

# Power BI

# Dashboard in a Day

## Lab 5

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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](http://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.

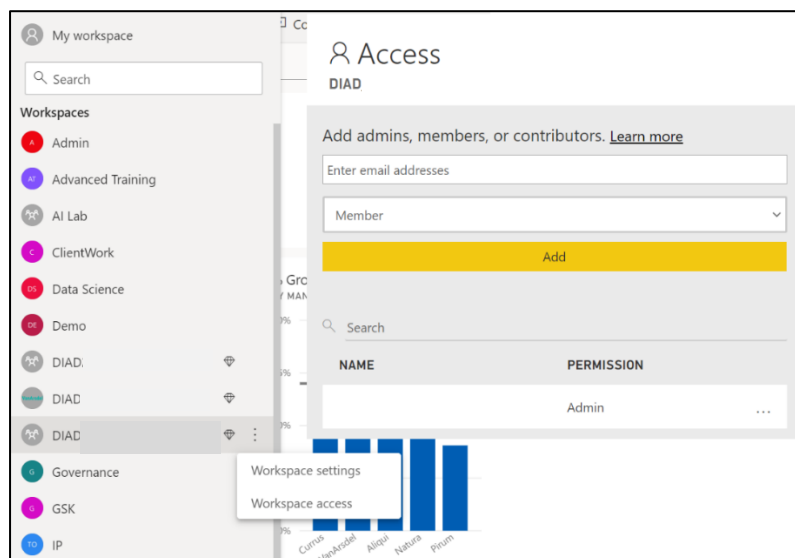
## Power BI Service – Collaboration and Distribution

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:

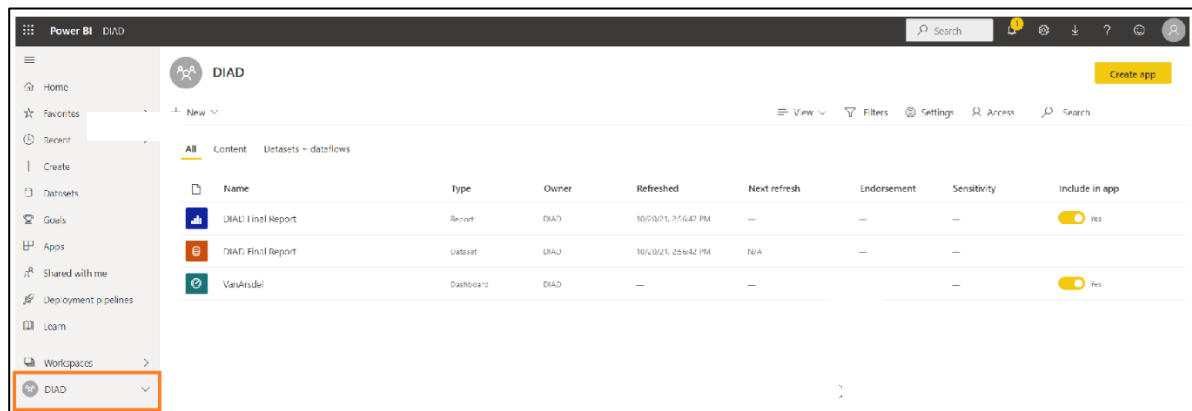
Contributor	Add/edit/delete content within workspace.
Member	Everything a Contributor can do. Re-share. Publish & update Apps.
Admin	Everything a member can do. Can change/delete workspace.
Viewer	Can add Admins. View/interact Read data stored in workplace Data Flows

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.



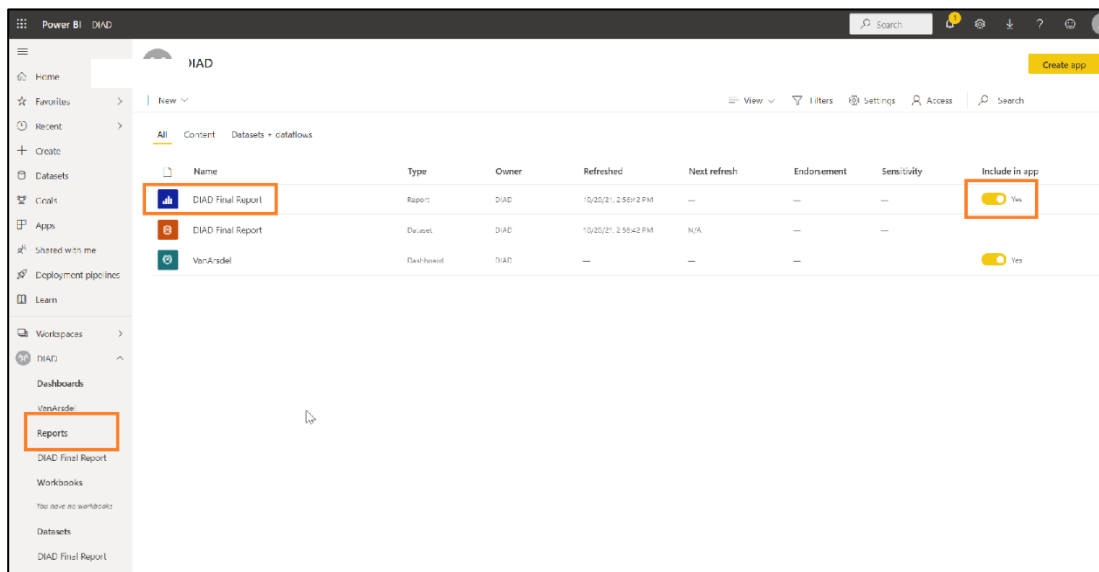
Now let's share the content we have created with report viewers and consumers. To start, we need to publish an app. An App can include multiple dashboards and reports.

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.

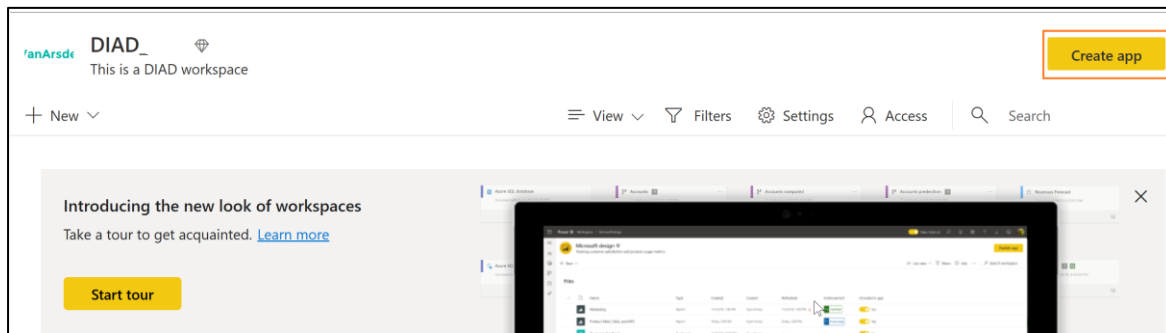


3. Navigate to the **Reports** page.
4. Notice there is an option named **Included in App** which can be selected to include the Reports in the App.

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, name the app and type **This is a DIAD app** in the description field.

DIAD

Setup

Navigation

Permissions

Build your app

App name \*

DIAD

Description \*

This is a DIAD App

182 characters left

Support site

Share where your users can find help

App logo

Upload

Delete

App theme color

Contact Information

☒ Show app publisher

☐ Show items contacts from the workspace

☐ Show specific individuals or groups

8. Click the **Navigation** tab.

9. From the **Navigation** menu, click **VanArsdel (dashboard)**.

DIAD

Setup **Navigation** Permissions

New navigation builder

☒ On

Add reports and dashboards to this app. Then organize the custom navigation pane so it's easy for people to find what they're looking for.

Navigation \*

+ New

VanArsdel

DIAD Final Report

Growth by Country

Dashboard details

Name \* **VanArsdel** [Reset](#)

Dashboard link [Open](#)

<https://app.powerbi.com/groups/cd17e9d7-daf7-44ef-90f9-48c908e35f0a/dashboards/e680a93f-2283>

Section

No section

☐ Hide from navigation

> Advanced

10. When a user accesses the DIAD app, we want them to land on the **VanArsdel** dashboard.

11. Navigate to the **Permissions** page.

Setup Navigation **Permissions**

Access

☐ Entire organization

☒ Specific individuals or group

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

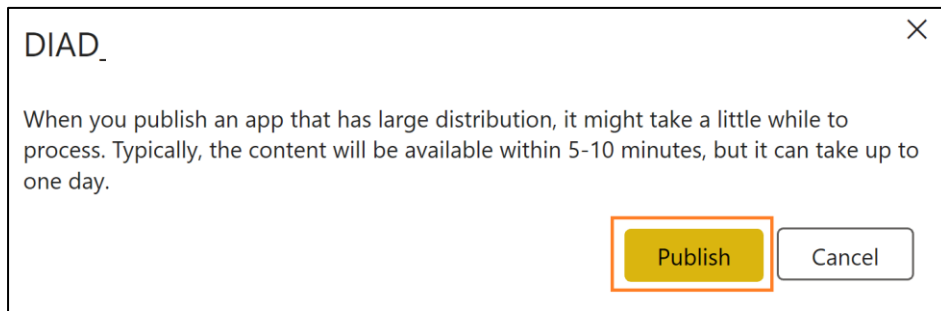
12. Enter the email addresses of the users or groups to whom you want to give access.

**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**.

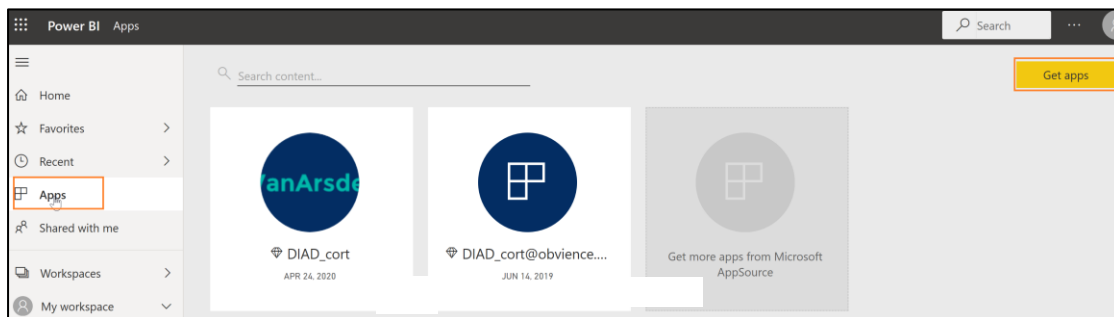
14. The **Ready to publish** dialog appears, click **Publish**.

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



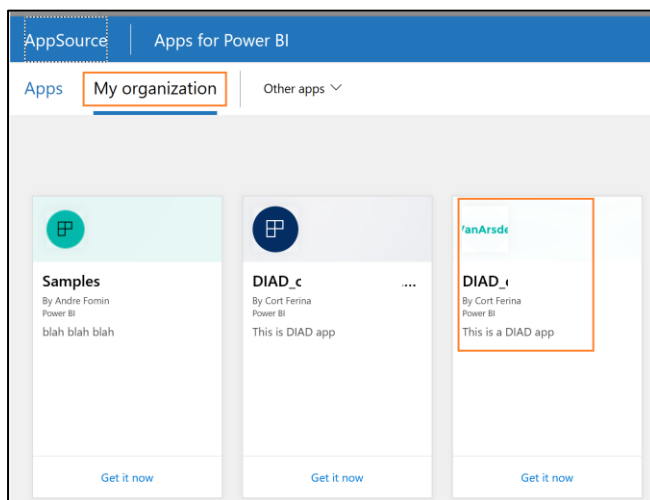
You can copy the link to the App after it's been successfully published and share it with individuals via email. A better way for report viewers to consume the App is by logging onto Power BI Service and registering the App. Let's impersonate a report viewer:

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.

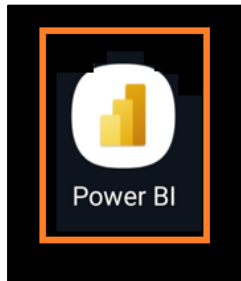
This is a one-time registration. Going forward when you select **Apps** in the left panel, you will see the **DIAD\_<youremailaddress>** app in the list of Apps you have registered, and then you can click **Get it now**.



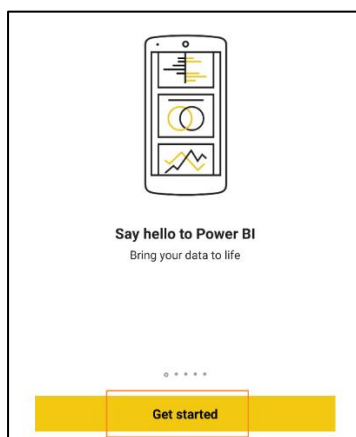


## Power BI Mobile – Accessing Report on Mobile Device

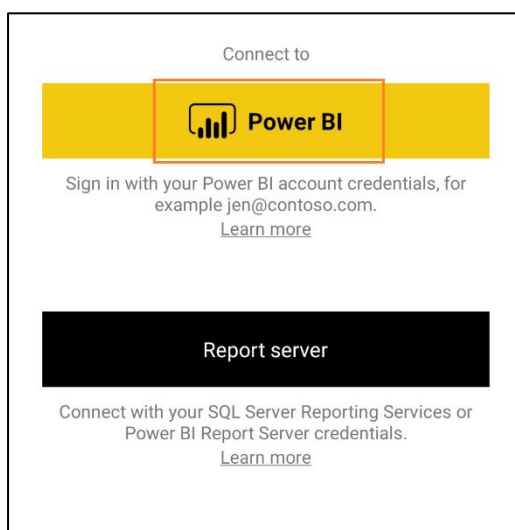
1. Open the Power BI Mobile app on your mobile device



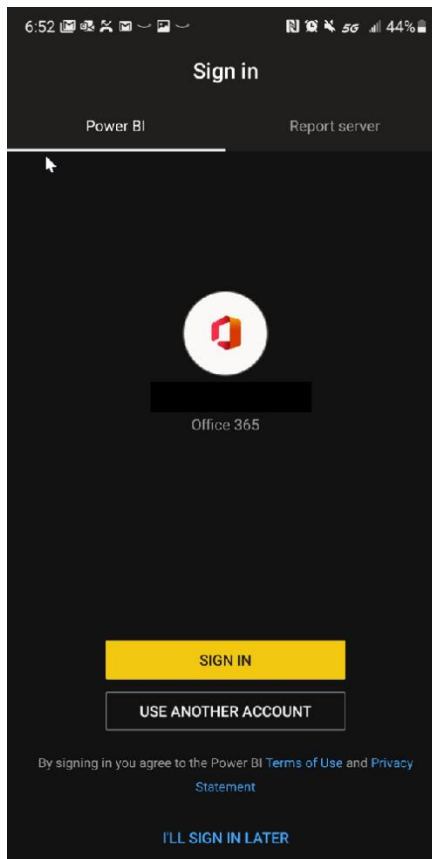
2. Click **Get Started** after the app is open.



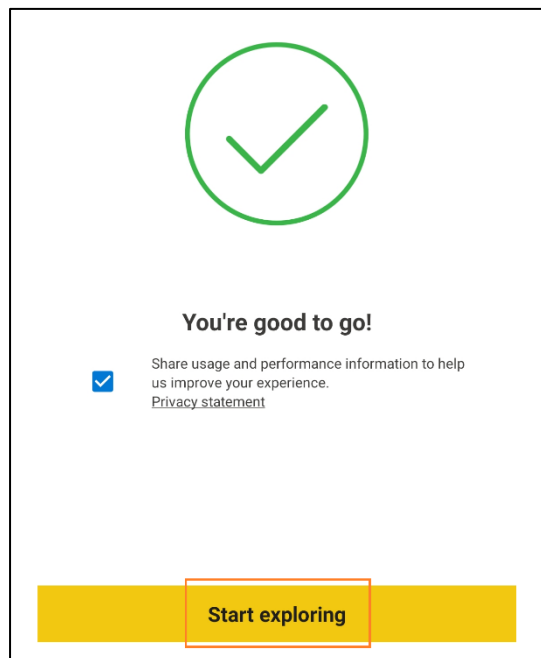
3. Click **Power BI** to connect to your report.



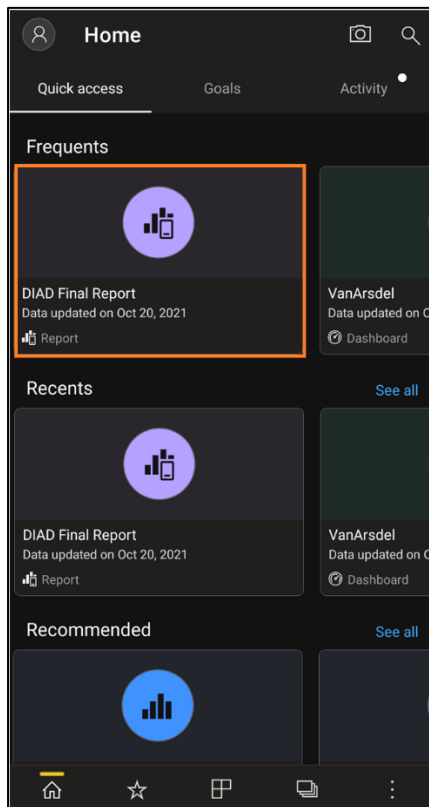
4. Click **Sign in** and enter your credentials.



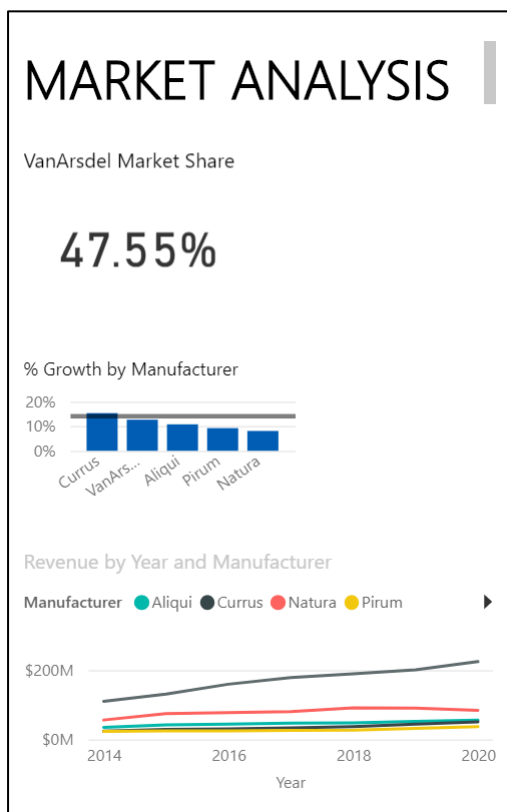
5. Verify you have successfully signed in and then click **Start exploring**.



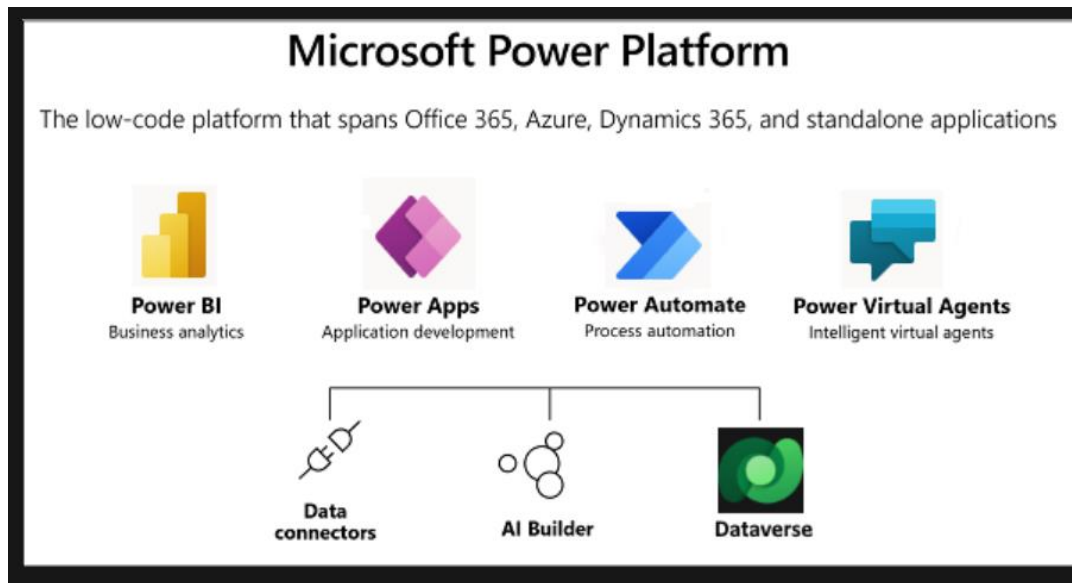
6. Click the **DIAD Final Report** that you published from Power BI Desktop.



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



## Further Exploration – Power Platform

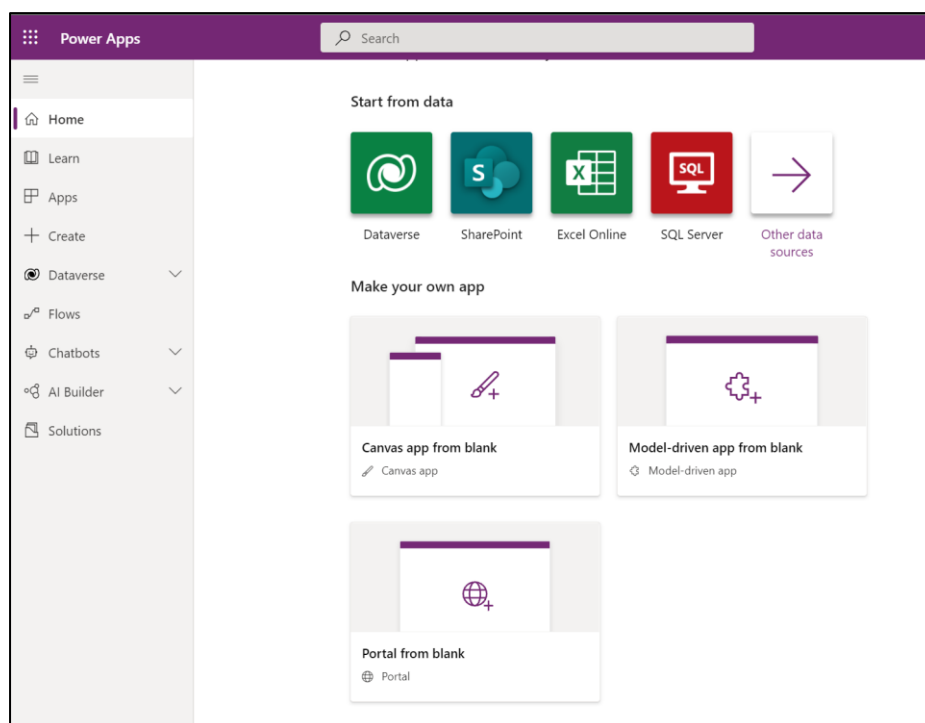


## Power Apps

[Microsoft Power Apps documentation - Power Apps](#) | [Microsoft Docs](#)

Suite of apps, services, and connectors, as well as a data platform, that provides rapid development environment to build custom apps for your business needs

Quickly build custom business apps that connect to your data stored either in the underlying data platform (Microsoft Dataverse) or in various online and on-premises data sources.



Additional Power Apps training

<https://powerapps.microsoft.com/en-us/blog/free-app-in-a-day-powerapps-training-and-more-from-pragmatic-works/>

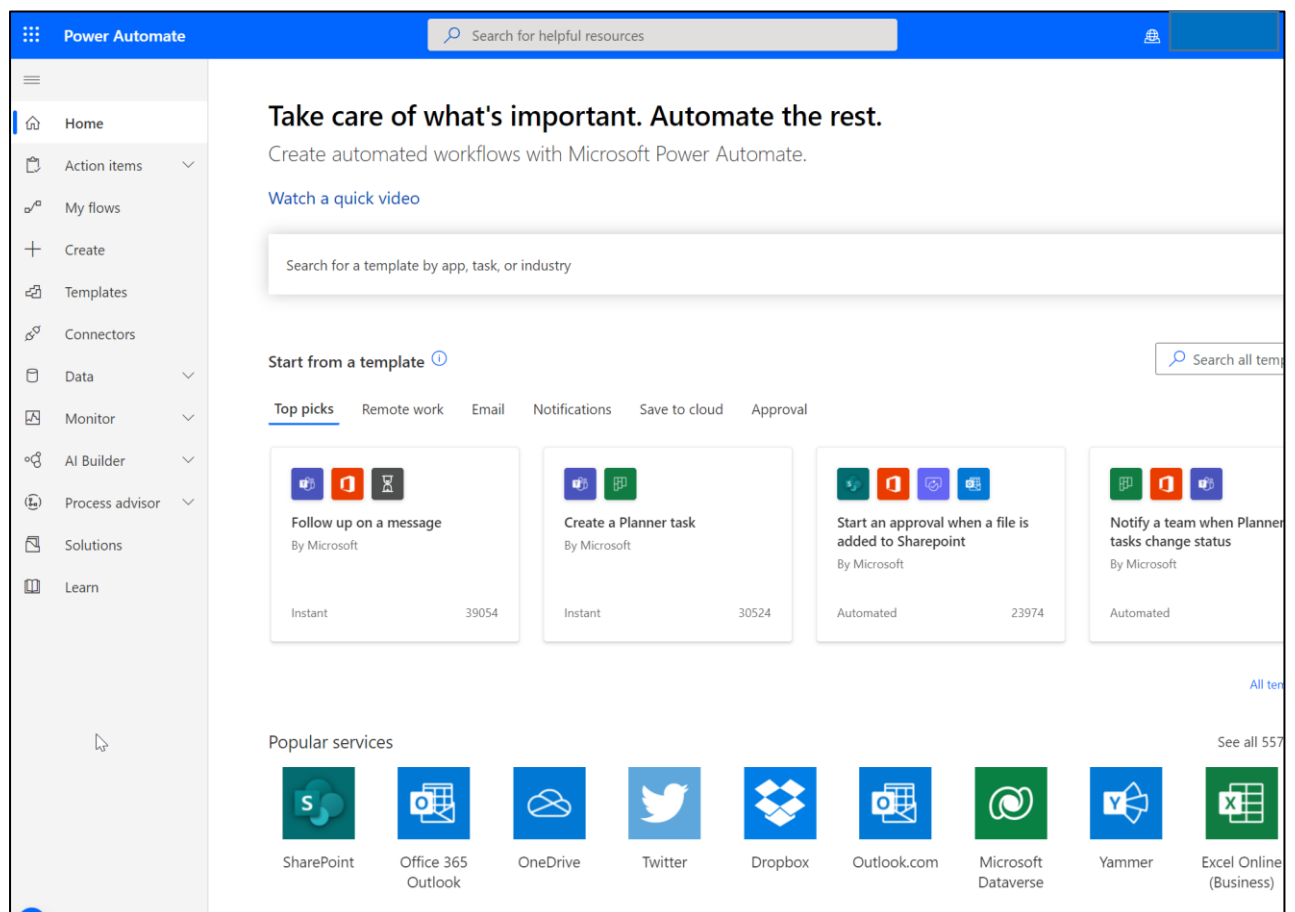
[Microsoft Power Platform: Learning Resources](#) | [Microsoft Power Apps](#)

## Power Automate

<https://docs.microsoft.com/en-us/power-automate/getting-started>

What can I do with Power Automate?

- Automate business processes
- Send automatic reminders for past due tasks
- Move business data between systems on a schedule
- Connect to almost 300 data sources or any publicly available API
- You can even automate tasks on your local computer like computing data in Excel



Additional Power Automate training

[Power Automate on Microsoft Learn](#) | [Microsoft Docs](#)

## Dataverse

[What is Microsoft Dataverse? - Power Apps | Microsoft Docs](#)

Dataverse lets you securely store and manage data that's used by business applications. Dataverse allows data to be integrated from multiple sources into a single store, which can then be used in Power Apps, Power Automate, Power BI, and Power Virtual Agents along with data that's already available from the Dynamics 365 applications.

### Why use Dataverse?

- Easy to manage
- Easy to secure
- Access your Dynamics 365 data
- Rich metadata
- Logic and validation
- Productivity tools

**Microsoft Dataverse**

Provides access to the org-based database on Microsoft Dataverse in current environment.

[See documentation](#)

**PREMIUM**

**Triggers** - A trigger is an event that starts a flow

- When a row is added, modified or deleted**
- When an action is performed (preview)**

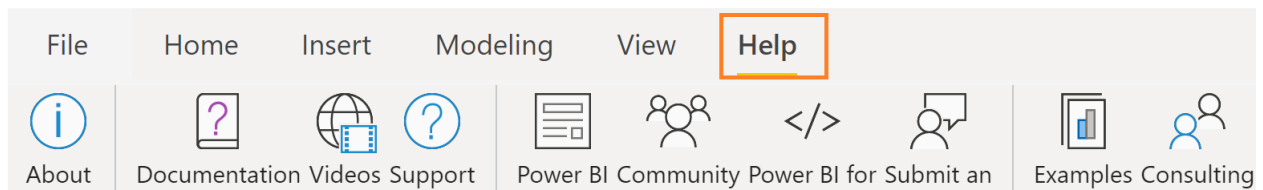
Template	Icon	Description	By	Category	Count
Click a button to read and save information from documents using AI Builder	AI Builder, Document	Click a button to read and save information from documents using AI Builder	By Microsoft	Instant	10137
Analyze emails sentiment with AI Builder and send results to Teams	AI Builder, Email, Teams	Analyze emails sentiment with AI Builder and send results to Teams	By Microsoft	Automated	6877
Extract text from images or PDF documents using AI Builder Text Recognition	AI Builder, Image, PDF	Extract text from images or PDF documents using AI Builder Text Recognition	By Microsoft	Instant	5334
Click a button to read information from invoices using AI Builder	AI Builder, Invoice	Click a button to read information from invoices using AI Builder	By Microsoft	Instant	4512

### Additional Dataverse training

[Get started using Microsoft Dataverse - Learn | Microsoft Docs](#)

## 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](https://aka.ms/PBI_Comm_Ideas)
- Power BI courses <http://aka.ms/pbi-create-reports>
- Power Platform <https://powerplatform.microsoft.com/en-us/instructor-led-training/>
- Power Apps [Business Apps | Microsoft Power Apps](#)
- Power Automate [Power Automate | Microsoft Power Platform](#)
- Dataverse [What is Microsoft Dataverse? - Power Apps | Microsoft Docs](#)

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