



An introduction to dashboards and reports

Sharing insights with Power BI

Publishing in Power BI

In order to understand the process of publishing and sharing dashboards and reports in Power BI, we first need to understand the key differences between **Power BI Desktop** and the **Power BI service**.

Power BI Desktop

- Power BI Desktop is a Windows application designed for **creating, designing, and authoring Power BI reports** and dashboards and is primarily used for report development, data modelling, and data transformation.
- It is an **offline tool** that is installed on a local computer. We can **work on reports and dashboards without an internet connection**.
- Reports and dashboards are **saved as .pbix files**, which are native to Power BI Desktop and can only be opened and edited within Power BI Desktop.

Power BI service

- The Power BI service, also known as Power BI online, is a cloud-based platform where we can **publish, share, collaborate on, and consume Power BI reports** and dashboards created in Power BI Desktop.
- The Power BI service is entirely **web-based**. It operates in the cloud, making it **accessible from anywhere with an internet connection**.
- Users are provided with a **link** to the dashboards in the Power BI service, where they can collaborate and access them via a **web browser**.

Both platforms offer a similar view of the reports, with Power BI Desktop emphasising features for importing, transforming, and modelling data to produce dashboards, whilst the Power BI service focuses on sharing and collaborating on already-built dashboards. These two components **work together to create a complete end-to-end solution for data analysis and reporting**.

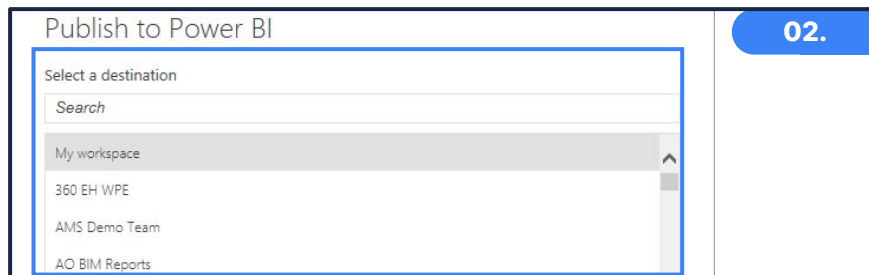
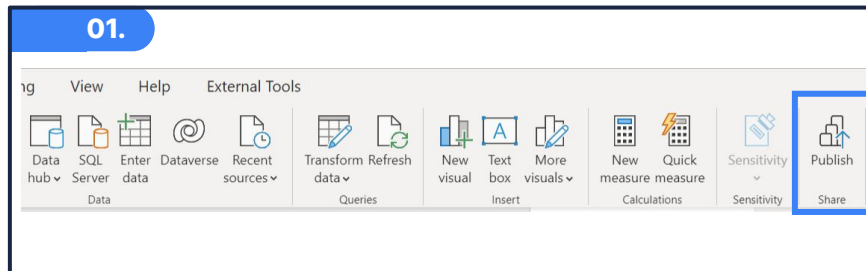


Publishing in the Power BI service

Publishing in Power BI is the process of **sharing reports and dashboards with others**. This is typically done through the Power BI service, where reports are hosted.

To publish a report in Power BI:

- 01.** Create or open a report in Power BI Desktop and then select the "Publish" button on the Home tab.
- 02.** Select the workspace in the Power BI service where we want to publish the report.
- 03.** Select the link to open the report in the Power BI site or right-click to share it.



Considerations when publishing in the Power BI service

01. Data source availability

Ensure that the data sources used in the report are **accessible and available in the Power BI service**. Ensure that data source **credentials and permissions** are configured properly.

02. Security and permissions

Understand **data security and privacy** implications of publishing to the Power BI service, consider dynamic **security roles**, and define appropriate **permissions** for reports.

03. Version control and backup

Implement version control practices for Power BI Desktop reports to **track changes** and **revert to previous versions**. Regularly back up .pbix files and **create backups** for published reports to prevent data loss.

04. Data refresh and schedule

Determine **how often data should be refreshed** in the Power BI service, considering the data update frequency to ensure that reports **reflect the latest data**. Then configure **scheduled refresh** settings to **automate data updates**.

05. Report design and layout

Optimise report layout and visuals **for web browser viewing**, as the Power BI service may render reports differently than desktop. **Test interactivity**, including drill-through actions and interactive visuals.

06. Testing and validation

Before publishing, **test the report in the Power BI service** to ensure visuals, interactions, and data refresh work as expected, and **verify the data matches the desktop version**.

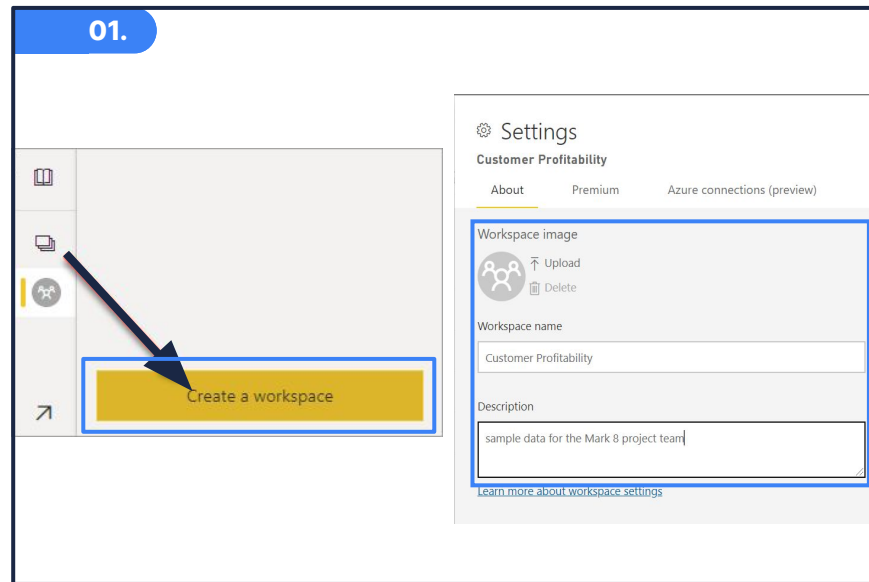
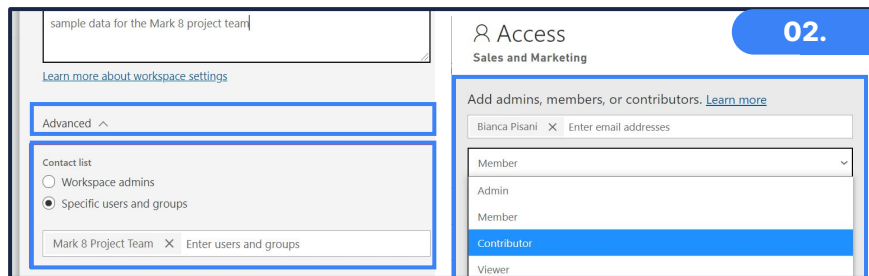
Creating workspaces in the Power BI service

Workspaces are **containers** for organising and managing reports. They are essential for collaboration, content sharing, and access control within the Power BI service. They provide a way to **group related reports and dashboards** for specific teams, projects, or purposes.

To create a workspace report in Power BI:

01. In the Power BI service under the “**Workspaces**” tab, select “**Create a workspace**” and provide a **name** and **description** for the workspace.

02. **Invite members** to join and **assign roles**. These roles determine what **actions members can perform** within the workspace.



Sharing via the Power BI mobile app

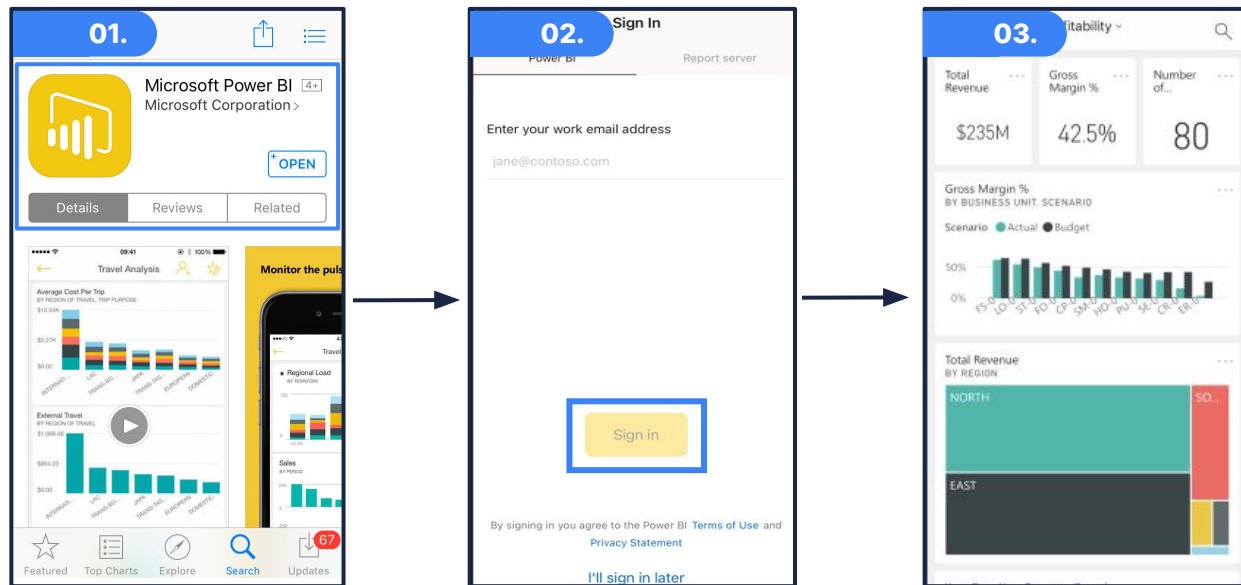
Users can **access** and **interact** with reports and dashboards **on their mobile devices** using the Power BI mobile app. This app functions similarly to the Power BI service, but on a mobile platform.

To share via the mobile app:

- 01.** Download and install the **Power BI mobile app** on an iOS or Android device.
- 02.** Sign in to the app using our **Power BI account credentials**.
- 03.** Access reports and dashboards shared via workspaces in the app.

Considerations:

In order to use this option, it is important to ensure that reports and dashboards are **designed for mobile viewing with responsive visuals and layouts**.



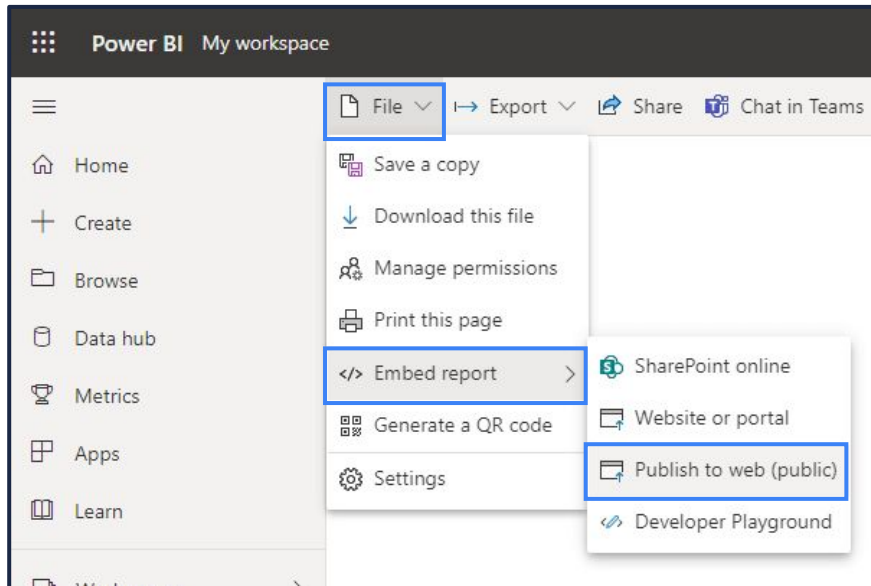
Publish to web

"Publish to web" is a feature that enables us to **share our reports publicly on the internet**, without requiring viewers to sign in.

To publish to web in the Power BI service:

- 01.** In the Power BI service, navigate to the report we want to publish, then select "File" and then "Embed report".
- 02.** The Publish to web feature will provide us with an embed code or link which can be shared with others to allow public access to the report.

This feature allows us to share our reports with a **wider audience**, including those without Power BI accounts, thereby making our data and insights **accessible to the public**.



Considerations when publishing to web

"Publish to web" is a useful method for sharing Power BI reports, but it's important to **exercise caution** particularly when it comes to data security and sensitivity.

01. Data sensitivity

Carefully evaluate the content of the report before using "Publish to web". This feature makes our **data and insights accessible to anyone** with the link or embed code. **Avoid sharing sensitive, confidential, or private data** in this way.

02. Expiration

The **link or embed code** generated using "Publish to web" **doesn't expire automatically**. It's our responsibility to **manage access** and, if necessary, revoke access by deleting or regenerating the link or embed code.

03. Limitations

Be aware of the limitations of "Publish to web." The reports are **read-only**, and some features (such as editing, filtering, and exporting) may be disabled in the embedded report.

04. Data refresh

Reports published with "Publish to web" **may not automatically refresh the data**. This means that the data displayed will **not always be up to date**. Consider whether this limitation is acceptable for our use case.

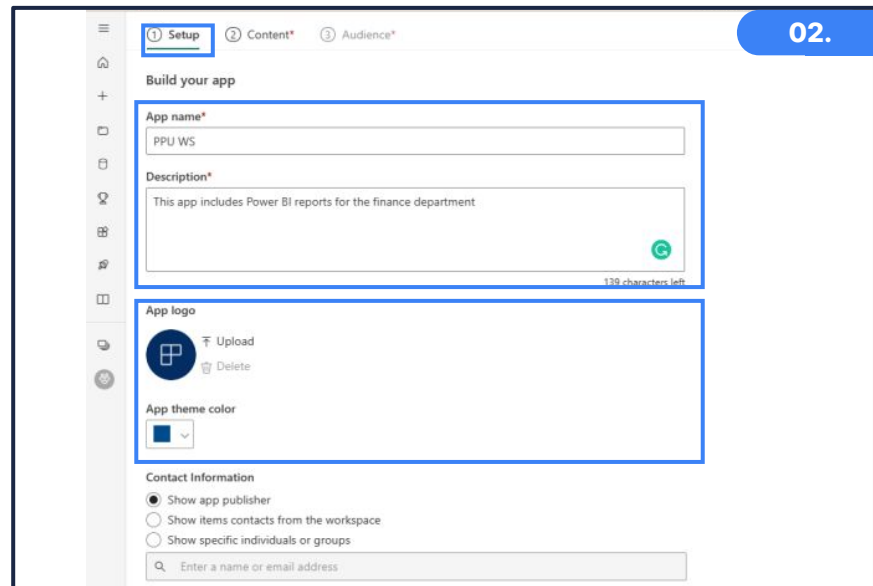
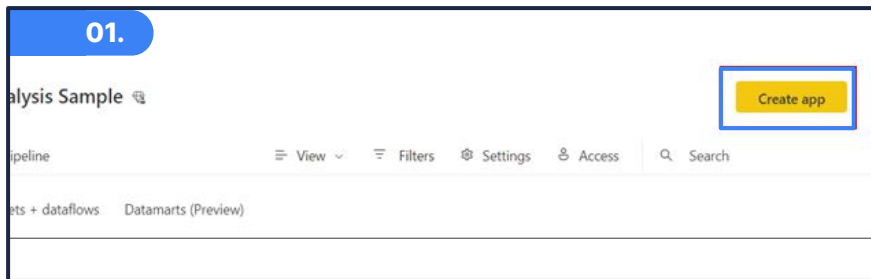
Building and using apps in the Power BI service

Power BI apps are **bundled and branded reports, dashboards, and datasets for specific audiences**. They enhance user experience, streamline content sharing, and provide structured insights for organisations.

To build an app in Power BI:

01. In the workspace list view, select “Create app” to start the process of creating and publishing an app from the workspace.

02. Customise the appearance of the app, including its name, logo, colours, and branding. This helps create a consistent and user-friendly experience.

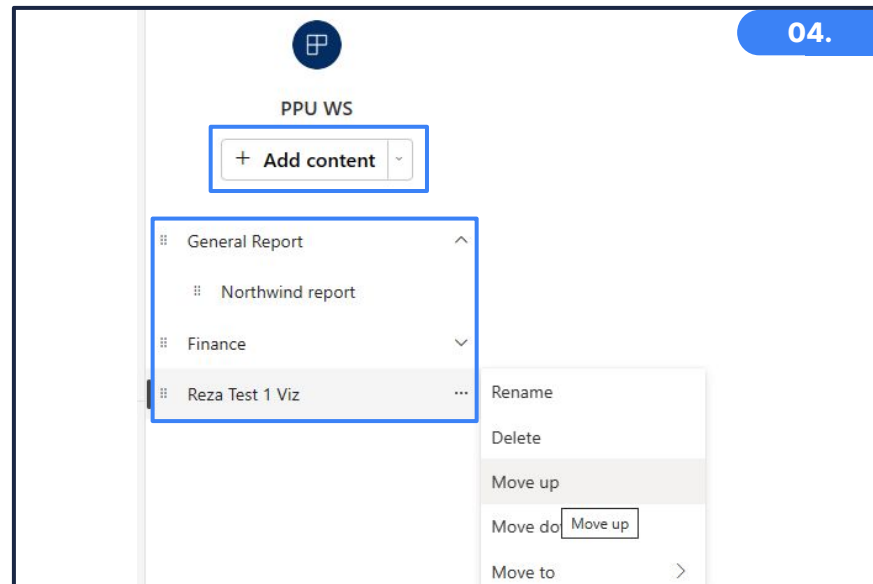
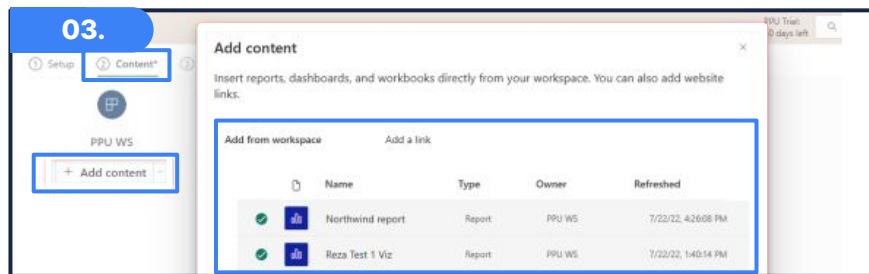


Building and using apps in Power BI

Building and using apps in Power BI **allows end-users to access, explore, and interact with reports and dashboards from anywhere** while maintaining control over access and security.

To build an app in Power BI:

- 03.** Select the relevant content that we would like to add from the current workspace.
- 04.** Organise the content within the app workspace to create a logical navigation structure using the Power BI app navigation builder to design menus, sections, and landing pages.



Building and using apps in Power BI

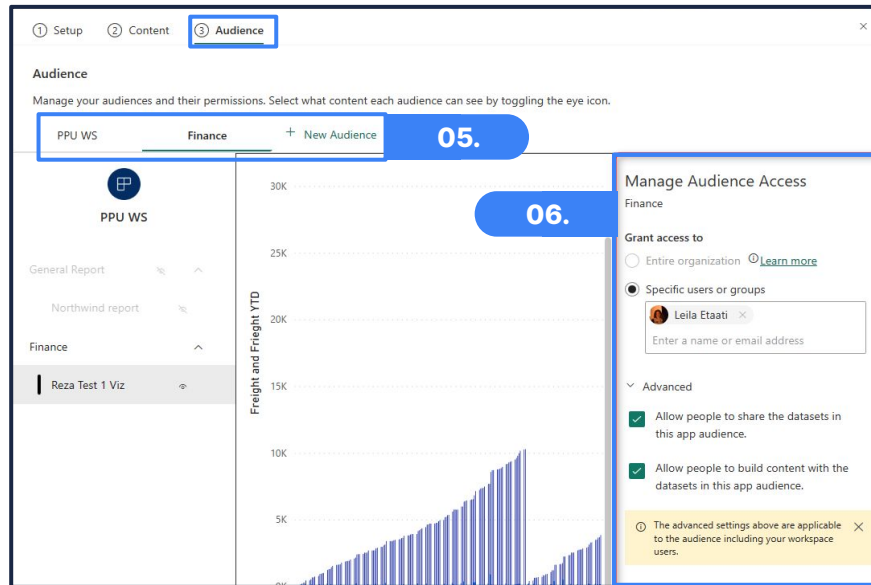
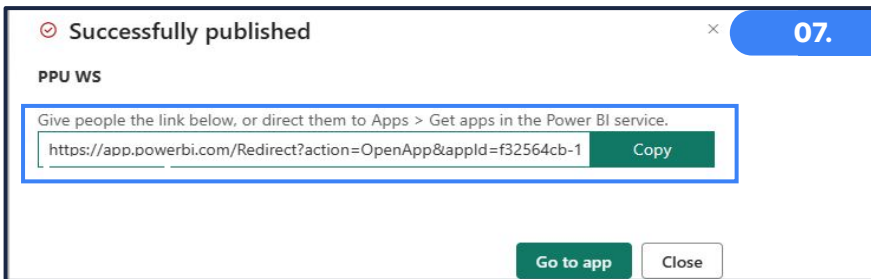
Well-designed apps can enhance the user experience and ensure that insights are easily accessible to the right audience.

To build an app in Power BI:

05. The next step in creating a Power BI app is to define the audience, which are multiple groups with differing access to content.

06. We then manage each audience's access and add or conceal content from them in order to make it unavailable or visible in the published app.

07. Finally, we can publish the app and copy and share the link.



How users can interact with the app

Building and using apps in Power BI can help an **organisation deliver insights in a structured and branded manner** allowing users to easily access, explore, and interact with reports.

01. Users can access published apps in the **"Apps"** section of the Power BI service or find them in the Power BI mobile app.
02. The app offers users the ability to **explore various content** such as reports, dashboards, and datasets, **guided by its navigation and structure**.
03. Users can **interact with visuals, apply filters, drill into data**, and **gain insights** from the reports and dashboards within the app.
04. The app may include **collaboration features** such as comments and email subscriptions. Users can engage in discussions and receive updates.
05. Users can **access app content** on mobile devices using the **Power BI mobile app**, making it convenient for on-the-go insights.

Export and print dashboards and reports

Power BI allows us to **export and print our reports and dashboards** in various formats, making it easier to share information with others.

To export a report:

01. Open the report or dashboard and navigate to the "File" menu to find the "Export" option.

02. Select the desired format for export, such as PDF, PowerPoint, Excel, or others.

