



Power Platform Bootcamp: Expert

Hands-On Lab Guide

Published (Jan 2026)

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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.

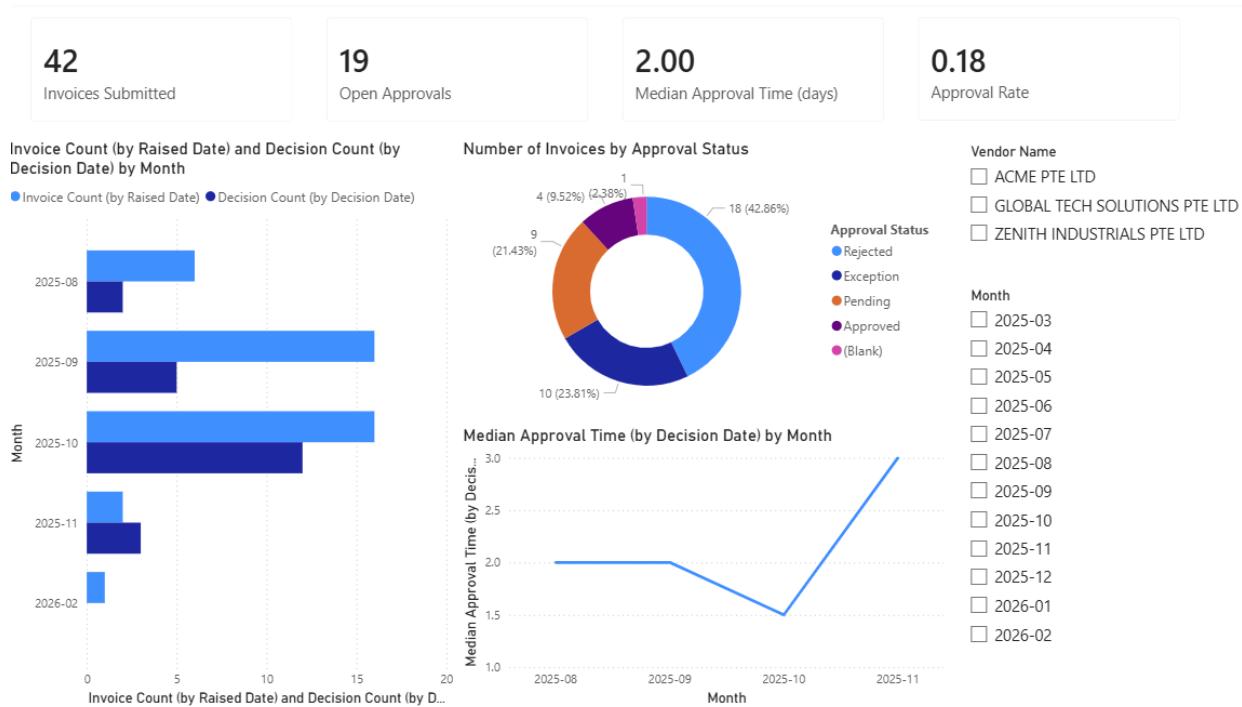
Objectives

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

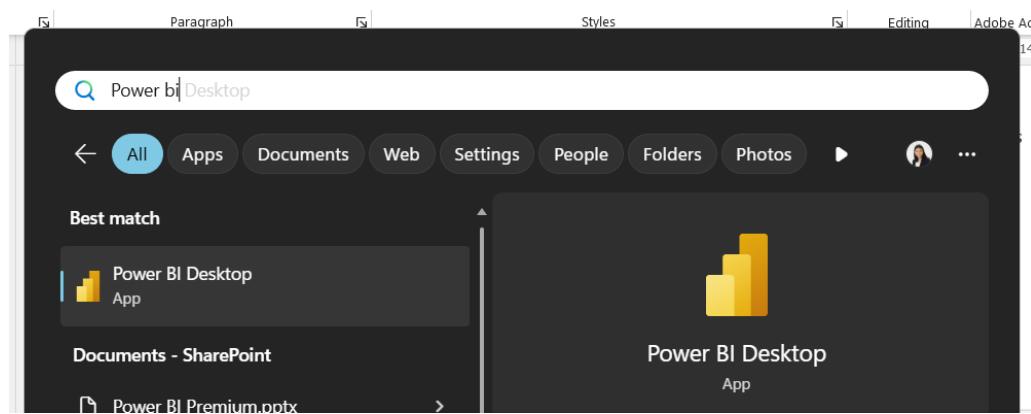
Estimated Time

1-1.5 hours

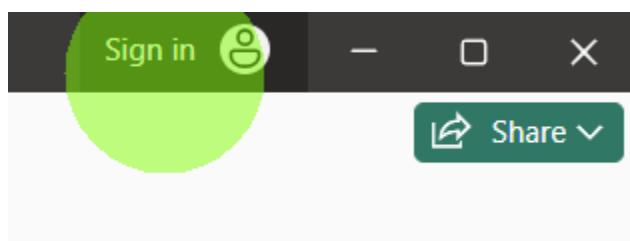


Task 1: Launch and Login to Power BI

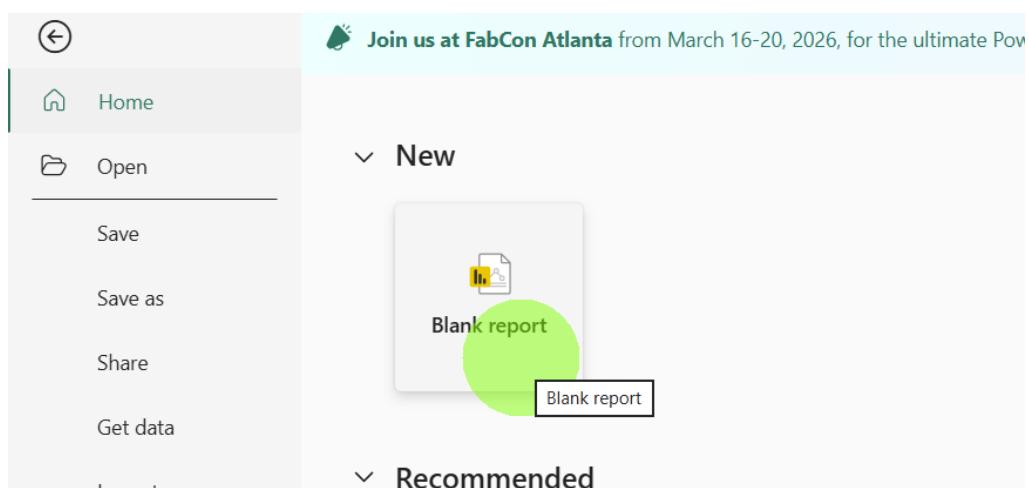
1. Launch **Power BI Desktop** from your Start Menu.



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 *

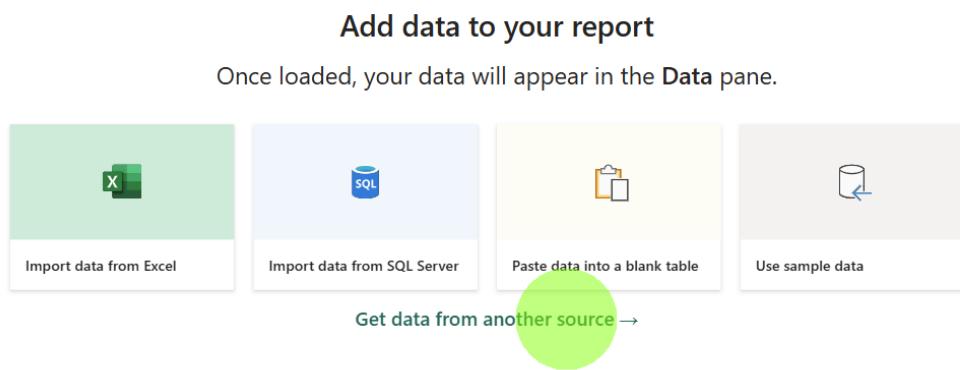
Invoice Report .pbix

Recent locations

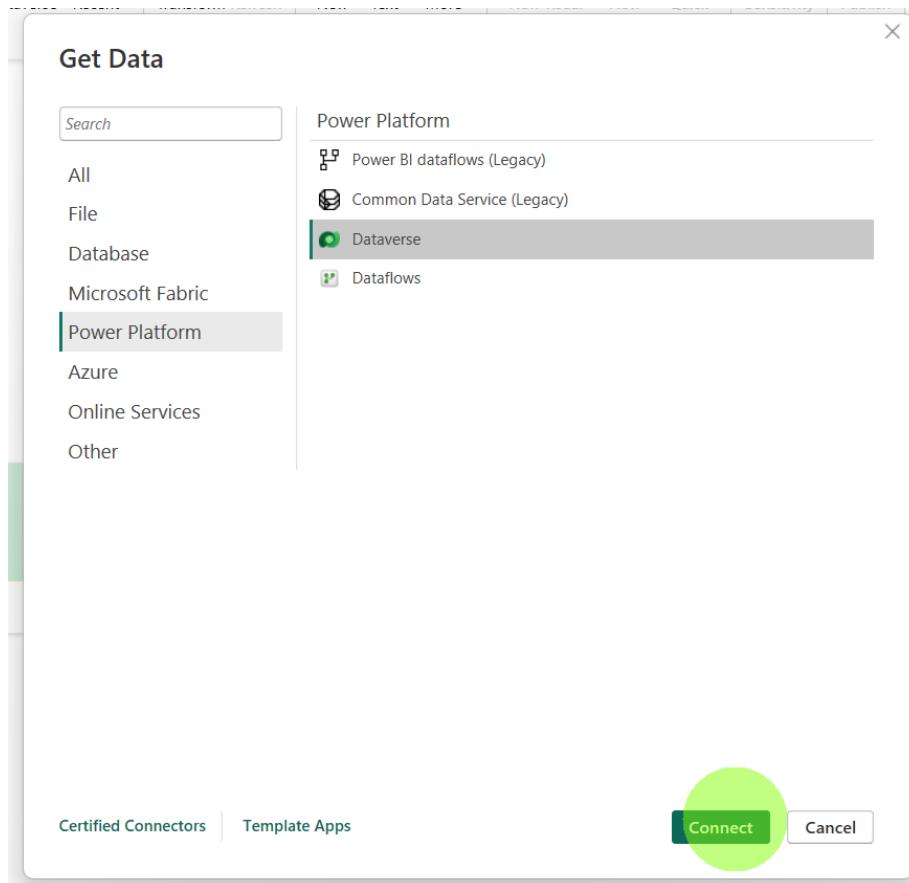
End of Task

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 interface showing a list of environments. At the top is a search bar with a magnifying glass icon and a 'Display Options' dropdown. Below is a tree view under 'Dataverse [1]'. A green circle highlights the 'CRM781496' node, which is expanded to show several table names: 'contactinvoices', 'cr61e_invoice' (with a checked checkbox), 'invoice', 'invoicedetail', 'msdyn_agreementinvoicedate', 'msdyn_agreementinvoiceproduct', and 'msdyn_agreementinvoicesetup'. The 'cr61e_invoice' node is also highlighted with a green circle.

- ▲ Dataverse [1]
 - ▷ CRM781496 (org173a8a24.crm5.dynamics.co...
 - contactinvoices
 - cr61e_invoice
 - invoice
 - invoicedetail
 - msdyn_agreementinvoicedate
 - msdyn_agreementinvoiceproduct
 - msdyn_agreementinvoicesetup

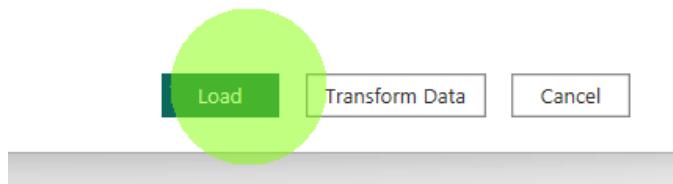
3. Expand the environment where you have stored **Invoice** data and select Invoice table (the one with crxxx_ prefix).

Navigator

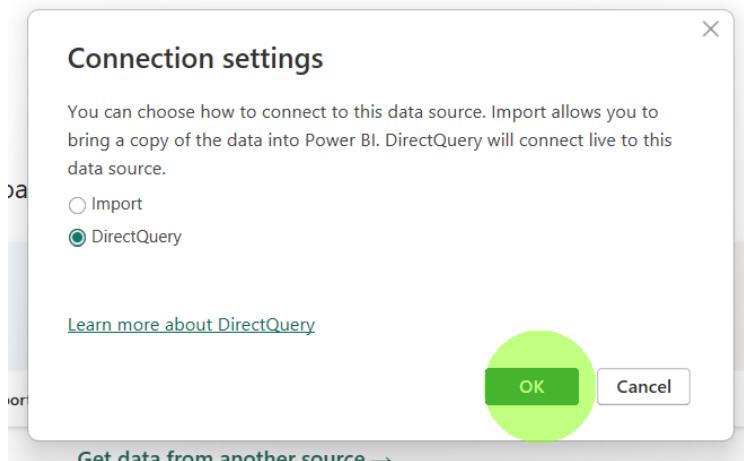
A screenshot of the Navigator interface. At the top is a search bar with the text 'invoice' and a clear button. Below is a 'Display Options' dropdown and a tree view under 'Dataverse'. A green circle highlights the 'cr61e_invoice' node, which is selected (indicated by a checked checkbox). The node is part of the 'CRM781496' environment, which is also highlighted with a green circle.

- Display Options ▾
- ▲ Dataverse
 - ▲ CRM781496 (org173a8a24.crm5.dynamics.co...
 - cr61e_invoice
 - invoice
 - invoicedetail
 - msdyn_agreementinvoicedate
 - msdyn_agreementinvoiceproduct
 - msdyn_agreementinvoicesetup

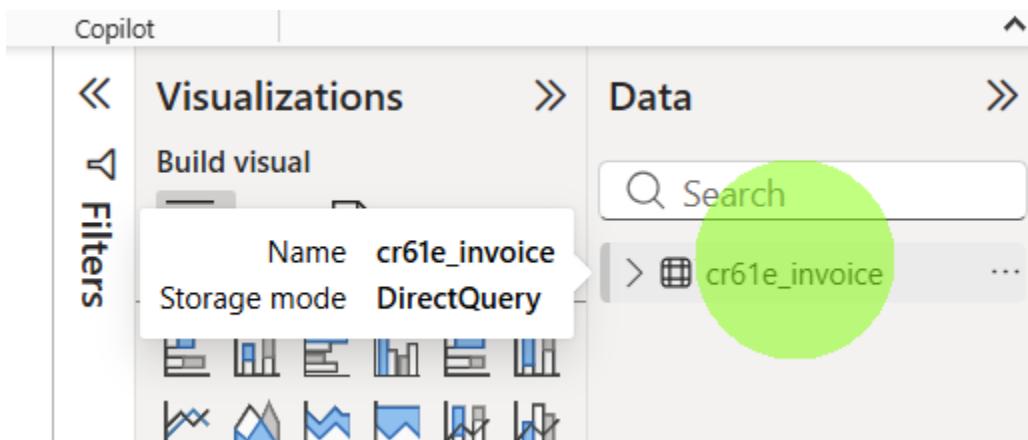
4. Click **Load**.



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.

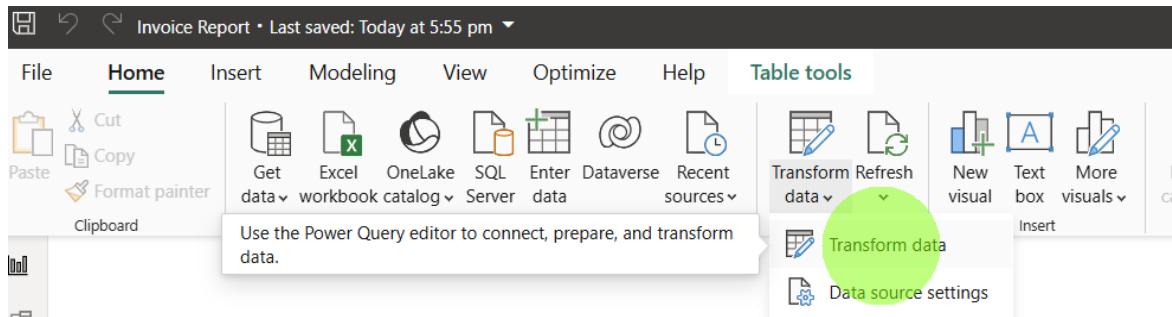


The screenshot shows the Power BI desktop application. On the left, there's a sidebar with 'Copilot', 'Visualizations' (selected), 'Build visual', and 'Filters'. In the center, there's a preview area with various chart and visualization icons. On the right, the 'Data' pane is open, showing a search bar and a list of tables. One table, 'cr61e_invoice', is highlighted with a green circle. Below the table list are several small chart icons.

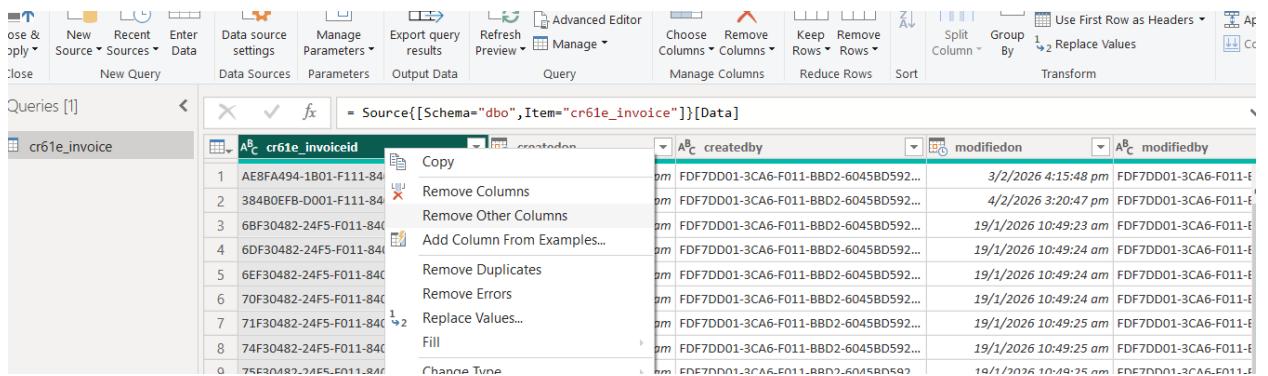
----- End of Task -----

Task 3: Prepare Data for Report

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



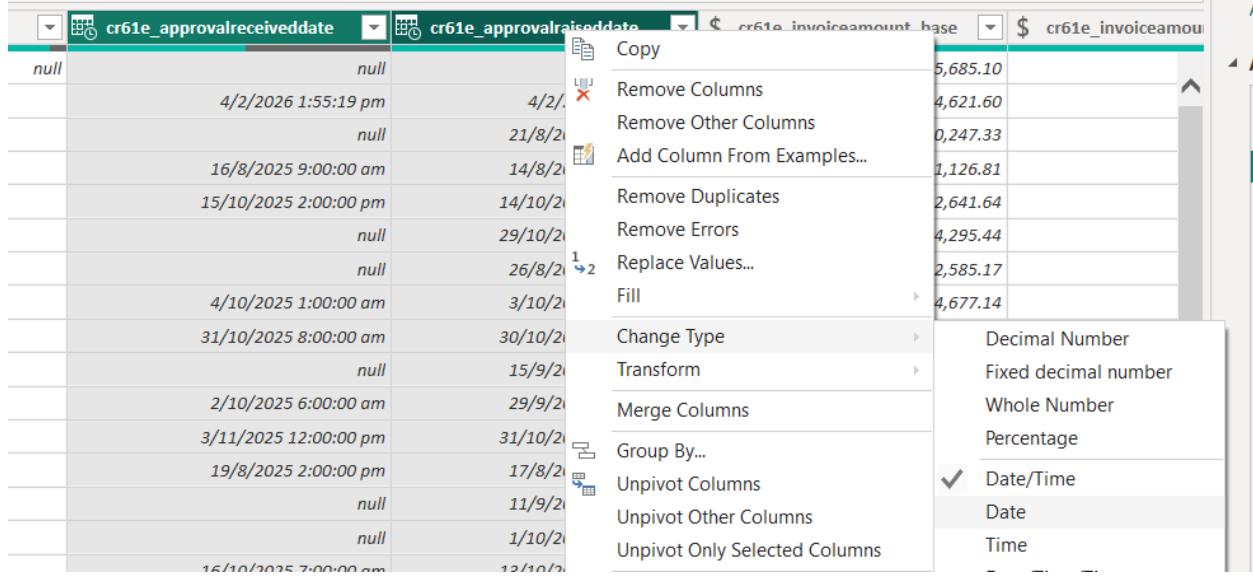
2. Multi-select below columns and right-click select **Remove Other Columns**. Hold down **Ctrl key from keyboard to select multiple columns**.
 - "cr61e_approvalstatus"
 - "cr61e_approvalreceiveddate"
 - "cr61e_approvalraiseddate"
 - "cr61e_invoiceamount_base"
 - "cr61e_invoiceamount"
 - "cr61e_invoicedate"
 - "cr61e_vendorname"
 - "cr61e_invoiceidentifier"
 - "cr61e_invoiceid"



The screenshot shows the Microsoft Power Query Editor window. At the top, there's a toolbar with various icons for file operations and data management. Below the toolbar, the ribbon has sections like "Data Sources", "Parameters", "Output Data", "Query", and "Transform". The main area is titled "Queries [1]" and contains a table named "cr61e_invoice". The table has columns: "cr61e_invoiceid", "createdon", "createdby", "modifiedon", and "modifiedby". The "modifiedby" column is currently selected. A context menu is open over this column, listing options such as "Copy", "Remove Columns", "Remove Other Columns", "Add Column From Examples...", "Remove Duplicates", "Remove Errors", "Replace Values...", "Fill", "Change Type", and a separator line.

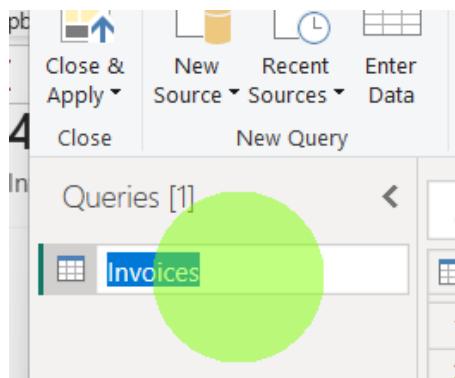
3. Multi-select below columns and right-click select **Change Type → Date**. Hold down **Ctrl key from keyboard to select multiple columns**.

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

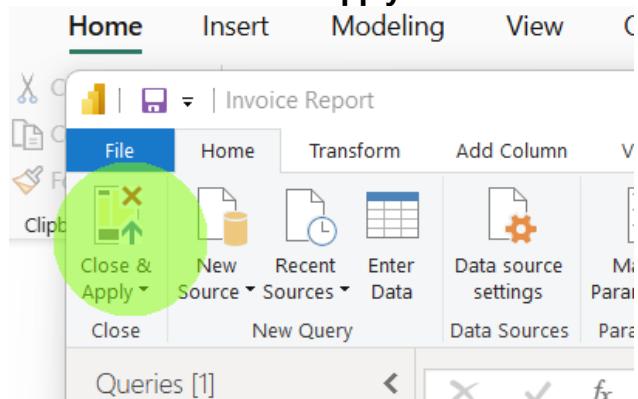


	cr61e_approvalreceiveddate	cr61e_approvalraiseddate	\$ cr61e_invoiceamount_base	\$ cr61e_invoiceamount
1	null	null	5,685.10	
2	4/2/2026 1:55:19 pm	4/2/2026	4,621.60	
3	null	21/8/2025	0,247.33	
4	16/8/2025 9:00:00 am	14/8/2025	1,126.81	
5	15/10/2025 2:00:00 pm	14/10/2025	2,641.64	
6	null	29/10/2025	4,295.44	
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.



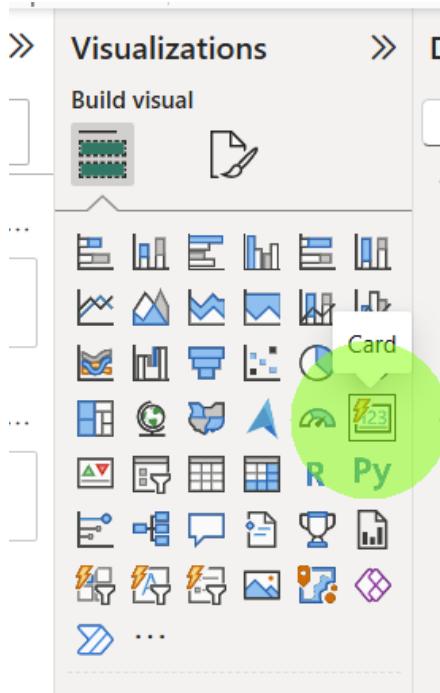
- Click **Home** → **Close & Apply** to save and close the data transformation.



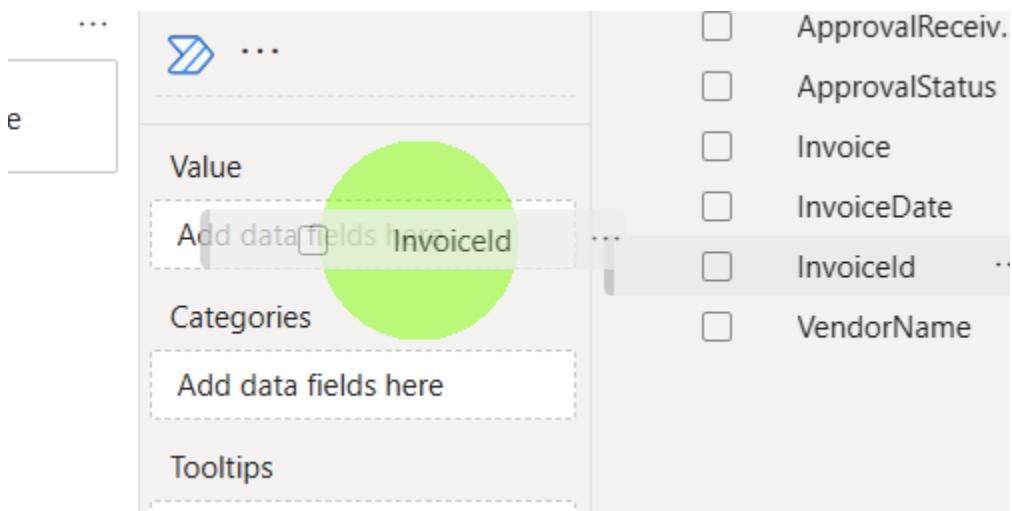
----- End of Task -----

Task 4: Add Invoices Submitted Card

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

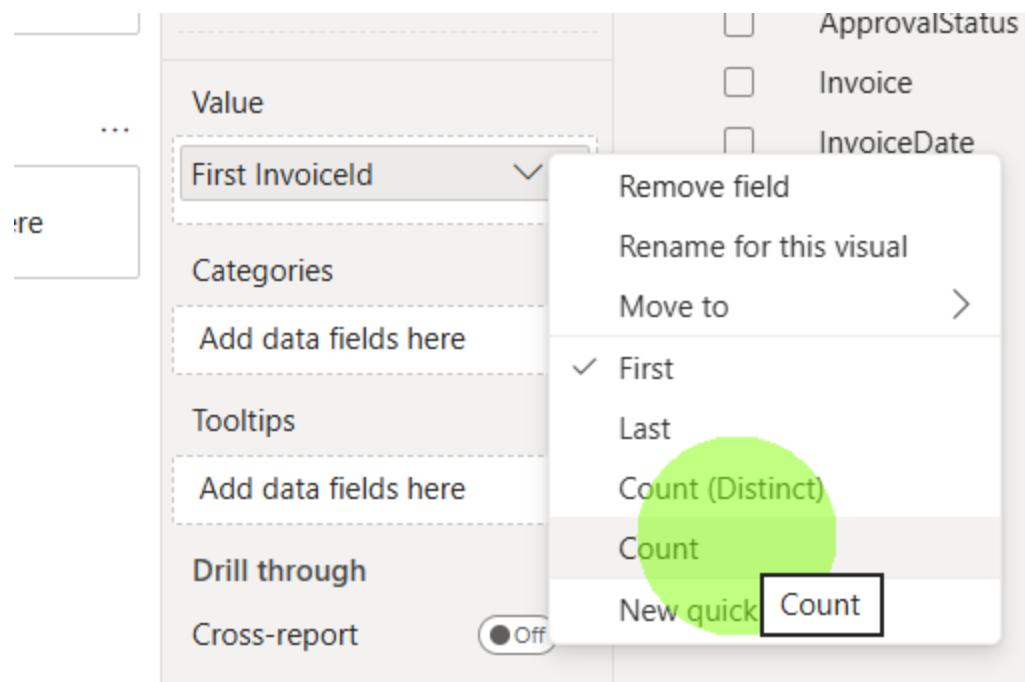


2. Drag **InvoiceId** to **Value** field.

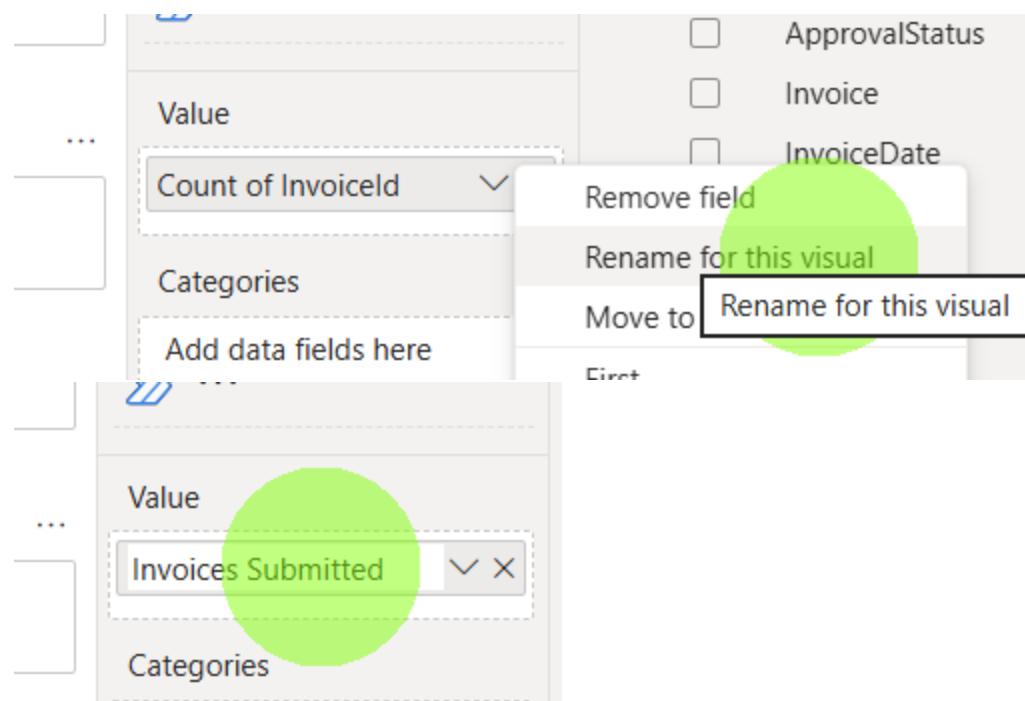


The screenshot shows the Power BI canvas with a 'Card' visualization selected. The visualization has three fields: 'Value', 'Categories', and 'Toolips'. The 'Value' field is currently active, indicated by a green circle over the 'Add data fields here' placeholder. A dropdown menu is open, showing a list of data fields: ApprovalReceiv., ApprovalStatus, Invoice, InvoiceDate, InvoiceId, and VendorName. The 'InvoiceId' field is highlighted with a green circle.

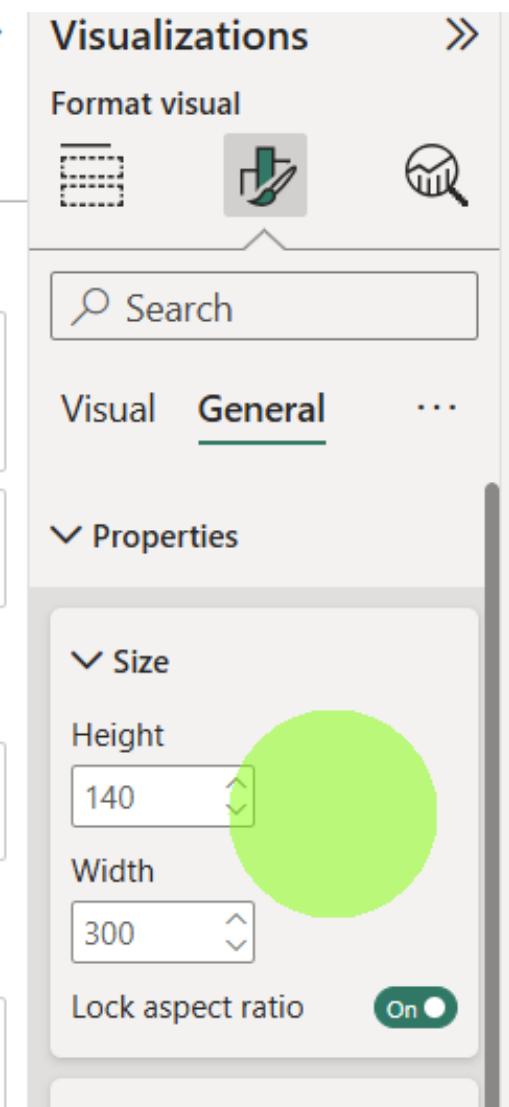
3. Click the Dropdown in Value field and select **Count**.



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



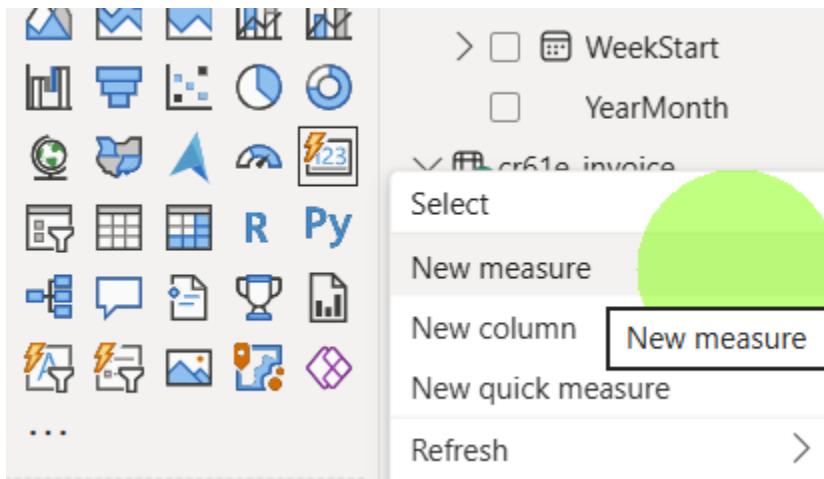
5. Switch to **Format** view and change below settings.



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

Task 5: Add Open Approvals Card

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



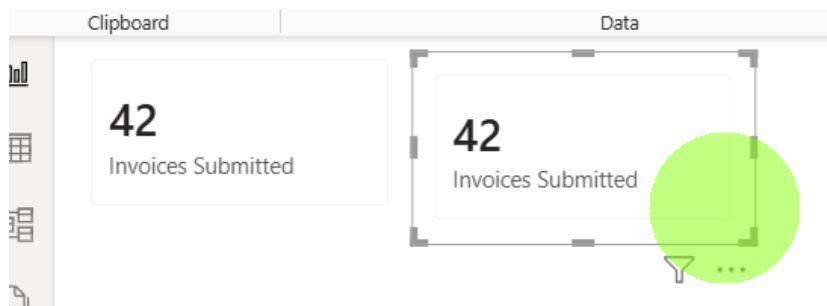
2. Add DAX formula below to determine if each invoice is open.

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

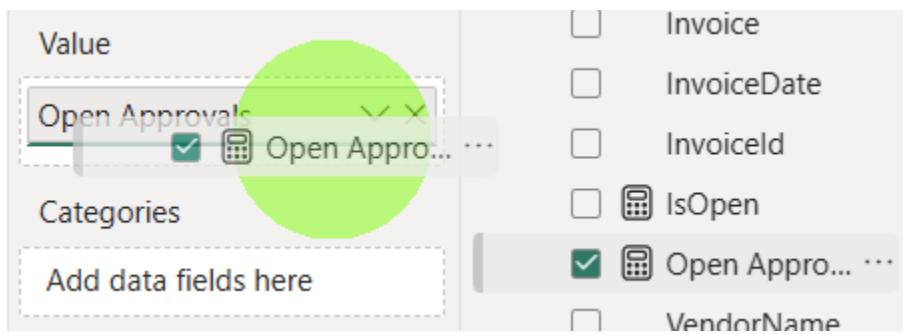
3. Add one more measure with DAX formula below to get the count of open invoices.

```
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.



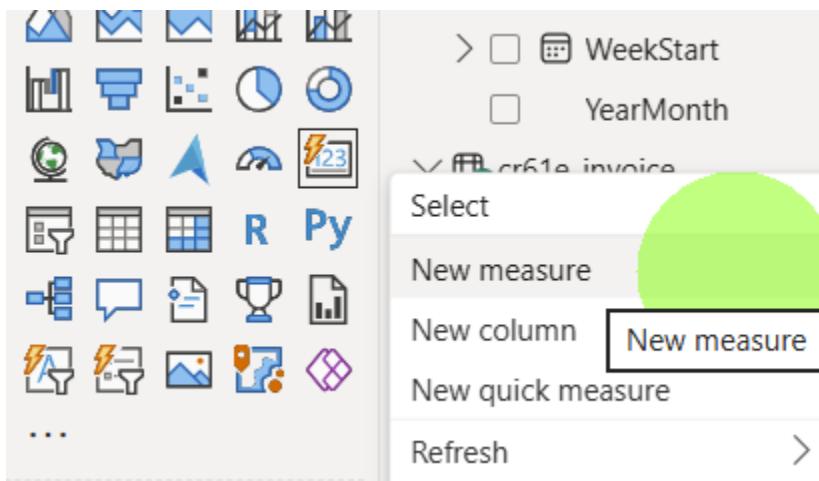
The screenshot shows the Power BI Data view interface. On the left, under 'Value', there's a dropdown menu containing 'Open Approvals' with a checkmark. To the right of this dropdown is a list of available data fields:

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

End of Task

Task 6: Add Median Approval Time (hrs) Card

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



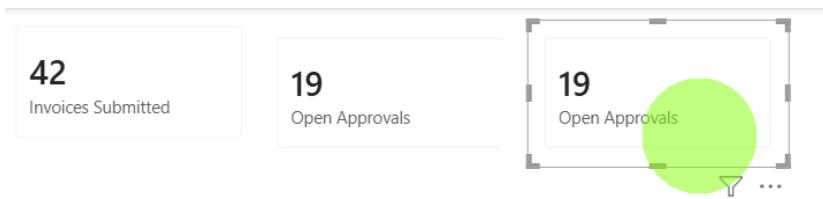
2. Add DAX formula below to determine if each invoice's approval duration in days.

```
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 ()
)
```

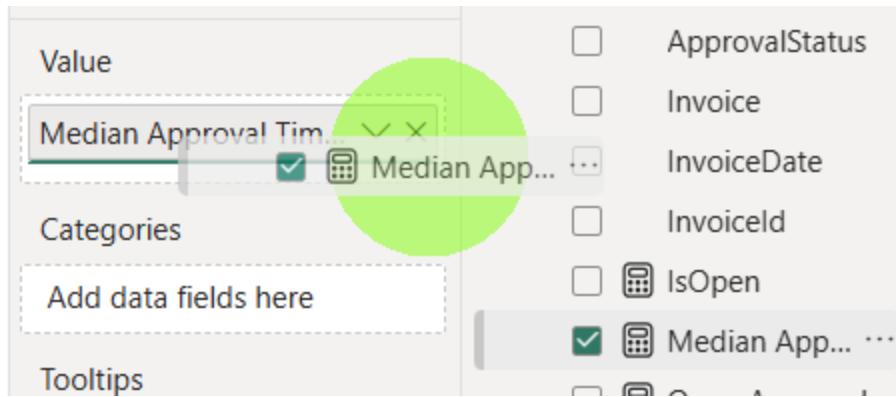
3. Add one more measure with DAX formula below to get the median approval duration.

```
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.

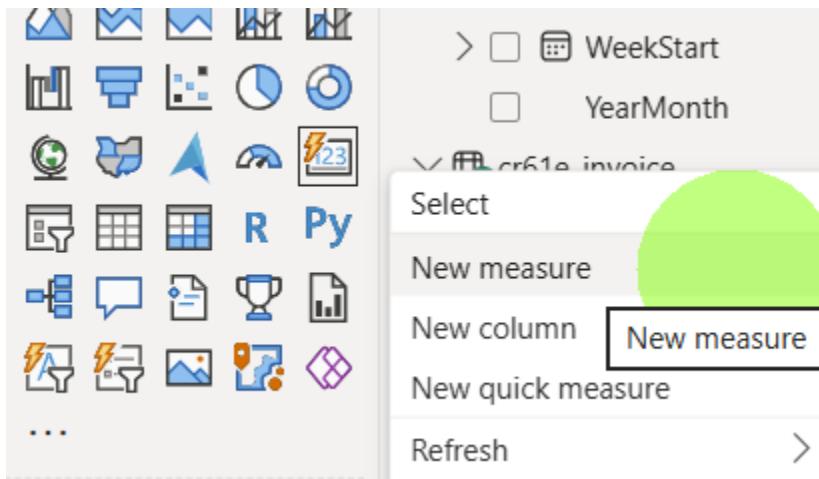


The screenshot shows the Power BI Data view pane. On the left, there are three sections: "Value", "Categories", and "ToolTips". The "Value" section has a dropdown menu with "Median Approval Tim..." selected. The "Categories" section has a placeholder "Add data fields here". The "ToolTips" section also has a placeholder "Add data fields here". On the right, a list of data fields is shown, each with a checkbox and a tooltip. The "Median Approval Tim..." field is checked and highlighted with a green circle. Other fields listed include ApprovalStatus, Invoice, InvoiceDate, InvoiceId, IsOpen, and another "Median App..." field which is also checked.

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

Task 7: Add Approval Rate Card

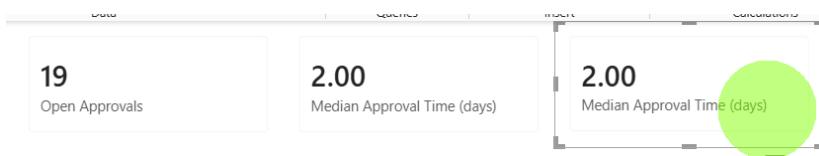
1. Click 3 dots beside the table name and select **New measure**.



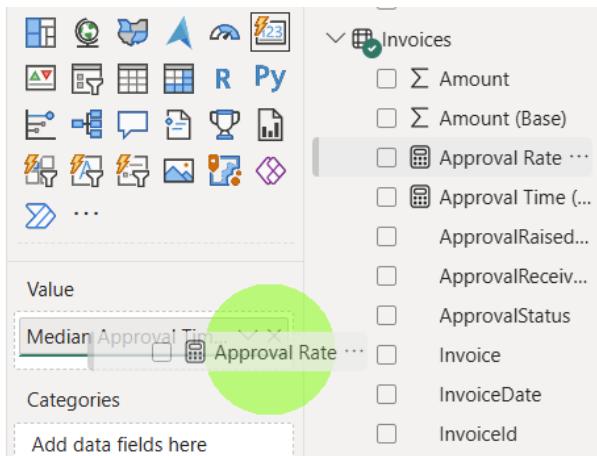
2. Add DAX formula below to calculate approval rate.

```
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.



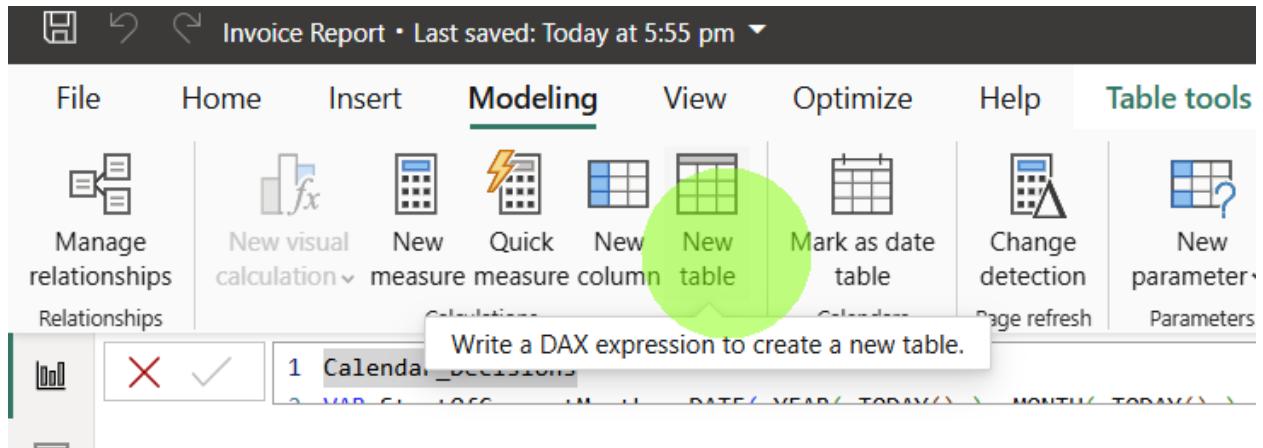
4. Drag **Approval Rate** measure to Value field.



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

Task 8: Create Calendar Table for Time Series Charts

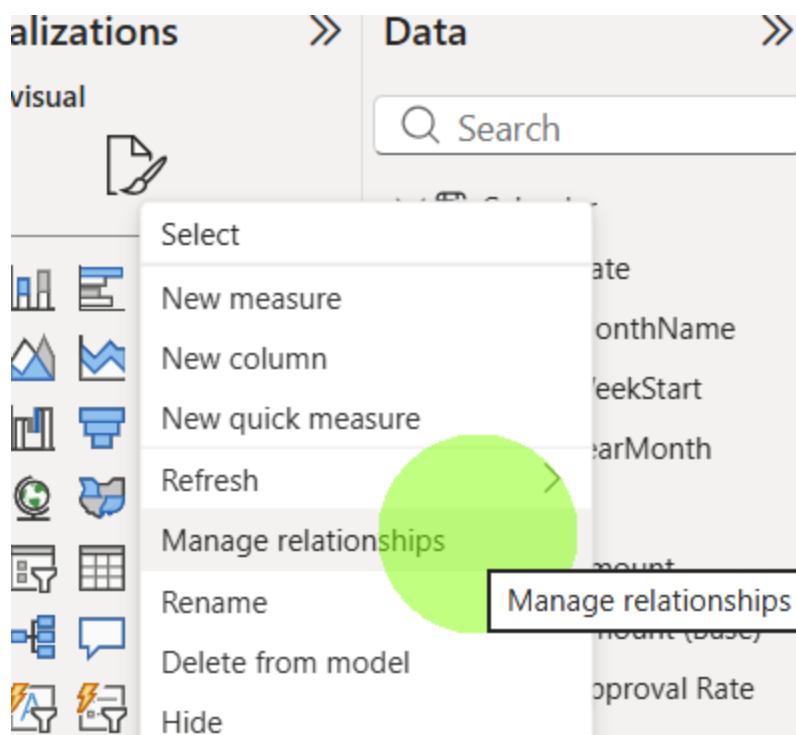
1. Click **Modeling** → **New table** to create a Date table.



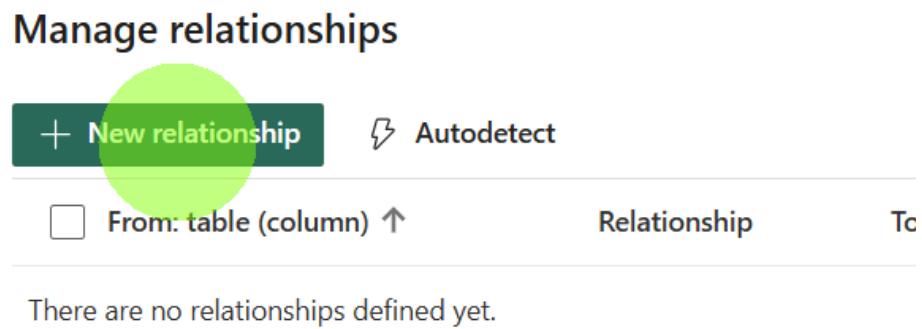
2. Paste in DAX formula below to create a Calendar table.

```
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". To its right 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 below contains 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

<input type="button" value="New relationship"/>	<input type="button" value="Autodetect"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Filter"/>
From: table (column)	Relationship	To: table (column)	Status	
<input type="checkbox"/> Invoices (ApprovalRaisedDate)		<input type="checkbox"/> Calendar (Date)	Inactive	
<input type="checkbox"/> Invoices (ApprovalReceivedDa...		<input type="checkbox"/> Calendar (Date)	Inactive	

End of Task

Task 9: Create Monthly Invoice Submitted Vs Decision Made Chart

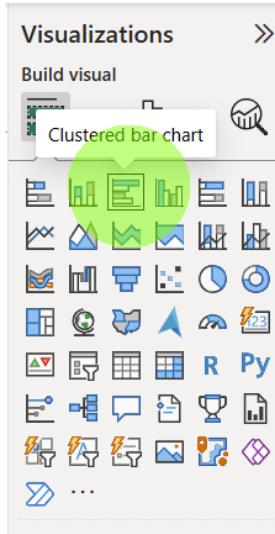
1. Add a new measure to get monthly invoice count.

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

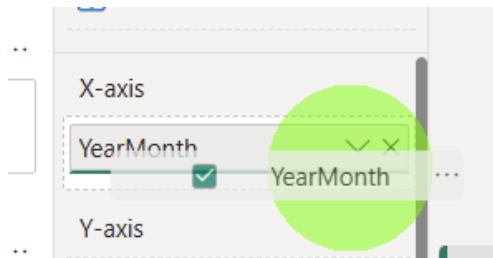
2. Add a new measure to get monthly decision count where status is approved or rejected.

```
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.



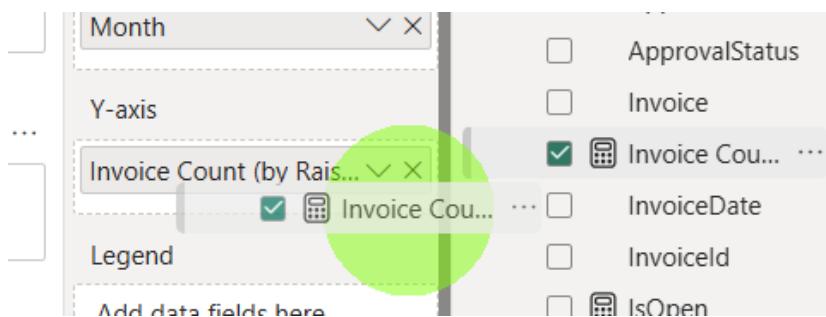
4. Drag **YearMonth** to X-axis.



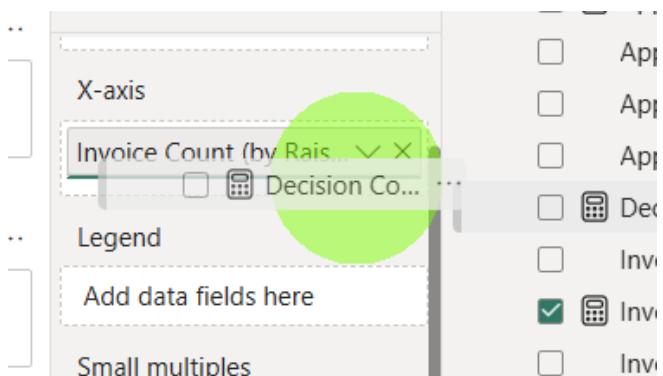
Rename it to Month.



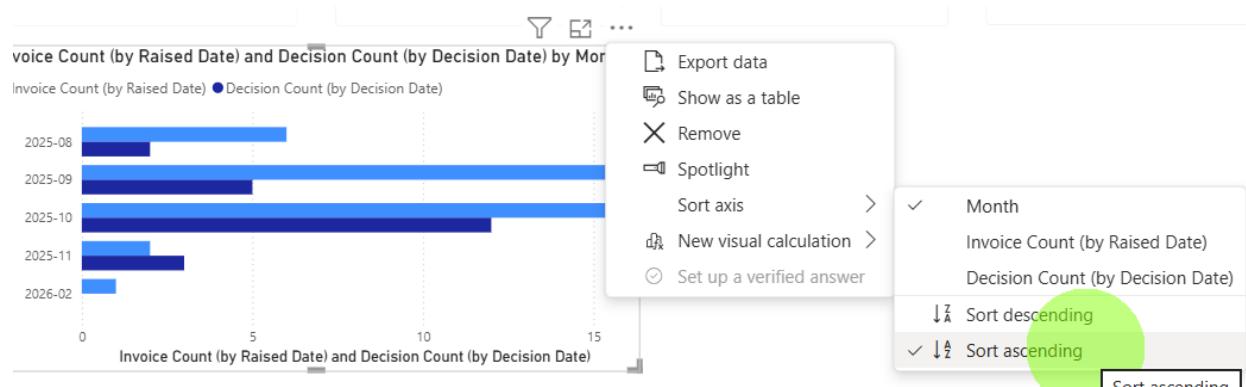
5. Drag **Invoice Count (by Raised Date)** measure to Y-axis.



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



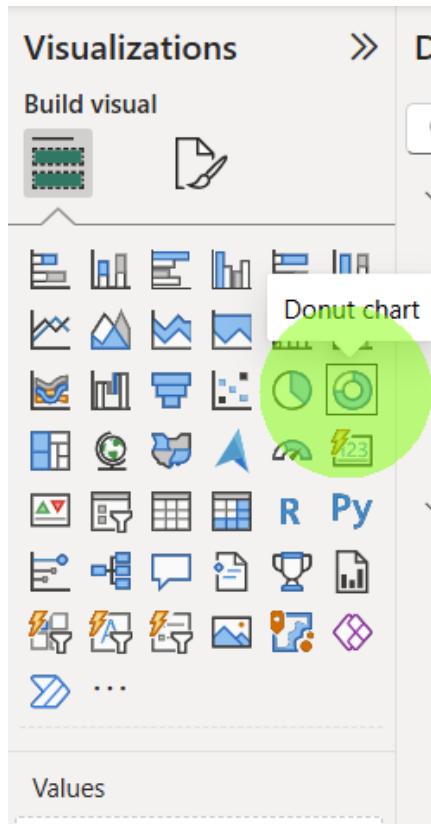
7. Click on 3 dots at the top-right corner of the Chart. Select **Sort axis → Month → Sort ascending.**



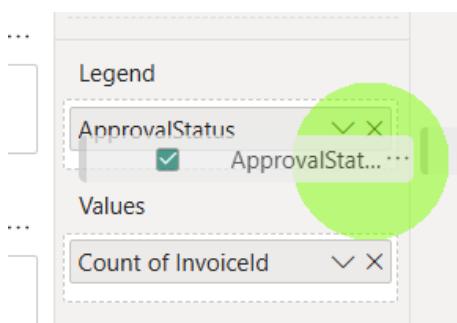
----- End of Task -----

Task 10: Create Invoices Count by Status Chart

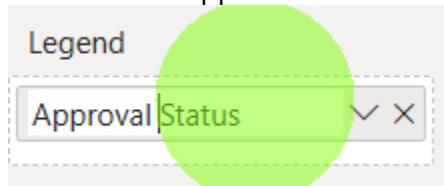
1. Add a Donut Chart to the report.



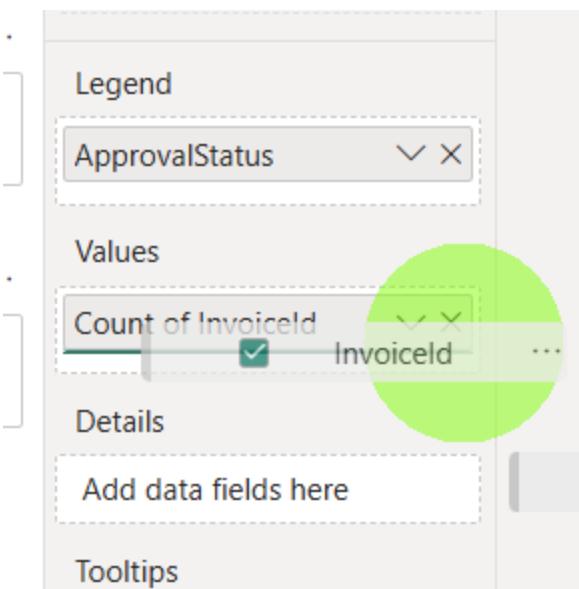
2. Drag ApprovalStatus to Legend.



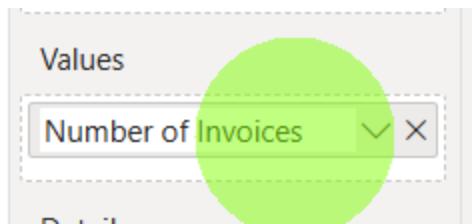
Rename it to Approval Status.



3. Drag Invoiceld field to Values.



Rename it to Number of Invoices.



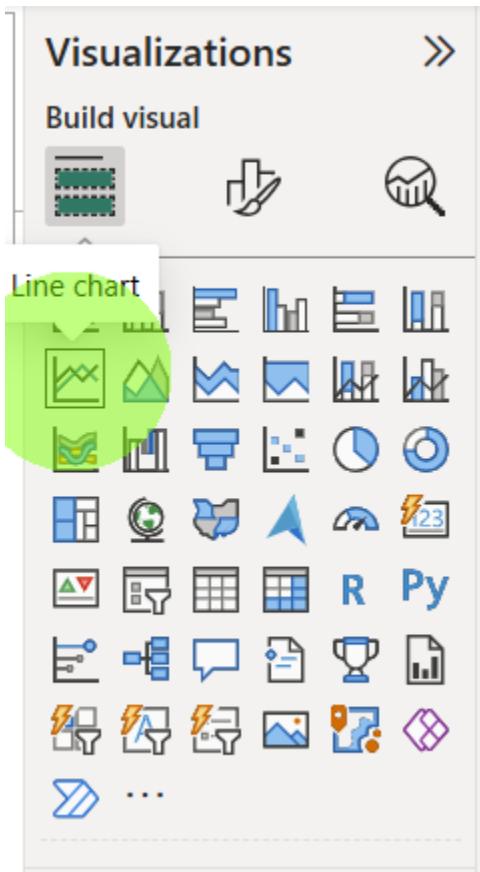
----- End of Task -----

Task 11: Create Median Approval Time Chart

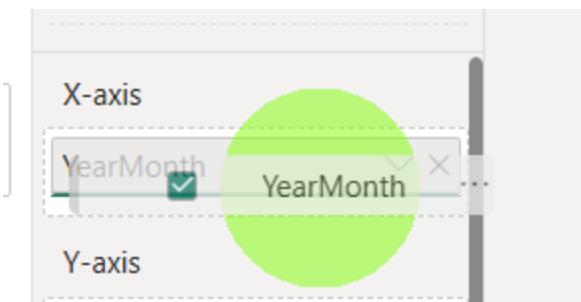
1. Create a new measure to calculate the Median Approval Time by month.

```
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.



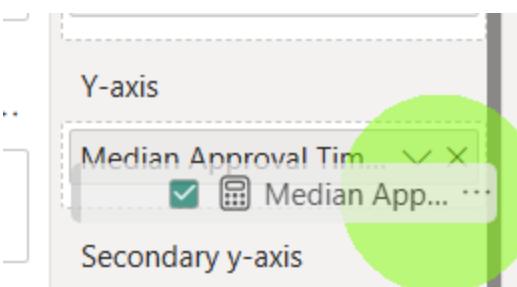
3. Drag **YearMonth** to X-Axis.



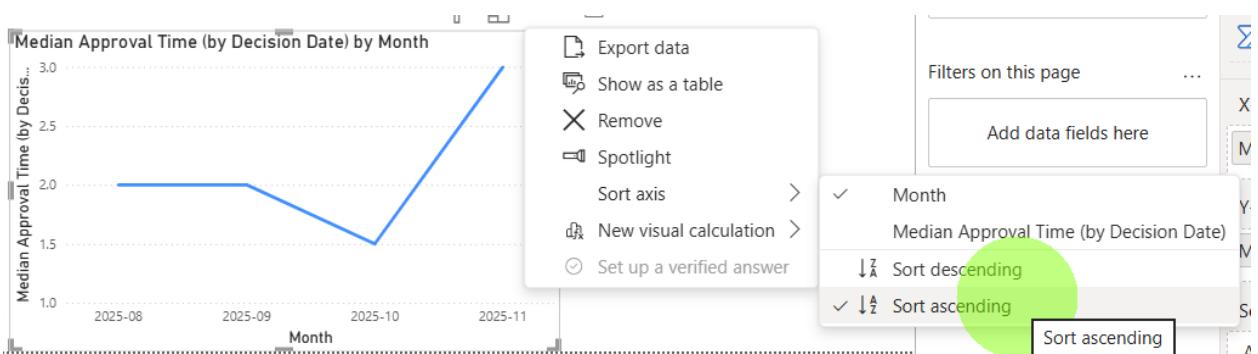
Rename it to Month.



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



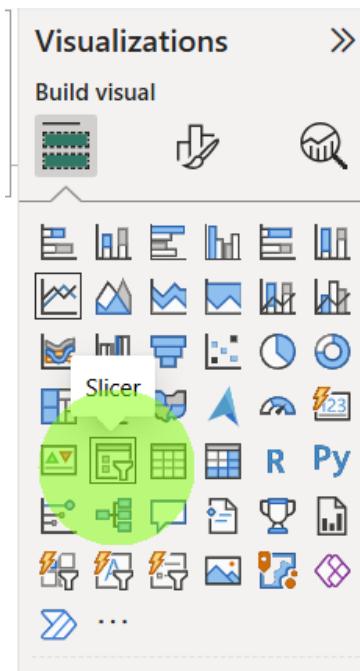
5. Click on 3 dots at the top-right corner of the Chart. Select **Sort axis → Month → Sort ascending**.



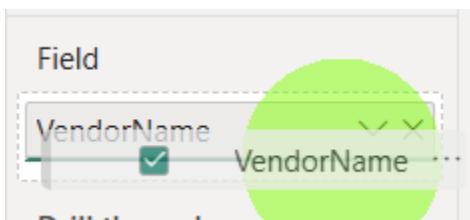
----- End of Task -----

Task 12: Add Slicers to the Report

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



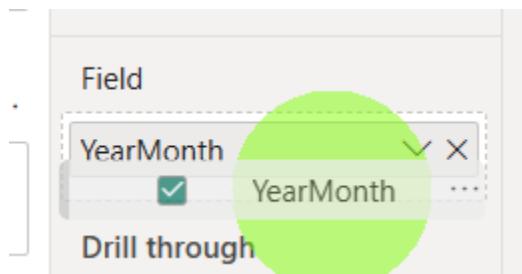
2. Add **VendorName** to Field.



Rename it to Vendor Name.



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

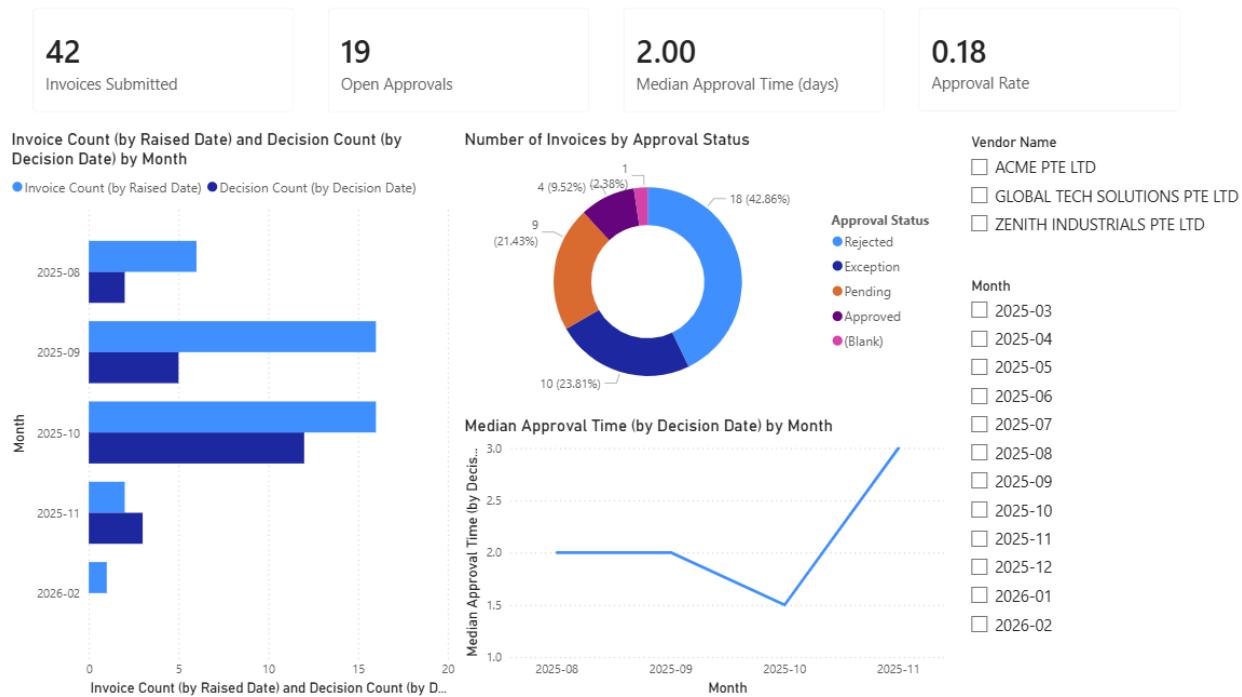


Rename it to Month.



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.

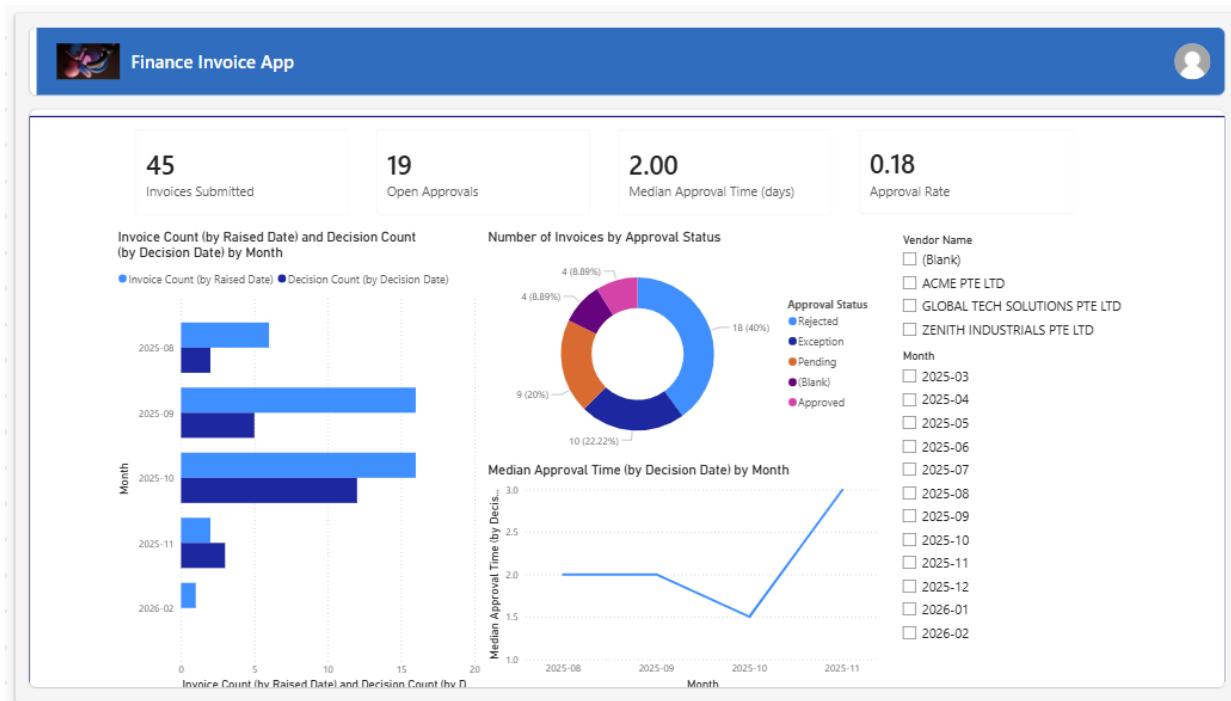
Objectives

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

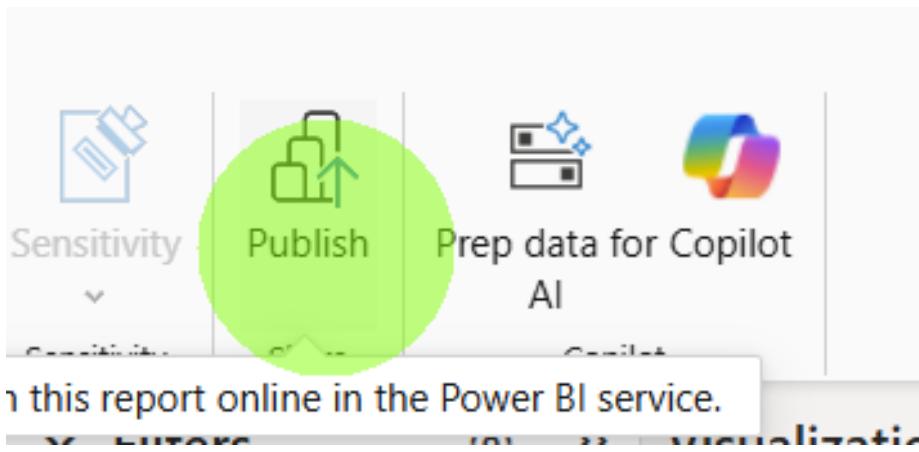
Estimated Time

30–40 mins

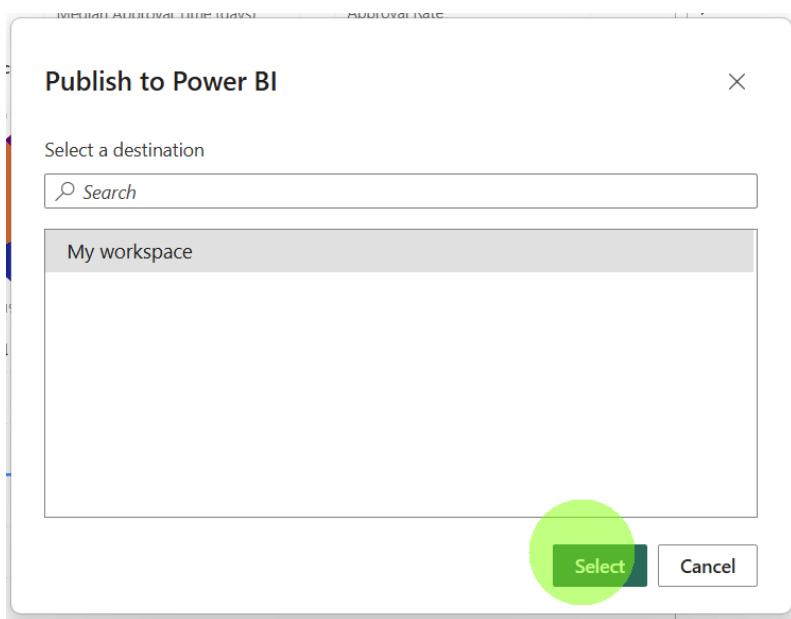


Task 1: Publishing Power BI Report

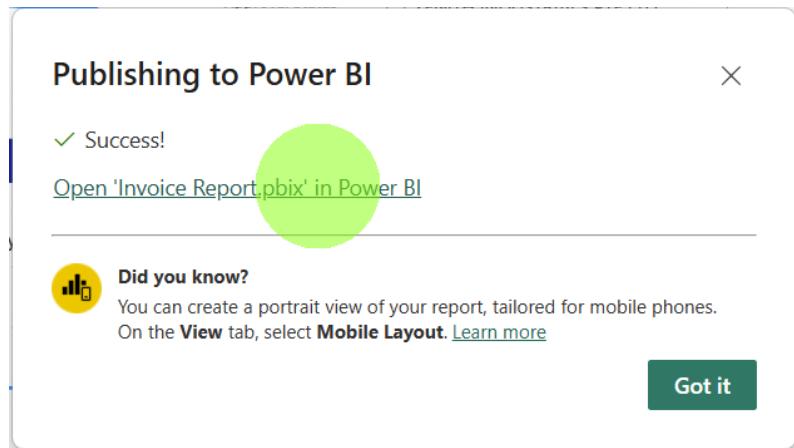
1. Click Publish at the top of the screen.



2. Select My workspace and click Select.



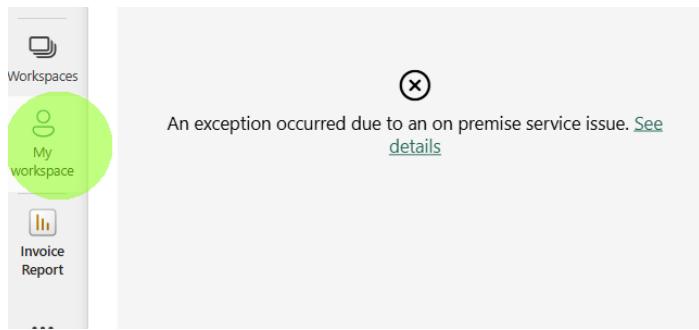
3. Once done, click the link to navigate to the published online report.



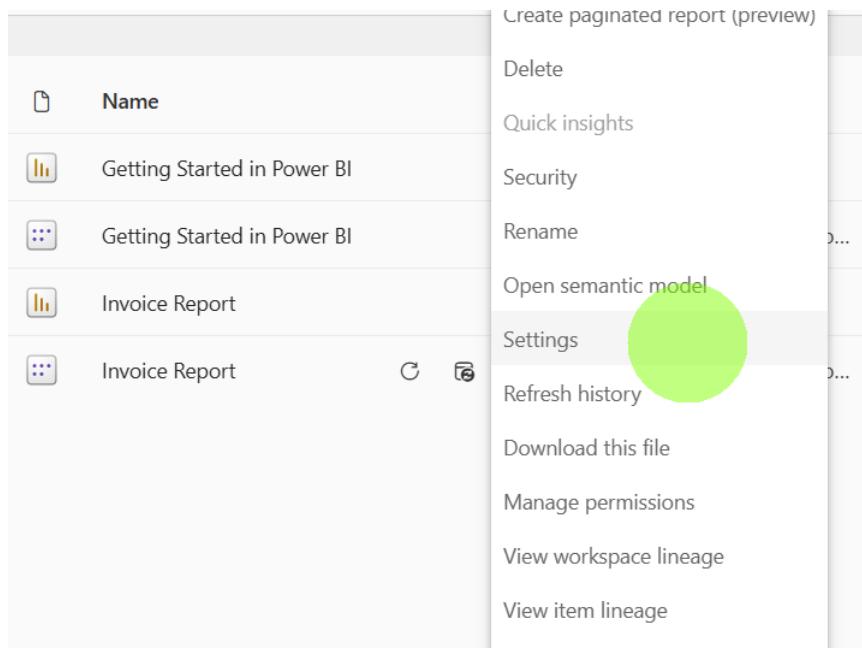
----- End of Task -----

Task 2: Fixing Data Source Connection Issue

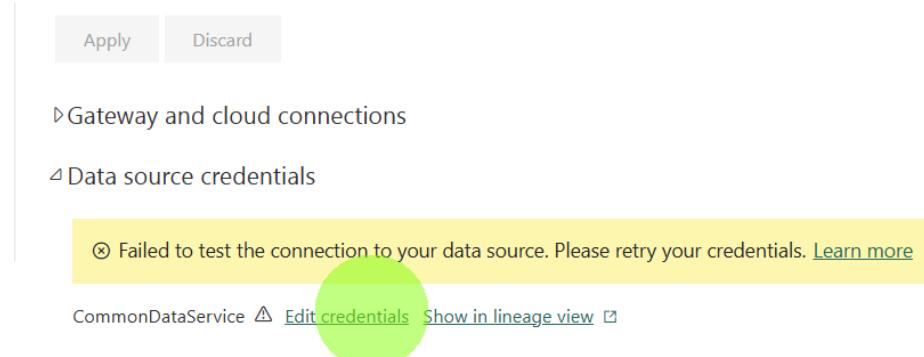
1. On Power BI Online report view, click My Workspace (or choose the workspace that you have published your report to).



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

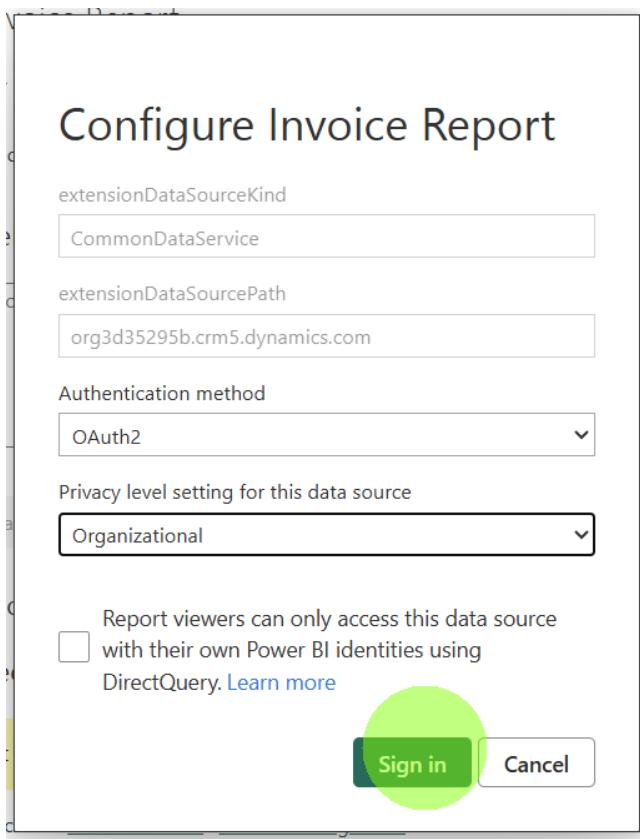


3. On Settings page, click **Edit credentials** under **Data source credentials**.



The screenshot shows a settings page with two buttons at the top: "Apply" and "Discard". Below them is a tree view with two nodes: "Gateway and cloud connections" and "Data source credentials". The "Data source credentials" node is expanded, revealing a yellow warning box with the text: "Failed to test the connection to your data source. Please retry your credentials. [Learn more](#)". Below the warning box is a link to "CommonDataService" with options to "Edit credentials" and "Show in lineage view". A green circle highlights the "Edit credentials" link.

4. Select following settings and click Sign in.

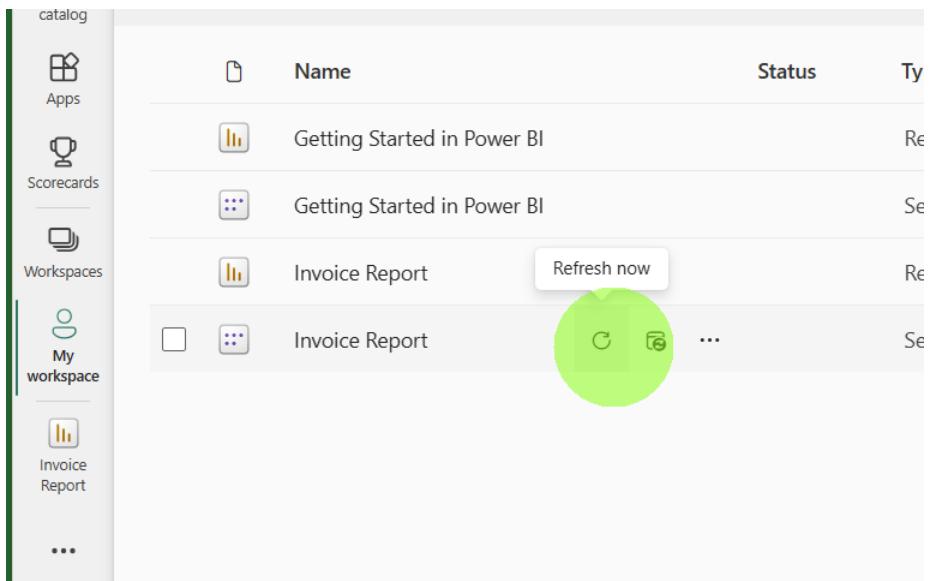


The screenshot shows a "Configure Invoice Report" dialog box. It contains the following fields:

- 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. [Learn more](#)". At the bottom of the dialog are two buttons: "Sign in" (highlighted with a green circle) and "Cancel".

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), 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 highlighted with a green circle. Below the table, there are three icons: a circular arrow, a refresh symbol, and three dots.

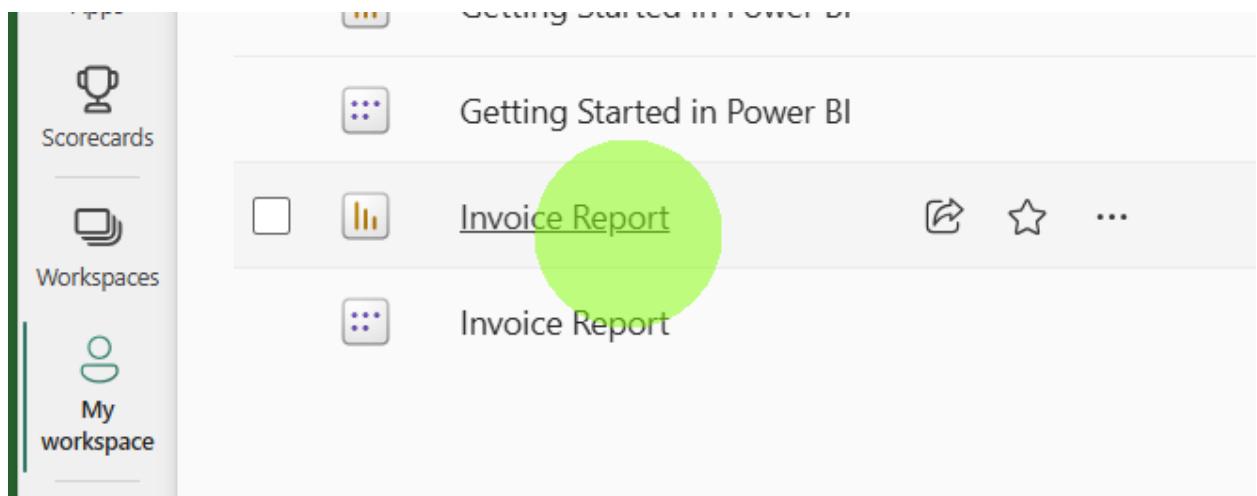
	Name	Status	Type
	Getting Started in Power BI	Re	
	Getting Started in Power BI	Se	
	Invoice Report	Re	
	Invoice Report	Se	

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

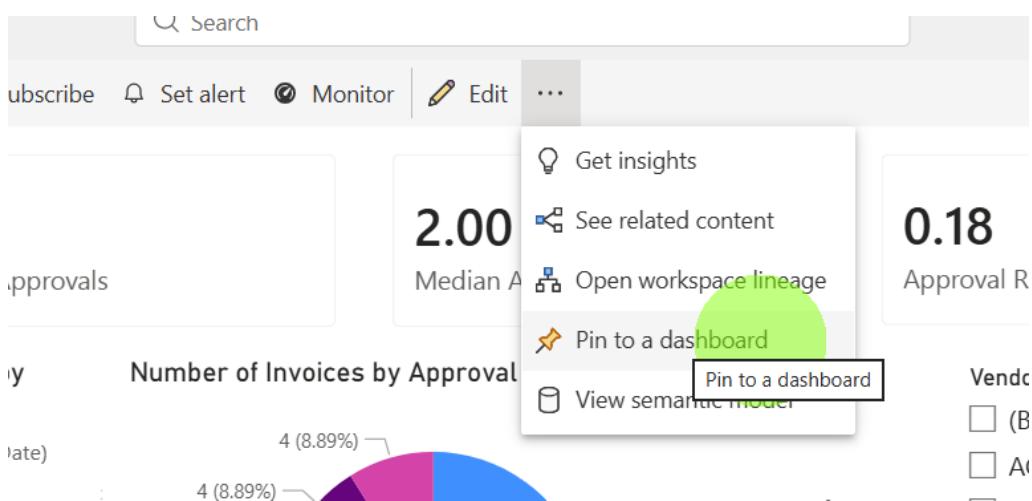
End of Task

Task 3: Adding Report to a Dashboard

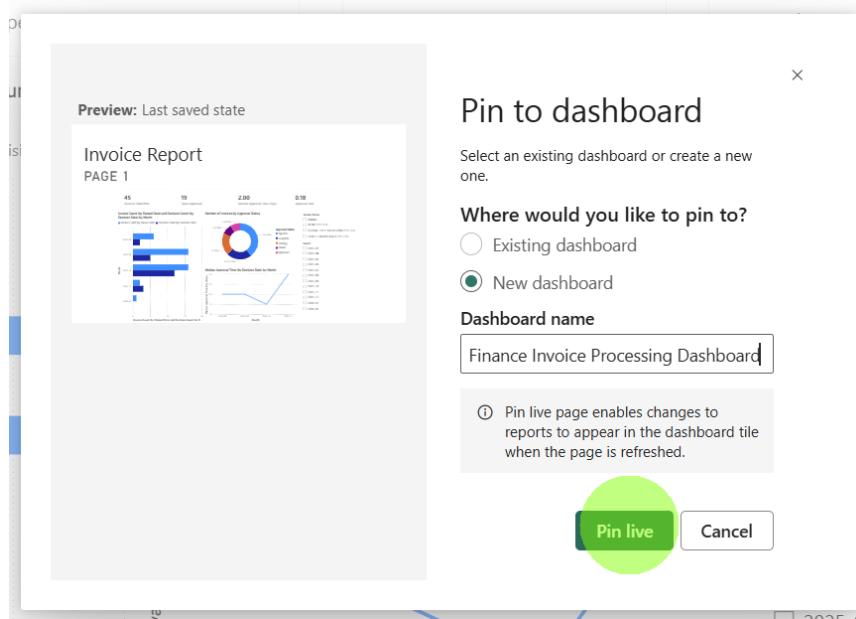
1. Go back to My workspace and open your report.



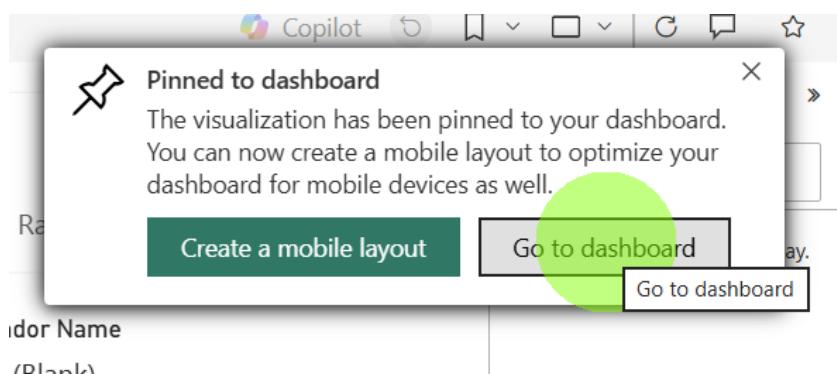
2. Click Pin to a dashboard from top menu of the report



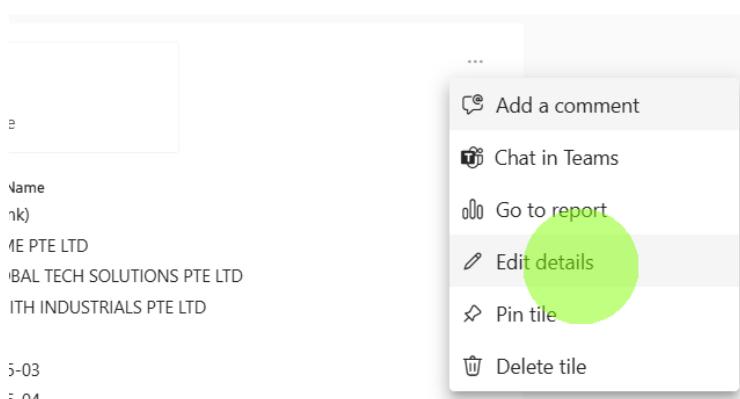
3. Give name for a new dashboard and click Pin live.



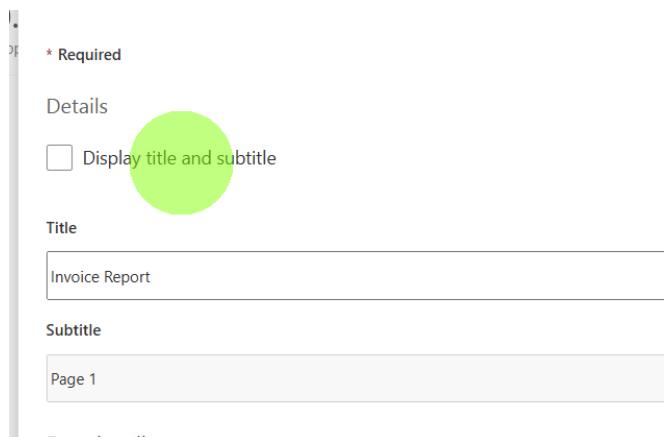
4. Click **Go to dashboard**



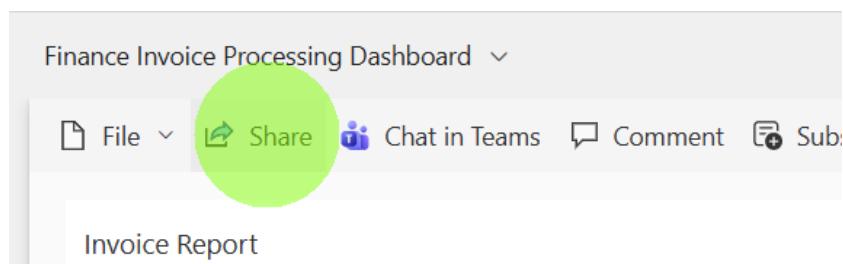
5. Click 3 dots from top right corner and **Edit Details**.



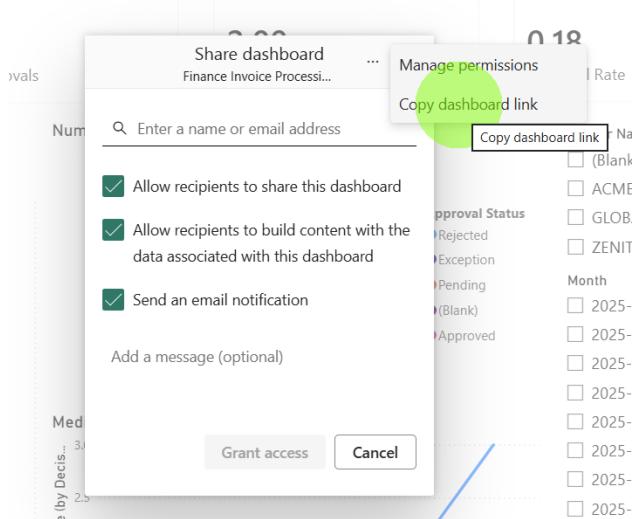
6. Uncheck **Display title and subtitle** and click **Apply**



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



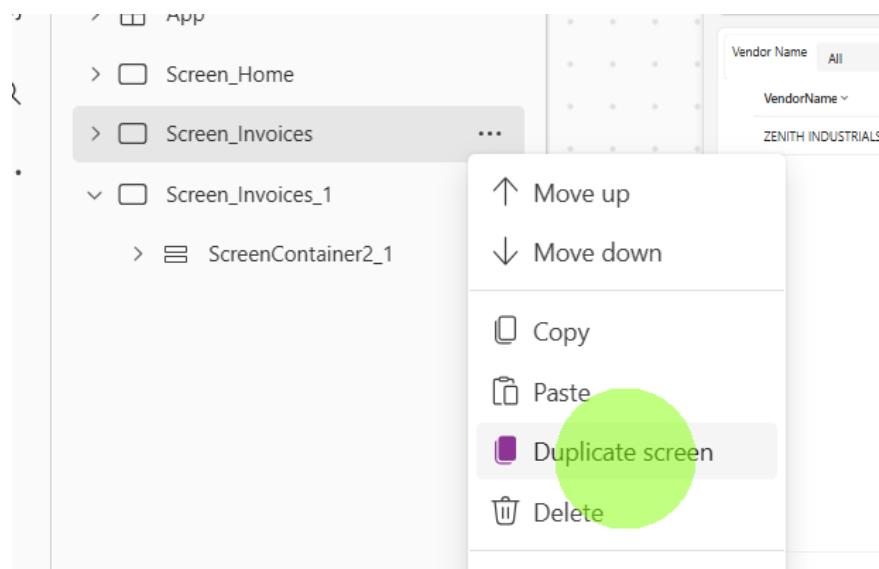
Add users that you would like to share the Dashboard with.



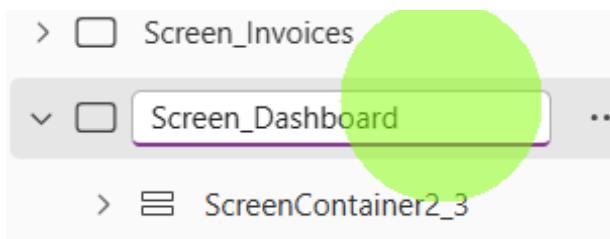
End of Task

Task 4: Adding Dashboard to Canvas App

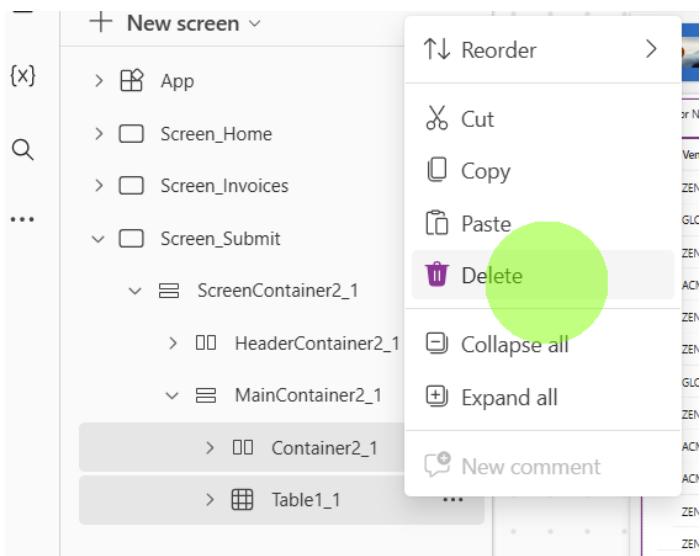
1. Open Finance Invoice App.
2. Duplicate Screen_Invoices by following selecting the screen, right clicking it, and then selecting the 'Duplicate Screen' option.



3. Rename the new screen to Screen_Dashboard.

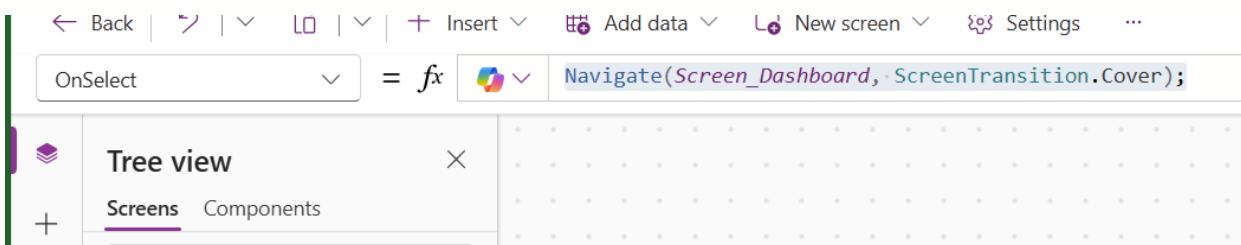


4. Expand the Main Container and delete the controls inside.

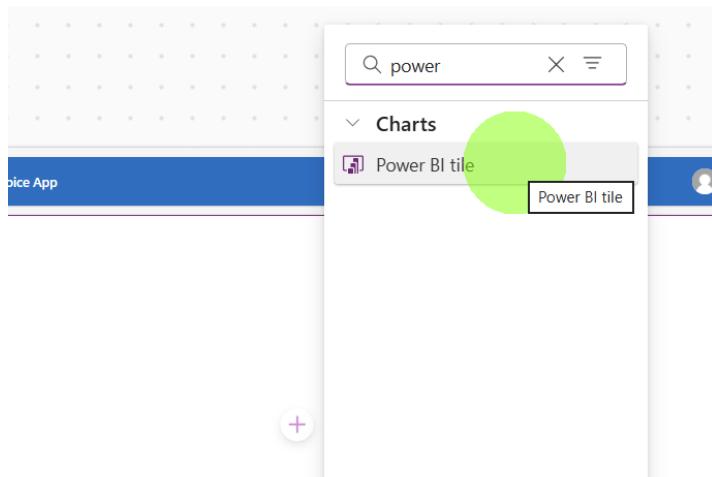


5. Go back to Screen_Home and update OnSelect event of Dashboard icon to below.

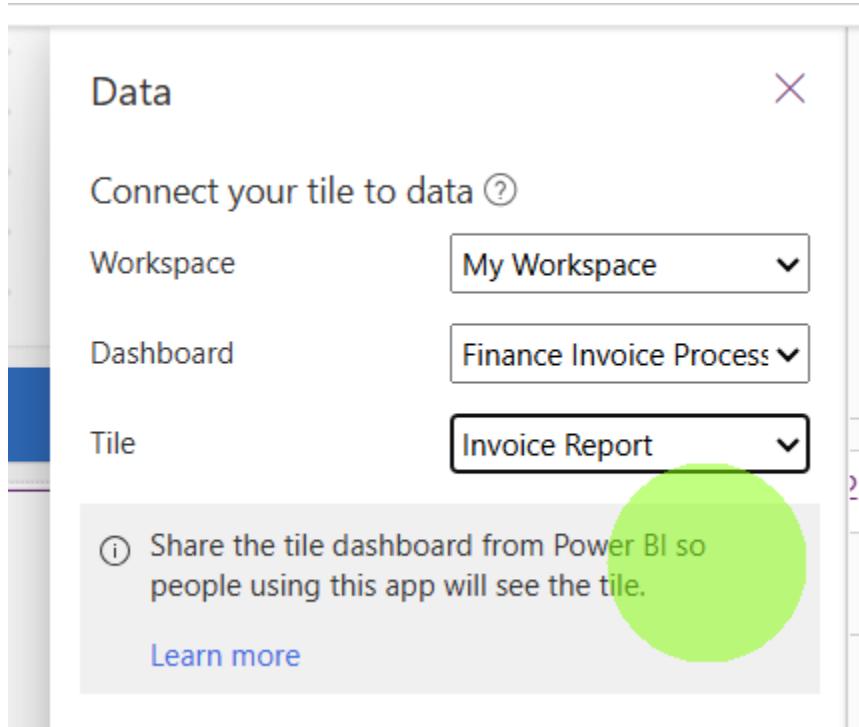
```
Navigate(Screen_Dashboard, ScreenTransition.Cover);
```



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

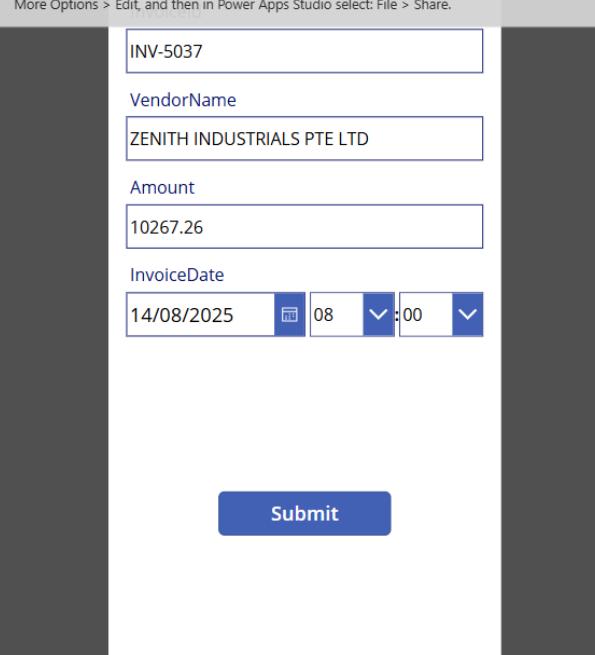
Estimated Time

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.



INV-5037

VendorName

ZENITH INDUSTRIALS PTE LTD

Amount

10267.26

InvoiceDate

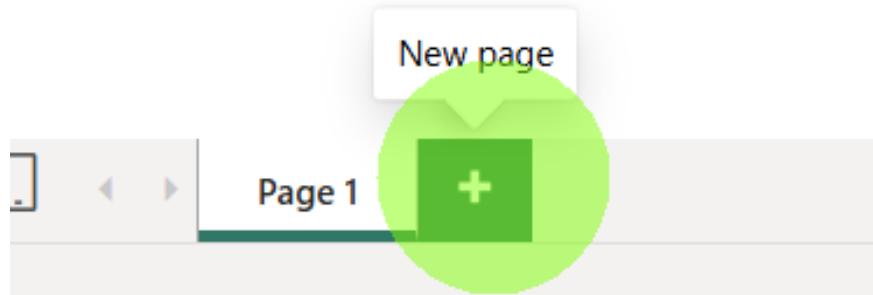
14/08/2025

Submit

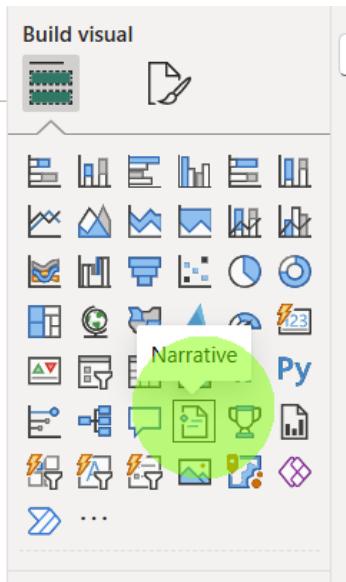
Run flow

Task 1: Prepare Power BI Report

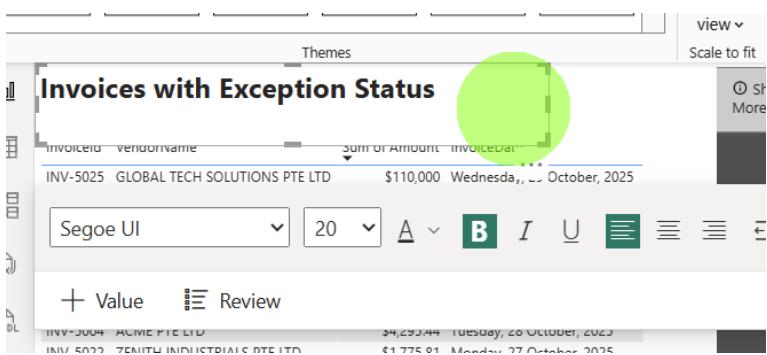
1. Start by adding a new page to the Power BI report on Power BI Desktop.



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

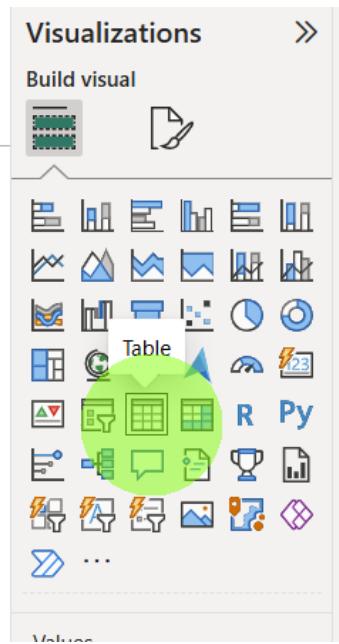


2. Edit the narrative as below to show as a page title.

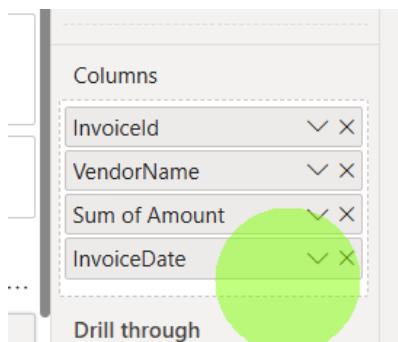


A screenshot of the Power BI Desktop report canvas. A narrative visualization titled 'Invoices with Exception Status' is displayed. The text in the narrative is:
Invoices with Exception Status
INVOICEID VendorName Sum of Amount Invoiced Date
INV-5025 GLOBAL TECH SOLUTIONS PTE LTD \$110,000 Wednesday,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

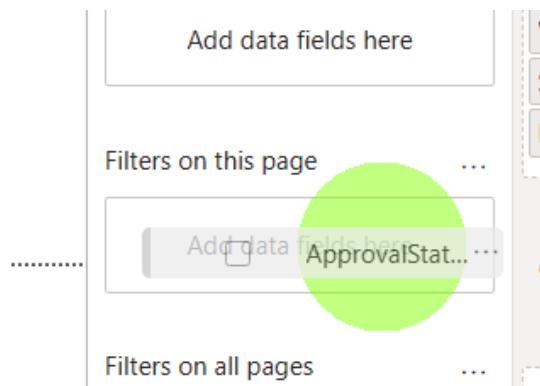
3. Add **Table visualization** to the report.



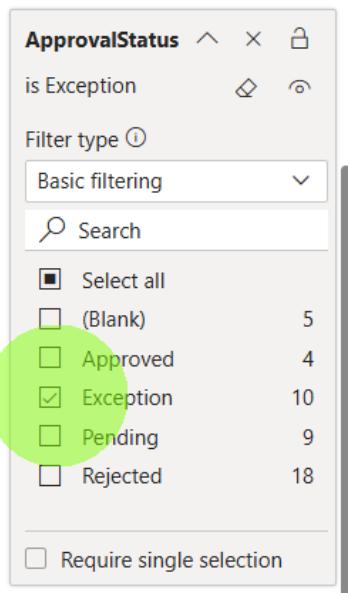
4. Drag below field to **Columns**.



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



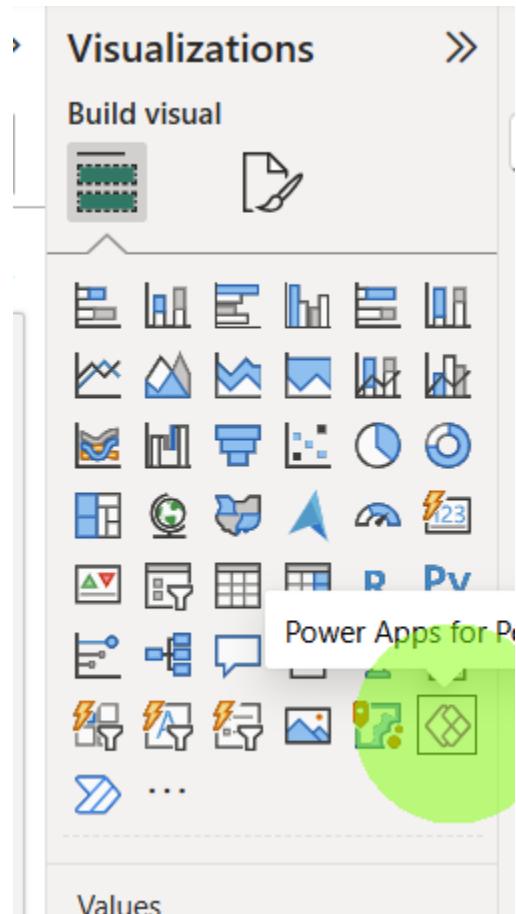
6. Select **Exception** in filter



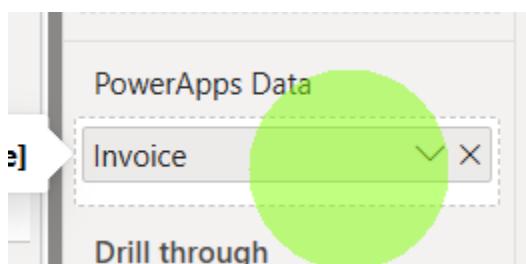
----- End of Task -----

Task 2: Embed Power App in Power BI Report

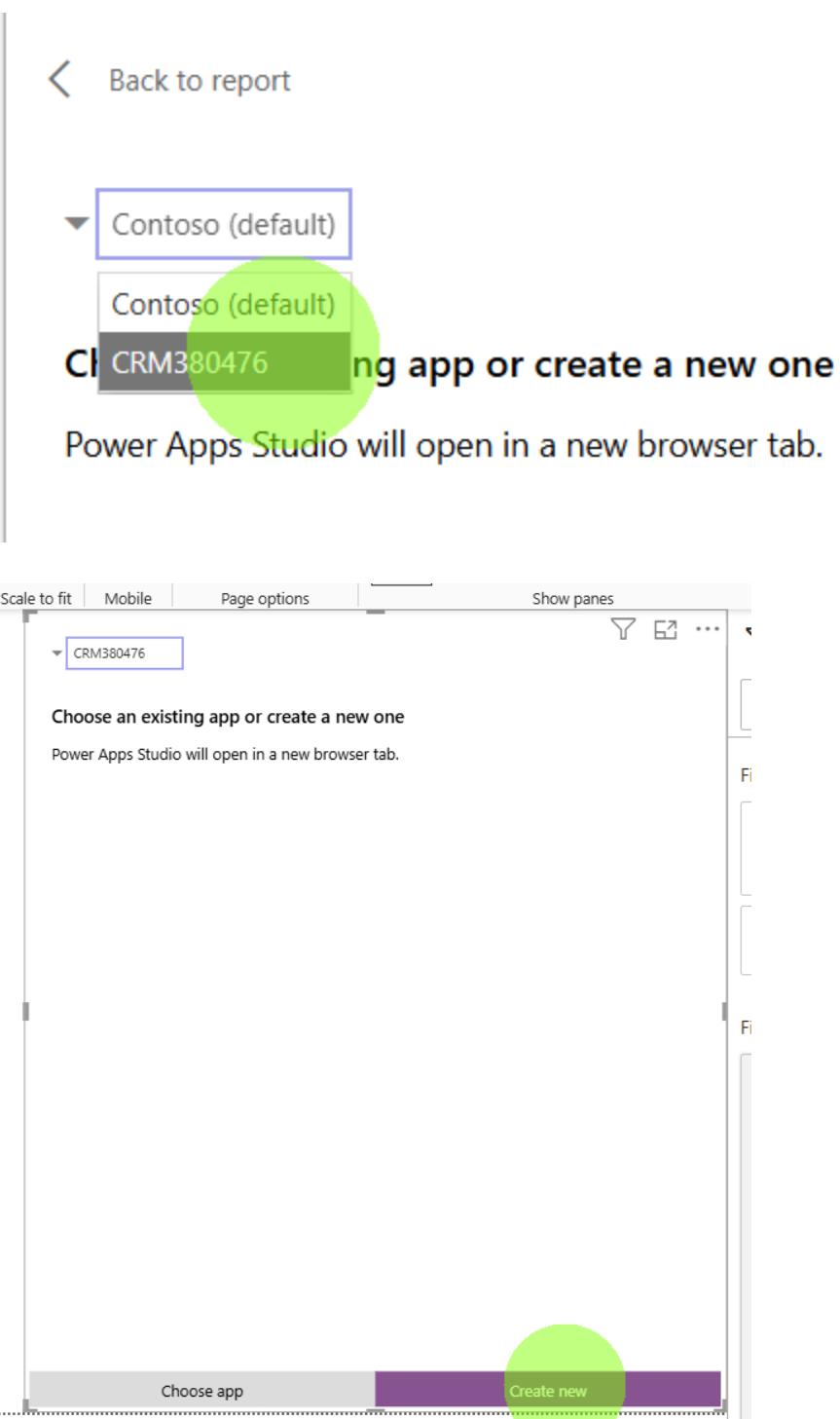
1. Add **Power App for Power BI** to the report.



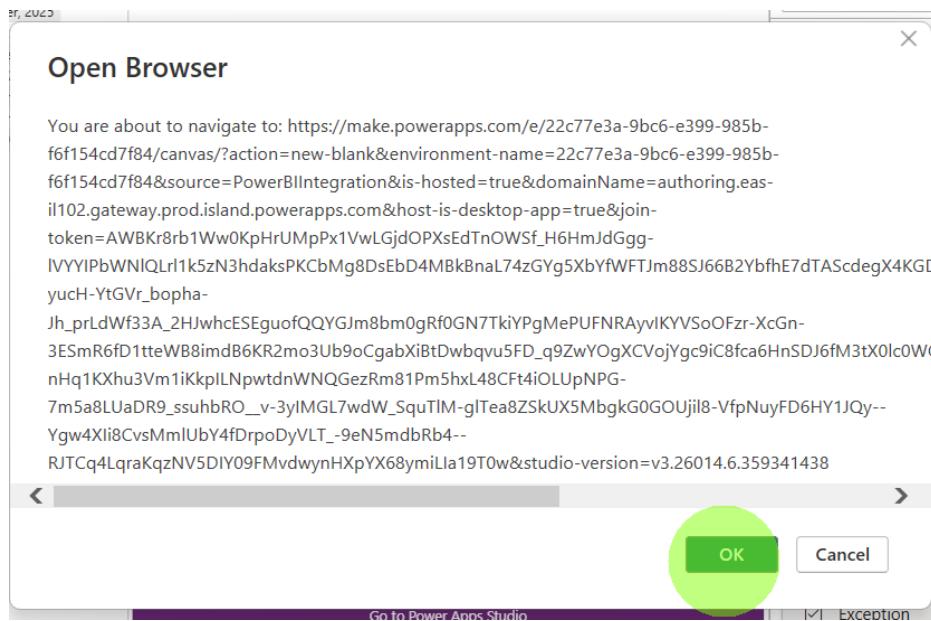
2. Drag **Invoice** to PowerApps Data.



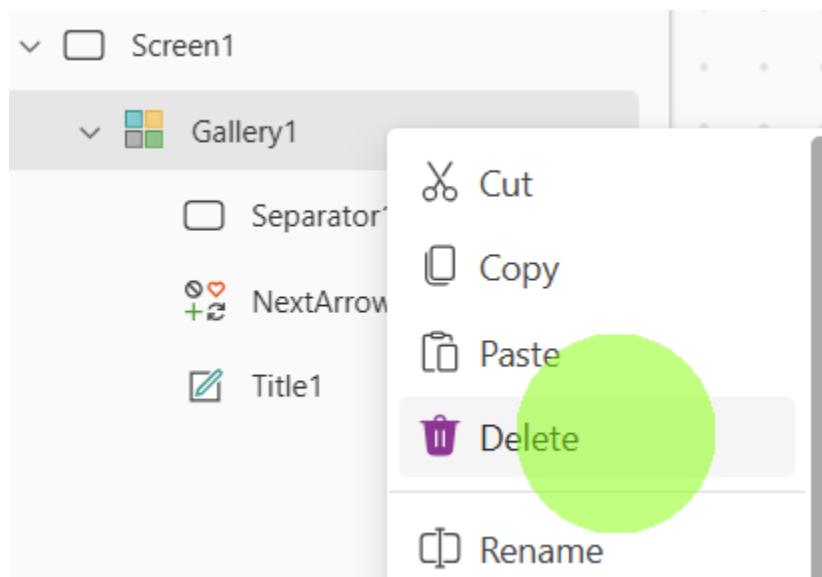
3. Select the environment where Invoice Table is hosted and Create new.



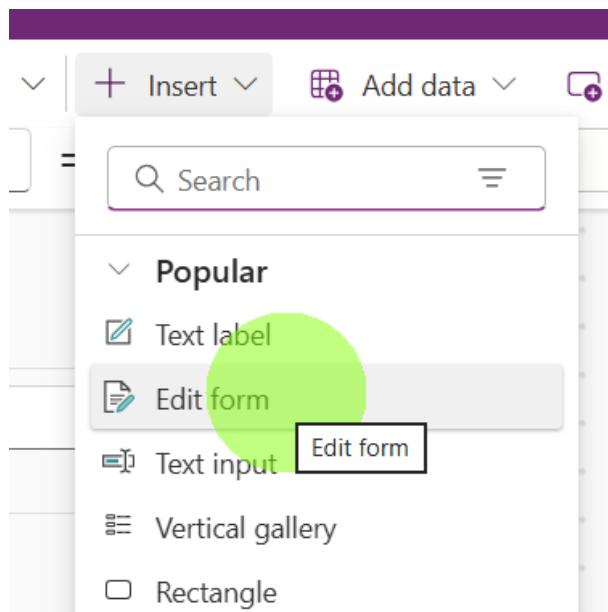
4. Click OK and it will bring you to Power App Studio.



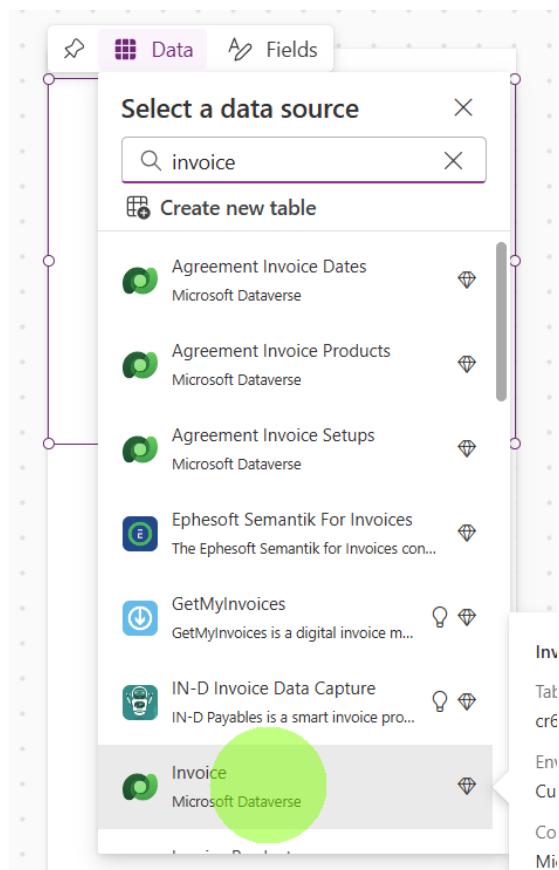
5. Delete Gallery 1 (Created by Default) in Power App.



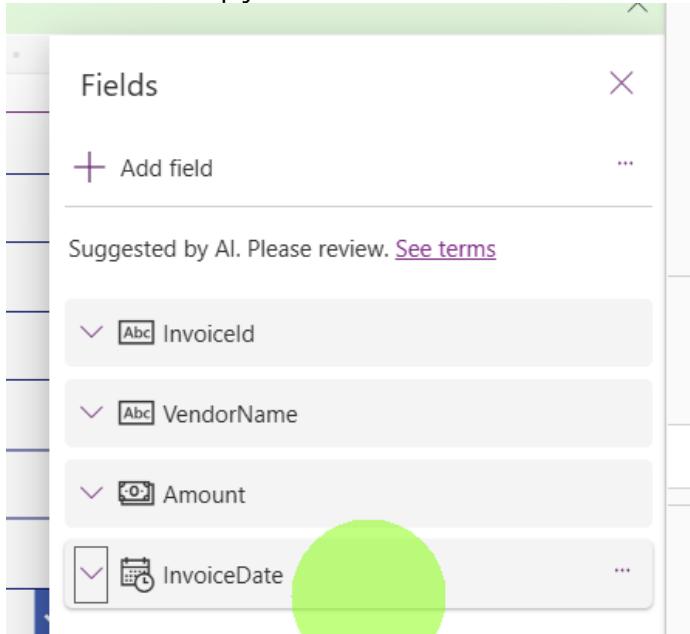
6. Add a new Edit form.



7. Select Invoice as data source.



8. Edit fields to keep just 4 fields below.



Fields

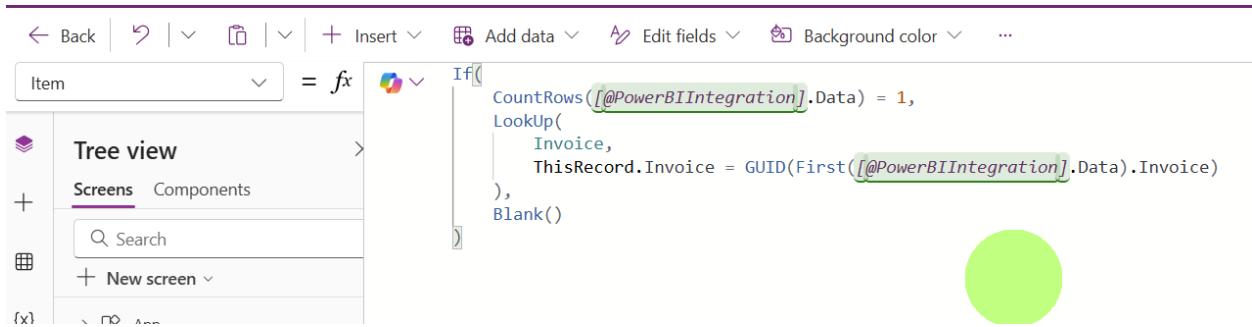
Add field

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

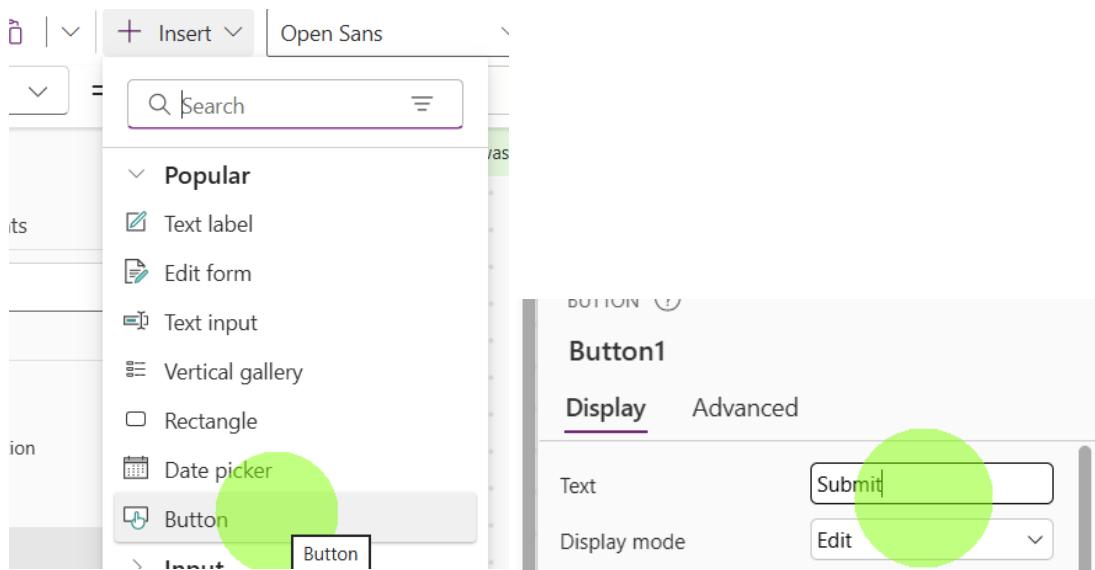
Screens Components

Search

New screen

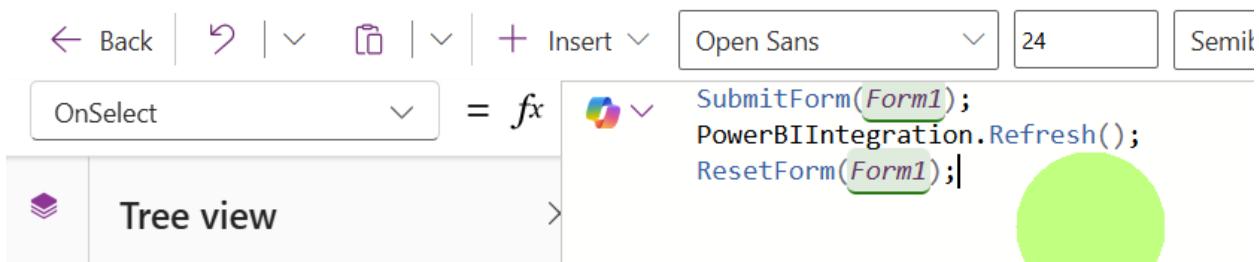
If(
 CountRows(@PowerBIIntegration).Data) = 1,
 LookUp(
 Invoice,
 ThisRecord.Invoice =
 GUID(First(@PowerBIIntegration).Data).Invoice)
),
 Blank()

10. Add a Button and change Text to Submit.

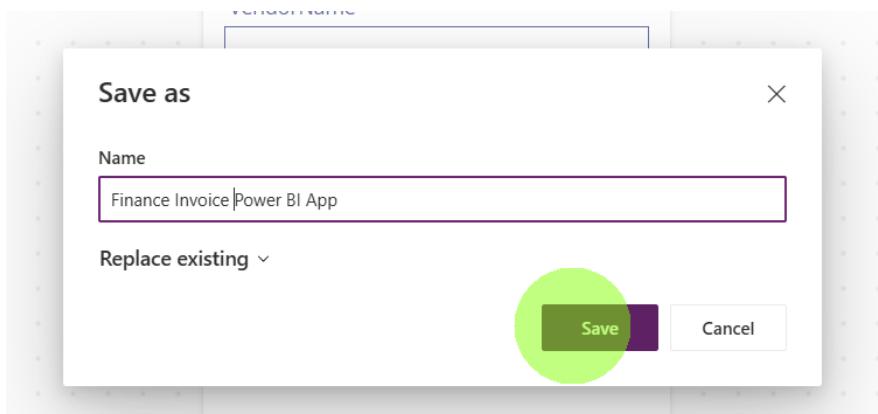


11. Set OnSelect property to below formula.

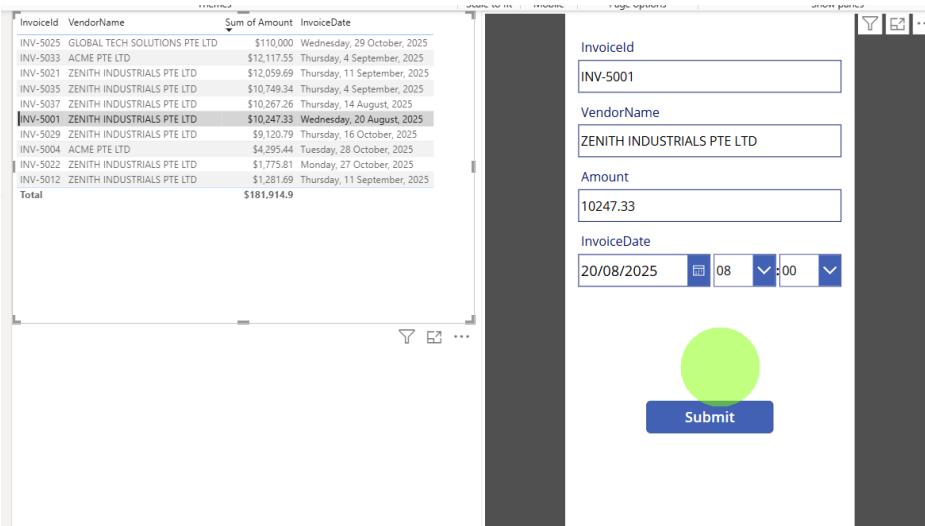
```
SubmitForm(Form1);
PowerBIIntegration.Refresh();
ResetForm(Form1);
```



12. Save and Publish the app.



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

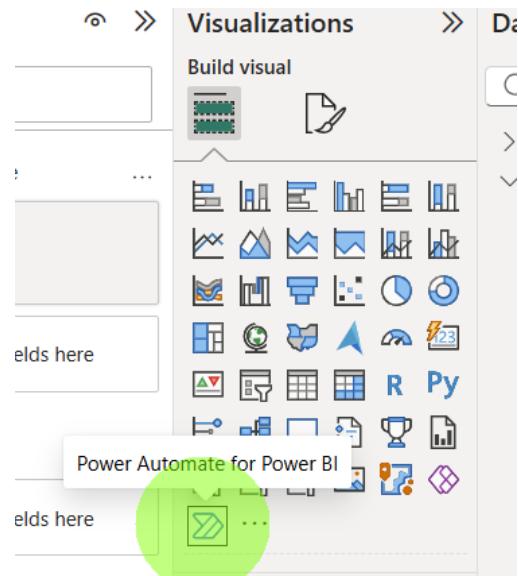


Invoiceld	VendorName	Sum of Amount	InvoiceDate
INV-5025	GLOBAL TECH SOLUTIONS PTE LTD	\$110,000	Wednesday, 29 October, 2025
INV-5033	ACME PTE LTD	\$12,117.55	Thursday, 4 September, 2025
INV-5021	ZENITH INDUSTRIALS PTE LTD	\$12,059.69	Thursday, 11 September, 2025
INV-5035	ZENITH INDUSTRIALS PTE LTD	\$10,749.34	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	

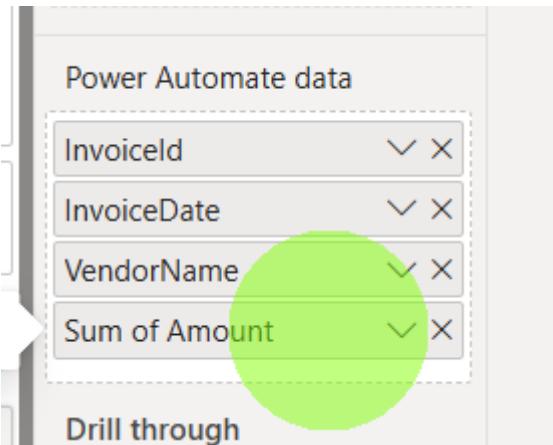
End of Task

Task 3: Trigger Power Automate Flow from Power BI

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

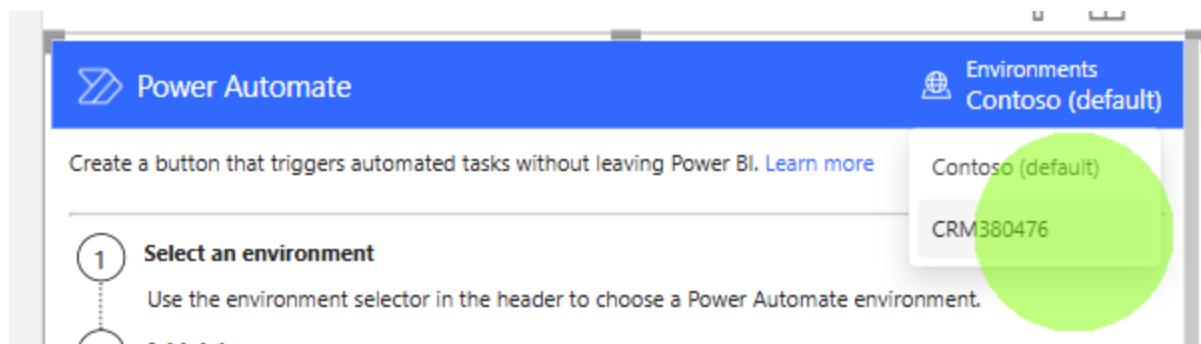


2. Drag the fields below to Power Automate Data.

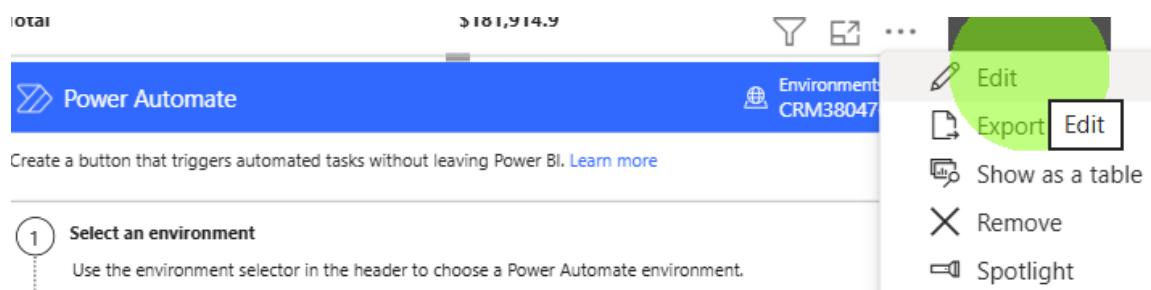


A screenshot of the 'Power Automate data' pane. It contains four fields: 'Invoiceld', 'InvoiceDate', 'VendorName', and 'Sum of Amount'. The 'Sum of Amount' field is highlighted with a large green circle. Below the fields is a 'Drill through' button.

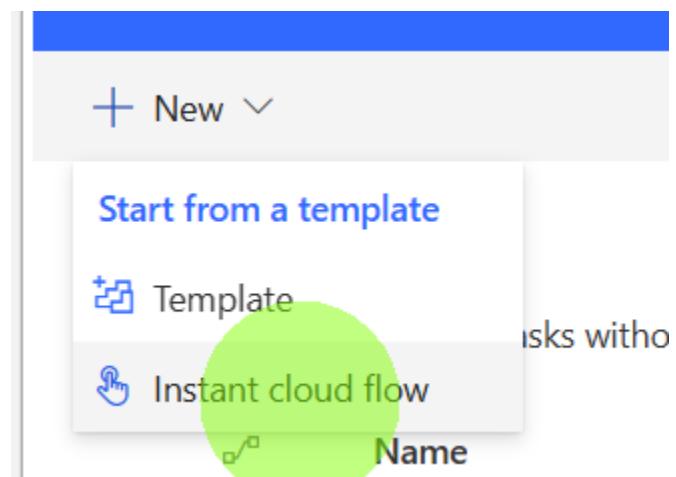
3. Select the correct environment in Power Automate.



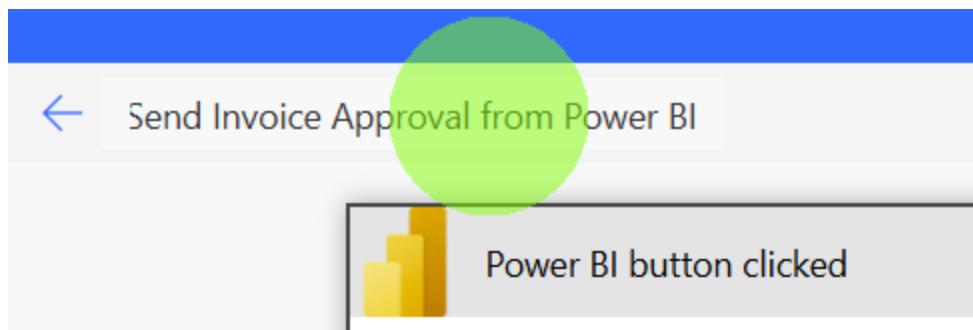
4. Click on 3 dots and **Edit**.



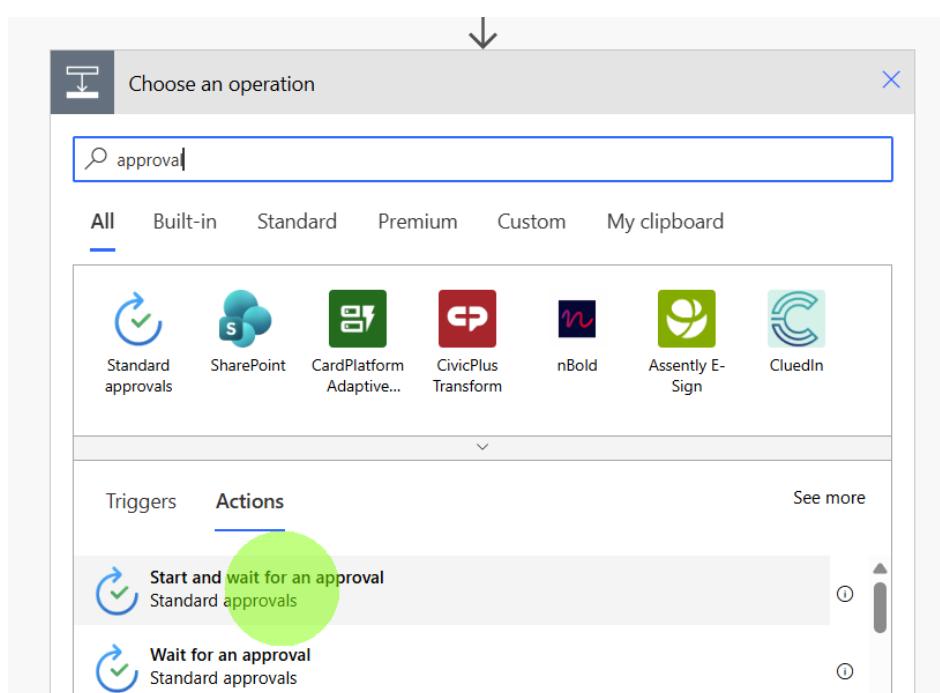
5. Select New → Instant Cloud Flow.



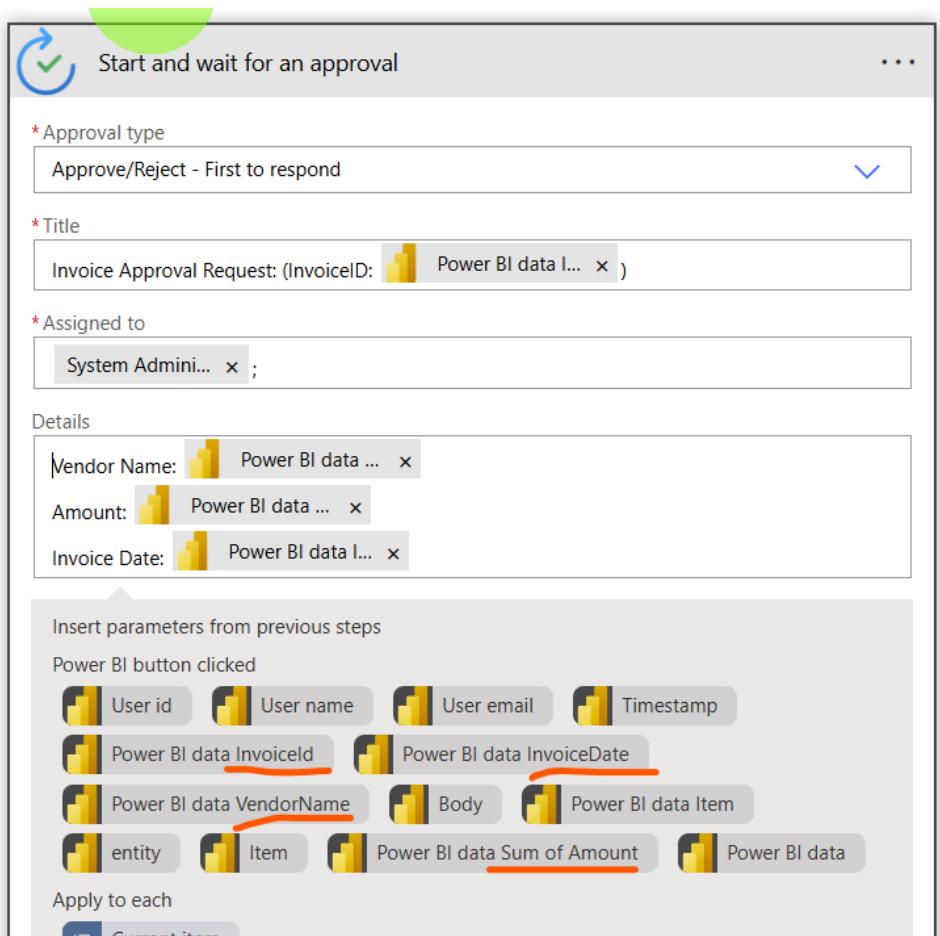
6. Rename the flow.



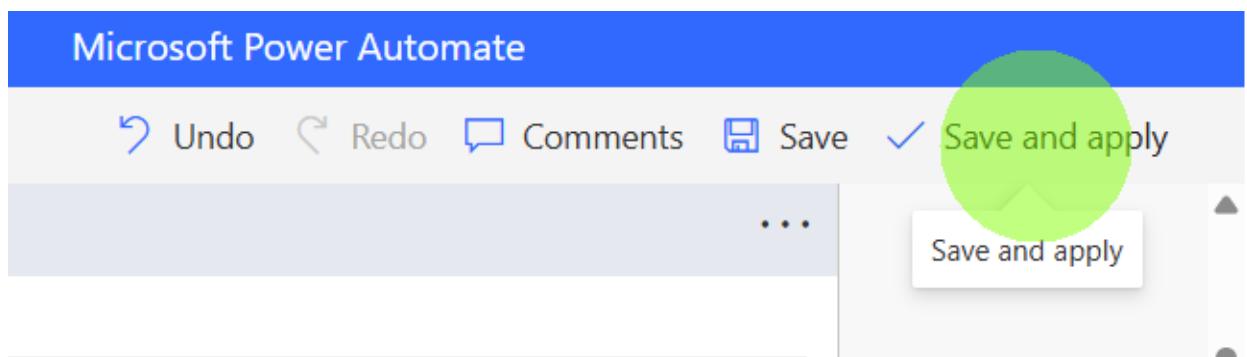
7. Add Start and wait for an approval stage.

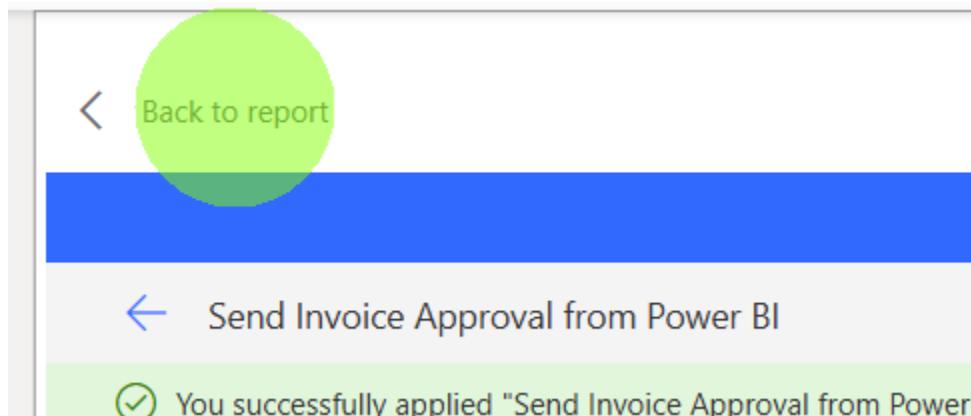


8. Choose the fields as below. Temporarily hardcode your own email address for Approver.
After the flow is saved, you can add the flow to solution and change to the ApproverEmail Environment Variable you created in previous day's lab.



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 highlighted. On the right is a form with fields: VendorName (set to ZENITH INDUSTRIALS PTE LTD), Amount (set to 10267.26), and InvoiceDate (set to 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 -----