



Dashboard in a Day – Lab 5

Collaboration

by Power BI Team, Microsoft



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Introduction

This document is lab five of five total labs.

Please continue to use your file after completing Lab 4. If you are joining the DIAD at this point or were unable to complete previous labs, please start this lab with the provided **DIAD Final Report.pbix** file located in the Reports folder.

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

The lab includes steps for the user to follow along together with associated screenshots that provide a visual aid. In the screenshots, sections are highlighted with red or orange boxes to indicate the area the user needs to focus on.

NOTE: This lab uses real, anonymized data provided by ObviEnce, LLC. Visit their site to learn about their services: www.obvience.com. This data is the property of ObviEnce, LLC and has been shared to demonstrate Power BI functionality with industry sample data. Any use of this data must include this attribution to ObviEnce, LLC.

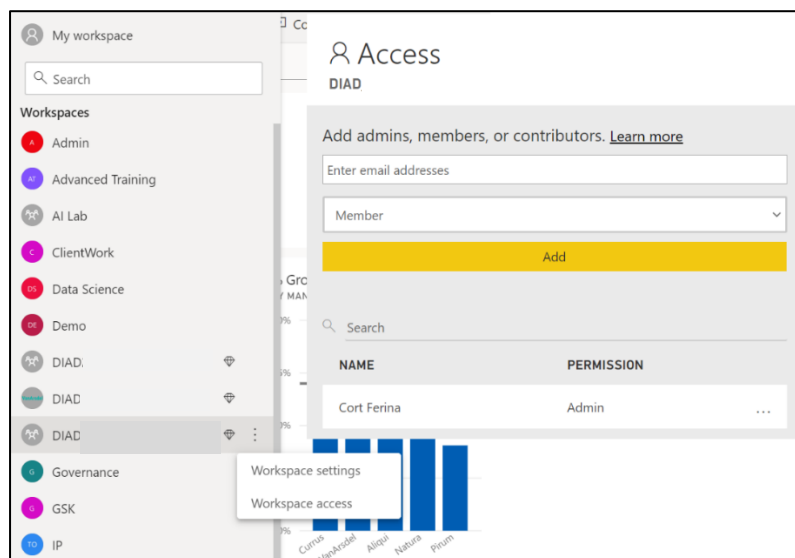
Power BI Service – Collaboration and Distribution

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

1. Sign in to PowerBI.com to access your workspace.
2. From the left panel, click **Workspaces**.
3. Click the **ellipsis** next to **DIAD_<youremailaddress>**.
4. Click **Workspace access**.
5. The **Access** dialog opens. Enter the email addresses of the colleagues with whom you want to collaborate. Each user can belong to one of three roles as follows:

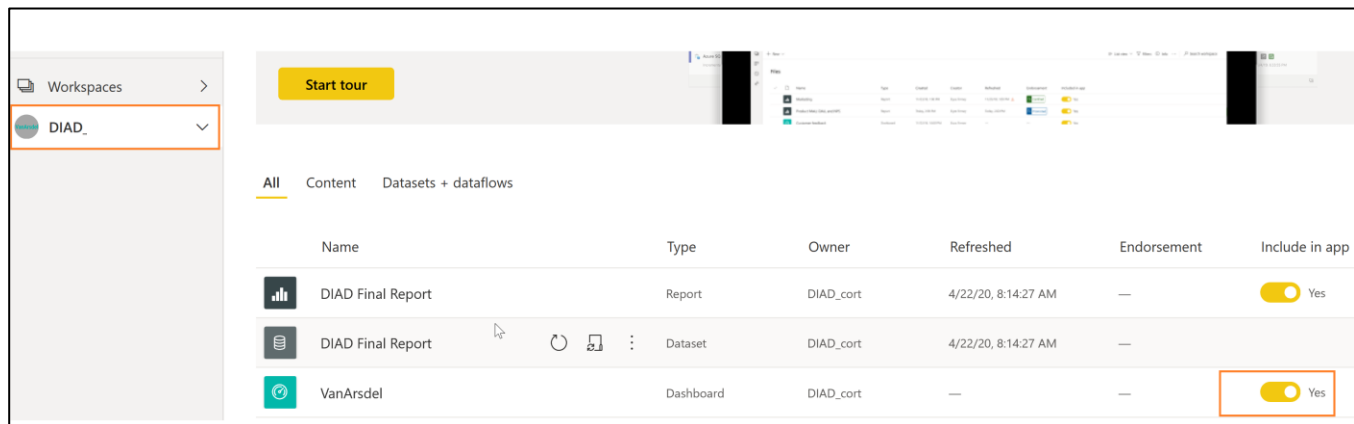
Contributor	Add/edit/delete content within workspace.
Member	Everything a Contributor can do. Re-share. Publish & update Apps.
Admin	Everything a member can do. Can change/delete workspace.
Viewer	Can add Admins. View/interact Read data stored in workplace Data Flows

6. Select the appropriate role and then click **Add**.
 7. Once you have finished adding your colleagues, click **Close**.
- Note:** If you don't have a colleague's email please close without submission.
- Note:** You can ask your colleague to login and access the workspace.



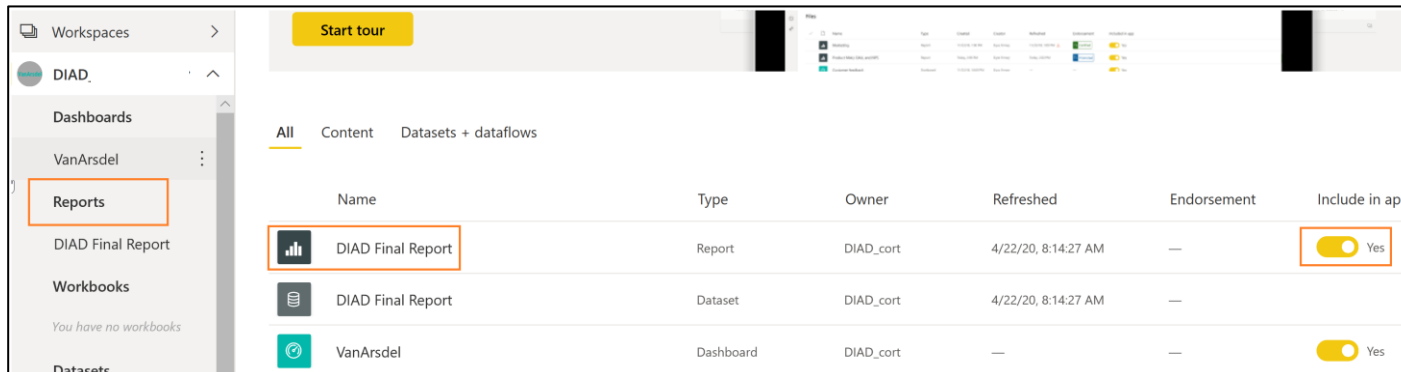
Now let's share the content we have created with report viewers and consumers. To start, we need to publish an app. An App can include multiple dashboards and reports.

1. In the left panel select the **DIAD_<youremailaddress>** workspace.
2. In the **Dashboard** page, notice there is an option named **Included in App** which can be selected to include the Dashboard in the App.

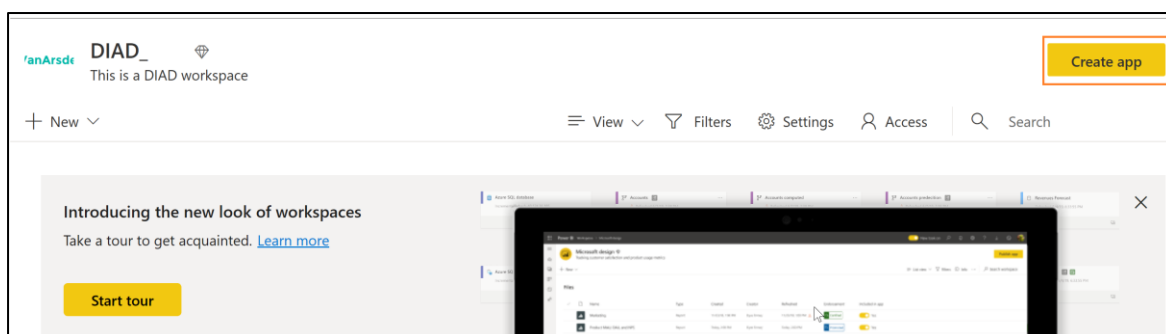


3. Navigate to the **Reports** page.
4. Notice there is an option named **Included in App** which can be selected to include the Reports in the App.

If you have reports and dashboards in your workspace that you do not want to share with report viewers, uncheck this box. In our case we would like to include the DIAD Final Report, so we will leave the box checked. Ensure you have checked the report and not the dataset.



5. In the left panel, click the **DIAD_<youremailaddress>** workspace.
6. In the upper right corner, click the **Create app** button.



7. In the **Setup** page, type **This is DIAD app** in the description field.
8. Click the **Navigation** tab.

The screenshot shows the 'DIAD_cort' app setup page with the 'Navigation' tab selected. The 'App name' field contains 'DIAD_'. The 'Description' field contains 'This is a DIAD app' and shows '182 characters left'. The 'Support site' field is empty with the placeholder text 'Share where your users can find help'.

9. From the **Navigation** menu, click **VanArsdel (dashboard)**.
10. When a user accesses the DIAD app, we want them to land on the **VanArsdel** dashboard.
11. Navigate to the **Permissions** page.

The screenshot shows the 'DIAD_cort' app setup page with the 'Navigation' tab selected. The 'New navigation builder' toggle is 'On'. The 'Navigation' list on the left includes 'VanArsdel' (highlighted) and 'DIAD Final Report'. The 'Dashboard details' section on the right shows the 'Name' field set to 'VanArsdel', the 'Dashboard link' field set to 'https://app.powerbi.com/groups/81e3b2c7-6df3-4c92-bcaf-0b96ee65b5a1/dashboards/a3ade2ab-48', the 'Section' dropdown set to 'No section', and the 'Hide from navigation' checkbox unchecked. There are 'Reset' and 'Open' links next to the 'Name' and 'Dashboard link' fields respectively. An '> Advanced' link is at the bottom.

Setup Navigation **Permissions**

Access

☐ Entire organization

☒ Specific individuals or group

Cort Ferina cort@obvience.com

☒ Users and groups with access to this workspace can access this app.

This app will be created in a Power BI Premium workspace. As long as the workspace remains a Premium workspace, anyone in your organization can be given access to it.

Allow everyone who has app access to

☒ Allow all users to connect to the app's underlying datasets using the Build permission.

☒ Allow users to make a copy of the reports in this app.

☐ Allow users to share the app and the app's underlying datasets using the share permission.

[Learn more](#)

Installation

☐ Install this app automatically.

Publish app Cancel

12. Enter the email addresses of the users or groups to whom you want to give access.

Note: If you didn't enter an email address previously, no need to enter one here.

13. On the bottom right corner, click **Publish App**.

14. The **Ready to publish** dialog appears, click **Publish**.

15. Once the App is published a success dialog appears.

DIAD_

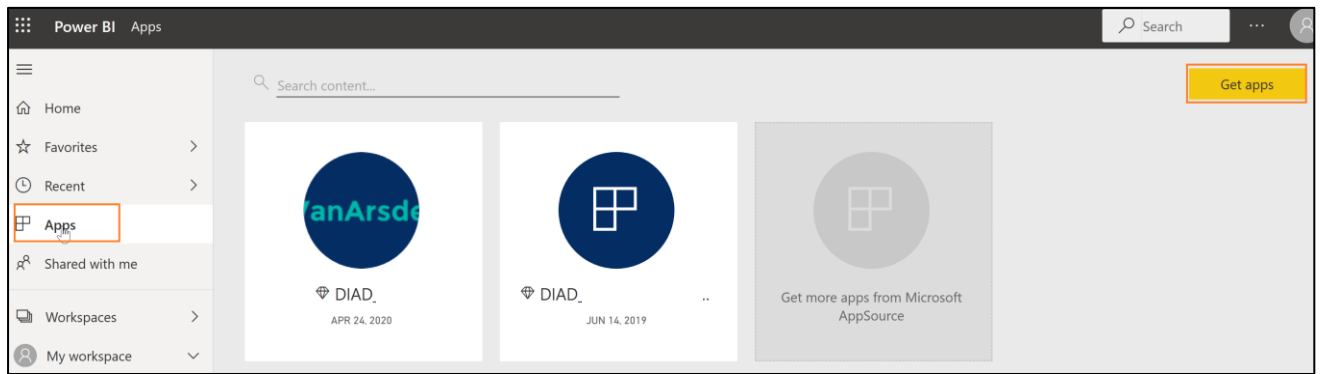
When you publish an app that has large distribution, it might take a little while to process. Typically, the content will be available within 5-10 minutes, but it can take up to one day.

Publish Cancel

You can copy the link to the App after it's been successfully published and share it with individuals via email. A better way for report viewers to consume the App is by logging onto Power BI Service and registering the App. Let's impersonate a report viewer:

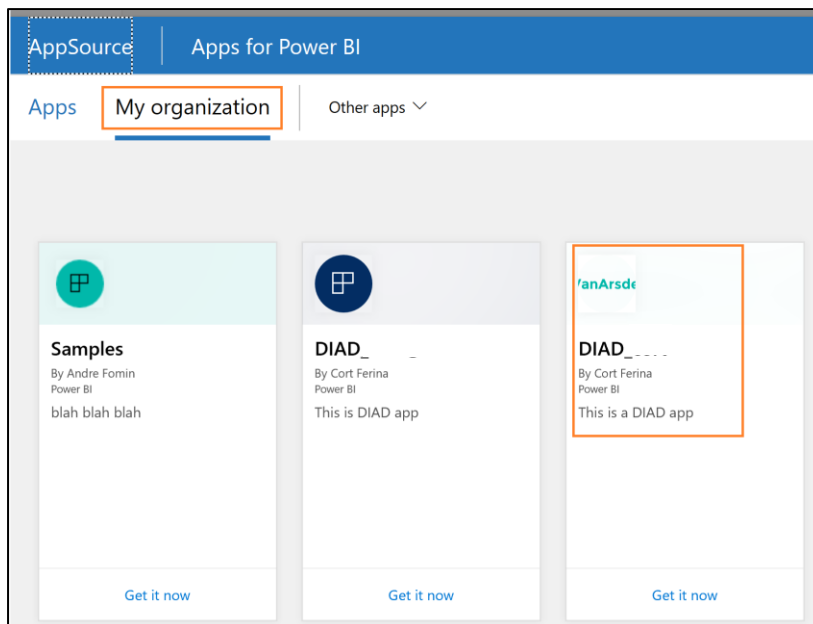
1. From the left menu, click **Apps**.

2. Click **Get Apps**.



3. The **AppSource** dialog opens. You will notice the **DIAD_<youremailaddress>** app is listed. Select the newly added app.

This is a one-time registration. Going forward when you select **Apps** in the left panel, you will see the **DIAD_<youremailaddress>** app in the list of Apps you have registered, and then you can click **Get it now**.

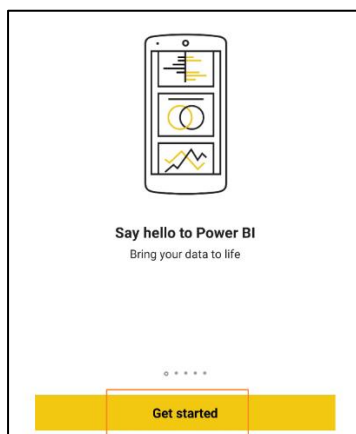


Power BI Mobile – Accessing Report on Mobile Device

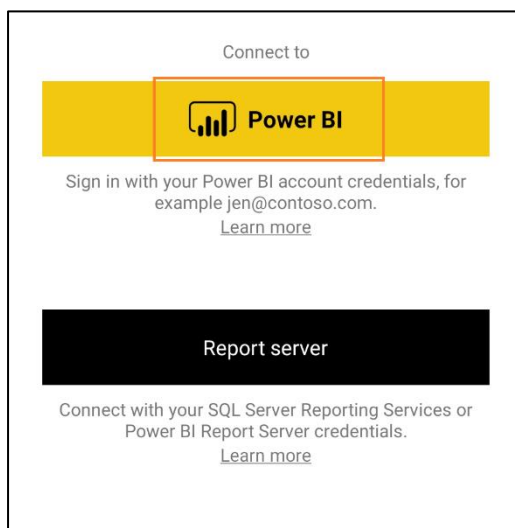
1. Open the Power BI Mobile app on your mobile device



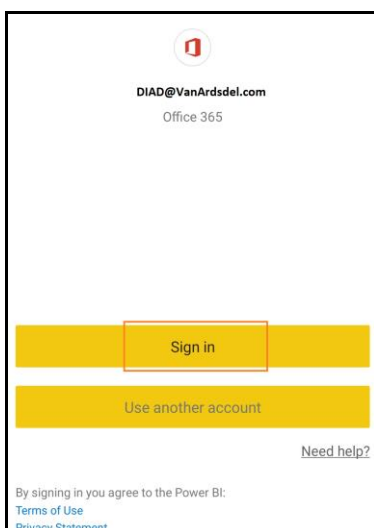
2. Click **Get Started** after the app is open.



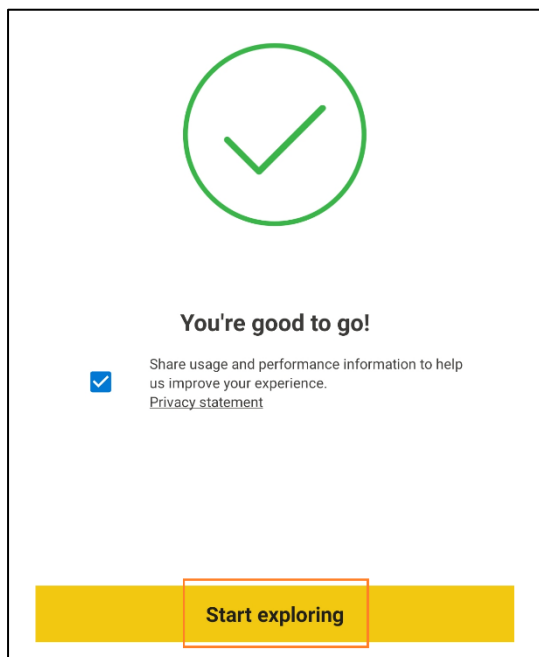
3. Click **Power BI** to connect to your report.



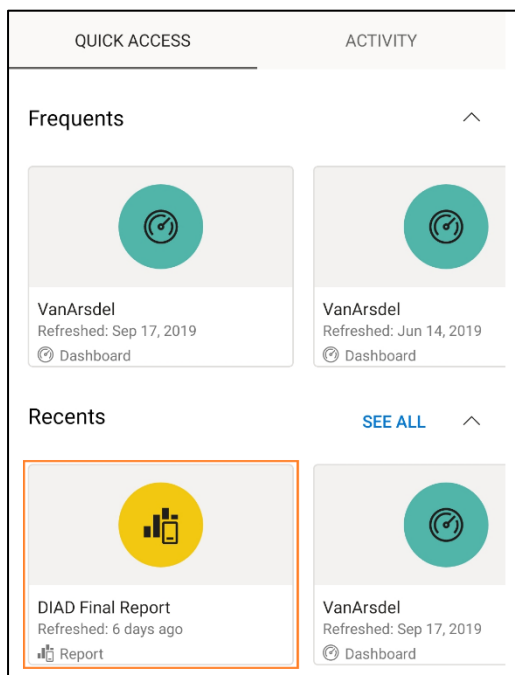
4. Click **Sign in** and enter your credentials.



5. Verify you have successfully signed in and then click **Start exploring**.



6. Click the **DIAD Final Report** that you published from Power BI Desktop.



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

MARKET ANALYSIS

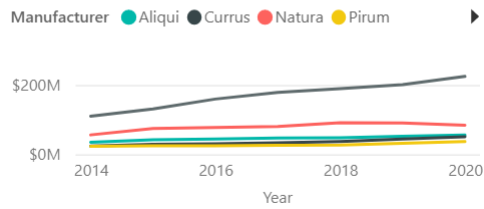
VanArsdel Market Share

47.55%

% Growth by Manufacturer

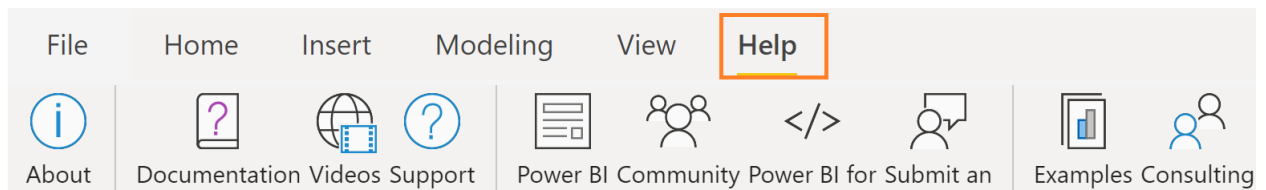


Revenue by Year and Manufacturer



References

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



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

Getting started: <http://powerbi.com>

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

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

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

Power BI Getting started support page:

<https://support.powerbi.com/knowledgebase/articles/430814-get-started-with-power-bi>

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

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

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

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

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