



Power Platform Bootcamp: Expert

Hands-On Lab Guide

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Exercise 1: Developing Power BI Report for Invoice Processing

In this hands-on exercise, participants will create a Power BI Report to show KPIs and trends using data gathered from Finance Invoice Processing App.

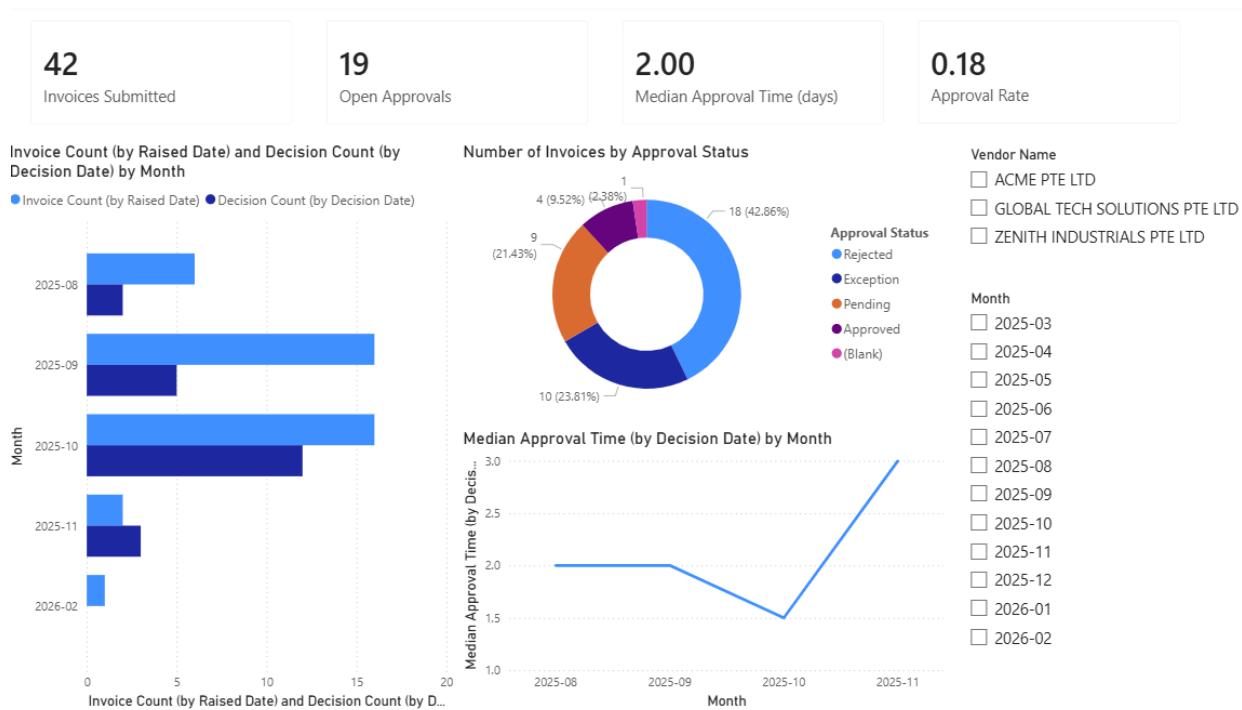
Objectives

After completing this exercise, participants will be able to:

- Connect to Dataverse tables from Power BI
- Perform data transformation in Power BI
- Familiarize themselves with Power BI Visualizations
- Develop a Power BI Report

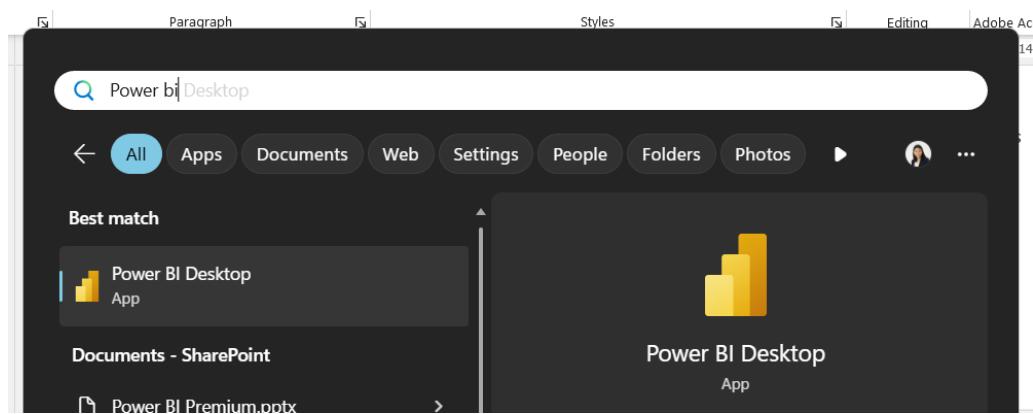
Estimated Time

1-1.5 hours

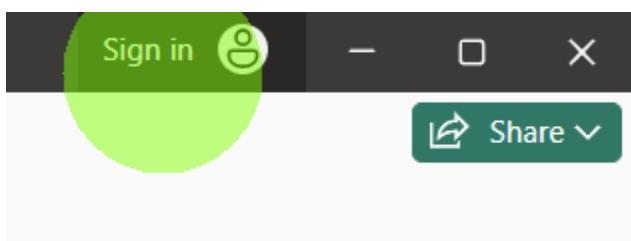


Task 1: Launch and Login to Power BI

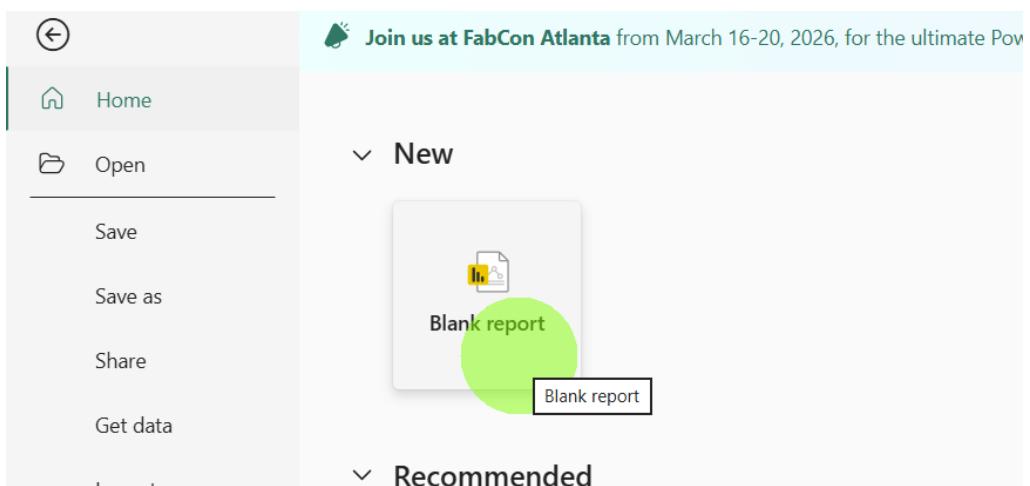
1. Launch **Power BI Desktop** from your Start Menu.



2. Sign in to Power BI by clicking on Sign In on top right corner. (Optional if you are already signed in to Power BI)



3. Click **Blank report**.



4. Save the report file on your local machine by pressing Ctrl + S. (Remember to save along the way as you make more changes)

Save this file X

Name *

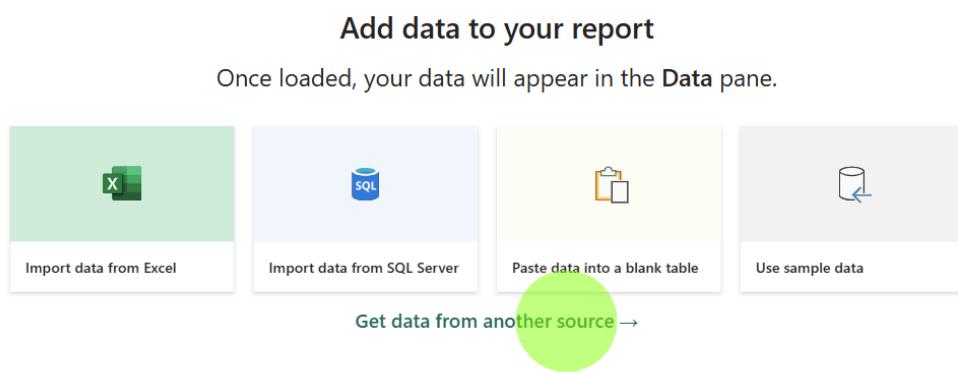
 .pbix

Recent locations

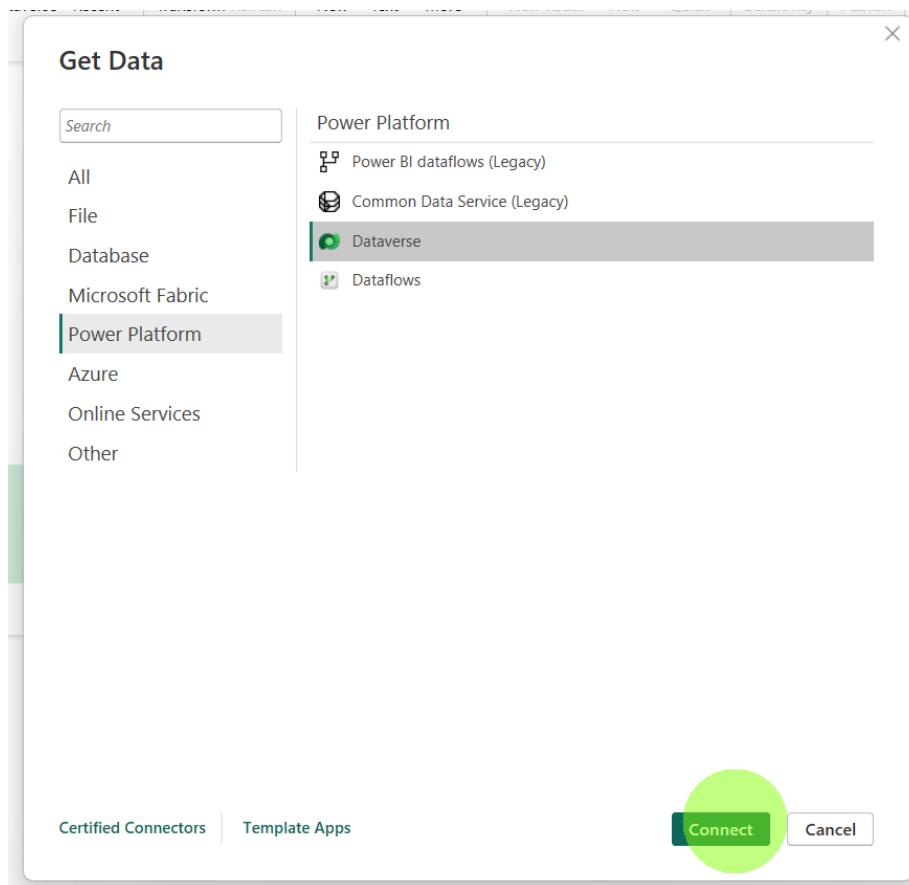
End of Task

Task 2: Get Data from Dataverse

1. Click **Get data from another source.**



2. Select **Power Platform → Dataverse** and select **Connect**.





You will see a list of Power Platform environments you have access to.

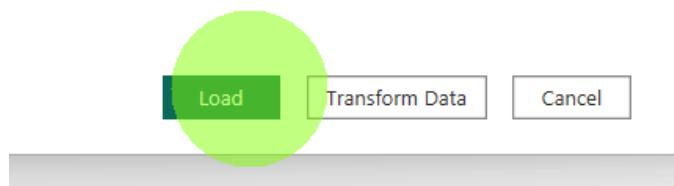
A screenshot of a web-based application interface. At the top, there is a search bar with a magnifying glass icon and a 'Display Options' dropdown menu. Below this, a tree view shows a 'Dataverse [1]' node expanded, revealing a single child node: 'CRM781496 (org173a8a24.crm5.dynamics.co...'. A large green circle highlights the 'Dataverse [1]' node. The URL in the browser's address bar is 'https://powerplatform.microsoft.com/environments'.

3. Expand the environment where you have stored **Invoice** data and select Invoice table (the one with crxxx_ prefix).

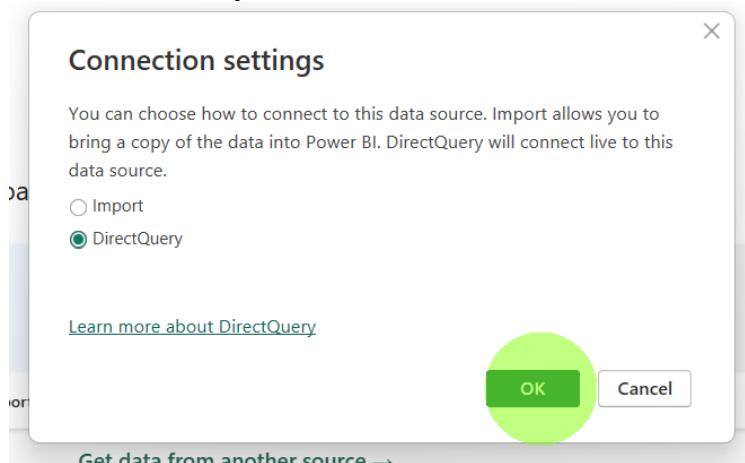
Navigator

A screenshot of the Microsoft Navigator interface. At the top, there is a search bar with the text 'invoice' and a clear button. Below this, a 'Display Options' dropdown menu and a 'Copy' button are visible. The main area shows a tree view under the 'Dataverse' node, with the 'CRM781496' environment expanded. Under 'Dataverse', there is a list of tables: 'contactinvoices', 'cr61e_invoice' (which has a checked checkbox next to it), 'invoice', 'invoicedetail', 'msdyn_agreementinvoicedate', 'msdyn_agreementinvoiceproduct', and 'msdyn_agreementinvoicesetup'. A large green circle highlights the 'cr61e_invoice' table. The URL in the browser's address bar is 'https://powerplatform.microsoft.com/navigator'.

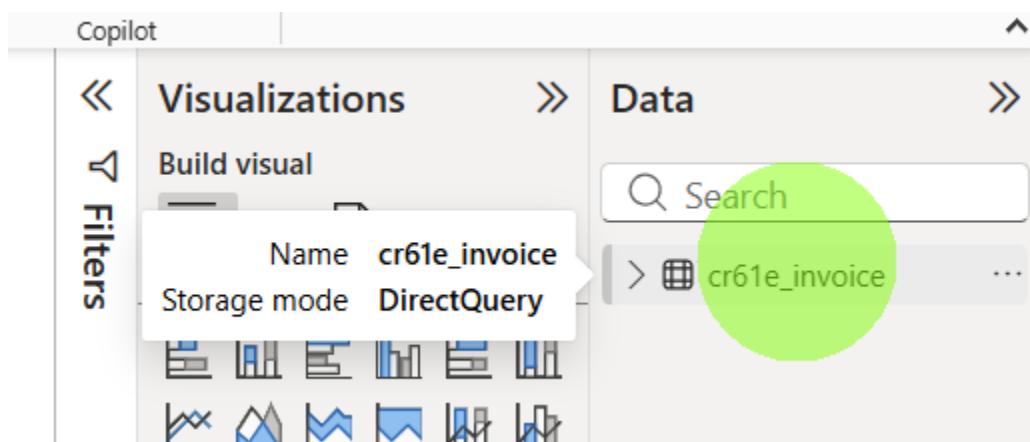
4. Click **Load**.



5. Select DirectQuery and click OK. (It will take about 3-5 minutes to load data).



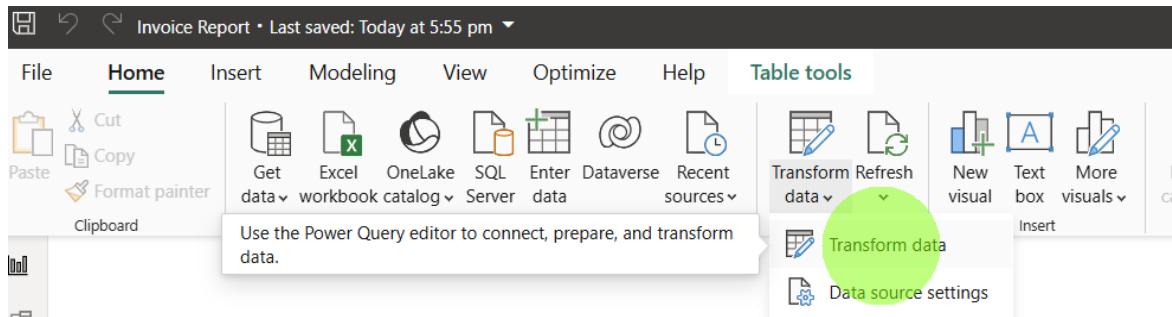
Once the table is loaded, you will see the table name populated on right-hand side.



----- End of Task -----

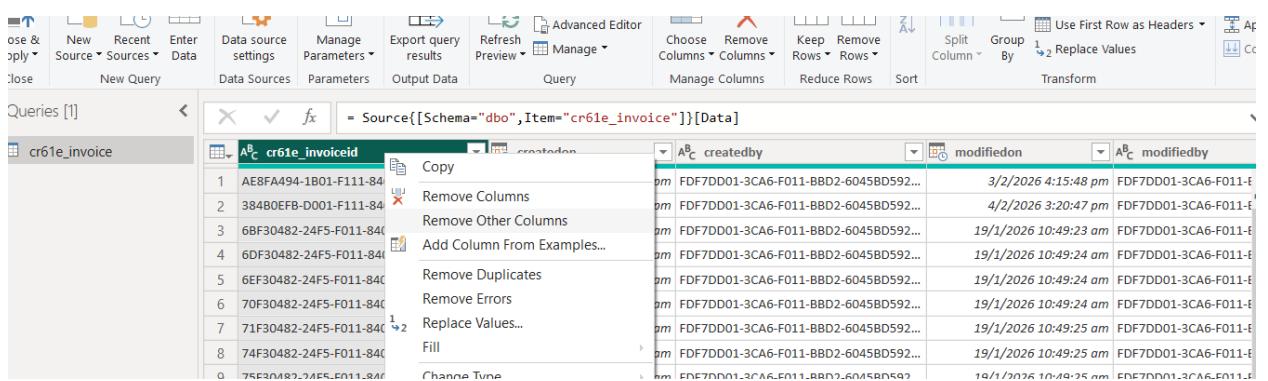
Task 3: Prepare Data for Report

1. Launch Query Editor by clicking **Transform** data.



2. Multi-select below columns and right-click select **Remove Other Columns**. Hold down **Ctrl key from keyboard** to select multiple columns.

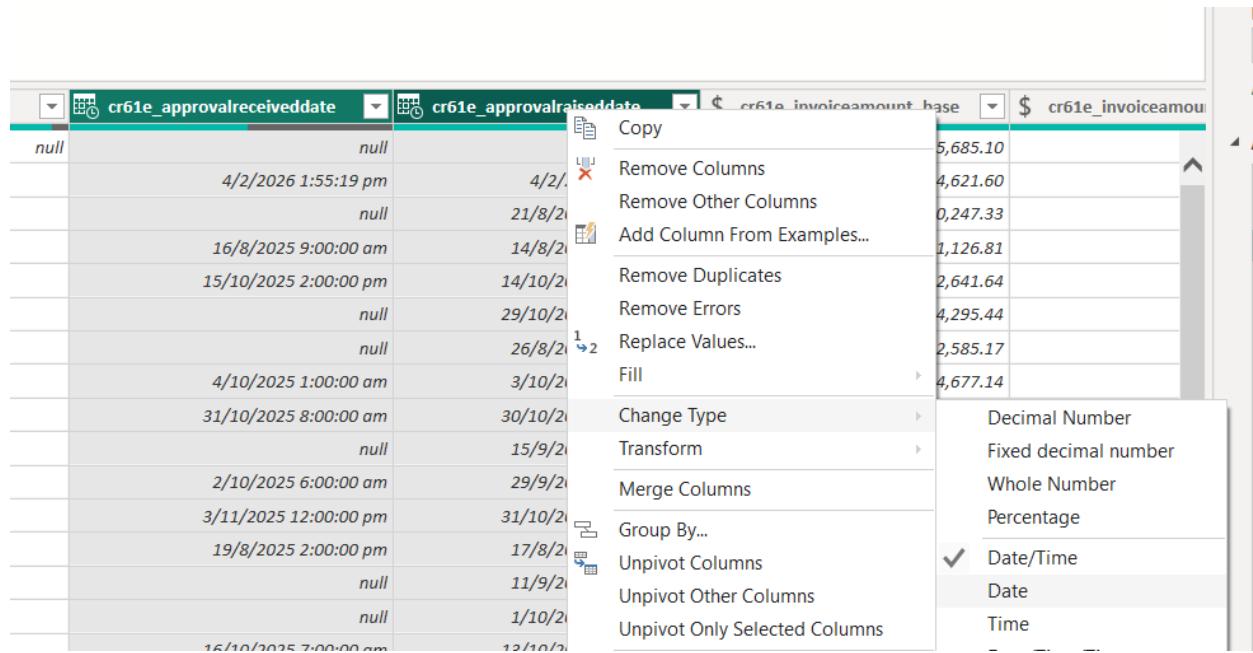
- "cr61e_approvalstatus"
- "cr61e_approvalreceiveddate"
- "cr61e_approvalraiseddate"
- "cr61e_invoiceamount_base"
- "cr61e_invoiceamount"
- "cr61e_invoicedate"
- "cr61e_vendorname"
- "cr61e_invoiceidentifier"
- "cr61e_invoiceid"



cr61e_invoiceid	createdon	createdby	modifiedon	modifiedby
AE8FA494-1B01-F111-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	3/2/2026 4:15:48 pm	FDF7DD01-3CA6-F011-E
384B0EFB-D001-F111-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	4/2/2026 3:20:47 pm	FDF7DD01-3CA6-F011-E
6BF30482-24F5-F011-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	19/1/2026 10:49:23 am	FDF7DD01-3CA6-F011-E
6DF30482-24F5-F011-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	19/1/2026 10:49:24 am	FDF7DD01-3CA6-F011-E
6EF30482-24F5-F011-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	19/1/2026 10:49:24 am	FDF7DD01-3CA6-F011-E
70F30482-24F5-F011-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	19/1/2026 10:49:24 am	FDF7DD01-3CA6-F011-E
71F30482-24F5-F011-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	19/1/2026 10:49:25 am	FDF7DD01-3CA6-F011-E
74F30482-24F5-F011-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	19/1/2026 10:49:25 am	FDF7DD01-3CA6-F011-E
75F30482-24F5-F011-84		FDF7DD01-3CA6-F011-BBD2-6045BD592...	19/1/2026 10:49:25 am	FDF7DD01-3CA6-F011-E

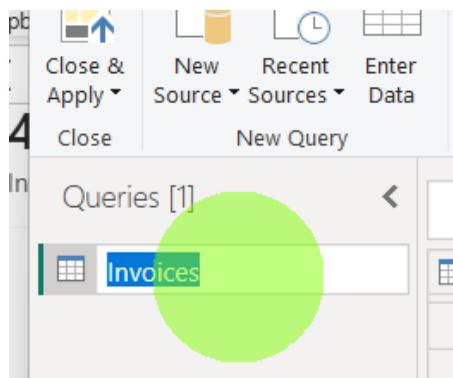
3. Multi-select below columns and right-click select **Change Type → Date**. Hold down **Ctrl key from keyboard** to select multiple columns.

- "cr61e_approvalreceiveddate"
- "cr61e_approvalraiseddate"
- "cr61e_invoicedate"

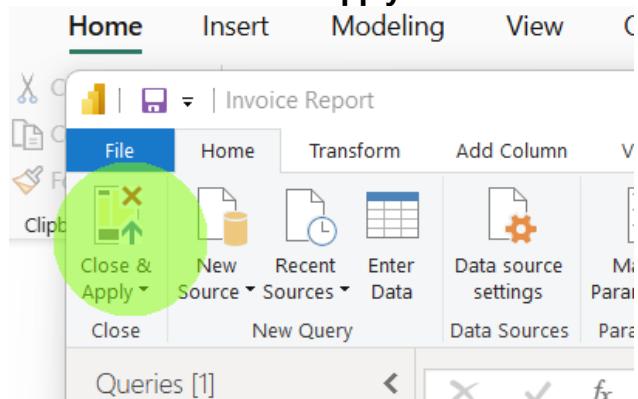


	cr61e_approvalreceiveddate	cr61e_approvalraiseddate	\$ cr61e_invoiceamount_base	\$ cr61e_invoiceamount
1	null	null	5,685.10	
2	4/2/2026 1:55:19 pm	4/2/2026	4,621.60	
3	null	21/8/2025	0,247.33	
4	16/8/2025 9:00:00 am	14/8/2025	1,126.81	
5	15/10/2025 2:00:00 pm	14/10/2025	2,641.64	
6	null	29/10/2025	4,295.44	
7	null	26/8/2025	2,585.17	
8	4/10/2025 1:00:00 am	3/10/2025	4,677.14	
9	31/10/2025 8:00:00 am	30/10/2025		
10	null	15/9/2025		
11	2/10/2025 6:00:00 am	29/9/2025		
12	3/11/2025 12:00:00 pm	31/10/2025		
13	19/8/2025 2:00:00 pm	17/8/2025		
14	null	11/9/2025		
15	null	1/10/2025		
16	15/10/2025 7:00:00 am	13/10/2025		

- Rename the table to Invoices.



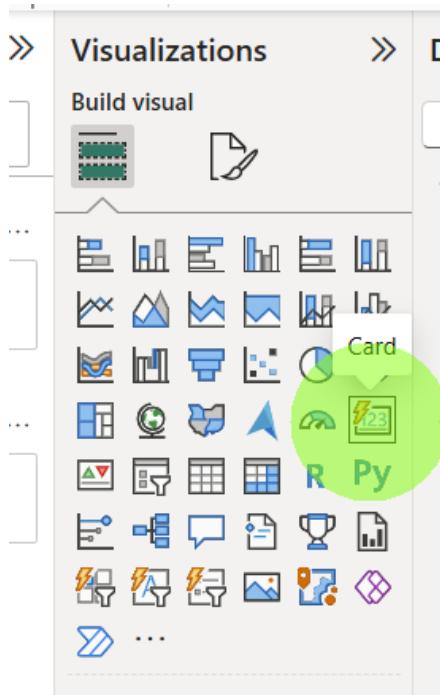
- Click **Home** → **Close & Apply** to save and close the data transformation.



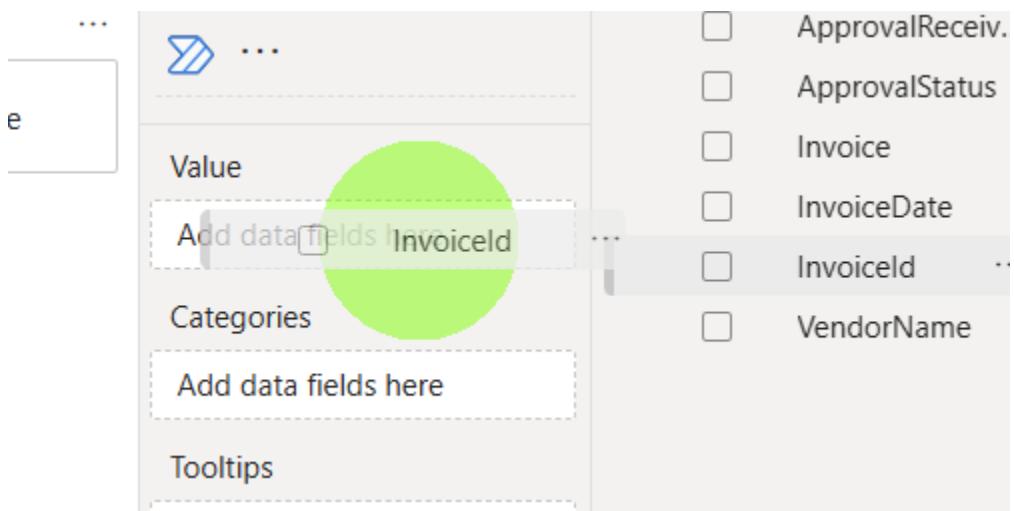
----- End of Task -----

Task 4: Add Invoices Submitted Card

1. Select **Card** visualization to add to the page.



2. Drag **InvoiceId** to **Value** field.

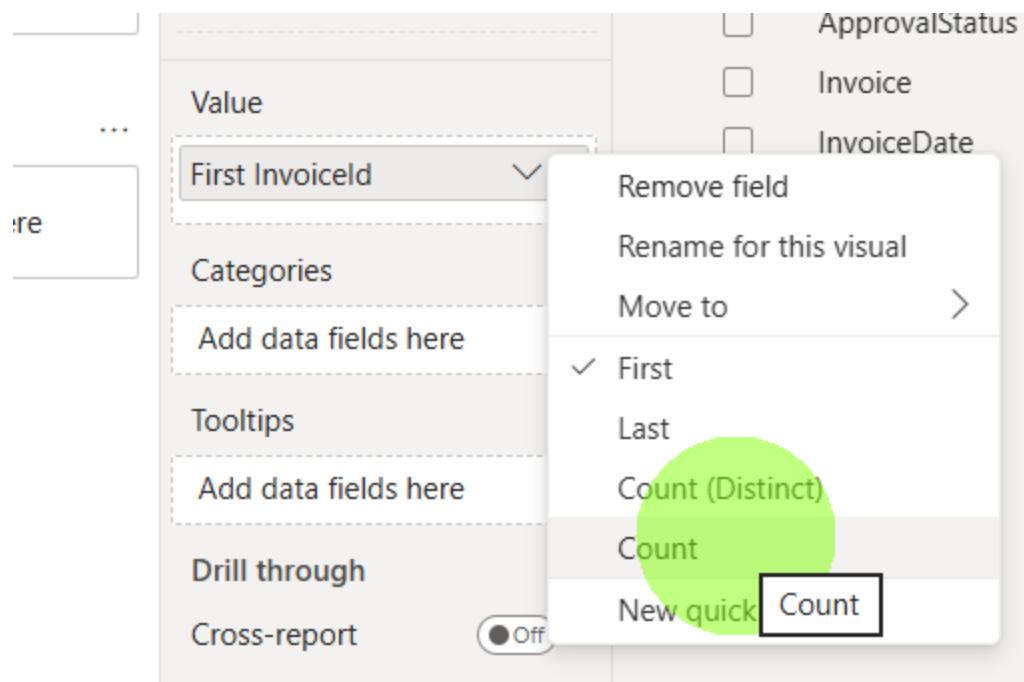


The screenshot shows the configuration pane for a card visualization. On the left, there are sections for 'Value' (with a dropdown menu showing 'Add data fields here') and 'Categories' (also with a 'Add data fields here' section). On the right, a list of data fields is shown with checkboxes:

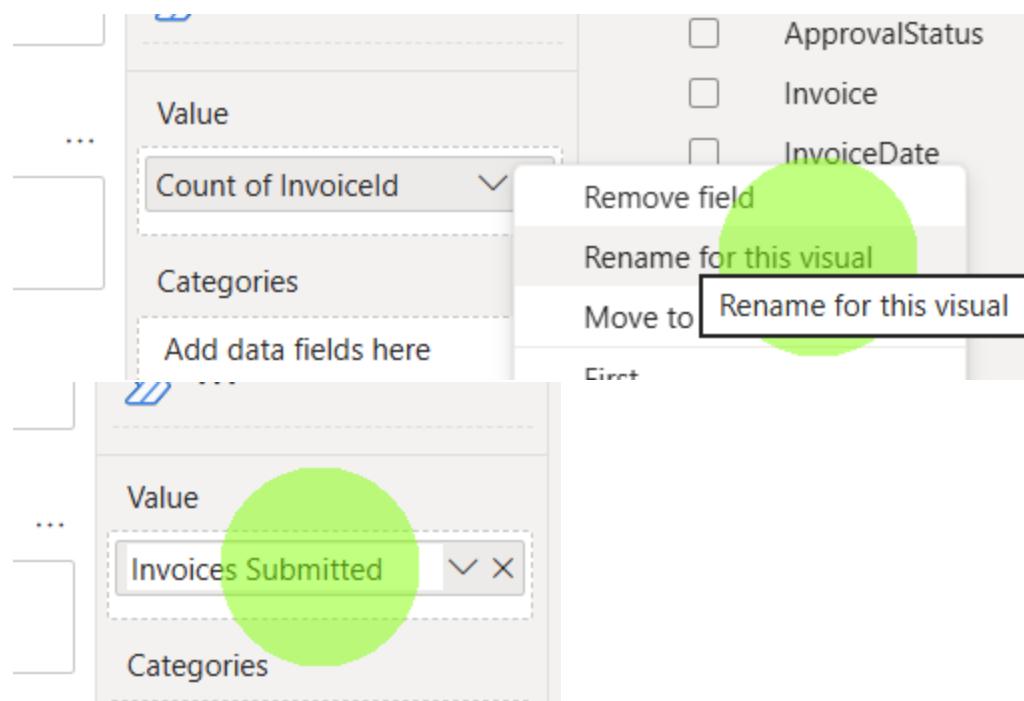
- ApprovalReceiv.
- ApprovalStatus
- Invoice
- InvoiceDate
- InvoiceId
- VendorName

A green circle highlights the 'Value' field's dropdown menu.

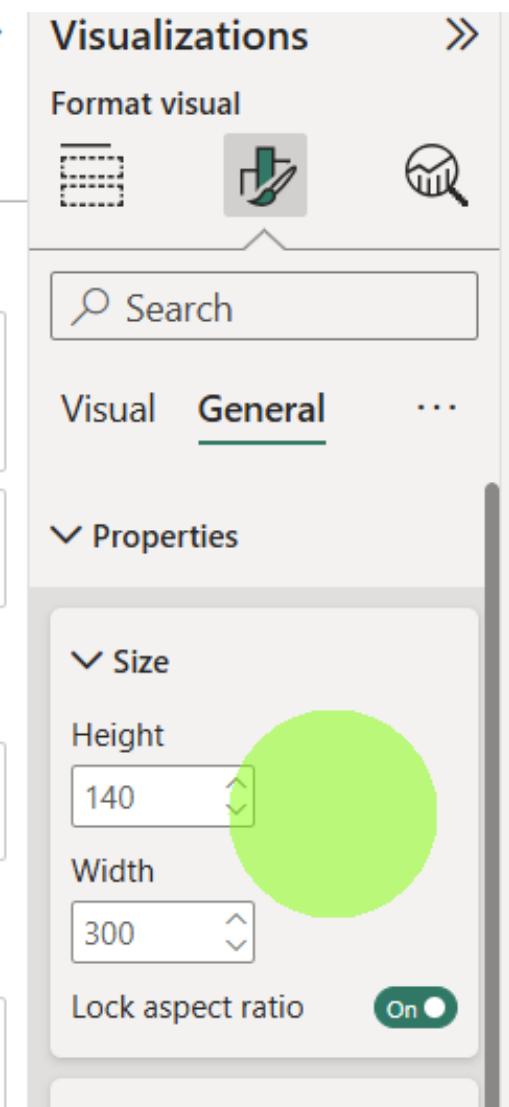
3. Click the Dropdown in Value field and select **Count**.



4. Rename the Visual to a more meaningful name **Invoices Submitted**.



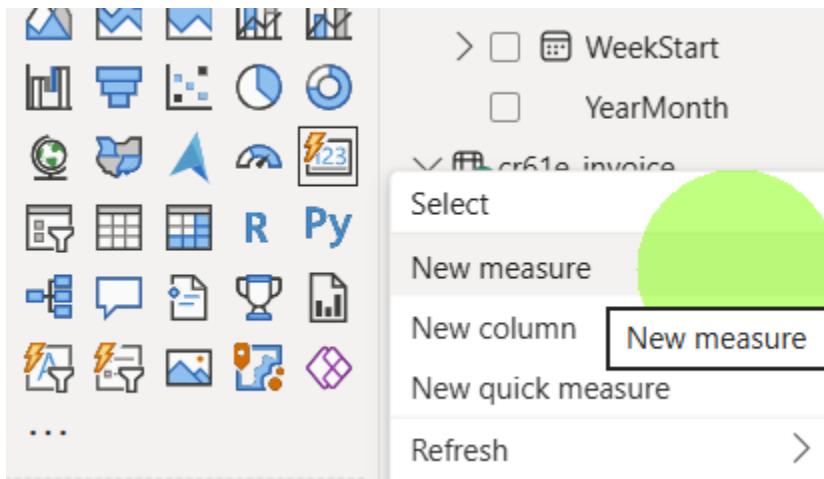
5. Switch to **Format** view and change below settings.



----- End of Task -----

Task 5: Add Open Approvals Card

1. Click 3 dots beside the table name and select **New measure**.



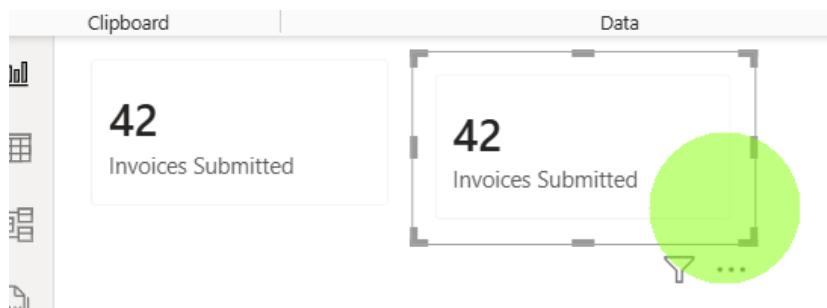
2. Add DAX formula below to determine if each invoice is open.

```
IsOpen =  
IF (  
    SELECTEDVALUE ( Invoices[ApprovalStatus] ) = "Pending"  
    || (  
        SELECTEDVALUE ( Invoices[ApprovalStatus] ) = "Exception"  
        && ISBLANK ( SELECTEDVALUE ( Invoices[ApprovalReceivedDate] ) )  
    ),  
    TRUE(), FALSE()  
)
```

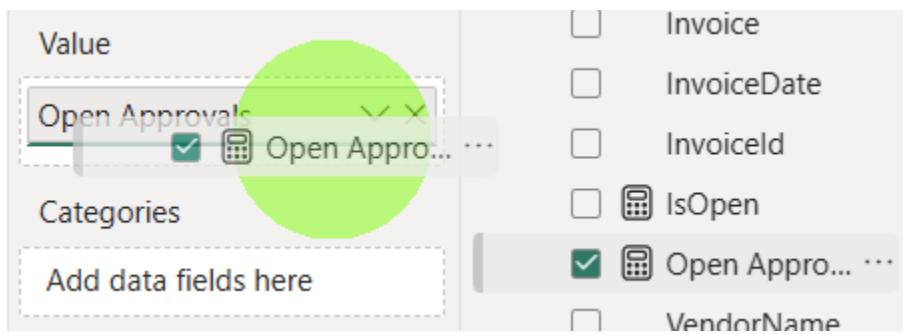
3. Add one more measure with DAX formula below to get the count of open invoices.

```
Open Approvals =  
CALCULATE ( COUNTROWS ( Invoices ), FILTER ( Invoices, [IsOpen] = TRUE() ) )
```

4. Duplicate the existing card by performing Copy/Paste and drag to the side.



5. Drag **Open Approvals** measure to Value field.



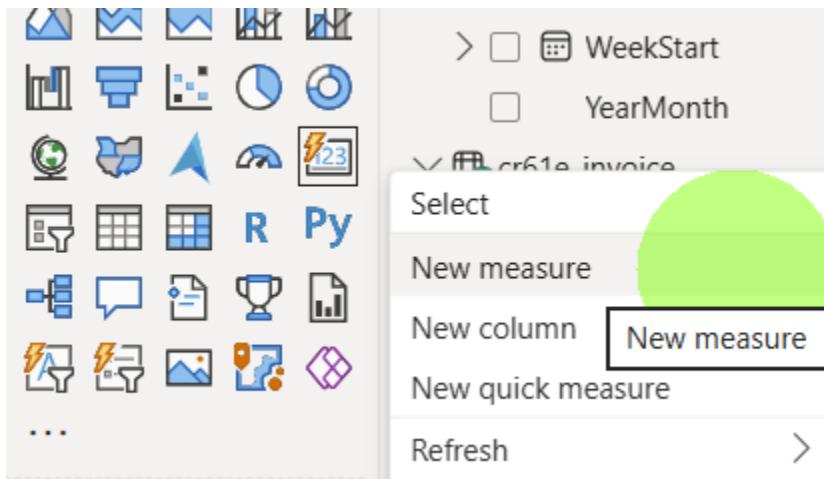
The screenshot shows the Power BI Data view interface. On the left, under 'Value', there's a dropdown menu containing 'Open Approvals' with a checkmark. To the right of this dropdown is a list of available data fields:

- Invoice
- InvoiceDate
- InvoiceId
- IsOpen
- Open Appro... ...
- VendorName

End of Task

Task 6: Add Median Approval Time (days) Card

1. Click 3 dots beside the table name and select **New measure**.



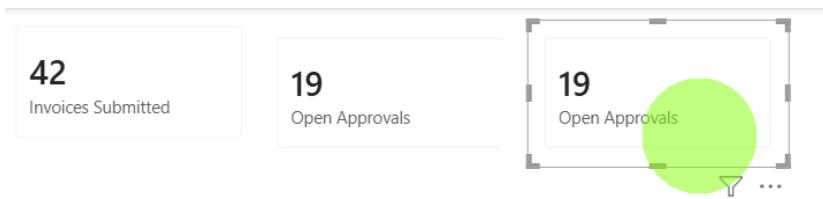
2. Add DAX formula below to determine if each invoice's approval duration in days.

```
Approval Time (days) =
VAR dtRaised = SELECTEDVALUE ( Invoices[ApprovalRaisedDate] )
VAR dtRecv = SELECTEDVALUE ( Invoices[ApprovalReceivedDate] )
RETURN
IF (
    SELECTEDVALUE ( Invoices[ApprovalStatus] ) IN { "Approved", "Rejected" } && NOT
    ISBLANK ( dtRecv ),
    DATEDIFF ( dtRaised, dtRecv, DAY ),
    BLANK ()
)
```

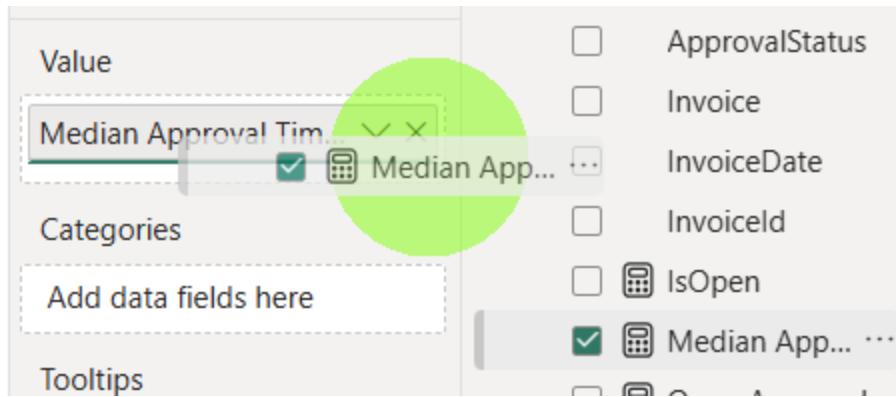
3. Add one more measure with DAX formula below to get the median approval duration.

```
Median Approval Time (days) =
MEDIANX (
    FILTER ( Invoices, Invoices[ApprovalStatus] IN { "Approved", "Rejected" } && NOT
    ISBLANK ( Invoices[ApprovalReceivedDate] ) ),
    [Approval Time (days)]
)
```

4. Duplicate the existing card by performing Copy/Paste and drag to the side.



5. Drag **Median Approval Time (days)** measure to Value field.

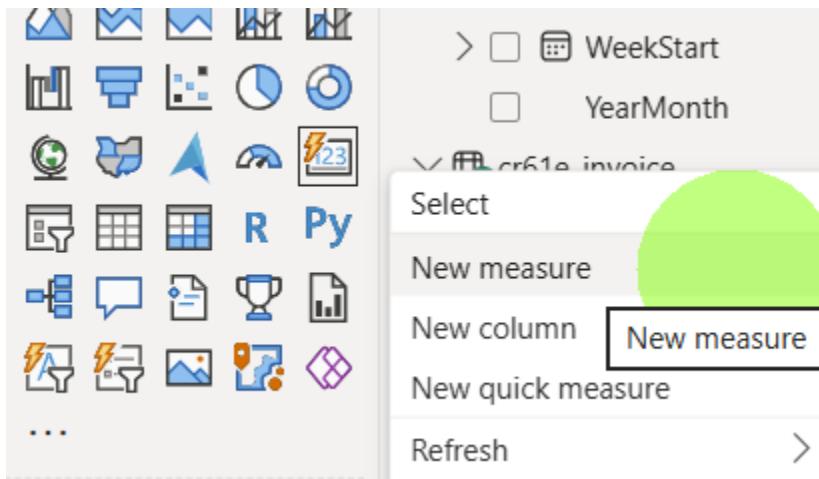


The screenshot shows the Power BI Data view pane. The 'Value' section on the left has a dropdown menu open, with 'Median Approval Tim.' selected. A green circle highlights this selection. To the right, a list of data fields is shown, with 'Median App...' also highlighted by a green circle. Other fields listed include ApprovalStatus, Invoice, InvoiceDate, InvoiceId, IsOpen, and another 'Median App...' entry.

----- End of Task -----

Task 7: Add Approval Rate Card

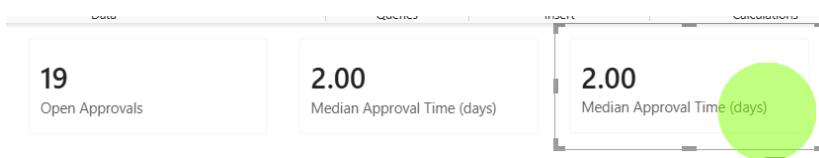
1. Click 3 dots beside the table name and select **New measure**.



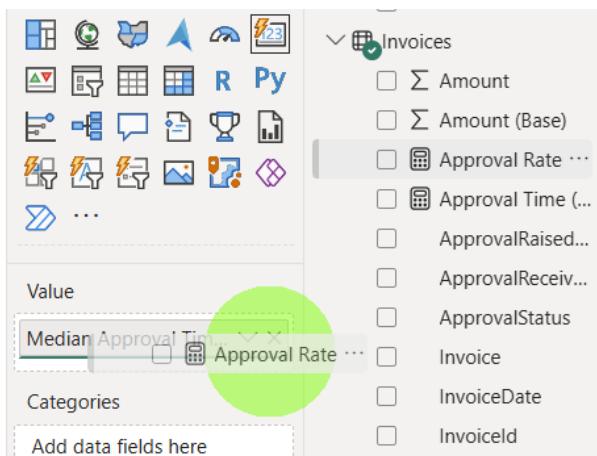
2. Add DAX formula below to calculate approval rate.

```
Approval Rate =  
VAR ApprovedCount =  
    CALCULATE ( COUNTROWS ( Invoices ), Invoices[ApprovalStatus] = "Approved" )  
VAR DecisionBase =  
    CALCULATE ( COUNTROWS ( Invoices ), Invoices[ApprovalStatus] IN { "Approved",  
"Rejected" } )  
RETURN DIVIDE ( ApprovedCount, DecisionBase )
```

3. Duplicate the existing card by performing Copy/Paste and drag to the side.



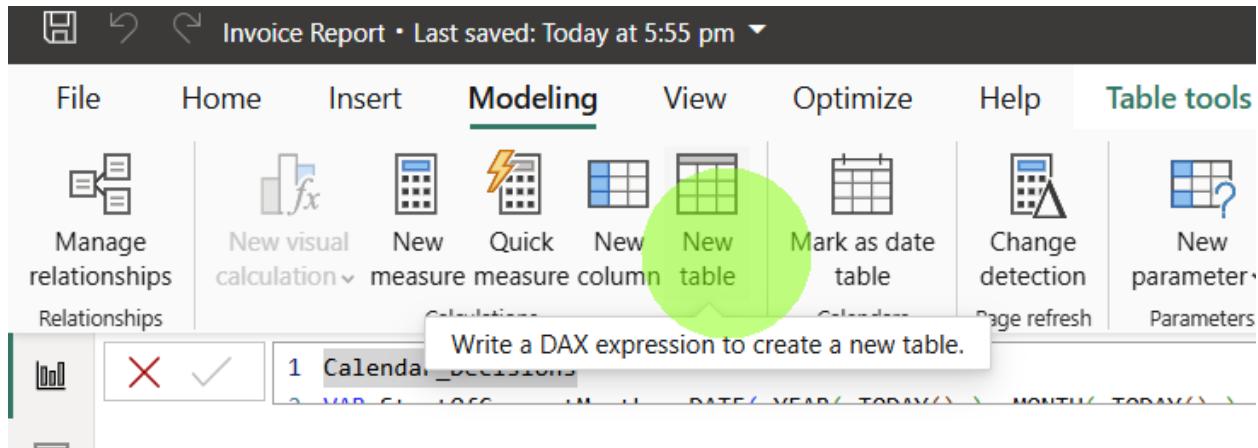
4. Drag **Approval Rate** measure to Value field.



----- End of Task -----

Task 8: Create Calendar Table for Time Series Charts

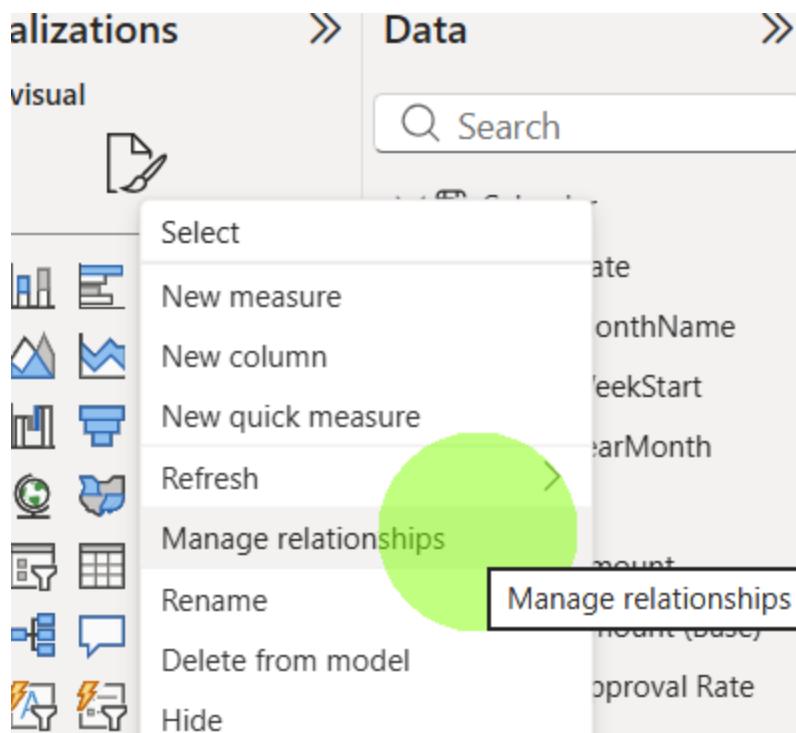
1. Click **Modeling** → **New table** to create a Date table.



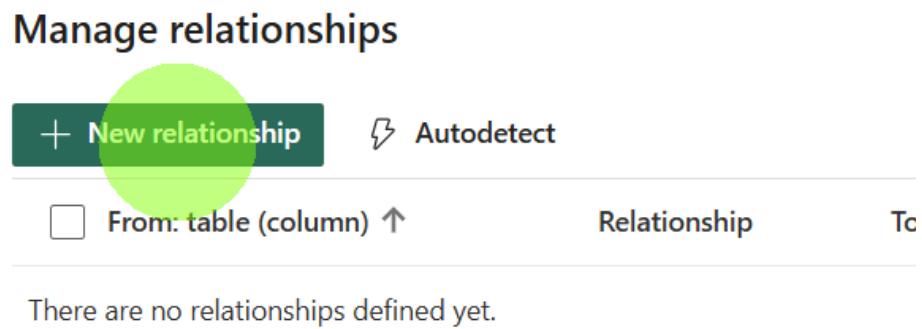
2. Paste in DAX formula below to create a Calendar table.

```
Calendar =  
VAR StartOfCurrentMonth = DATE( YEAR( TODAY() ), MONTH( TODAY() ), 1 )  
VAR FromDate = EOMONTH( StartOfCurrentMonth, - 12 ) + 1  
VAR ToDate = EOMONTH( StartOfCurrentMonth, 0 )  
RETURN  
ADDCOLUMNS(  
    CALENDAR ( FromDate, ToDate ),  
    "YearMonth", FORMAT ( [Date], "YYYY-MM" ),  
    "WeekStart", [Date] - WEEKDAY ( [Date], 2 ) + 1, -- Monday=2  
    "MonthName", FORMAT ( [Date], "MMM YYYY" )  
)
```

6. Right-click on the Calendar table and select **Manage Relationships**.



7. Select **New relationship**.



The screenshot shows the "Manage relationships" screen. At the top, there's a green button with a white plus sign and the text "New relationship". Next to it is a "Autodetect" button with a lightning bolt icon. Below these are two input fields: "From: table (column)" with an upward arrow icon and "Relationship" with a downward arrow icon. A large green circle highlights the "New relationship" button. The main area of the screen displays the message "There are no relationships defined yet."

8. Create Relationship between **Invoices - ApprovalRaisedDate** column and **Calendar - Date** column and Save.

Edit relationship

Select tables and columns that are related.

From table: Invoices

ApprovalRais...	ApprovalRece...	ApprovalStatus	Invoice	InvoiceDate	InvoiceId
null	null	null	AE8FA494-1B...	Wednesday, 2...	INV-3001
Wednesday, 4...	Wednesday, 4...	Pending	384B0EFB-D0...	Monday, 12 ...	INV-3005
Thursday, 21 ...	null	Exception	6BF30482-24...	Wednesday, 2...	INV-5001

To table: Calendar

Date	MonthName	WeekStart	YearMonth
1/3/2025 12:0...	Mar 2025	24/2/2025 12:...	2025-03
2/3/2025 12:0...	Mar 2025	24/2/2025 12:...	2025-03
3/3/2025 12:0...	Mar 2025	3/3/2025 12:0...	2025-03

Cardinality: Many to one (*:1)

Cross-filter direction: Single

Make this relationship active

Apply security filter in both directions

Assume referential integrity

Save **Cancel**

9. Create one more Relationship between **Invoices – ApprovalReceivedDate** column and **Calendar – Date** column and Save.

Edit relationship

Select tables and columns that are related.

From table

ApprovalRais...	ApprovalRec...	ApprovalStatus	Invoice	InvoiceDate	InvoiceId
null	null	null	AE8FA494-1B...	Wednesday, 2...	INV-3001
Wednesday, 4...	Wednesday, 4...	Pending	384B0EFB-D0...	Monday, 12 ...	INV-3005
Thursday, 21 ...	null	Exception	6BF30482-24...	Wednesday, 2...	INV-5001

To table

Date	MonthName	WeekStart	YearMonth
1/3/2025 12:0...	Mar 2025	24/2/2025 12:...	2025-03
2/3/2025 12:0...	Mar 2025	24/2/2025 12:...	2025-03
3/3/2025 12:0...	Mar 2025	3/3/2025 12:0...	2025-03

Cardinality

Many to one (*:1)

Cross-filter direction

Single

Make this relationship active

Apply security filter in both directions

Assume referential integrity

Save **Cancel**

10. You should see two relationships created as below.

Manage relationships X

+ New relationship Autodetect Edit Delete Filter

<input type="checkbox"/> From: table (column) ↑	Relationship	To: table (column)	Status
<input type="checkbox"/> Invoices (ApprovalRaisedDate)	*—<—1	Calendar (Date)	Inactive ...
<input type="checkbox"/> Invoices (ApprovalReceivedDa...	*—<—1	Calendar (Date)	Inactive ...

----- End of Task -----

Task 9: Create Monthly Invoice Submitted Vs Decision Made Chart

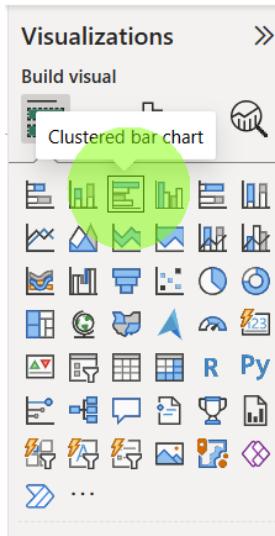
1. Add a new measure to get monthly invoice count.

```
Invoice Count (by Raised Date) =  
CALCULATE (  
    COUNT(Invoice[InvoiceId]),  
    USERELATIONSHIP ( Calendar[Date], Invoice[ApprovalRaisedDate] )  
)
```

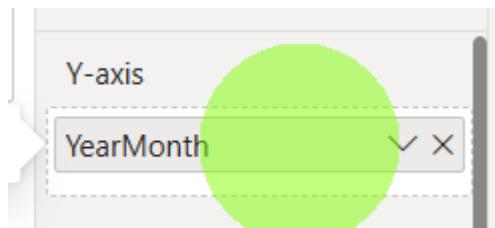
2. Add a new measure to get monthly decision count where status is approved or rejected.

```
Decision Count (by Decision Date) =  
CALCULATE (  
    CALCULATE (  
        COUNTROWS ( Invoice ),  
        KEEPFILTERS ( Invoice[ApprovalStatus] IN { "Approved", "Rejected" } ),  
        NOT ISBLANK ( Invoice[ApprovalReceivedDate] )  
    )  
,  
    USERELATIONSHIP ( Calendar[Date], Invoice[ApprovalReceivedDate] )  
)
```

3. Add **Clustered bar chart** visualization.



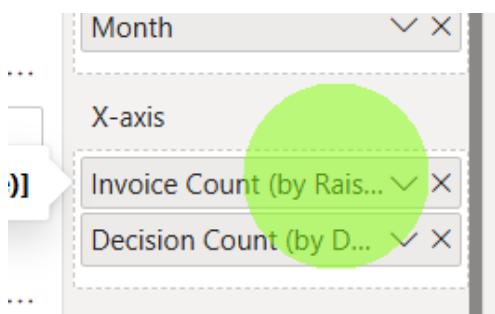
4. Drag **YearMonth** to Y-axis.



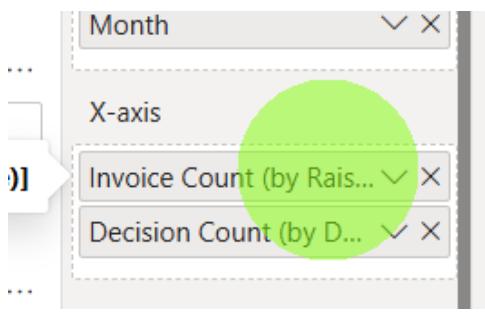
Rename it to Month.



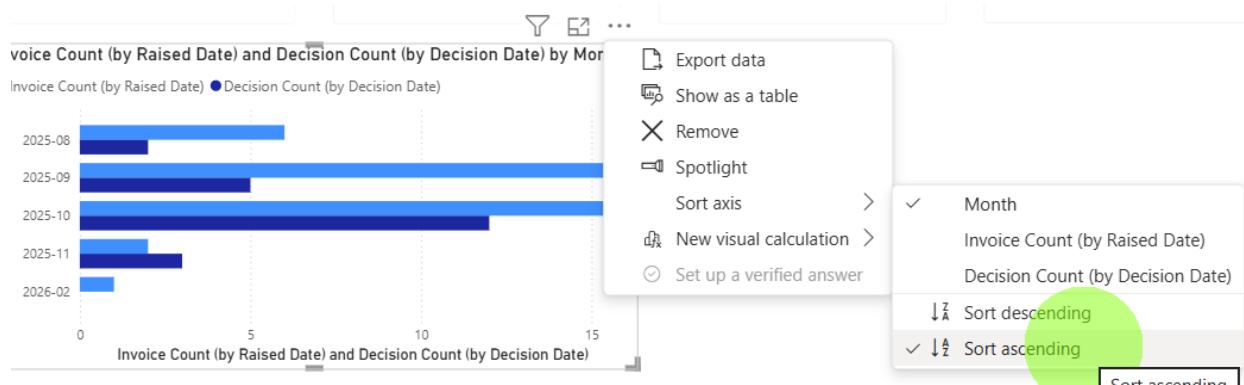
5. Drag **Invoice Count (by Raised Date)** measure to X-axis.



6. Drag **Decision Count (by Decision Date)** measure to X-axis.



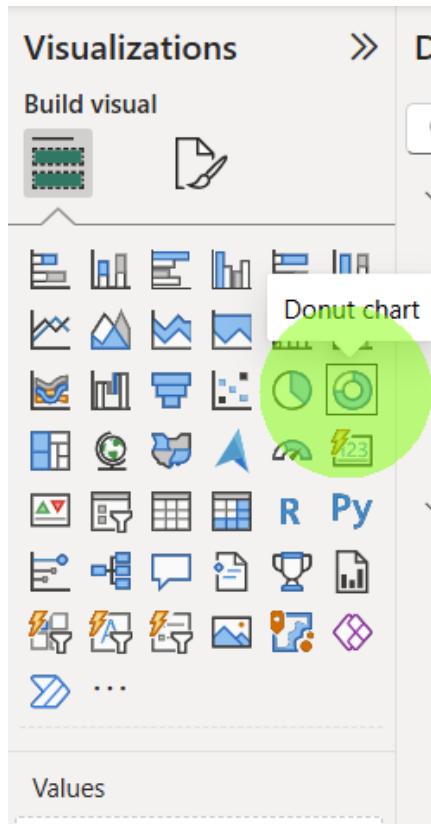
7. Click on 3 dots at the top-right corner of the Chart. Select **Sort axis → Month → Sort ascending.**



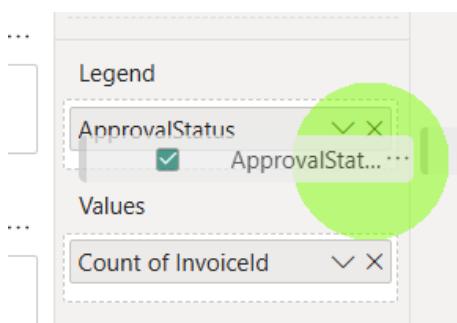
----- End of Task -----

Task 10: Create Invoices Count by Status Chart

1. Add a Donut Chart to the report.



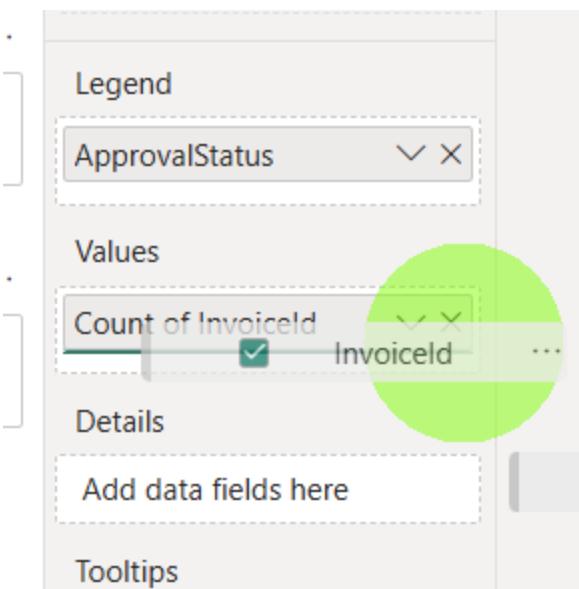
2. Drag ApprovalStatus to Legend.



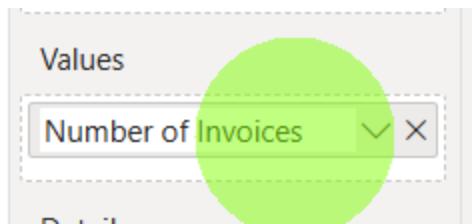
Rename it to Approval Status.



3. Drag Invoiceld field to Values.



Rename it to Number of Invoices.



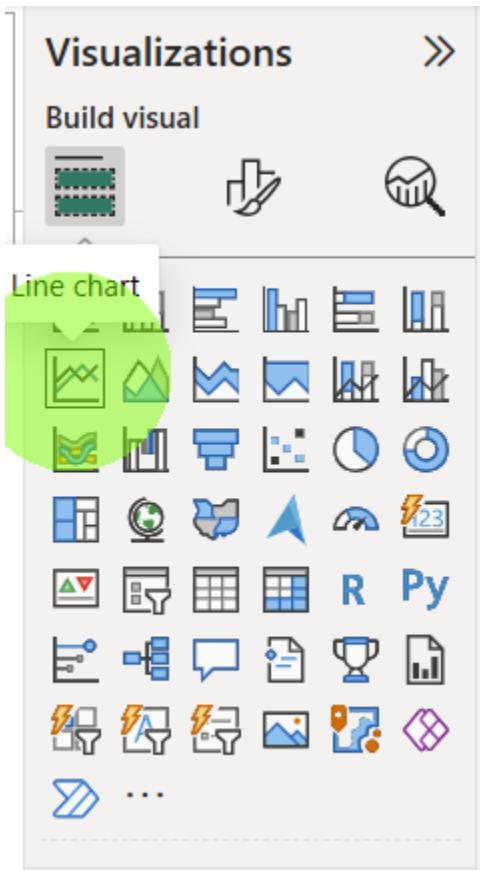
----- End of Task -----

Task 11: Create Median Approval Time Chart

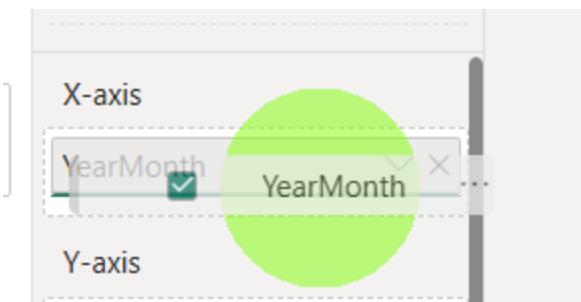
1. Create a new measure to calculate the Median Approval Time by month.

```
Median Approval Time (by Decision Date) =  
CALCULATE (  
    [Median Approval Time (days)],  
    USERELATIONSHIP ( Calendar[Date], Invoices[ApprovalReceivedDate] )  
)
```

2. Add a **Line Chart visualization** to the report.



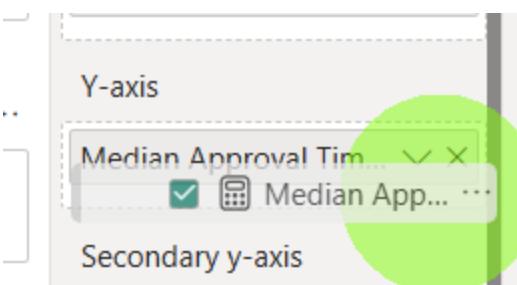
3. Drag **YearMonth** to X-Axis.



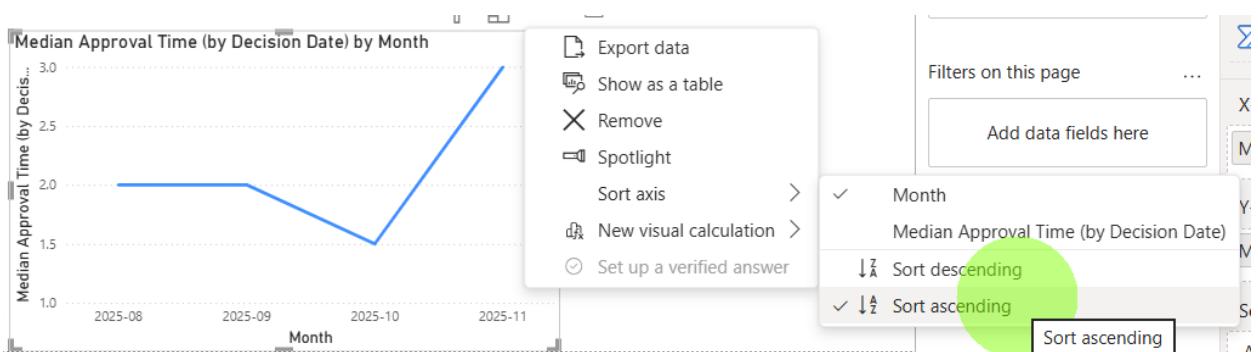
Rename it to Month.



4. Drag **Median Approval Time (by Decision Date)** to Y-Axis.



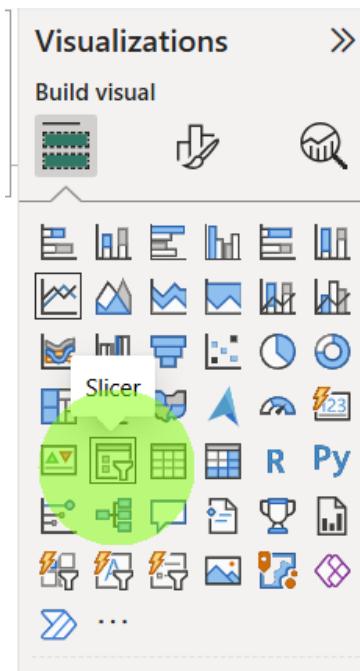
5. Click on 3 dots at the top-right corner of the Chart. Select **Sort axis → Month → Sort ascending**.



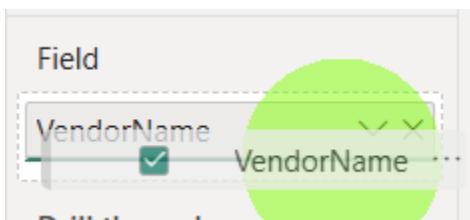
----- End of Task -----

Task 12: Add Slicers to the Report

1. Add **Slicer Visualization** to the Report.



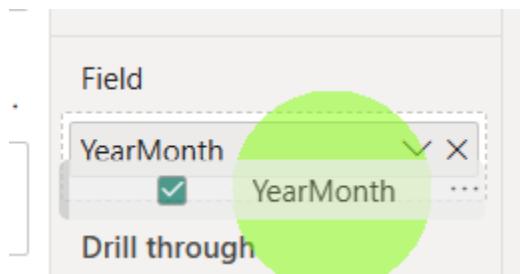
2. Add **VendorName** to Field.



Rename it to Vendor Name.



3. Add one more slicer and Add **YearMonth** to Field.

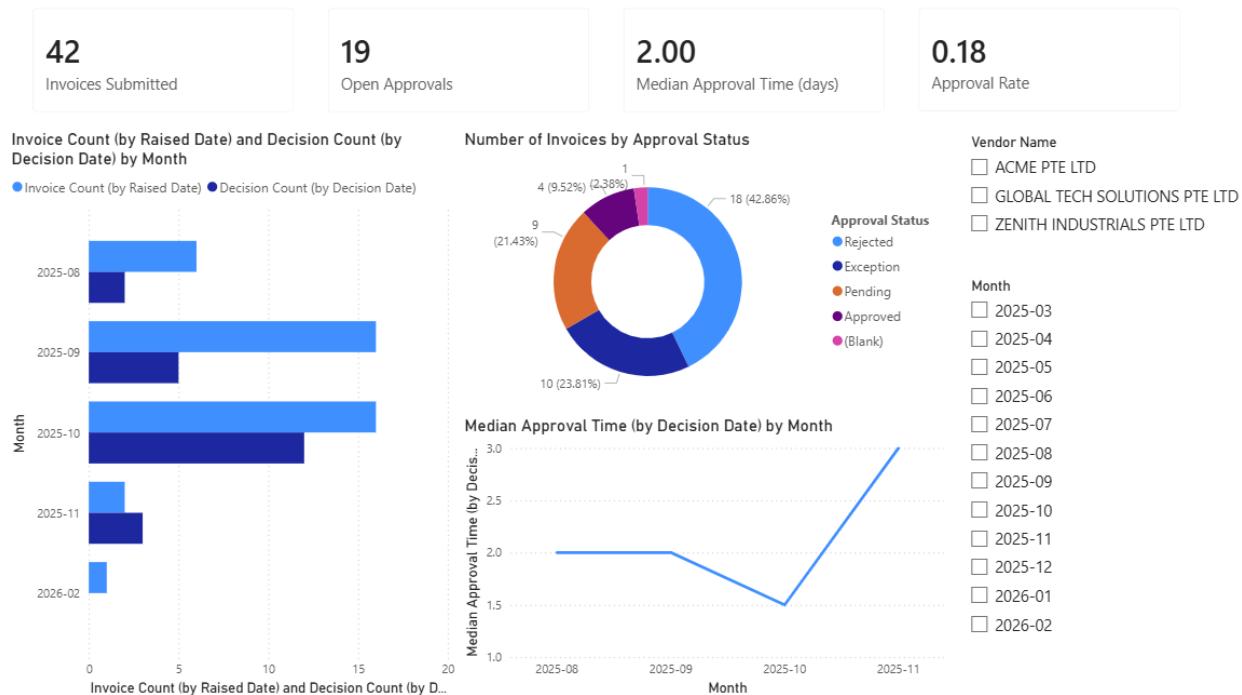


Rename it to Month.



Slicers allow you to filter your data.

Rearrange the visualizations on screen.



End of Task

Exercise 2: Embedding Power BI Dashboard in Power App

In this exercise, you'll learn how to publish local Power BI report to Power BI online dashboard and display it in Power Apps.

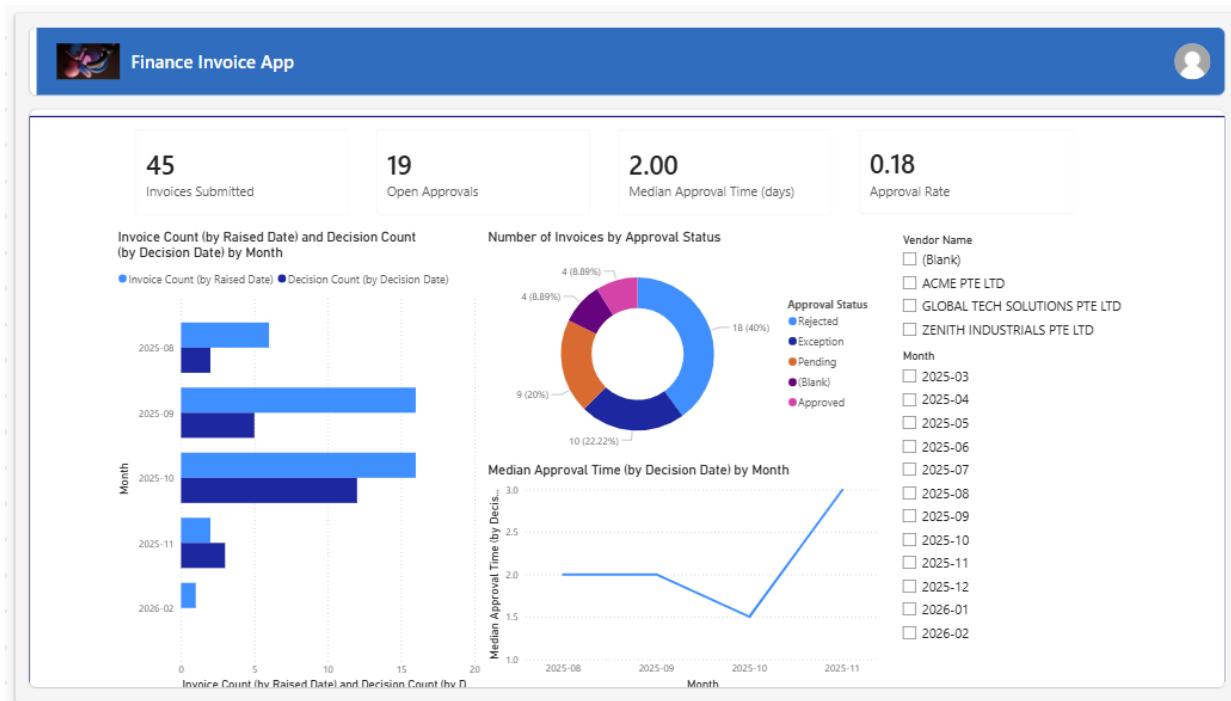
Objectives

After completing this exercise, participants will be able to:

- Publish local Power BI report to Power BI Dashboard Online
- Share Power BI Dashboard with other users
- Embed Power BI Dashboard in Power App

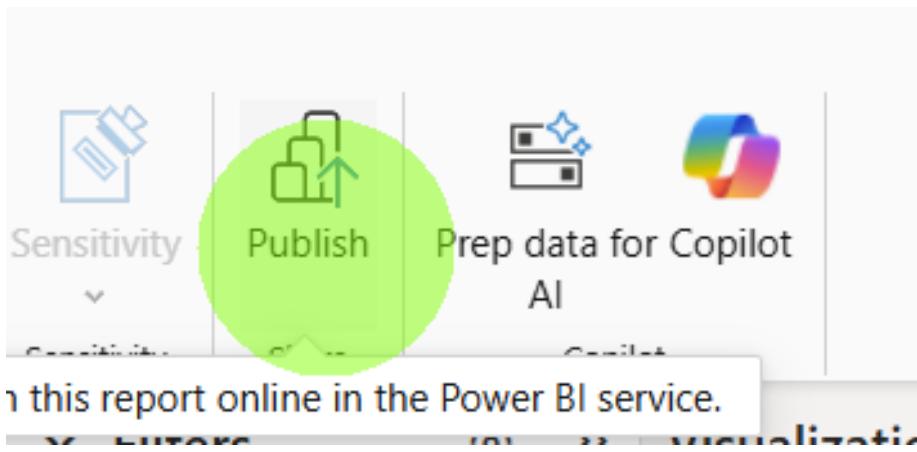
Estimated Time

30–40 mins

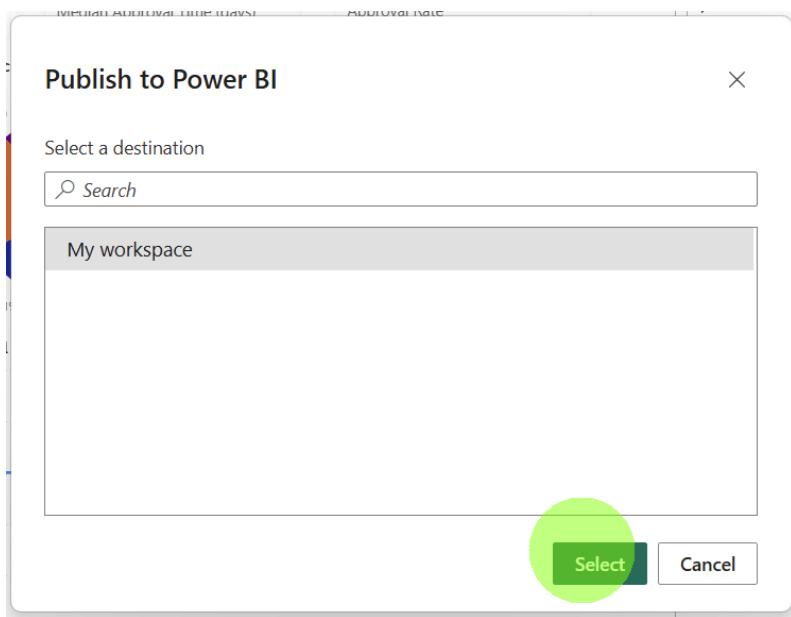


Task 1: Publishing Power BI Report

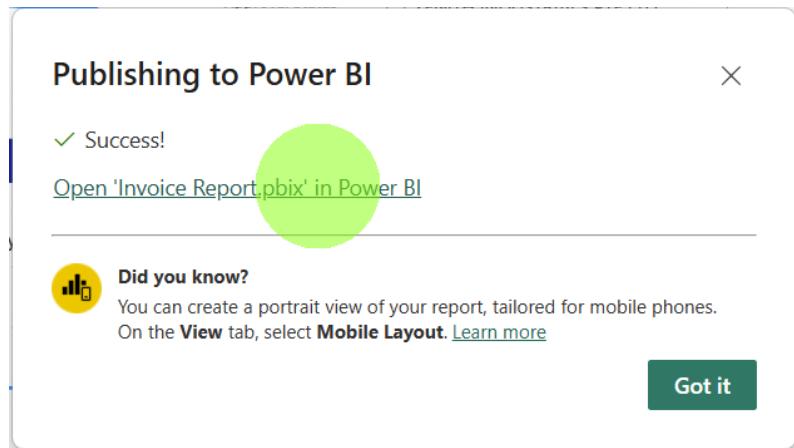
1. Click Publish at the top of the screen.



2. Select My workspace and click Select.



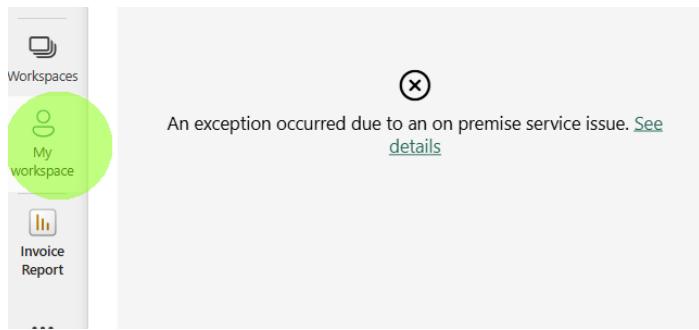
3. Once done, click the link to navigate to the published online report.



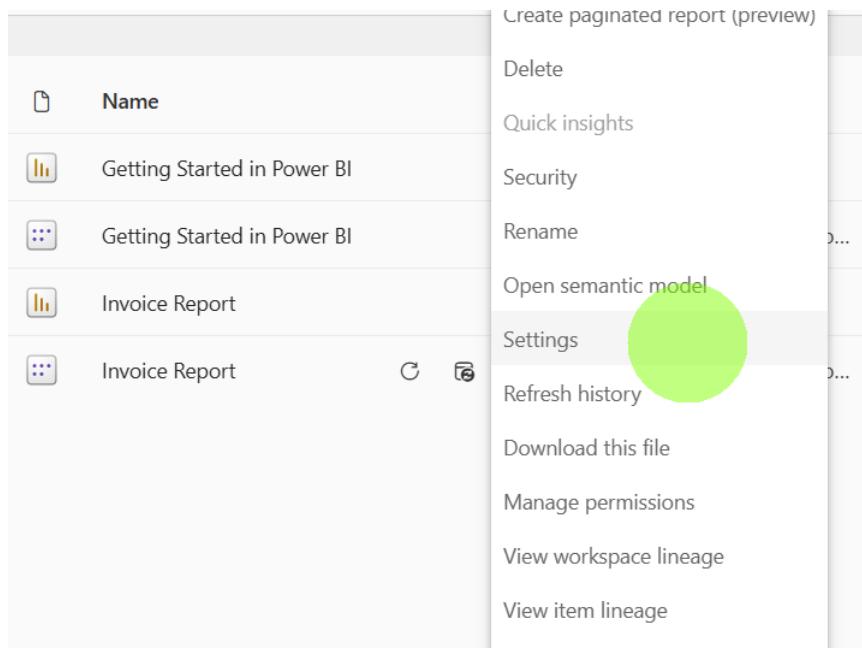
----- End of Task -----

Task 2: Fixing Data Source Connection Issue

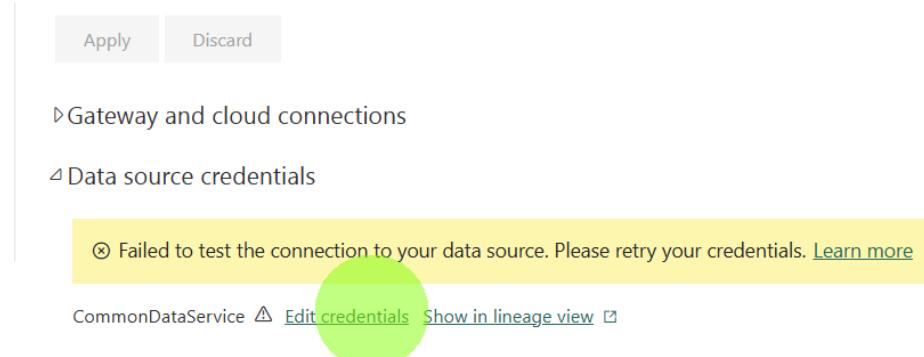
1. On Power BI Online report view, click My Workspace (or choose the workspace that you have published your report to).



2. Click on 3 dots beside **Invoice Report Semantic Model** and click **Settings**.

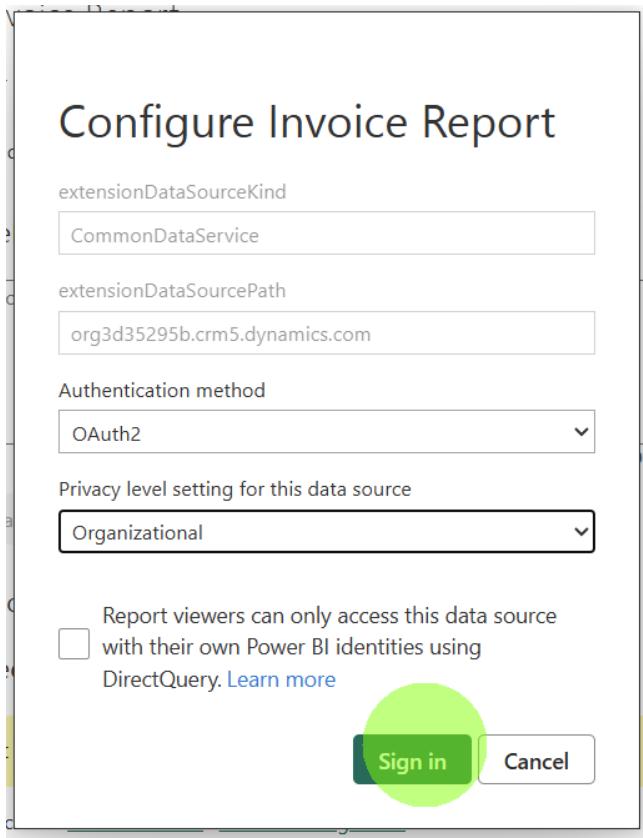


3. On Settings page, click **Edit credentials** under **Data source credentials**.



The screenshot shows the 'Data source credentials' section of the settings page. At the top are 'Apply' and 'Discard' buttons. Below them is a tree view with 'Gateway and cloud connections' and 'Data source credentials'. Under 'Data source credentials', there is a yellow warning box containing the text: 'Failed to test the connection to your data source. Please retry your credentials.' followed by a link 'Learn more'. Below the warning box is a green circle highlighting the 'Edit credentials' link. At the bottom of the section are links for 'CommonDataService' (with a triangle icon), 'Edit credentials' (highlighted with a green circle), 'Show in lineage view' (with a blue icon), and another link with a blue icon.

4. Select following settings and click Sign in.

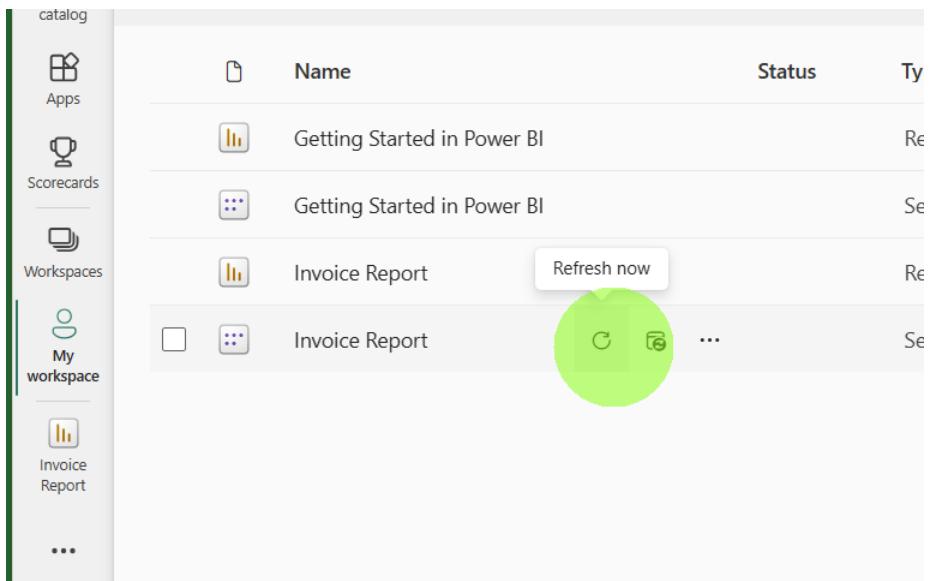


The screenshot shows the 'Configure Invoice Report' dialog box. It contains the following fields:

- extensionDataSourceKind: CommonDataService
- extensionDataSourcePath: org3d35295b.crm5.dynamics.com
- Authentication method: OAuth2
- Privacy level setting for this data source: Organizational

Below these fields is a note: "Report viewers can only access this data source with their own Power BI identities using DirectQuery." A checkbox is present next to this note. At the bottom of the dialog are 'Sign in' and 'Cancel' buttons, with the 'Sign in' button highlighted with a green circle.

5. Go back to My workspace and click Refresh icon to refresh data.



The screenshot shows the Microsoft Power Platform catalog interface. On the left, there's a sidebar with links: catalog, Apps, Scorecards, Workspaces, My workspace (which is highlighted with a blue background), Invoice Report, and The main area displays a table with columns: Name, Status, and Type. There are two rows for 'Getting Started in Power BI' and two rows for 'Invoice Report'. The second 'Invoice Report' row has a 'Refresh now' button next to it, which is circled in green. Below the table, there are three icons: a circular arrow, a refresh symbol, and three dots.

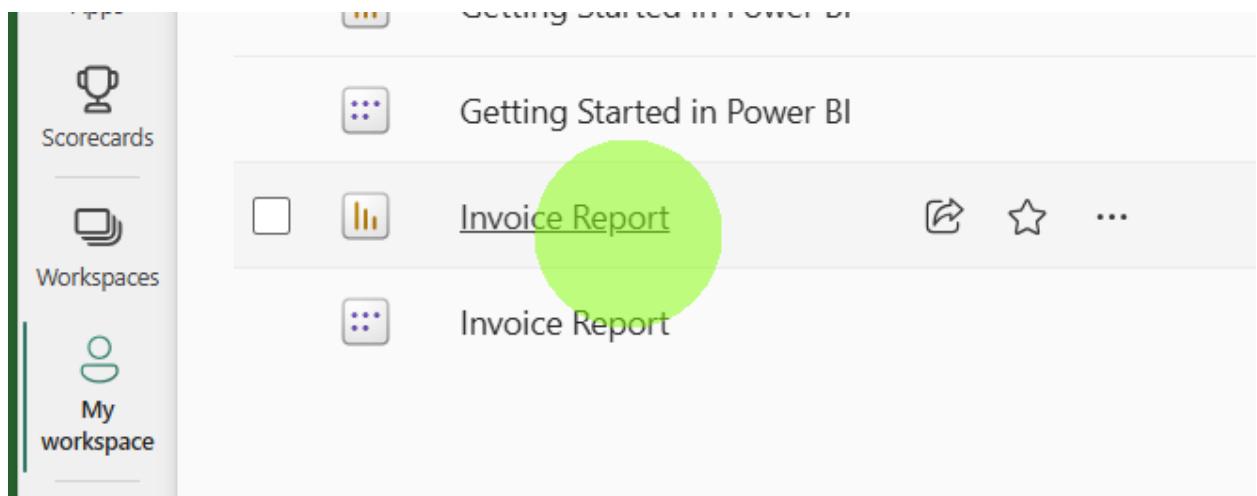
	Name	Status	Type
	Getting Started in Power BI	Re	
	Getting Started in Power BI	Se	
	Invoice Report	Re	
	Invoice Report	Se	

You should be able to see data loaded in your report.

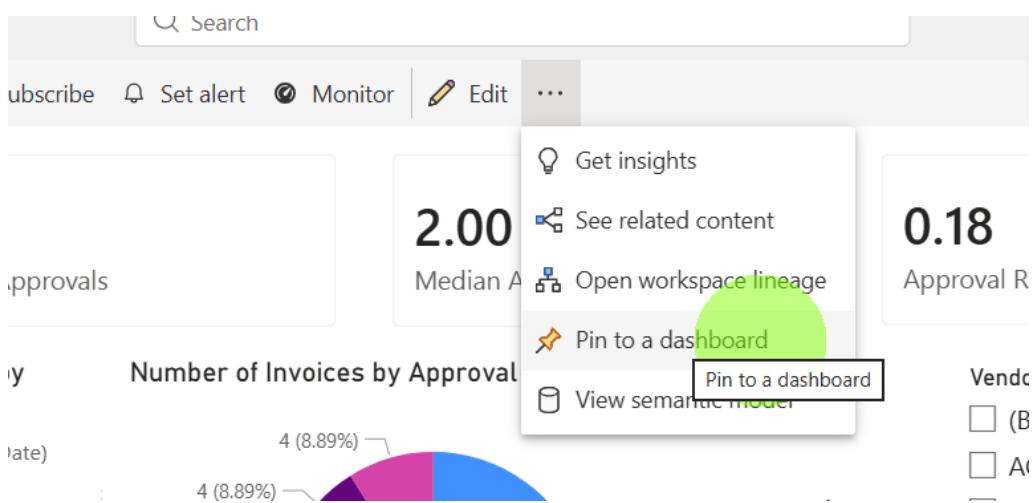
End of Task

Task 3: Adding Report to a Dashboard

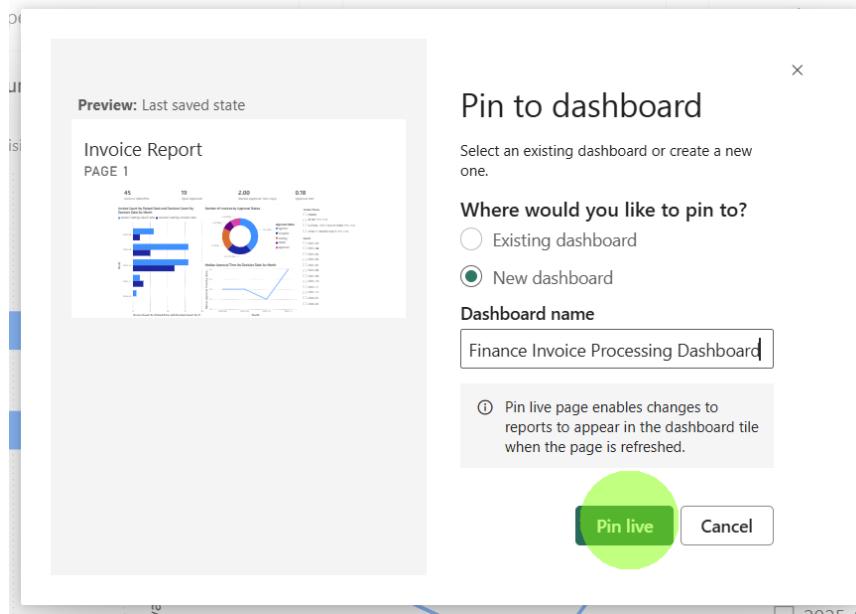
1. Go back to My workspace and open your report.



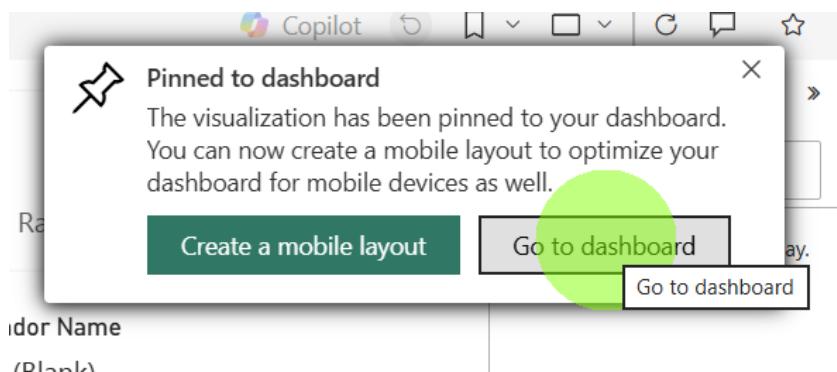
2. Click Pin to a dashboard from top menu of the report



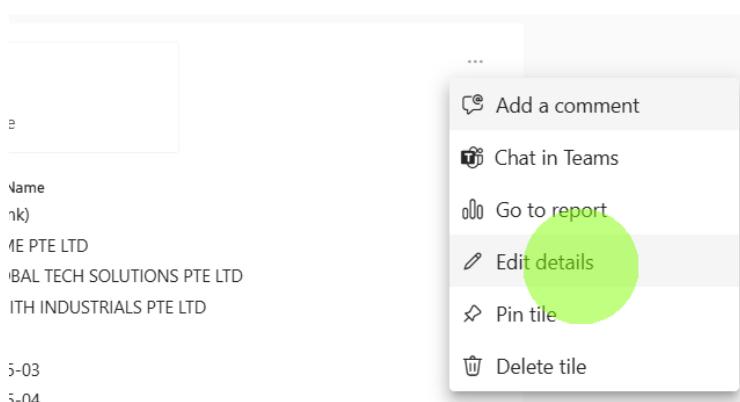
3. Give name for a new dashboard and click Pin live.



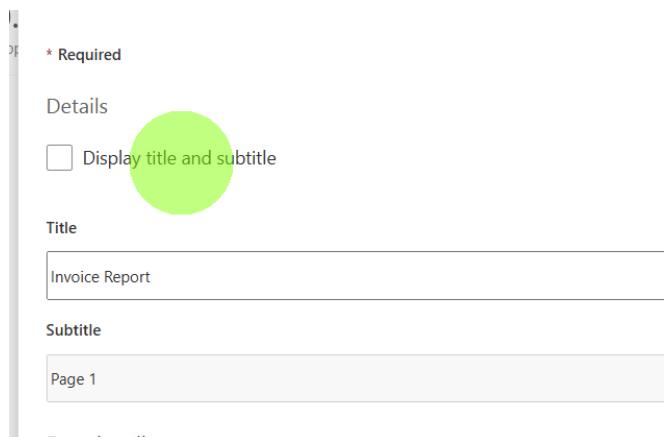
4. Click **Go to dashboard**



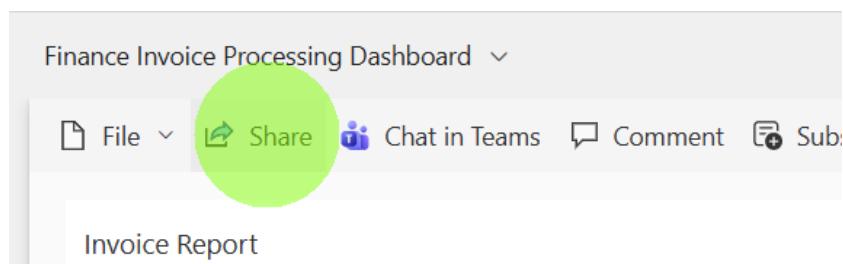
5. Click 3 dots from top right corner and **Edit Details**.



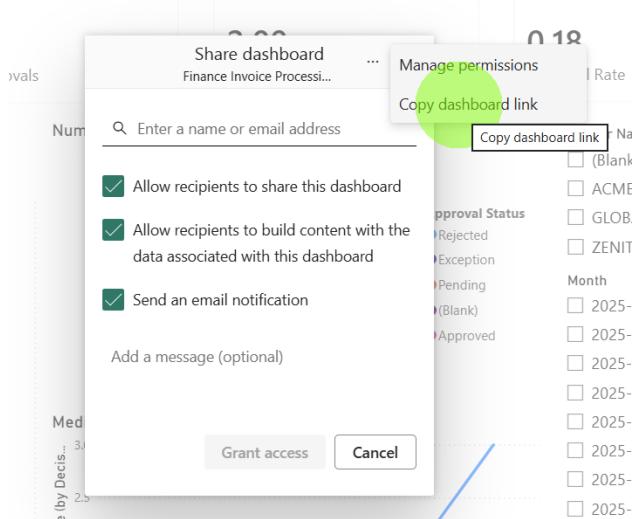
6. Uncheck **Display title and subtitle** and click **Apply**



7. (Optional) Click **Share**.



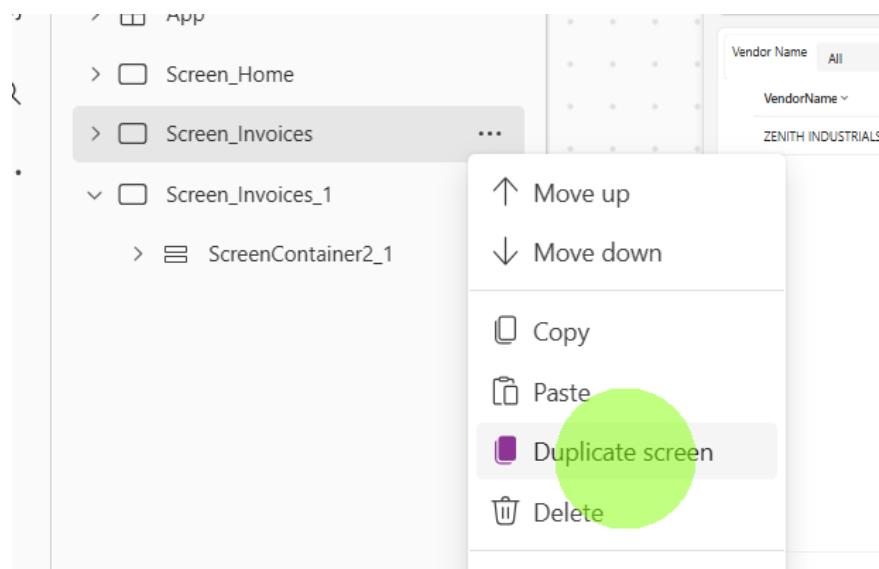
Add users that you would like to share the Dashboard with.



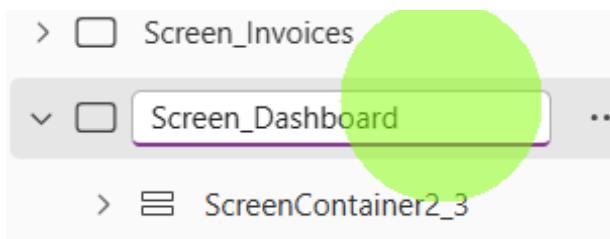
End of Task

Task 4: Adding Dashboard to Canvas App

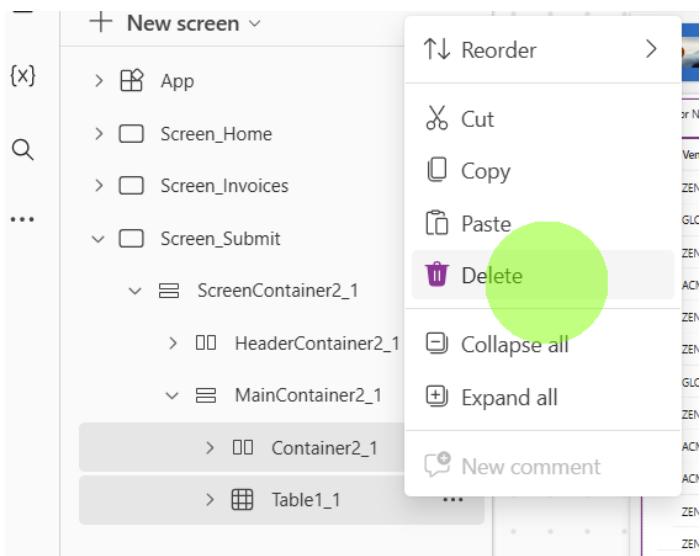
1. Open Finance Invoice App.
2. Duplicate Screen_Invoices by following selecting the screen, right clicking it, and then selecting the 'Duplicate Screen' option.



3. Rename the new screen to Screen_Dashboard.

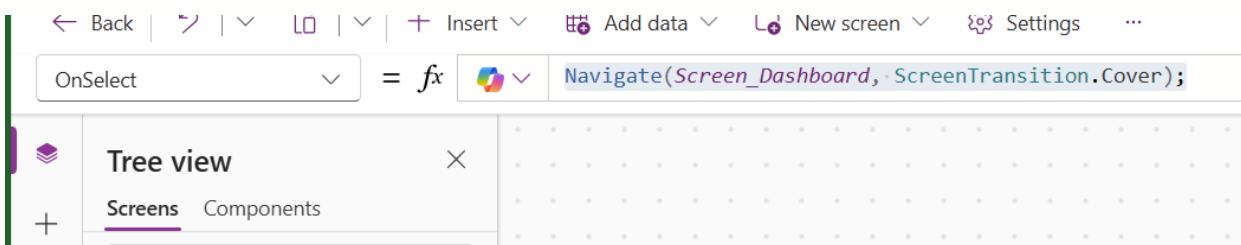


4. Expand the Main Container and delete the controls inside.

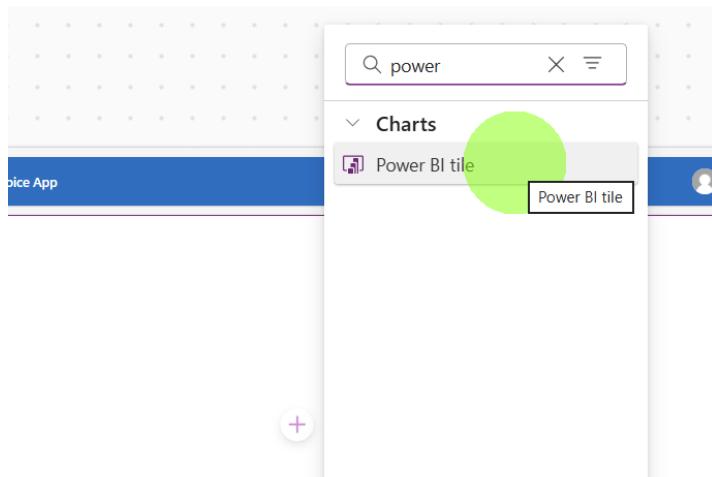


5. Go back to Screen_Home and update OnSelect event of Dashboard icon to below.

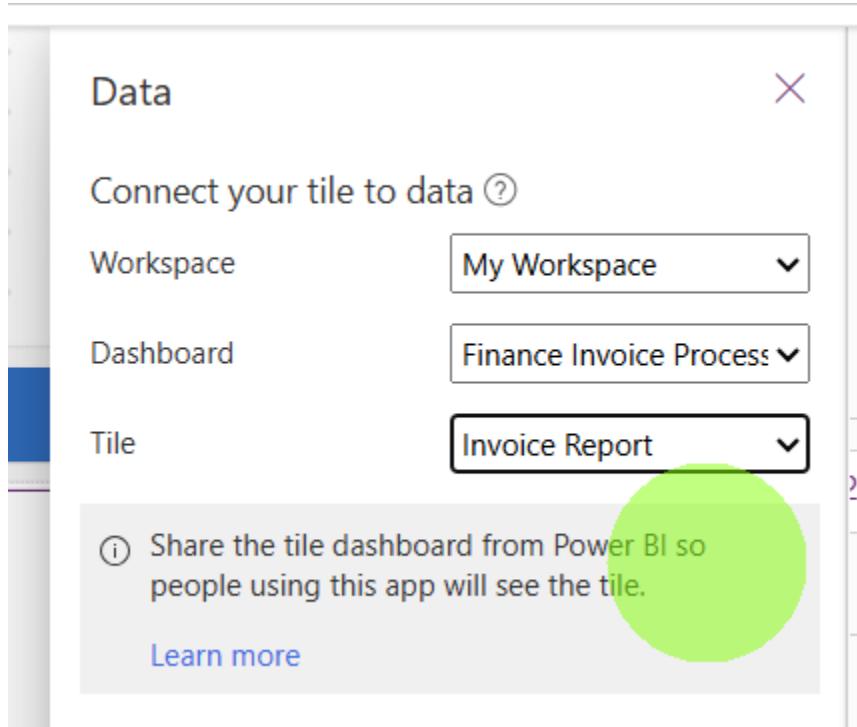
```
Navigate(Screen_Dashboard, ScreenTransition.Cover);
```



6. On Screen_Dashboard, add Power Bi Tile into the main container.



7. Select your Dashboard in Data window.



8. Adjust Dashboard Width and Height as below.

Width: `Parent.Width`

Height: `Parent.Height`

End of Task

Exercise 3: Embedding Power App and Power Automate in Power BI Dashboard

In this exercise, participants will learn how to embed Power App and Power Automate in their Power BI dashboard to interact with data directly.

Objectives

After completing this exercise, participants will be able to:

- Embed Power App Canvas App in their Power BI Reports
- Embed Power Automate Workflows in Power BI Reports

Estimated Time

30 mins

Invoices with Exception Status

InvoiceId	VendorName	Sum or Amount	InvoiceDate
INV-5025	GLOBAL TECH SOLUTIONS PTE LTD	\$110,000	Wednesday, 29 October, 2025
INV-5033	ACME PTE LTD	\$12,117.55	Thursday, 4 September, 2025
INV-5021	ZENITH INDUSTRIALS PTE LTD	\$12,059.69	Thursday, 11 September, 2025
INV-5035	ZENITH INDUSTRIALS PTE LTD	\$10,749.34	Thursday, 4 September, 2025
INV-5037	ZENITH INDUSTRIALS PTE LTD	\$10,267.26	Thursday, 14 August, 2025
INV-5001	ZENITH INDUSTRIALS PTE LTD	\$10,247.33	Wednesday, 20 August, 2025
INV-5029	ZENITH INDUSTRIALS PTE LTD	\$9,120.79	Thursday, 16 October, 2025
INV-5004	ACME PTE LTD	\$4,295.44	Tuesday, 28 October, 2025
INV-5022	ZENITH INDUSTRIALS PTE LTD	\$1,775.81	Monday, 27 October, 2025
INV-5012	ZENITH INDUSTRIALS PTE LTD	\$1,281.69	Thursday, 11 September, 2025
Total		\$181,914.9	

Share this app from Power Apps so others can view it in Power BI. To do so, select: More Options > Edit, and then in Power Apps Studio select: File > Share. X

INV-5037

VendorName

ZENITH INDUSTRIALS PTE LTD

Amount

10267.26

InvoiceDate

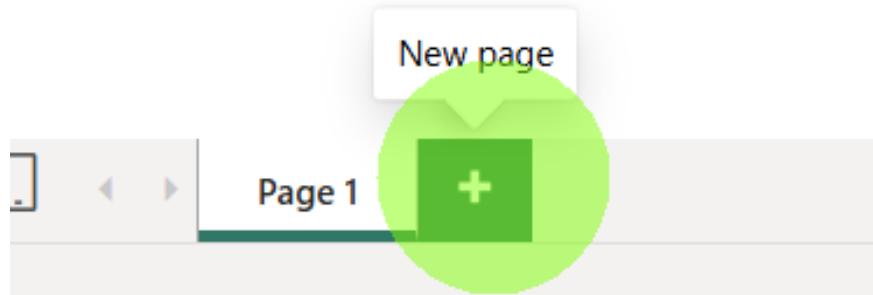
14/08/2025

Submit

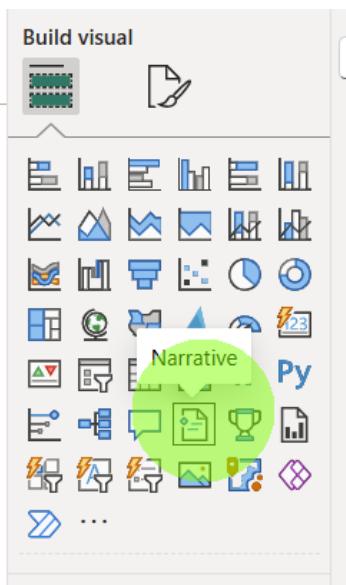
Run flow

Task 1: Prepare Power BI Report

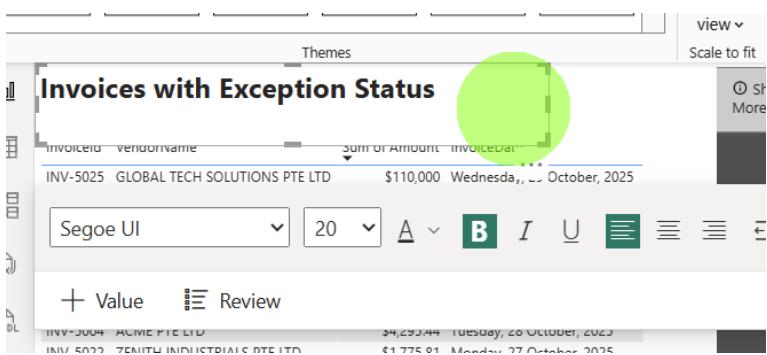
1. Start by adding a new page to the Power BI report on Power BI Desktop.



1. Add **Narrative visualization** to the report.

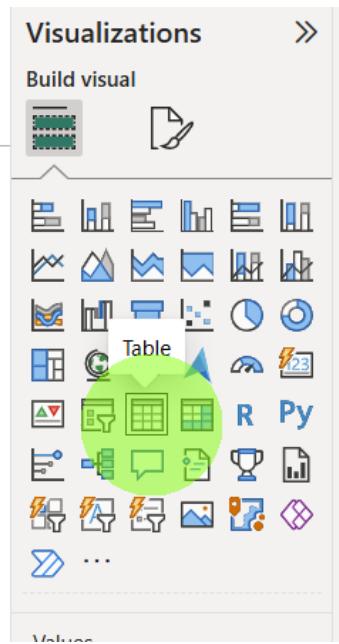


2. Edit the narrative as below to show as a page title.

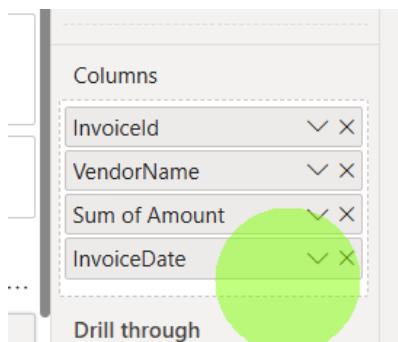


A screenshot of the Power BI Desktop report canvas. A narrative visualization titled 'Invoices with Exception Status' is displayed. The text in the narrative is:
Invoices with Exception Status
INVOICEID VendorName Sum of Amount Invoiced Date
INV-5025 GLOBAL TECH SOLUTIONS PTE LTD \$110,000 Wednesday, 25 October, 2025

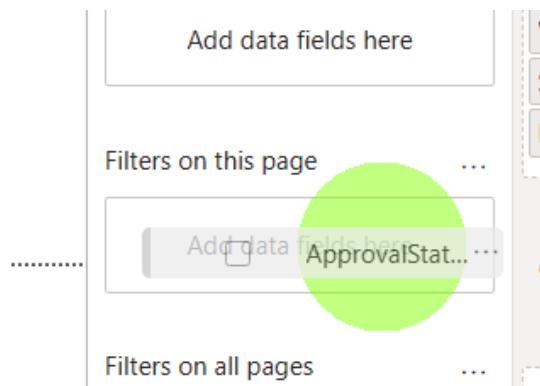
3. Add **Table visualization** to the report.



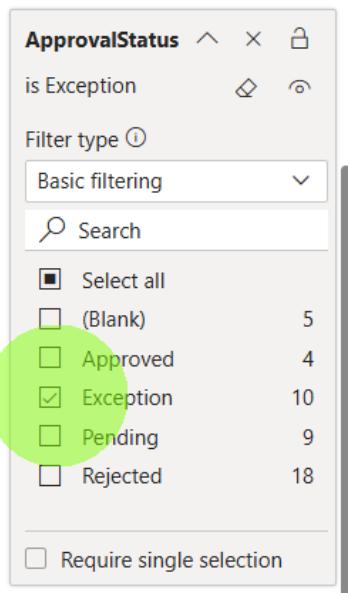
4. Drag below field to **Columns**.



5. Drag **Approval Status** to **Filter on this page**.



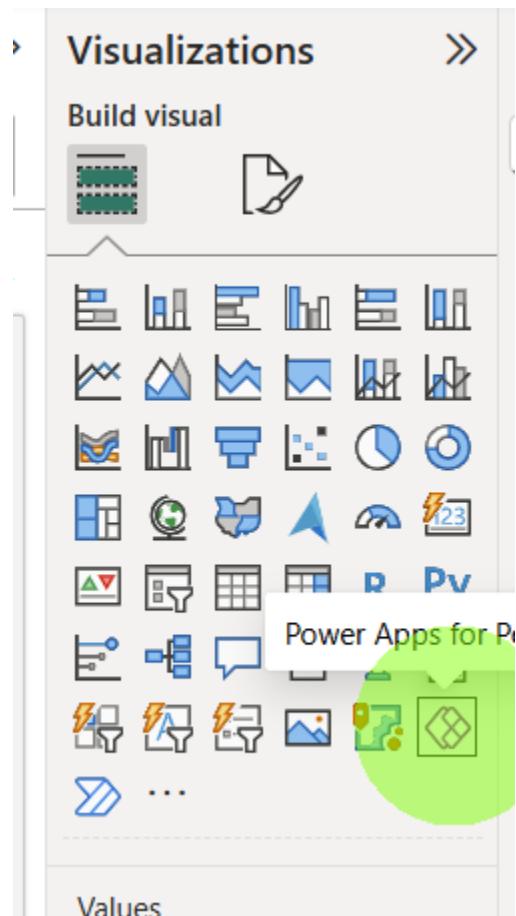
6. Select **Exception** in filter



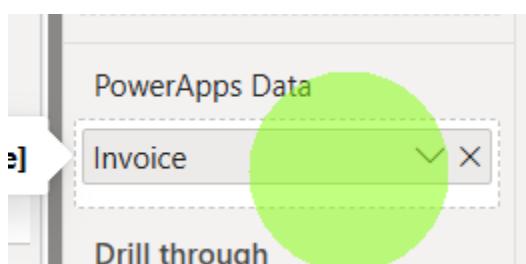
----- End of Task -----

Task 2: Embed Power App in Power BI Report

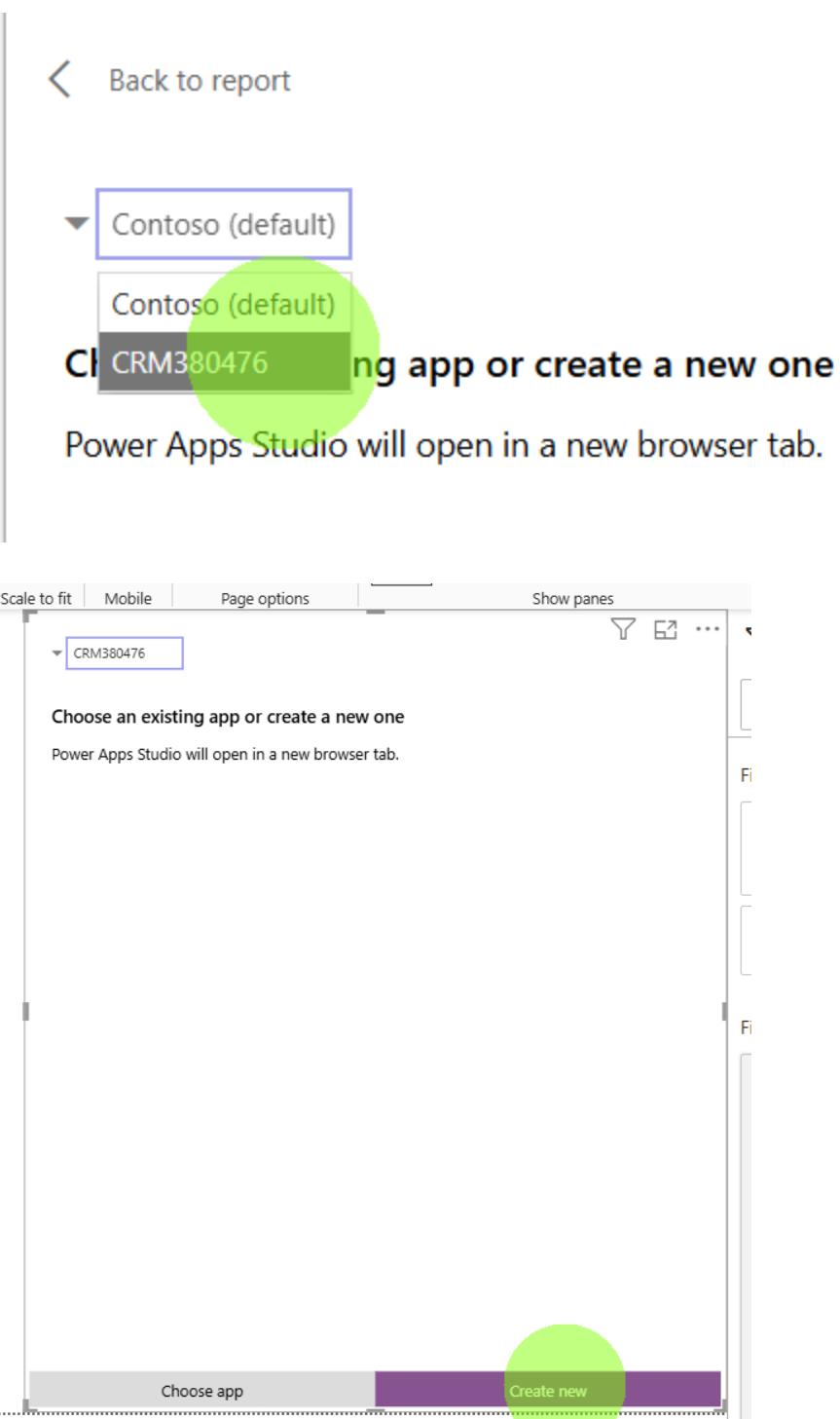
1. Add **Power App for Power BI** to the report.



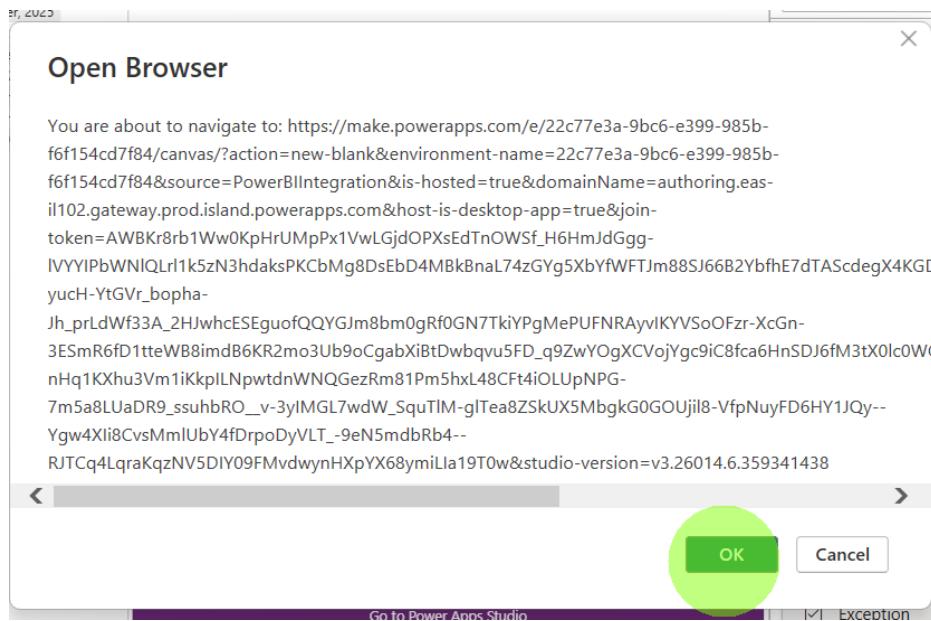
2. Drag **Invoice** to PowerApps Data.



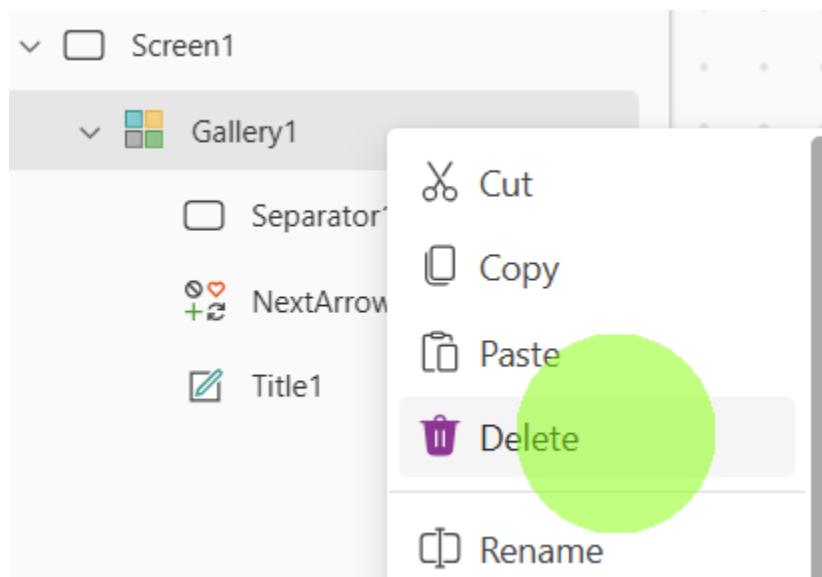
3. Select the environment where Invoice Table is hosted and Create new.



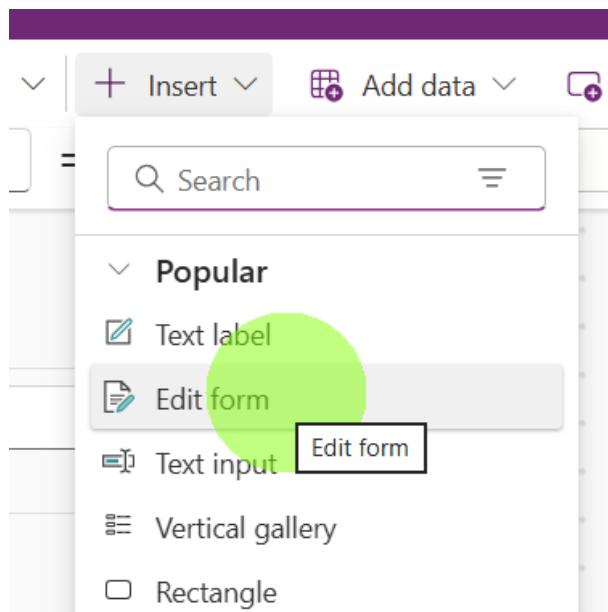
4. Click OK and it will bring you to Power App Studio.



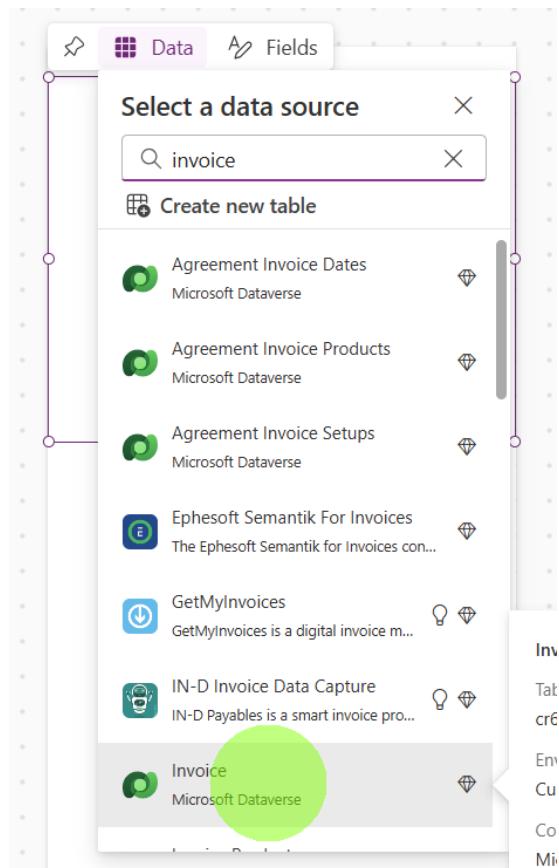
5. Delete Gallery 1 (Created by Default) in Power App.



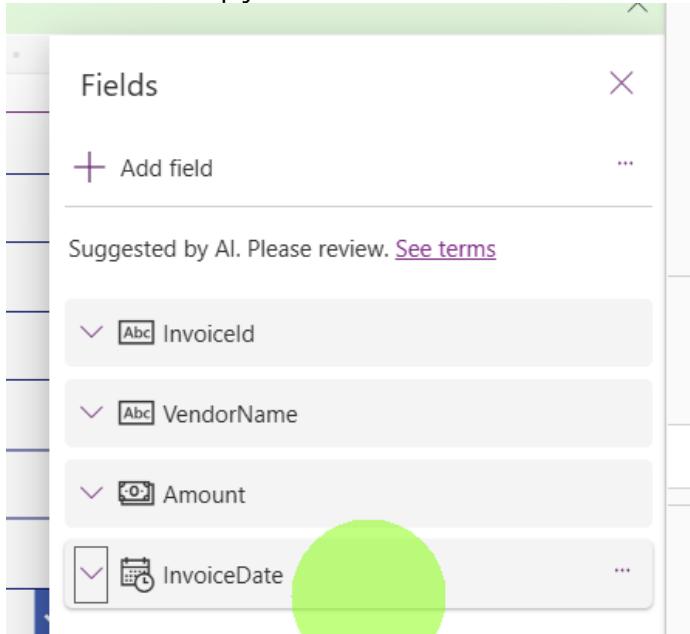
6. Add a new Edit form.



7. Select Invoice as data source.



8. Edit fields to keep just 4 fields below.



Fields

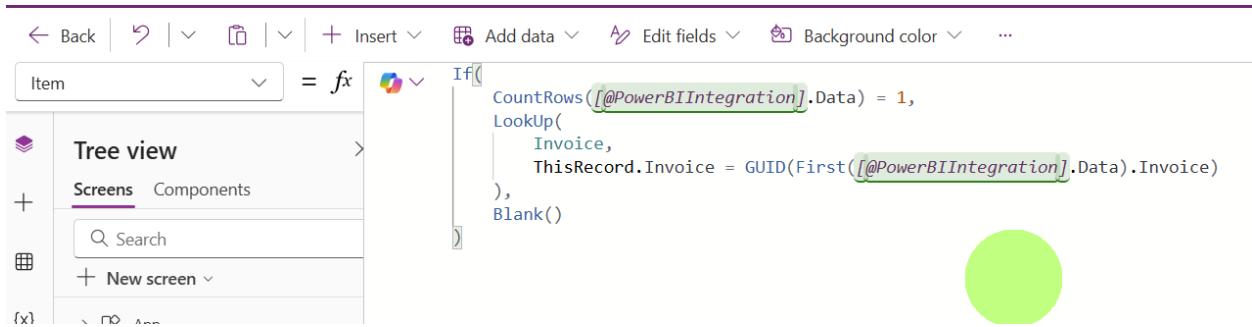
Add field

Suggested by AI. Please review. [See terms](#)

- Invoiceld
- VendorName
- Amount
- InvoiceDate

9. In the Item property of the form, update with the formula below to populate the invoice details if a record is selected in Power BI.

```
If(
    CountRows(@PowerBIIntegration).Data) = 1,
    LookUp(
        Invoice,
        ThisRecord.Invoice =
        GUID(First(@PowerBIIntegration).Data).Invoice)
    ),
    Blank()
)
```



Item = fx

Tree view

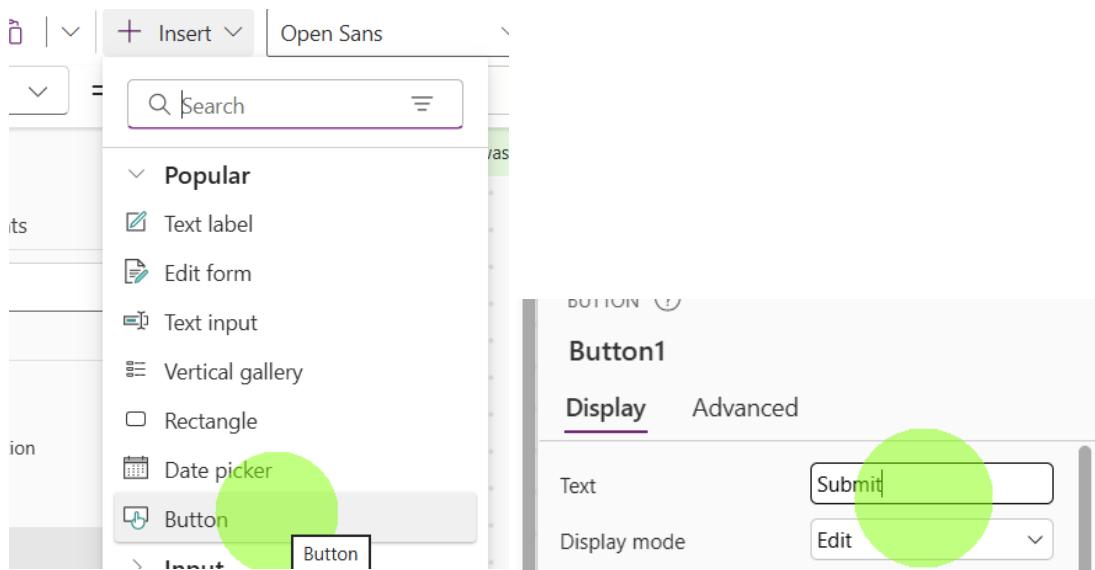
Screens Components

Search

New screen

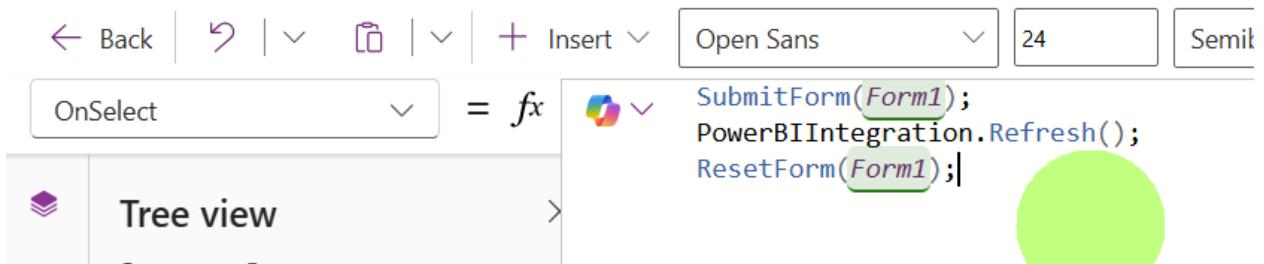
If(
 CountRows(@PowerBIIntegration).Data) = 1,
 LookUp(
 Invoice,
 ThisRecord.Invoice =
 GUID(First(@PowerBIIntegration).Data).Invoice)
),
 Blank()

10. Add a Button and change Text to Submit.

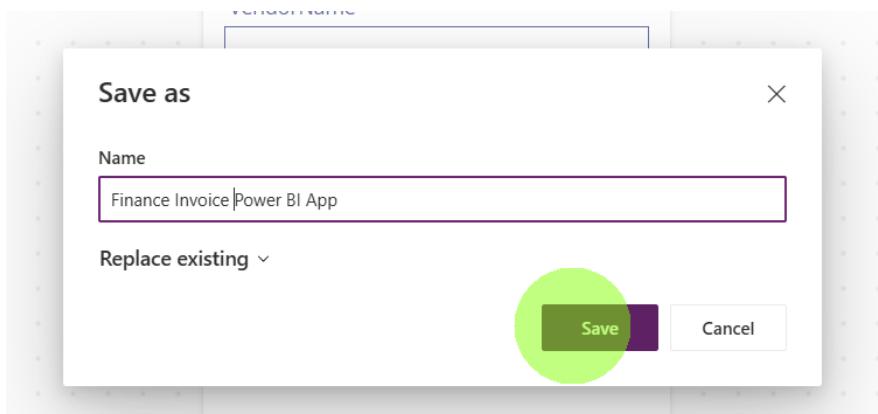


11. Set OnSelect property to below formula.

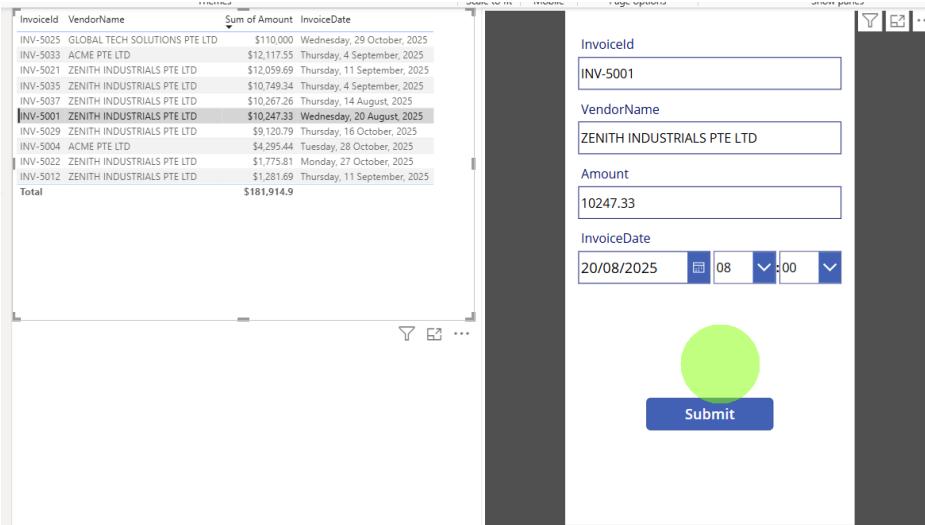
```
SubmitForm(Form1);
PowerBIIntegration.Refresh();
ResetForm(Form1);
```



12. Save and Publish the app.



13. You should be able to test the App in Power BI report.

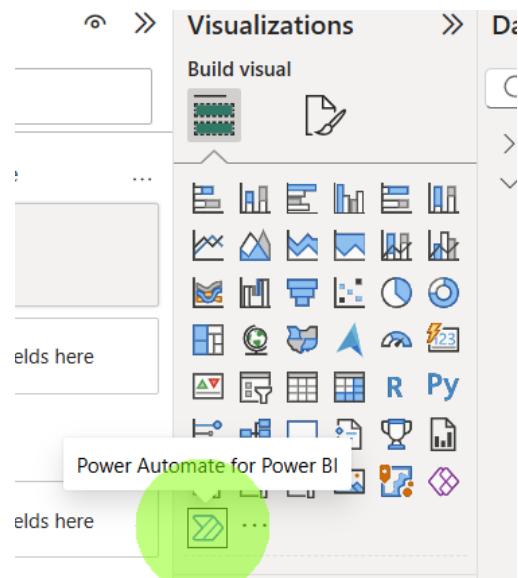


The screenshot shows a Power BI report interface. On the left, there is a table with columns: InvoiceId, VendorName, Sum of Amount, and InvoiceDate. The table contains several rows of invoice data. On the right, there is a form with fields: InvoiceId (set to INV-5001), VendorName (set to ZENITH INDUSTRIALS PTE LTD), Amount (set to 10247.33), and InvoiceDate (set to 20/08/2025). Below the form is a blue 'Submit' button, which is highlighted with a green circle.

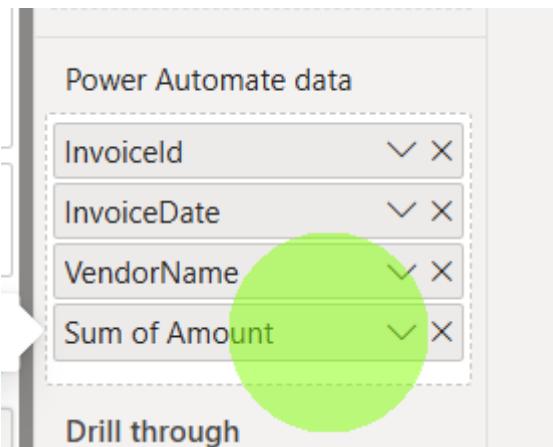
End of Task

Task 3: Trigger Power Automate Flow from Power BI

1. Add **Power Automate for Power BI** to the report.

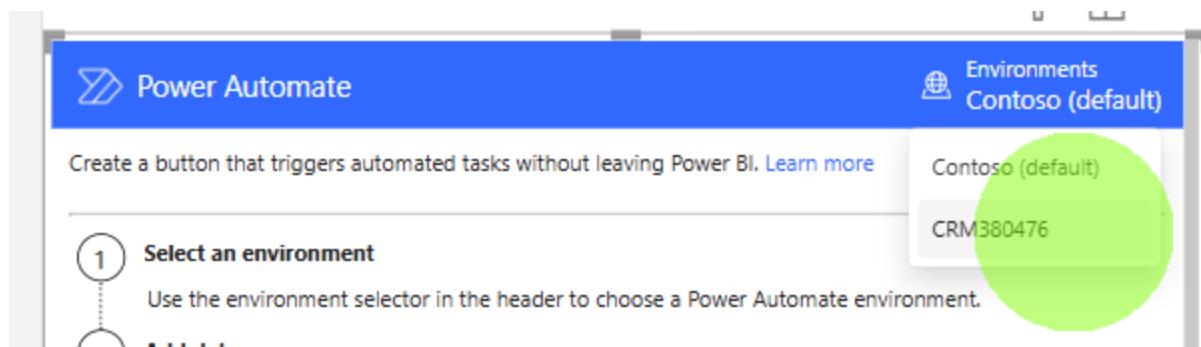


2. Drag the fields below to Power Automate Data.

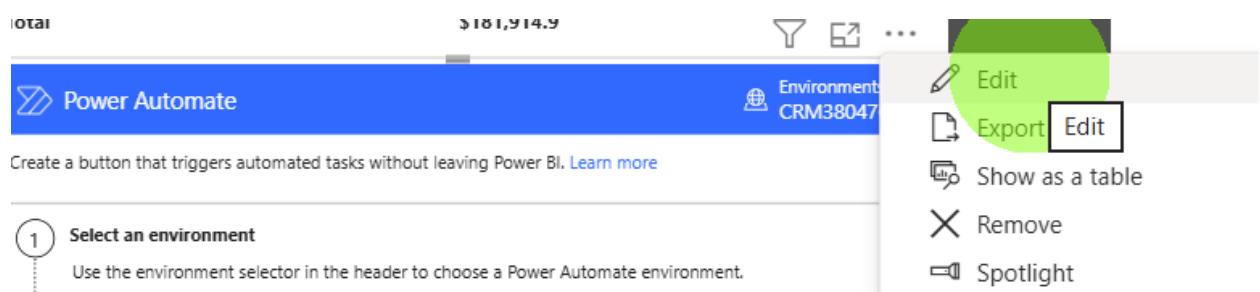


A screenshot of the Microsoft Power BI interface showing the 'Power Automate data' pane. It lists four fields: 'Invoiceld', 'InvoiceDate', 'VendorName', and 'Sum of Amount'. The 'Sum of Amount' field is highlighted with a large green circle. Below the list is a 'Drill through' button.

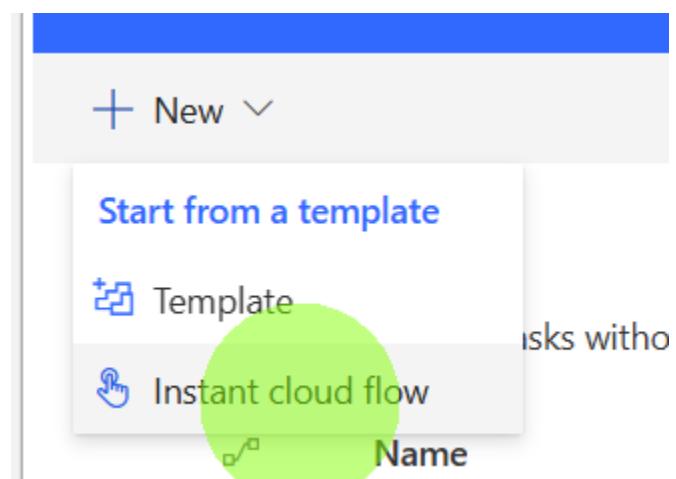
3. Select the correct environment in Power Automate.



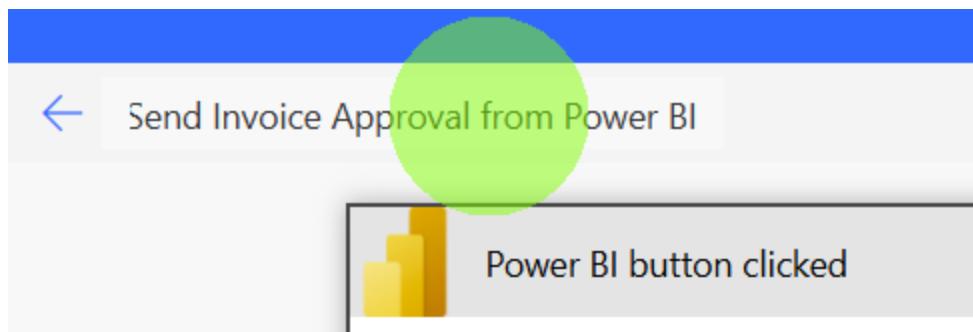
4. Click on 3 dots and **Edit**.



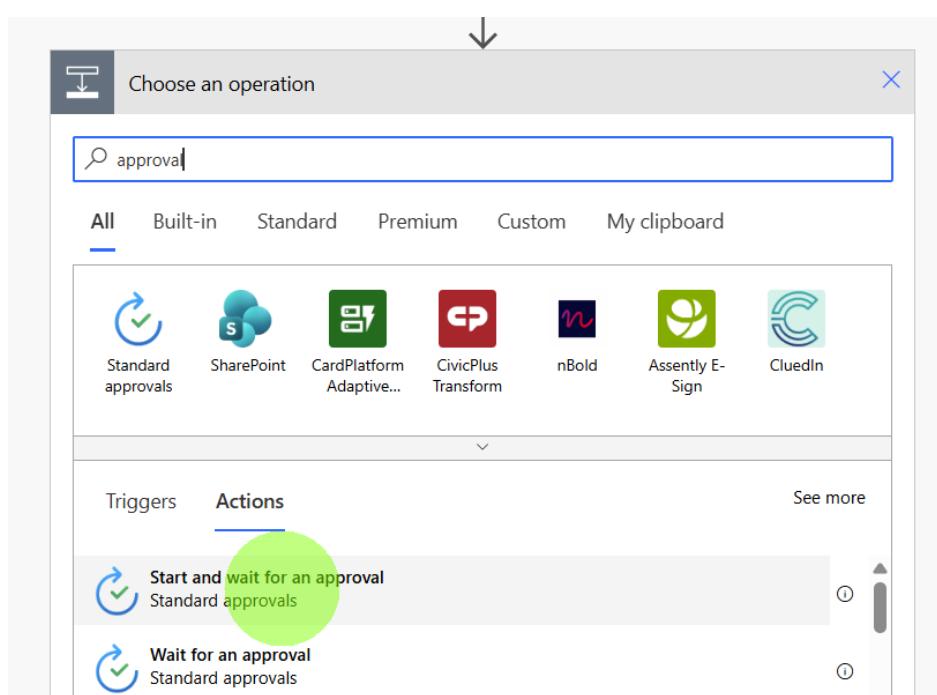
5. Select New → Instant Cloud Flow.



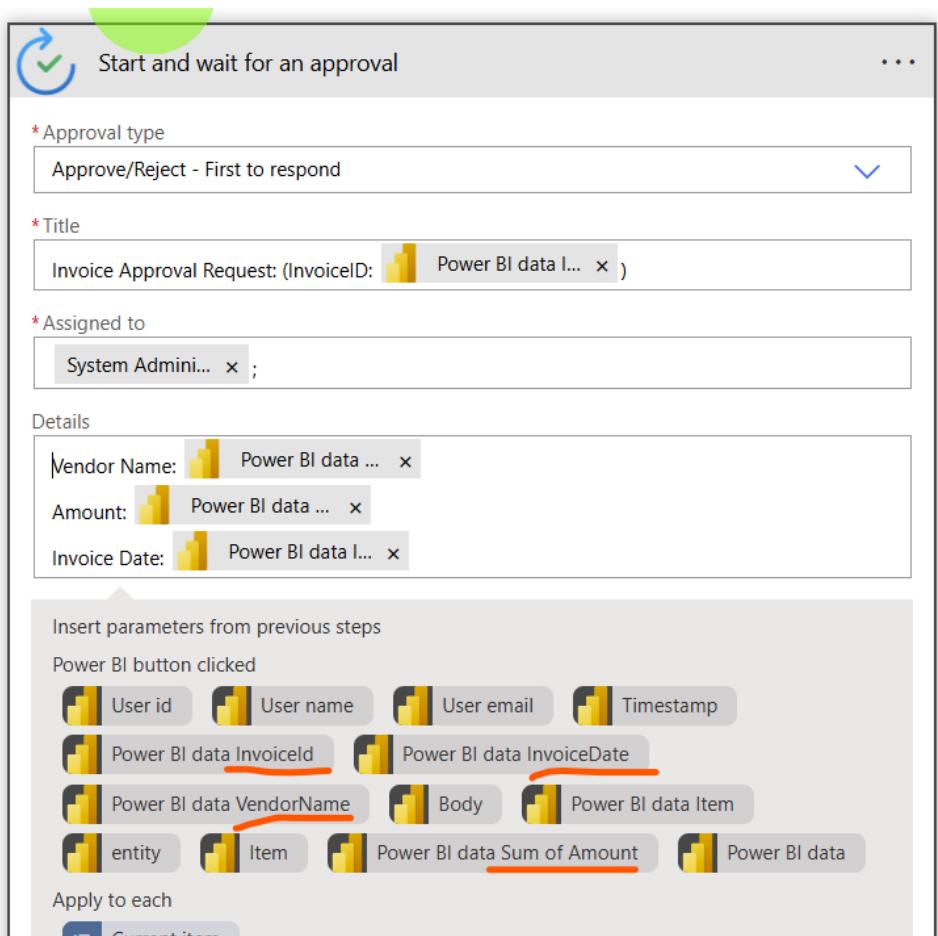
6. Rename the flow.



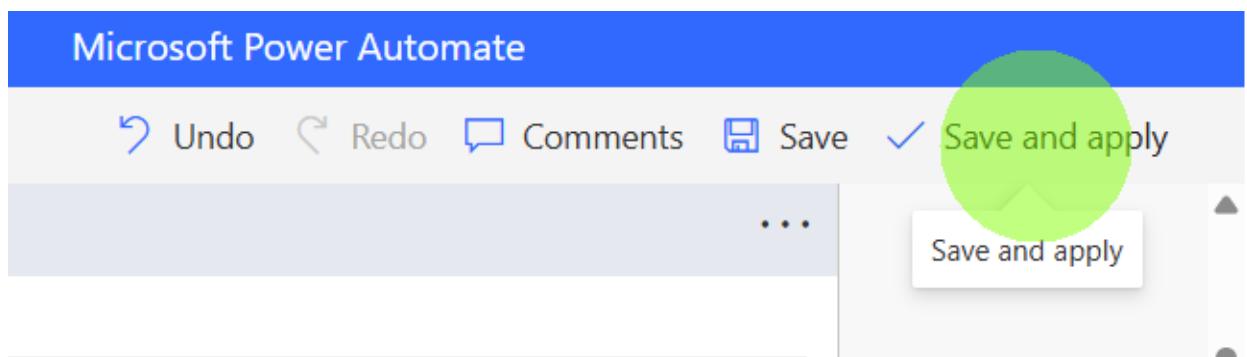
7. Add Start and wait for an approval stage.

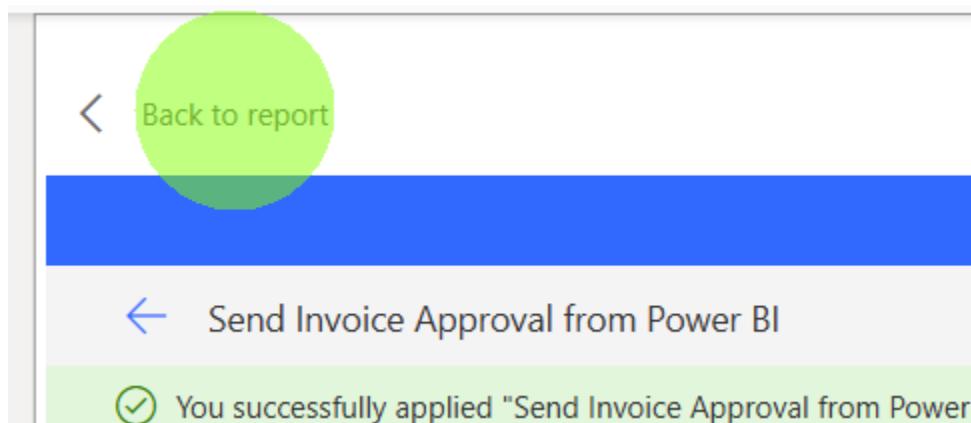


8. Choose the fields as below. Temporarily hardcode your own email address for Approver.
After the flow is saved, you can add the flow to solution and change to the ApproverEmail Environment Variable you created in previous day's lab.



9. Save the flow and go back to the report.





10. Hold down Ctrl key and click to trigger the flow.

The screenshot shows a Power Apps form titled "Invoices with Exception Status". On the left is a table with columns: invoiceid, vendorname, sum or amount, and invoiceDate. The table lists several invoices, with INV-5037 selected. On the right is a form with fields: VendorName (INV-5037), Amount (10267.26), and InvoiceDate (14/08/2025). A "Submit" button is at the bottom right. At the bottom left is a blue button labeled "Run flow".

invoiceid	vendorname	sum or amount	invoiceDate
INV-5025	GLOBAL TECH SOLUTIONS PTE LTD	\$110,000	Wednesday, 29 October, 2025
INV-5033	ACME PTE LTD	\$12,117.55	Thursday, 4 September, 2025
INV-5021	ZENITH INDUSTRIALS PTE LTD	\$12,059.69	Thursday, 11 September, 2025
INV-5035	ZENITH INDUSTRIALS PTE LTD	\$10,749.34	Thursday, 4 September, 2025
INV-5037	ZENITH INDUSTRIALS PTE LTD	\$10,267.26	Thursday, 14 August, 2025
INV-5001	ZENITH INDUSTRIALS PTE LTD	\$10,247.33	Wednesday, 20 August, 2025
INV-5029	ZENITH INDUSTRIALS PTE LTD	\$9,120.79	Thursday, 16 October, 2025
INV-5004	ACME PTE LTD	\$4,295.44	Tuesday, 28 October, 2025
INV-5022	ZENITH INDUSTRIALS PTE LTD	\$1,775.81	Monday, 27 October, 2025
INV-5012	ZENITH INDUSTRIALS PTE LTD	\$1,281.69	Thursday, 11 September, 2025
Total		\$181,914.9	

----- End of Task -----