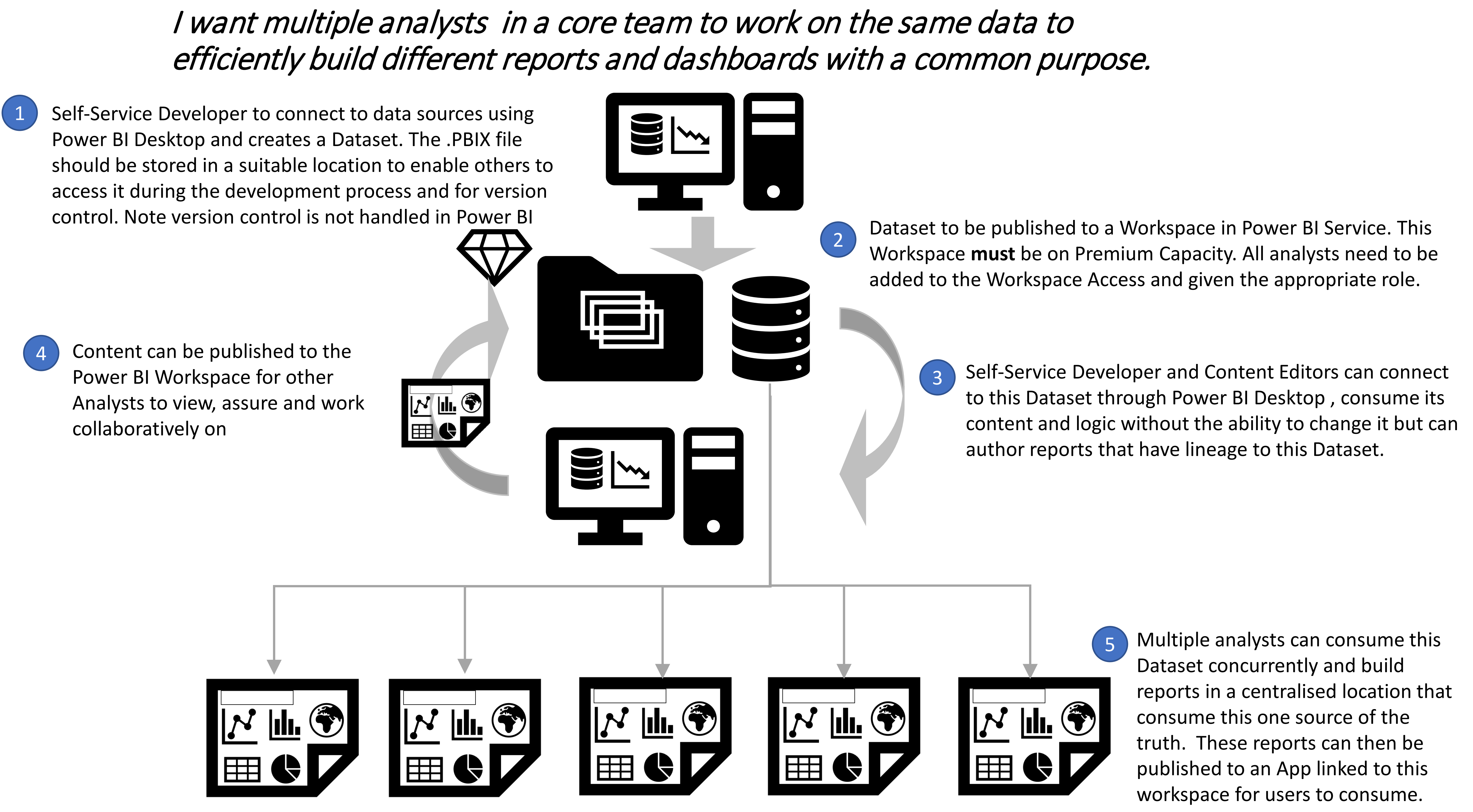
•From the dataset details page, select **Open data model**.



•From **edit mode** for a report connected to the dataset, select **Open data model** to open the corresponding data model in another tab.

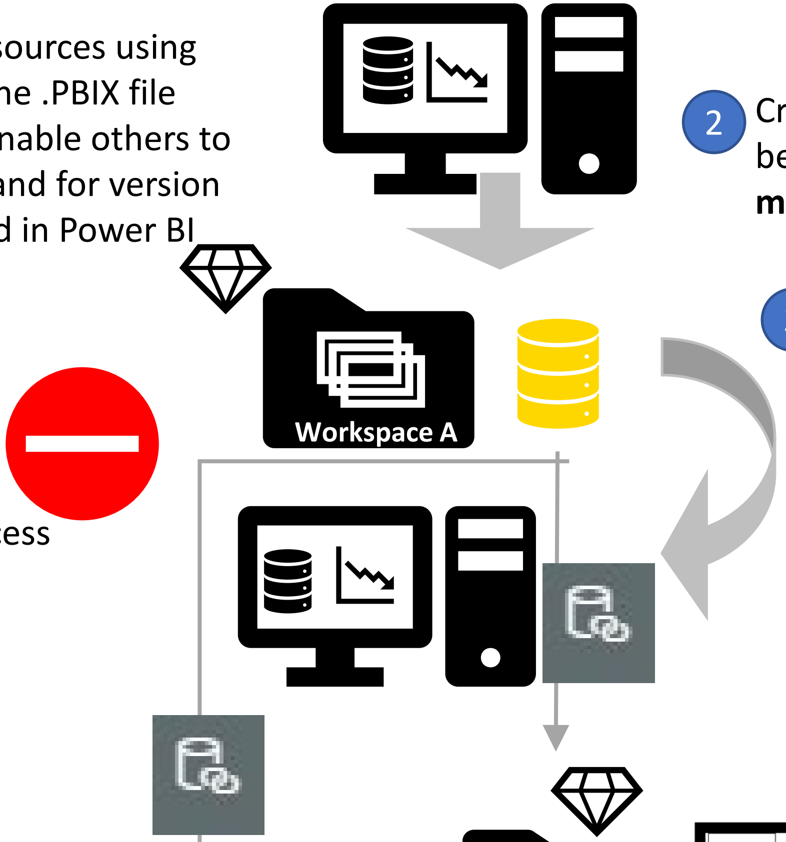
•From the datahub content list, select **More options (...)** for the dataset and select **Open data model**.




I want multiple analysts in a core team to work on the same data to efficiently build different reports and dashboards with a common purpose.
1
Self-Service Developer to connect to data sources using Power BI Desktop and creates a Dataset. The .PBIX file should be stored in a suitable location to enable others to access it during the development process and for version control. Note version control is not handled in Power BI
2
Dataset to be published to a Workspace in Power BI Service. This Workspace **must** be on Premium Capacity. All analysts need to be added to the Workspace Access and given the appropriate role.
3
Self-Service Developer and Content Editors can connect to this Dataset through Power BI Desktop , consume its content and logic without the ability to change it but can author reports that have lineage to this Dataset.
4
Content can be published to the Power BI Workspace for other Analysts to view, assure and work collaboratively on
5
Multiple analysts can consume this Dataset concurrently and build reports in a centralised location that consume this one source of the truth. These reports can then be published to an App linked to this workspace for users to consume.

I want analysts across my organisation to be able to use common data, sharing only the data and not enabling them to see content authored by me and my direct team

1 Self-Service Developer to connect to data sources using Power BI Desktop and creates a Dataset. The .PBIX file should be stored in a suitable location to enable others to access it during the development process and for version control. Note version control is not handled in Power BI



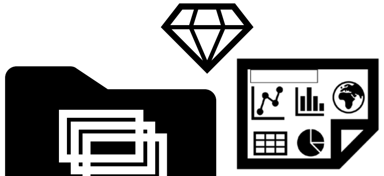
2 Create a 'Core' Workspace to store the **ONE Dataset.** This dataset to be published to a Workspace in Power BI Service. This Workspace **must** be on Premium Capacity.

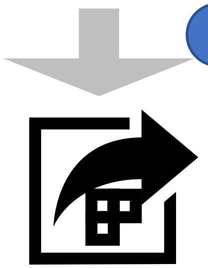
3 If you only want to add people to be able to build reports from the dataset, there is no need to add them to the Workspace. Also adding them to the Workspace as a Viewer will not enable them to see the Dataset.

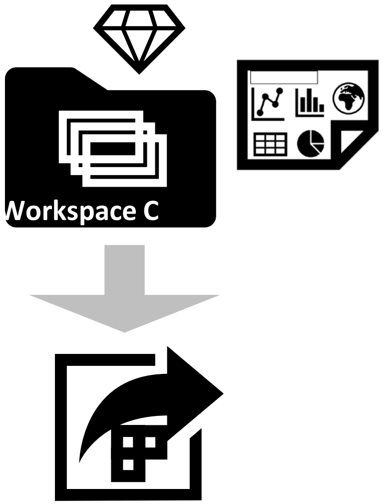
Instead use the "Manage Permissions" on the Dataset, adding users who need to consume the dataset, only enabling "Allow recipients to build new content from the underlying datasets". Alternatively when publishing an App you can enable all App users to build reports based on this dataset by selecting "Allow all users to connect to the app's underlying datasets using the Build permission."

Also consider making the Dataset an Endorsed or Promoted Dataset

4 By sharing the dataset this way, those who have access to the Dataset will have no access to or visibility to the Workspace







5 Users with access to this dataset can now build reports directly from it in Power BI Desktop without the ability to edit it. They can save these repots to other Workspaces and the Dataset is considered a shared or linked dataset, as denoted by the link that appears next to the dataset in the workspace. There is only 1 dataset and the owners of this can see all the lineage of this from their workspace. They cannot save to the host workspace

I want analysts across my organisation to be able to use common data, with those outside my team being able to view content we have created to minimise duplication

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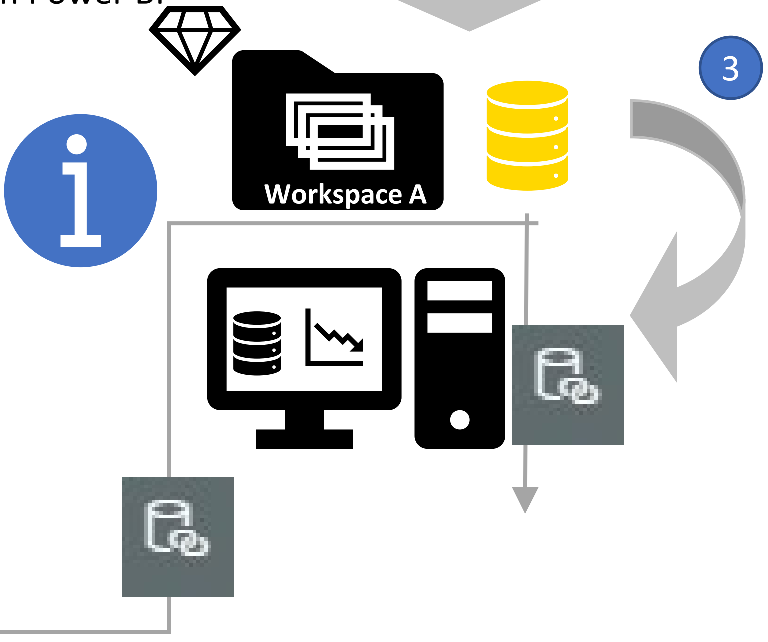

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Next add them as a Viewer to the Workspace to enable them to see content that has been created but with no ability to edit this, delete it or save content in this workspace

Also consider making the Dataset an Endorsed or Promoted Dataset

4 By sharing the dataset this way, those who have access to the dataset will also have visibility of the reports in the workspace and can copy these as a basis for their reports or see that a report already exists so they do not need to duplicate this

5 These users can then use the single data set to act as a source of truth and then publish reports to a Workspace they have access to. Importantly they will be able to view existing content the Workspace owner has created to help minimise duplication

I want analysts across my organisation to be able to use common data, with the ability to work collaboratively as one wider team on reports and dashboards

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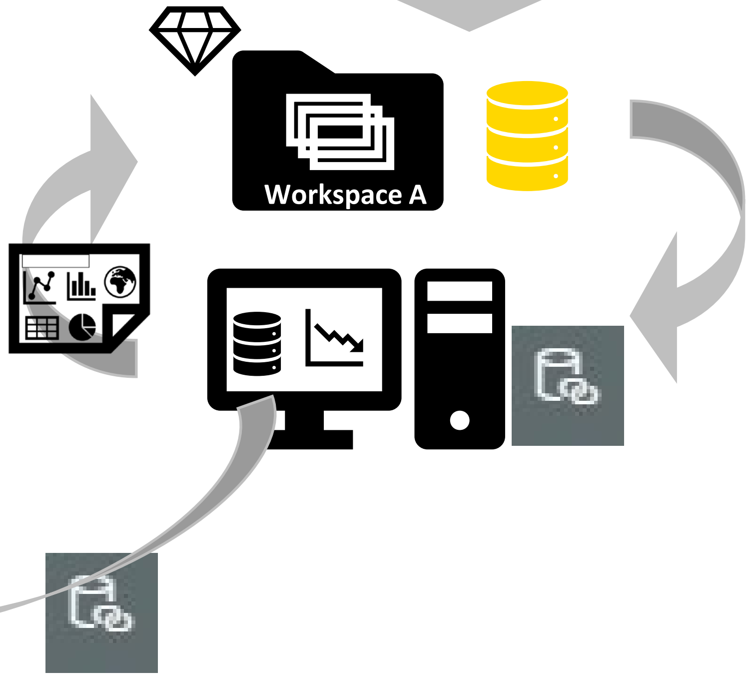
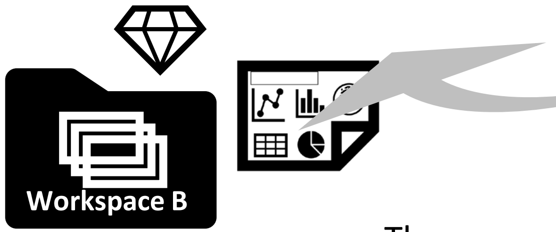
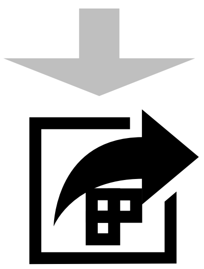
3 Create a 'Core' Workspace to store the **ONE Dataset.**

4 By sharing the dataset this way, those who have access to the dataset will also be able to save back to the workspace and edit/delete any content that is already present, even if they did not create it



If you want to add people so that they can consume the dataset AND save content back to the Workspace where the Dataset is stored then you need to add them to the Workspace Access. This approach is a more collaborative approach as it provides a set-up where you can work on reports together and separately and reduces the likelihood of duplication. Note that you need to decide between adding them as a





5 These users can then use the single data set to act as a source of truth and then either publish reports back to the source Workspace so to work collaboratively and avoid duplication or save this content to a different workspace whilst still maintaining data lineage

Contributor: These roles can edit content and delete existing content and also save their content to this workspace or others but importantly cannot publish an App to end users thus providing Workspace members and Admin more control

Members: Can do everything a contributor can do but can also publish content of the Workspace to an App.

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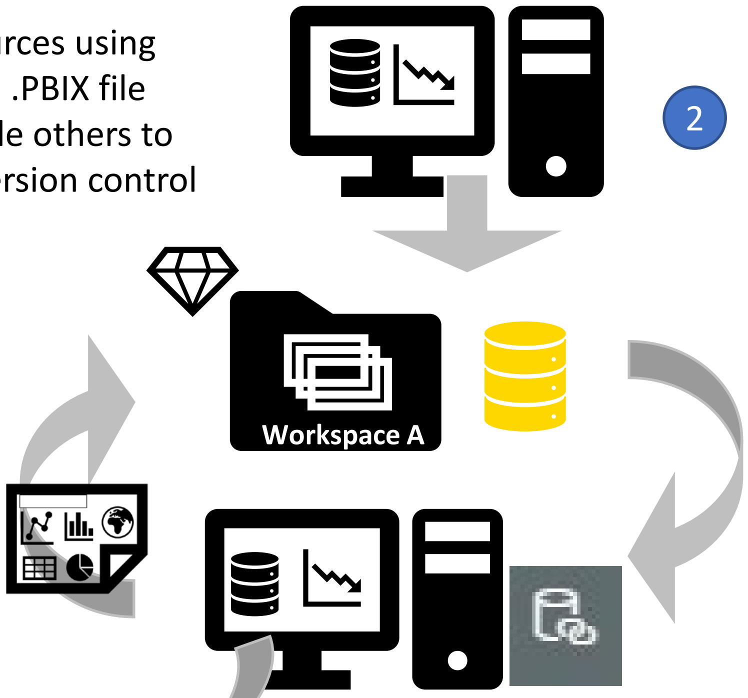

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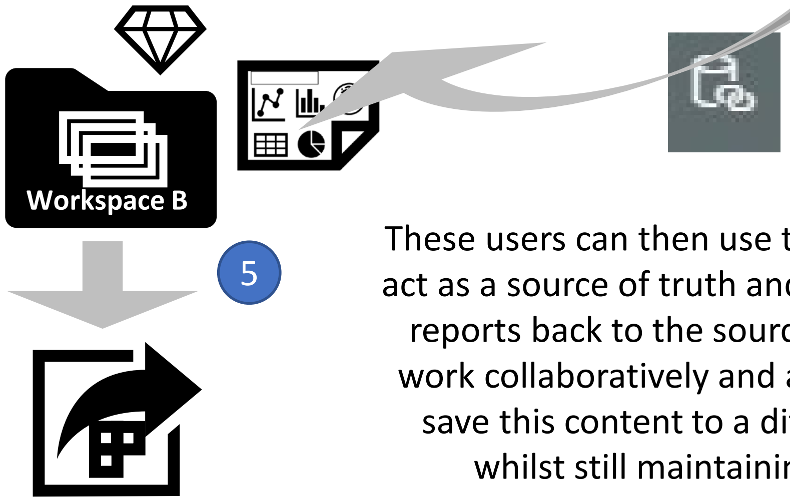

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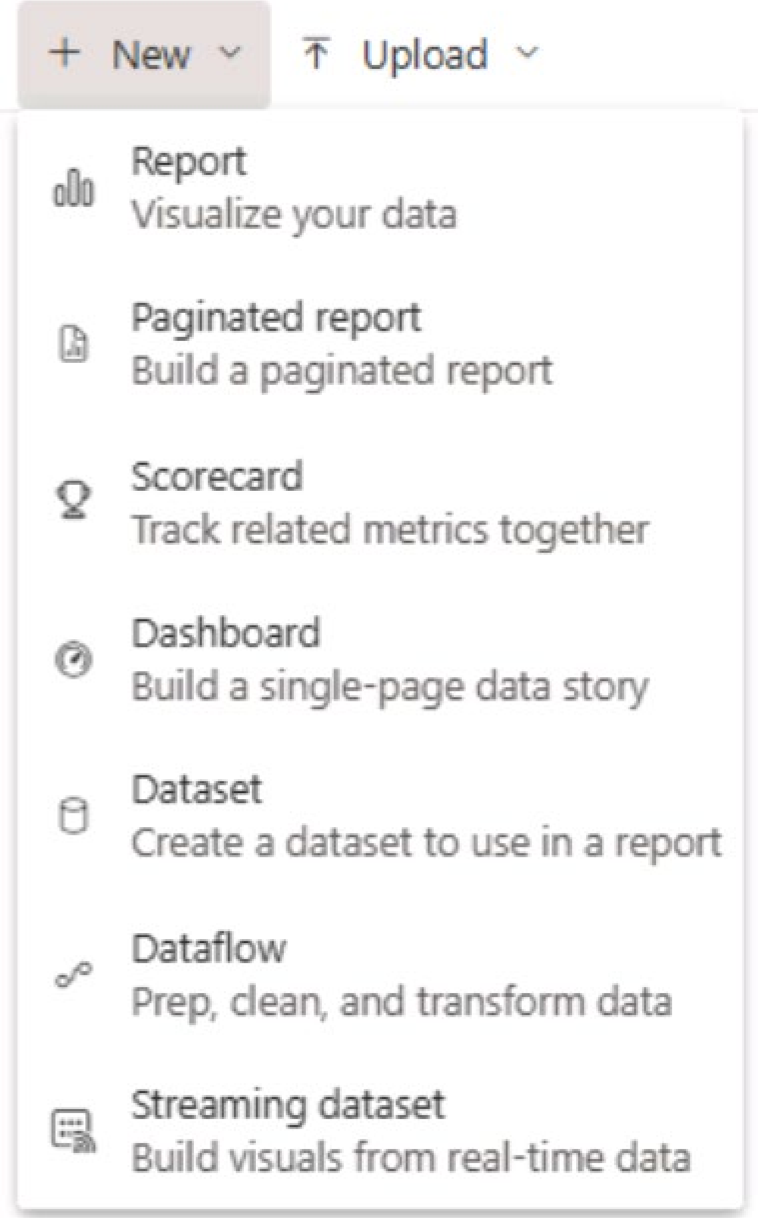
Module 9: Power BI App

Create and configure an app

After creating an app workspace and assigning your collaborator-specific roles, you want to add content to your app workspace. Content can be in the form of reports, dashboards, datasets, dataflows, and so on.

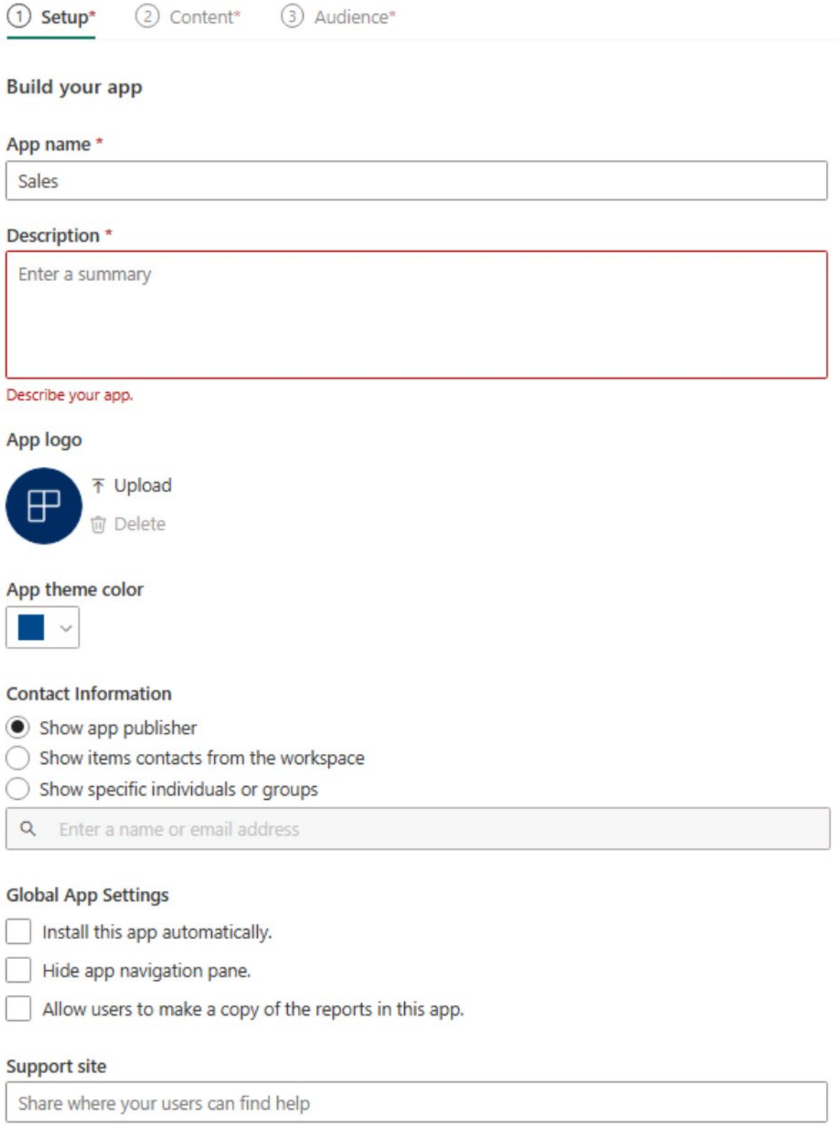
An app is a published, read-only window into your data for mass distribution and viewing. When ready to share apps with your users, you can publish the app. **This process requires a Power BI Pro license**. Consuming and viewing an app also requires a Pro license, or the workspace must be **hosted in a Premium capacity**.

You can now publish from Power BI Desktop to your new workspace, and upload saved files or create new items from within the workspace.

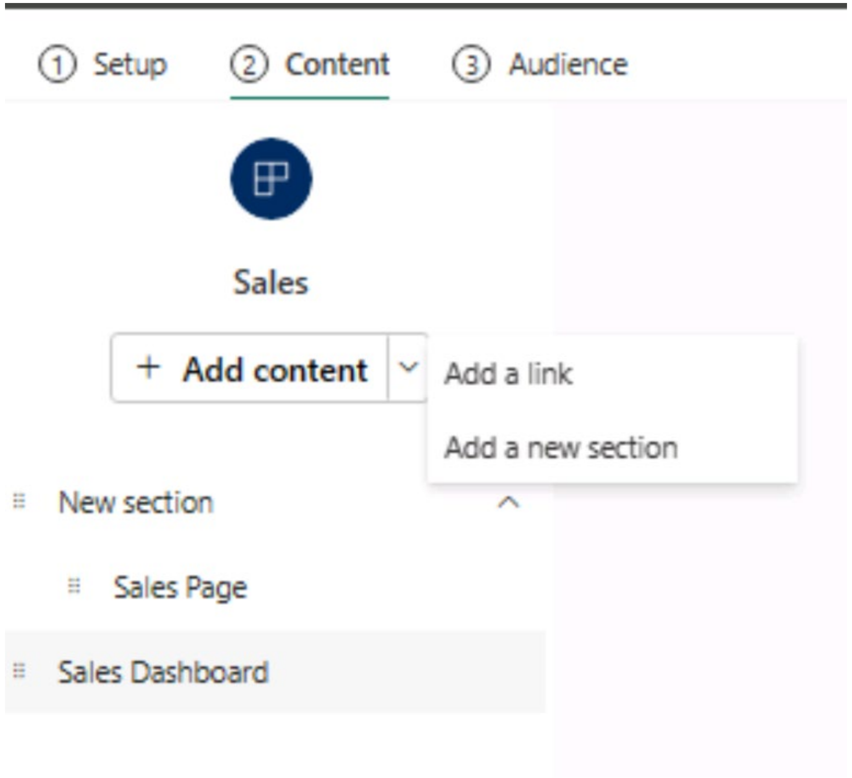


When you are ready to publish your app with its collection of reports, dashboards, and datasets, return to the workspace and select **Create app** in the upper-right corner of the ribbon.

The **Build your app** experience starts on the Setup page, where you add a name and description for the app.



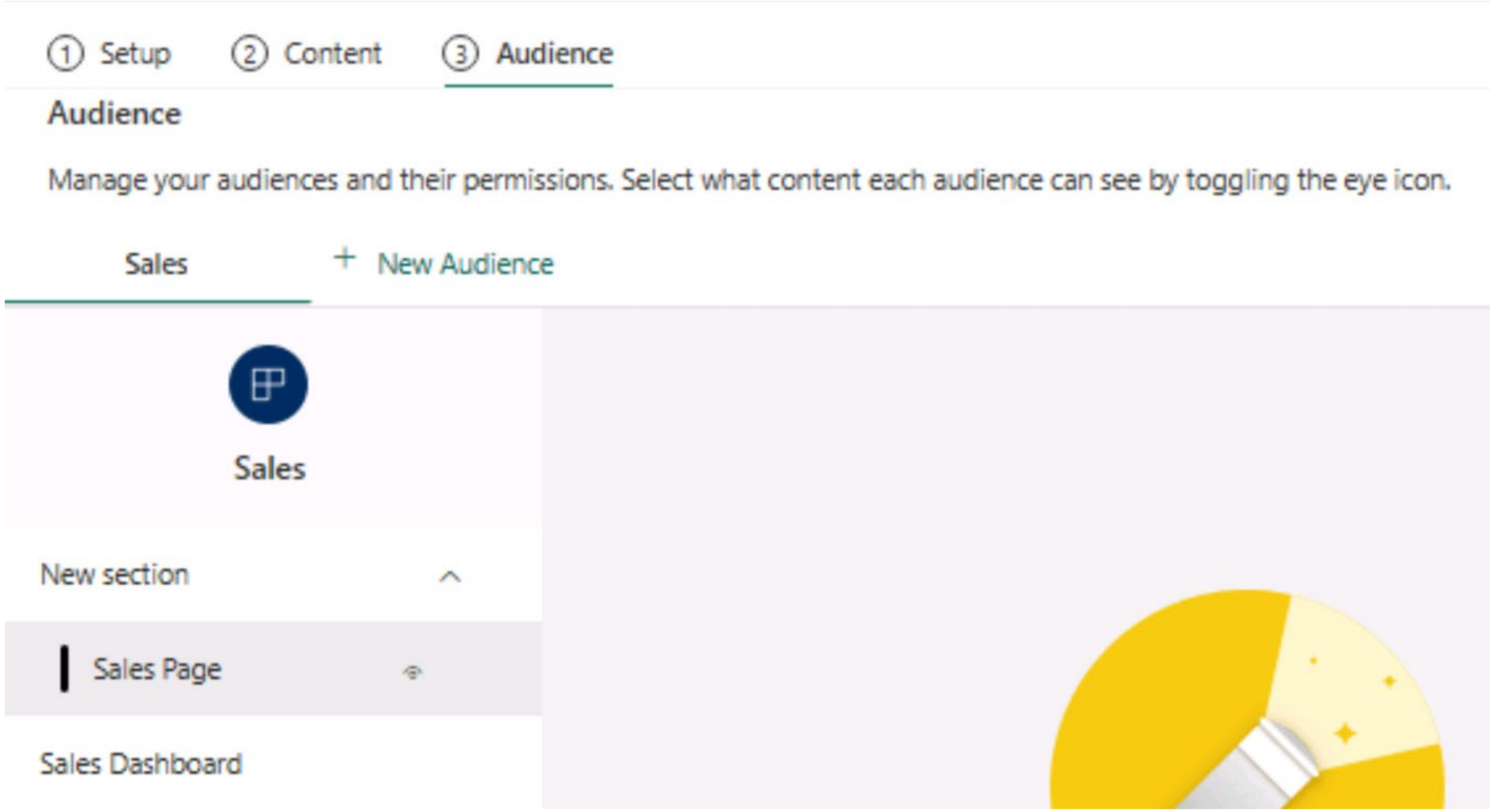
You can also customise the theme colour and add a logo if desired.



Under the **Content** tab, you can choose which content to include and change the viewing order. You can add content in the workspace, new sections for grouping, and external links.

In the **Audience** tab, you're now able to choose one or more audiences with different viewing options.
First, you'll select which reports you want visible to the default audience created. Select what content each audience sees by toggling the eye icon on the right.

In the following screenshot, the audience is called "Sales" by default, but you can right-click and rename it.



After selecting the viewable content, you can **Manage Audience Access**.

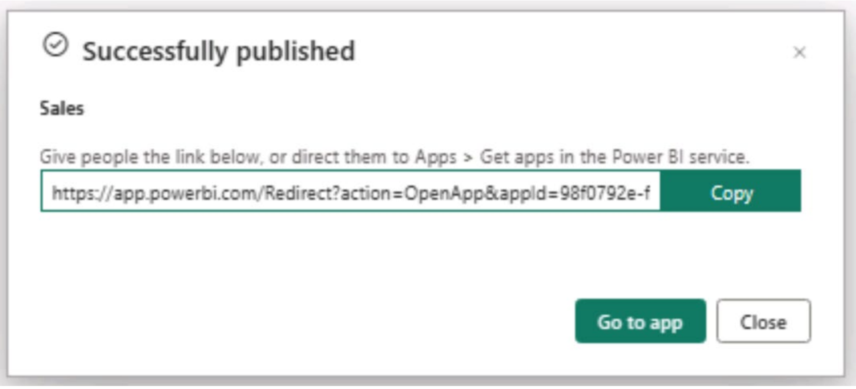
You can **Grant access to** the *Entire organization* or *Specific users or groups*. For Specific users or groups, you can enter any mail-enabled account.

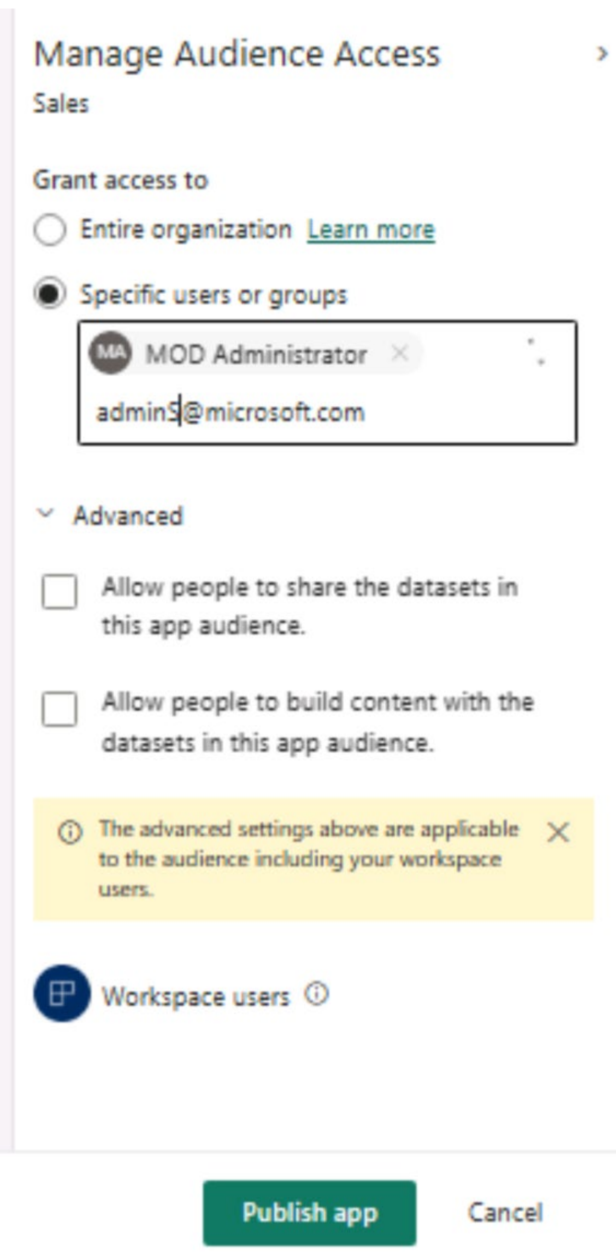
In the **Advanced** section, you can choose to grant additional permissions, individually or neither:

- Allow people to share the datasets in the app audience
- Allow people to build content with the datasets in the app audience

Lastly, notice that **Workspace users** are already included in the audience by default. This goes back to the roles we covered earlier.

When you're ready, select **Publish app**.





Update workspaces

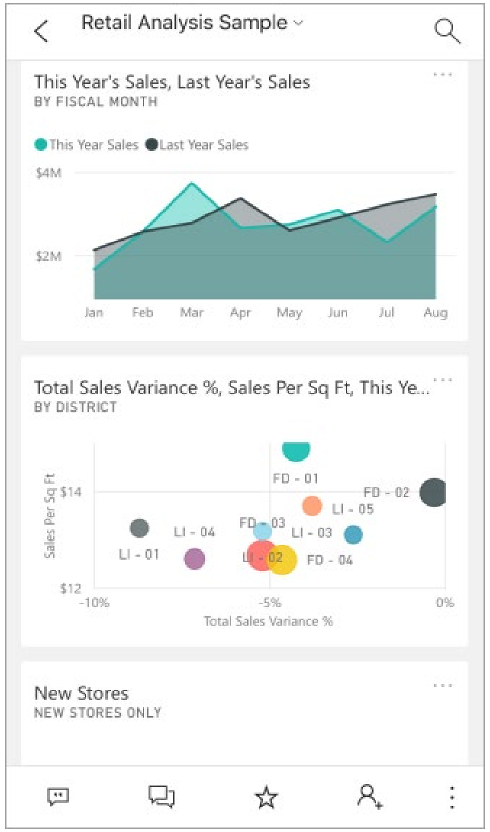
After publishing your app, you realise that you want to make updates within your workspace.

Don't worry, it's as easy as publishing your app. From the workspace, the **Create app button will now say Update app**.

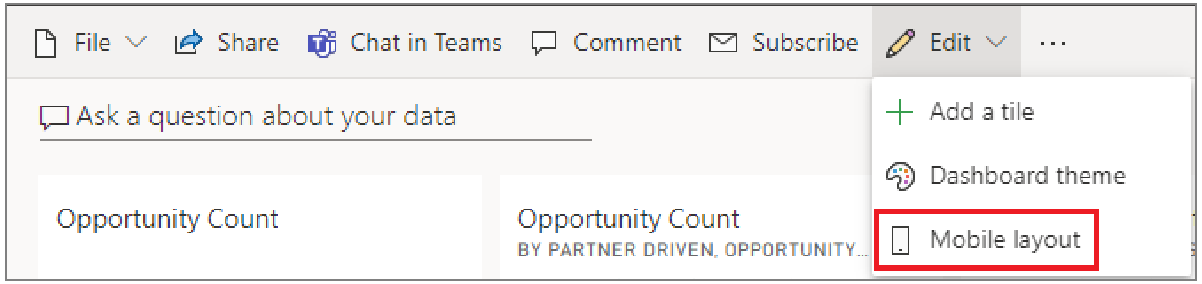
Select **Update app**, then move to the appropriate section and make your changes. When ready to save your changes, select the Update app button in the bottom where Publish App was before.

Creating Dashboards for Mobile devices

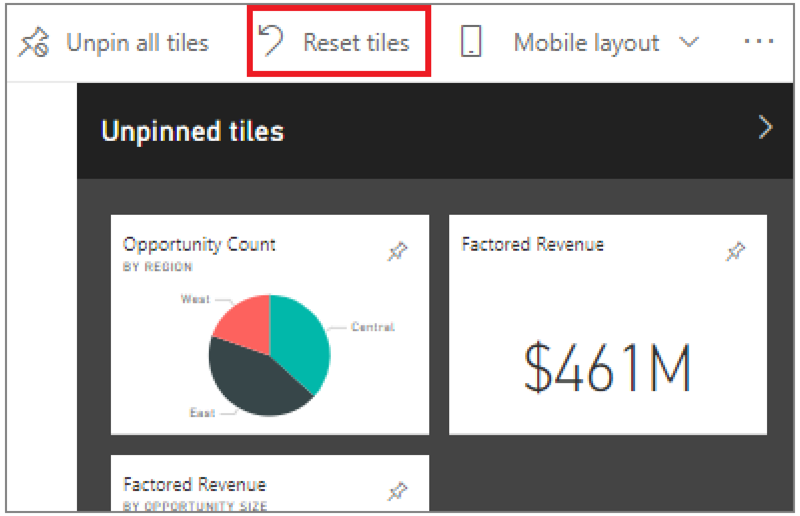
When you view Power BI dashboards in portrait mode on a phone, you notice the dashboard tiles are laid out one after another, all the same size.



Note: If you aren't the dashboard owner, you won't see this option.

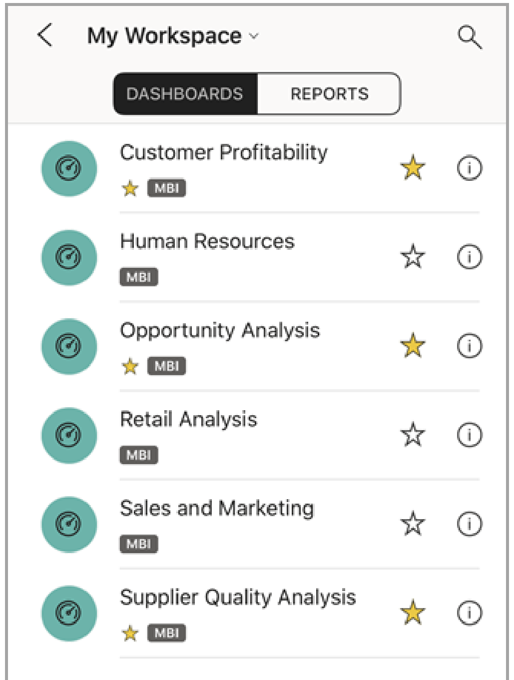


1. In the Power BI service, open a dashboard.
2. Select the arrow next to **Edit** on the top menu, and then select **Mobile layout**.
3. The phone dashboard edit view opens. Here you can unpin, resize, and rearrange tiles to fit the phone view. **Note:** The web version of the dashboard doesn't change.
4. Select a tile to drag, resize, or unpin it. You notice the other tiles move out of the way as you drag a tile.
5. If you change your mind, select **Reset tiles** to return them to their previous size and order.
6. Opening **Mobile layout** view in the Power BI service slightly changes the size and shape of the tiles on a phone. To return the dashboard to before you opened it in Mobile layout view, select **Reset tiles**.
7. When you're satisfied with the phone dashboard layout, switch back to web view by selecting **Web layout**.
8. Power BI saves the phone layout automatically.



Accessing Reports and Dashboards from Mobile

1. First **download** the Microsoft Power BI App from the relevant App Store.
2. Open the **Power BI app** on your phone and sign in.
3. Tap a **dashboard** to open it.

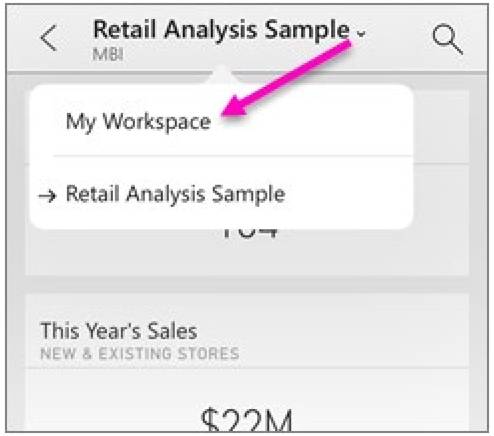


The yellow stars ⭐ show which dashboards are favourites.

Swipe up and down to see all the tiles in the dashboard.
You can:

- Tap a tile to open it in focus mode and interact with it.
- Tap the star ☆ to make it a favorite.
- Tap **Invite** to invite a colleague to view your dashboard.

To get back to the list of dashboards, tap the arrow next to the dashboard title, then tap **My Workspace**.



You can share a dashboard from your workspace. Tap the ellipsis (**...**) in the lower-right corner of the dashboard tile, and tap **Invite Others**.