Dashboard in a Day – Lab 5 Collaboration

by Power BI Team, Microsoft
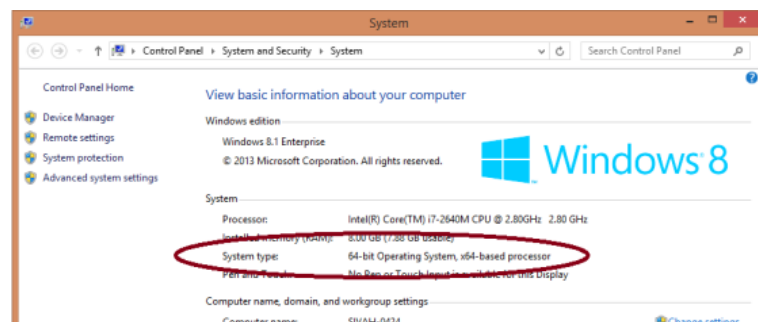
Contents

Lab Prerequisites

Following prerequisites and setup must be complete for successful completion of the exercise:

- You must be connected to the internet.
- You must have Microsoft Office installed.
- **Signup for Power BI:** Go to http://aka.ms/pbidiadtraining and sign up for Power BI with a business email address. If you cannot sign up for Power BI, let the instructor know. If you have an existing account, please use the same url as above.
- At minimum, a computer with 2-cores and 4GB RAM running one of the following versions of Windows: Windows 8 / Windows Server 2008 R2, or later.
- If you choose to use Internet Explorer it will require version 10 or greater, you can also use Edge or Chrome.
- Verify if you have 32-bit or 64-bit operating system to decide if you need to install the 32-bit or 64-bit applications.
  - Search for computer on your PC, right click properties for your computer.
  - You will be able to identify if your operating system is 64 or 32 bit based on "system type" as shown below.

- **Download the Power BI Content:** Create a folder called **DIAD** on the C drive of your local machine. Copy all contents from the folder called **Dashboard in a Day Assets** to the **DIAD** folder you just created (C:\DIAD).
- **Download and install Power BI Desktop** using any one of the options listed below:
  - If you have Windows 10, use Microsoft App Store to download and install Power BI Desktop app.
  - Download and install Microsoft Power BI Desktop from http://www.microsoft.com/en-us/download/details.aspx?id=45331.
  - If you already have Power BI Desktop installed ensure you have the **latest version** of Power BI downloaded**.**
- **Download and install Power BI Mobile App on your mobile device**
  - If you are using an Apple product download and install the Microsoft Power BI Mobile app from the Apple store or this link https://apps.apple.com/us/app/microsoft-power-bi/id929738808
  - If you are using an Android product download and install the Microsoft Power BI Mobile app from the Google Play store or this link https://play.google.com/store/apps/details?id=com.microsoft.powerbim

Document Structure

This document is lab 05 of 05 labs in total.

If you are joining the DIAD at this point or were unable to complete previous labs, please start this lab with the provided: "Lab 4 Solution.pbix" file you can find in the Reports folder.

At the end of this lab you will have learned how to share your dashboard and collaborate will other users. You will also have learned how to access your dashboard on your mobile device.

The document flow is in a table format. On the left panel are steps the user needs to follow and in the right panel are screenshots to provide a visual aid for the users. In the screenshots, sections are highlighted with red boxes to highlight the action/area user needs to focus on.

NOTE: This lab is using real anonymized data and is provided by ObviEnce LLC. Visit their site to learn about their services: www.obvience.com .

This data is property of ObviEnce LLC and has been shared for the purpose of demonstrating Power BI functionality with industry sample data.   Any uses of this data must include this attribution to ObviEnce

Power BI Service – Collaboration and Distribution

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

1. Sign into PowerBI.com to access your workspace
2. From the left panel, select **Workspaces**.
3. Select the **ellipsis** next to **DIAD_<youremailaddress>.**
4. Select **Workspace access**.
5. Access dialog opens. You can **enter the email addresses** of the colleagues you want to collaborate with.
Each user can belong to one of 3 **roles**:

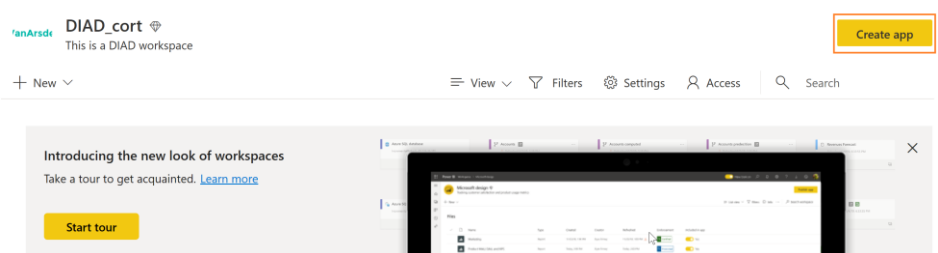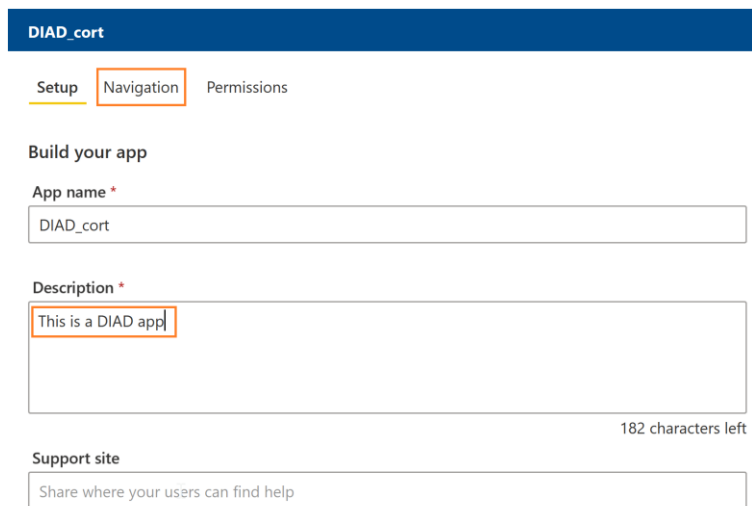|	
Contributor	Add/edit/delete content within workspace.
Member	Everything a Contributor can do. Re-share. Publish & update Apps.
Admin	Everything a member can do. Can change/delete workspace. Can add Admins.
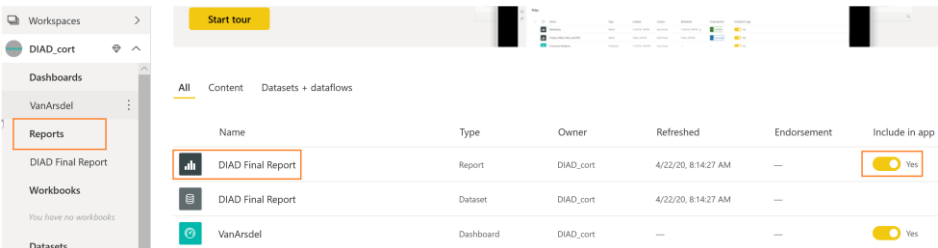
6. Select the **role** and select **Add**.
7. Once you finish adding your colleagues and select **Close**.
Note: If you don't have a colleague's email please close without submission.
Note: you can ask your colleague to login and access the workspace.
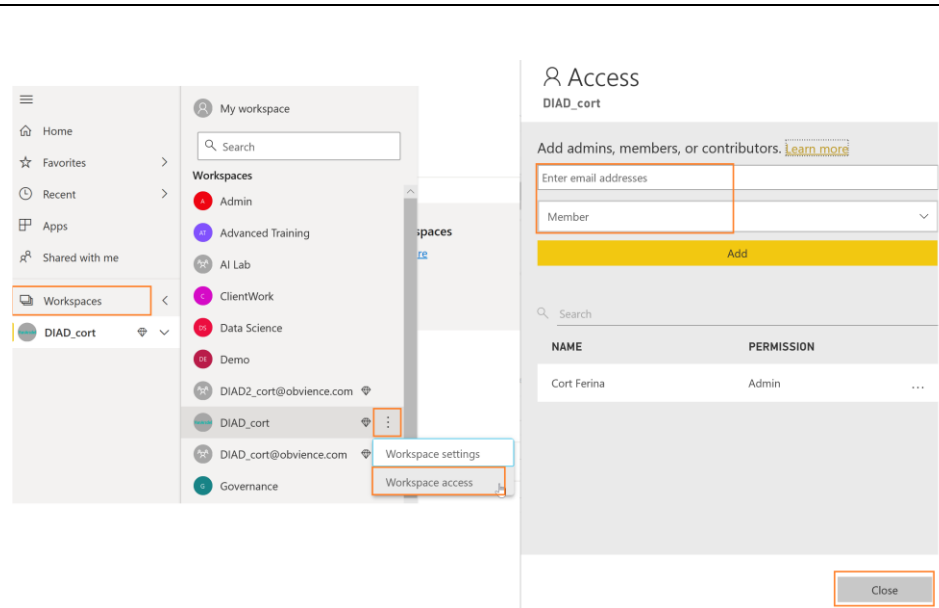
Now let's share the content we created with the report viewers/consumers. We need to publish an app to do this.
An App can include multiple dashboards and reports.

8. In the left panel select **DIAD_<youremailaddress> workspace**.
9. In the **Dashboard** page, notice there is an option **INCLUDED IN APP**, to include the Dashboard in the App.
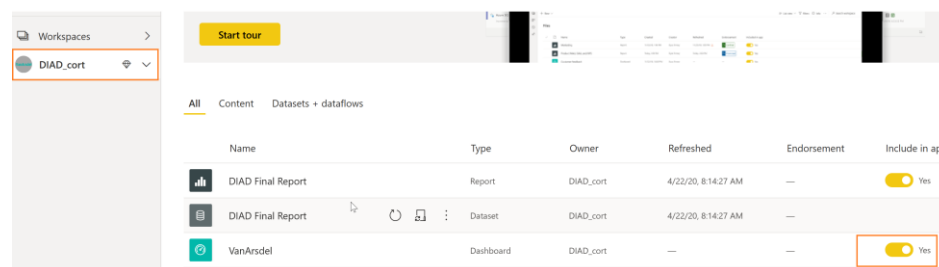
10. Navigate to **Reports** page. 11. Notice there is an option **INCLUDED IN APP** to include the Reports in the App. If you have reports and dashboards in your workspace that you do not want to share with report viewers, you can uncheck this box. When you are working with multiple reports you can decide which to include in the app. In our case we would like to include the 2 reports, so we will leave the boxes checked.	
12. In the left panel select **DIAD_<youremailaddress> workspace.** 13. In the upper right corner select the **Create app** button.	
14. In the **Setup** page, enter "**This is DIAD app**" in the description field. 15. Click on **Navigation** tab.	

16. From the Navigation menu select **VanArsdel (dashboard)**. When a user accesses the DIAD app, we want them to land on the VanArsdel dashboard. 17. Navigate to **Permissions** page.	
18. **Enter the email addresses** of the users or groups you want to give access to **Note**: If you didn't enter an email address above, no need to enter one here 19. On the bottom right corner, select **Publish App**. 20. **Ready to publish** dialog appears. Select **Publish**. 21. Once the App is published a success dialog appears.	
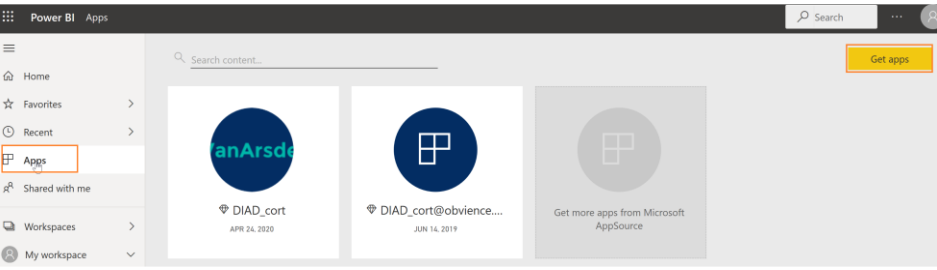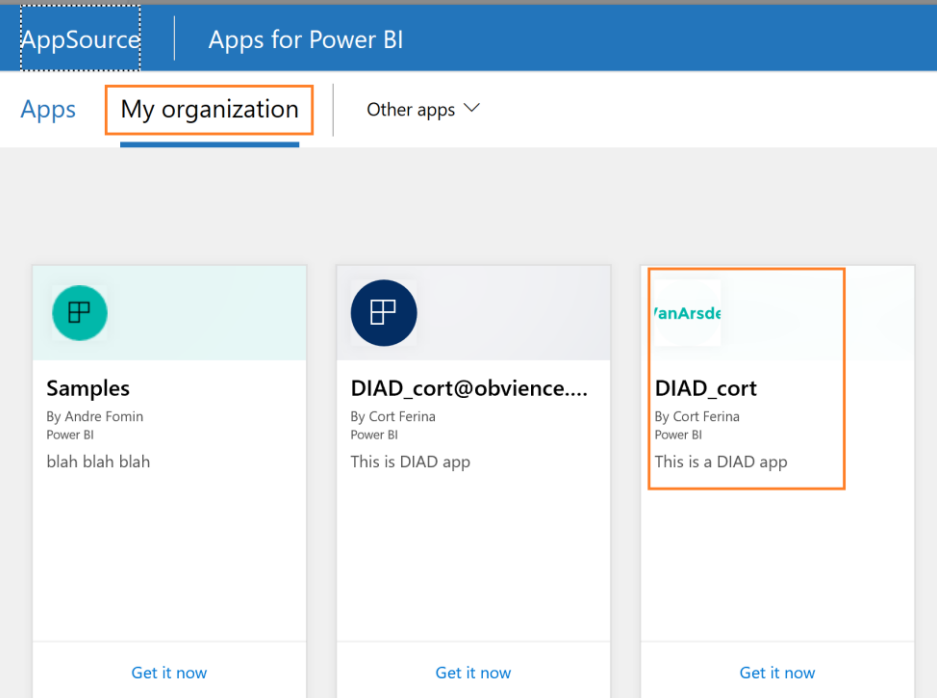
You can copy the link to the App after it's been successfully published and share it with the individuals via email. But a better way for report viewers to consume the App is by logging onto Power BI Service and registering the App. Let's impersonate a report viewer. 22. From the left menu, select **Apps**. 23. Select **Get Apps**.	
24. AppSource dialog opens. You will notice **DIAD_<youremailaddress>** App listed. Select the newly added app. This is a one-time registration. Going forward when you select Apps in the left panel, you will see **DIAD_<youremailaddress>** app in the list of Apps you have registered you can click on **Get it now.**	

Power BI Mobile – Accessing Report on Mobile Device

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

2. Click on Get Started once the app is open	Say hello to Power BI Bring your data to life ○ • • • • Get started
3. Click on Power BI to connect to your report	Connect to Power BI Sign in with your Power BI account credentials, for example jen@contoso.com. Learn more Report server Connect with your SQL Server Reporting Services or Power BI Report Server credentials. Learn more
4. Click on Sign in and enter your credentials	DIAD@VanArdsdel.com Office 365 Sign in Use another account Need help? By signing in you agree to the Power BI: Terms of Use Privacy Statement

|	
5. Verify you have successfully signed in and click Start exploring	You're good to go! ☑ Share usage and performance information to help us improve your experience. Privacy statement **Start exploring**
6. Click on DIAD Final Report that you published from Power BI Desktop	QUICK ACCESS ACTIVITY Frequents ^ VanArsdel Refreshed: Sep 17, 2019 ⊘ Dashboard VanArsdel Refreshed: Jun 14, 2019 ⊘ Dashboard Recents SEE ALL ^ DIAD Final Report Refreshed: 6 days ago ⊪ Report VanArsdel Refreshed: Sep 17, 2019 ⊘ Dashboard

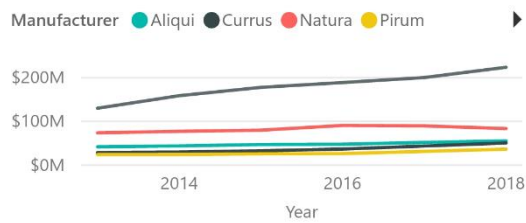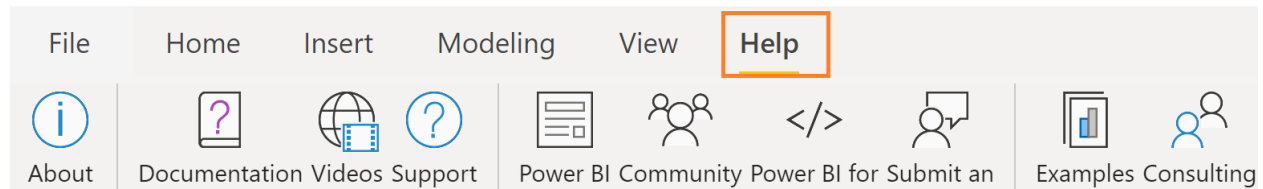| 7. Verify you see the mobile view that you published from Power BI Desktop		11
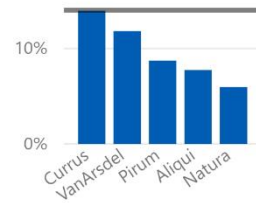
References

Dashboard in a Day introduces you to some of the key functionalities available in Power BI. In the ribbon of Power BI Desktop, the Help section has links to some great resources to help you as needed.

Here are a few more references that will help you with your next steps with Power BI.

Getting started: http://powerbi.com

Power BI Desktop: https://powerbi.microsoft.com/desktop

Power BI Mobile: https://powerbi.microsoft.com/mobile

Community site https://community.powerbi.com/

Power BI Getting started support page:
https://support.powerbi.com/knowledgebase/articles/430814-get-started-with-power-bi

Support site https://support.powerbi.com/

Feature requests https://ideas.powerbi.com/forums/265200-power-bi-ideas

New ideas for using Power BI https://aka.ms/PBI_Comm_Ideas

Power BI courses http://aka.ms/pbi-create-reports

© 2020 Microsoft Corporation. All rights reserved.

By using this demo/lab, you agree to the following terms:

The technology/functionality described in this demo/lab is provided by Microsoft Corporation for purposes of obtaining your feedback and to provide you with a learning experience. You may only use the demo/lab to evaluate such technology features and functionality and provide feedback to Microsoft. You may not use it for any other purpose. You may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell this demo/lab or any portion thereof.

COPYING OR REPRODUCTION OF THE DEMO/LAB (OR ANY PORTION OF IT) TO ANY OTHER SERVER OR LOCATION FOR FURTHER REPRODUCTION OR REDISTRIBUTION IS EXPRESSLY PROHIBITED.

THIS DEMO/LAB PROVIDES CERTAIN SOFTWARE TECHNOLOGY/PRODUCT FEATURES AND FUNCTIONALITY, INCLUDING POTENTIAL NEW FEATURES AND CONCEPTS, IN A SIMULATED ENVIRONMENT WITHOUT COMPLEX SET-UP OR INSTALLATION FOR THE PURPOSE DESCRIBED ABOVE. THE TECHNOLOGY/CONCEPTS REPRESENTED IN THIS DEMO/LAB MAY NOT REPRESENT FULL FEATURE FUNCTIONALITY AND MAY NOT WORK THE WAY A FINAL VERSION MAY WORK. WE ALSO MAY NOT RELEASE A FINAL VERSION OF SUCH FEATURES

OR CONCEPTS. YOUR EXPERIENCE WITH USING SUCH FEATURES AND FUNCITONALITY IN A PHYSICAL ENVIRONMENT MAY ALSO BE DIFFERENT.

FEEDBACK. If you give feedback about the technology features, functionality and/or concepts described in this demo/lab to Microsoft, you give to Microsoft, without charge, the right to use, share and commercialize your feedback in any way and for any purpose. You also give to third parties, without charge, any patent rights needed for their products, technologies and services to use or interface with any specific parts of a Microsoft software or service that includes the feedback. You will not give feedback that is subject to a license that requires Microsoft to license its software or documentation to third parties because we include your feedback in them. These rights survive this agreement.

MICROSOFT CORPORATION HEREBY DISCLAIMS ALL WARRANTIES AND CONDITIONS WITH REGARD TO THE DEMO/LAB, INCLUDING ALL WARRANTIES AND CONDITIONS OF MERCHANTABILITY, WHETHER EXPRESS, IMPLIED OR STATUTORY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT. MICROSOFT DOES NOT MAKE ANY ASSURANCES OR REPRESENTATIONS WITH REGARD TO THE ACCURACY OF THE RESULTS, OUTPUT THAT DERIVES FROM USE OF DEMO/ LAB, OR SUITABILITY OF THE INFORMATION CONTAINED IN THE DEMO/LAB FOR ANY PURPOSE.

DISCLAIMER

This demo/lab contains only a portion of new features and enhancements in Microsoft Power BI. Some of the features might change in future releases of the product. In this demo/lab, you will learn about some, but not all, new features.