

DIAD Power BI Service Demo Instructions

Prerequisites

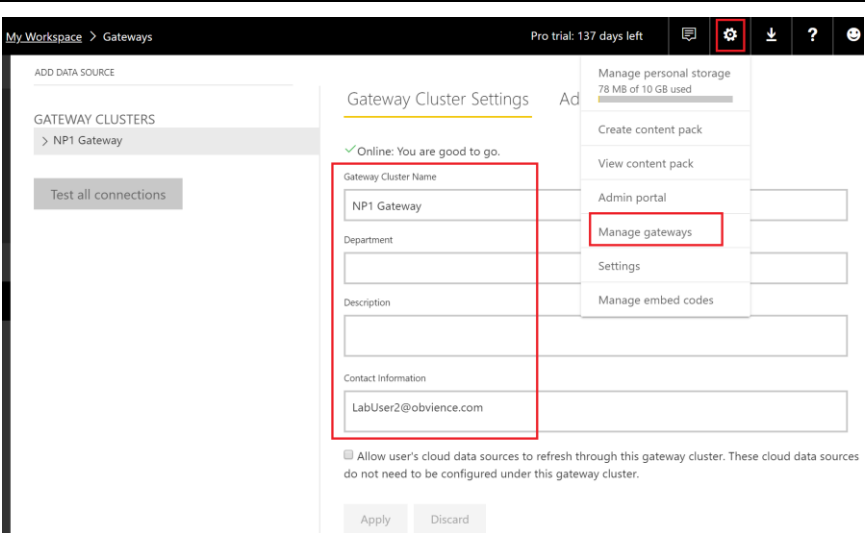
- You must be connected to the internet
- Download a copy of the demo assets locally
- Sign up for <https://app.powerbi.com>
- Create DIAD workspace
- Follow lab instructions to create VanArsdel dashboard in DIAD workspace
- Publish DIAD Final Report with RLS.pbix. This will be used to demo row level security
- Install data gateway

Demo – Scheduled Refresh

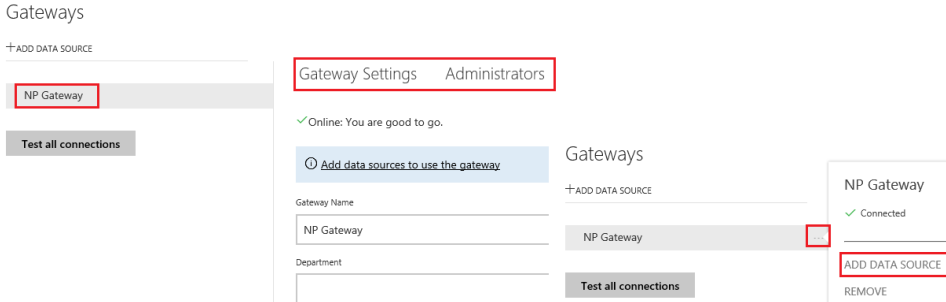
- 1. Sign into <https://app.powerbi.com>. Let's talk about configuring the gateway
- 2. From the menu on the top right, click on the gear and select Manage gateways
- 3. You will be navigated to Gateways screen. Notice the gateway you added is available

On-premises data gateway acts as a bridge, providing quick and secure data transfer between on-premises data (data that is not in the cloud) and the Power BI, Microsoft Flow, Logic Apps, and PowerApps services

- 4. On the right panel of the screen you can add more information regarding the gateway using Gateway Settings screen
- 5. On the right panel of the screen there is also an option to add Administrators for the gateway



- Let's add data sources that are used in our model so we can set up a refresh schedule.
- 6. Click on the ellipsis next to the gateway name and select ADD DATA SOURCE.



We need to configure 3 data sources that are used in the model.

7. In the Data Source Settings page enter the name of the data as Dimensions.
8. From the Data Source Type drop down select File.
9. Enter following for the Full Path C:\DIAD\Data\USSales\bi_dimensions.xlsx (if your file is in a different location change the path accordingly).
10. Enter the Windows username and password (this is typically the username and password you use to login to your machine).
11. Select Add.

Once the data source is added, notice you can add Users who can access this data source.

Data Source Settings

Data Source Name

Dimensions

Data Source Type

File

Full path

C:\DIAD\Data\USSales\bi_dimensions.xlsx

The credentials are encrypted using the key stored on-premises on the gateway server. [Learn more](#)

Windows username

johndoe

Windows password

> Advanced settings

Add

Discard

- Let's add the US Sales csv data source file.
12. Click on the ellipsis next to the gateway name and select ADD DATA SOURCE.
 13. In the Data Source Settings page enter the name of the data as US Sales.
 14. From the Data Source Type drop down select File.
 15. Enter following for the Full Path C:\DIAD\Data\USSales\sales.csv (if your file is in a different location change the path accordingly).
 16. Enter the Windows username and password (this is typically the username and password you use to login to your machine).

Select Add.

Data Source Settings Users

✓ Connection Successful

Data Source Name

US Sales

Data Source Type

File

Full path

C:\DIAD\Data\USSales\sales.csv

The credentials are encrypted using the key stored on-premises on the gateway server. [Learn more](#)

Username

Password

> Advanced settings

Apply

Discard

Let's add the International Sales folder data source.

17. Click on the ellipsis next to the gateway name and select ADD DATA SOURCE.
18. In the Data Source Settings page enter the name of the data as International Sales.
19. From the Data Source Type drop down select Folder.
20. Enter following for the Full Path C:\DIAD\Data\InternationalSales (if your file is in a different location change the path accordingly).
21. Enter the Windows username and password (this is typically the username and password you use to login to your machine).

Select Add.

Data Source Settings

Data Source Name

International Sales

Data Source Type

Folder

Full path

C:\DIAD\Data\InternationalSales

The credentials are encrypted using the key stored on premises on the gateway server. [Learn more](#)

Windows username

john.doe

Windows password

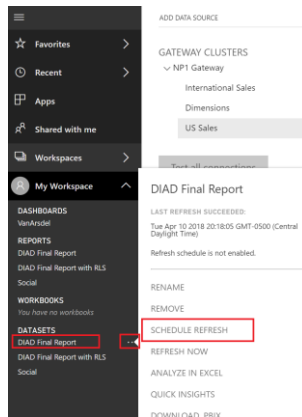
> Advanced settings

Add

Discard

Now let's look at how refresh is going to work.

22. If the left panel is collapsed, expand it by clicking on the three bars below PowerBI.
23. Navigate to Datasets section on the left panel and locate the dataset called DIAD Final Report. Click on the ellipses and click on Schedule Refresh as shown in the screenshot.



In the Settings page, you will see the Datasets section is selected.

24. The Power BI service has detected that you have setup a Gateway. Expand Gateway connection.
25. Select Use a data gateway and click Apply.

A dialog appears confirming the gateway for DIAD- Report Final has been updated.

Settings

General

Dashboards

Datasets

Workbooks

DIAD- Report Final

⚠ Your data gateway (Power BI – personal) is offline, but a data gateway is available.

Refresh history

Gateway connection

To use a data gateway, make sure the computer is online and the data source is added in [Man](#)

Use your data gateway (Power BI – personal)

(offline, running on OBV000001)

Use a data gateway

Status

Department

Gateway

Contact information

Description

online

NP Gateway

Nikil@obvience.com

Apply

Discard

Now let's schedule data refresh. Notice that you do not have to re-enter the credentials for each data source again. Since it is set up at the gateway level.

- 26. Expand Schedule Refresh section.
- 27. Enable data refresh by moving the slider below "Keep your data up to date".
- 28. There are two options for Refresh Frequency, daily and weekly. Pick Daily.
- 29. Using "Time Zone" drop down update the time zone to the appropriate selection.
- 30. Click on "Add another time" to select refresh time.
- 31. Data refresh can be scheduled on the hour or 30min.

▶Data source credentials (admin has granted access, credentials are not required)

◀ Schedule Refresh

Keep your data up to date

On

Refresh frequency

Daily

Time zone

(UTC-06:00) Central Time (US and Canada)

Time

[Add another time](#)

☒ Send refresh failure notification email to me

Apply

Discard

The company has sold Germany operations. Let's remove Germany file from International Sales folder.

- 32. Delete Germany.xlsx file from \DIAD\Data\InternationalSales folder
- 33. Navigate to Datasets section on the left panel and locate the dataset called DIAD Final Report. Click on the ellipses and click on REFRESH NOW as shown in the screenshot.

Favorites

Recent

Apps

Shared with me

Workspaces

My Workspace

DASHBOARDS

REPORTS

WORKBOOKS

DATASETS

VanArsdel

DIAD Final Report

DIAD Final Report with RLS

Social

You have no workbooks

DIAD Final Report

DIAD Final Report with RLS

Social

ADD DATA SOURCE

GATEWAY CLUSTERS

NP1 Gateway

Test all connections

DIAD Final Report

LAST REFRESH SUCCEEDED

Tue Apr 10 2018 20:18:05 GMT-0500 (Central Daylight Time)

Refresh schedule is not enabled.

RENAME

REMOVE

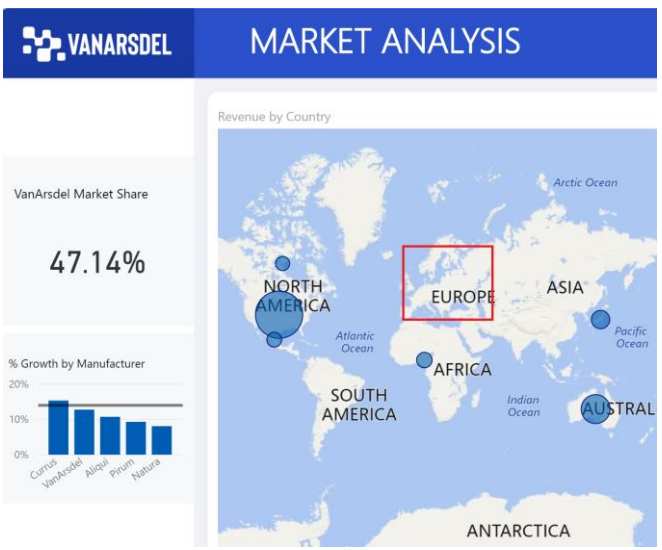
SCHEDULE REFRESH

REFRESH NOW

ANALYZE IN EXCEL

QUICK INSIGHTS

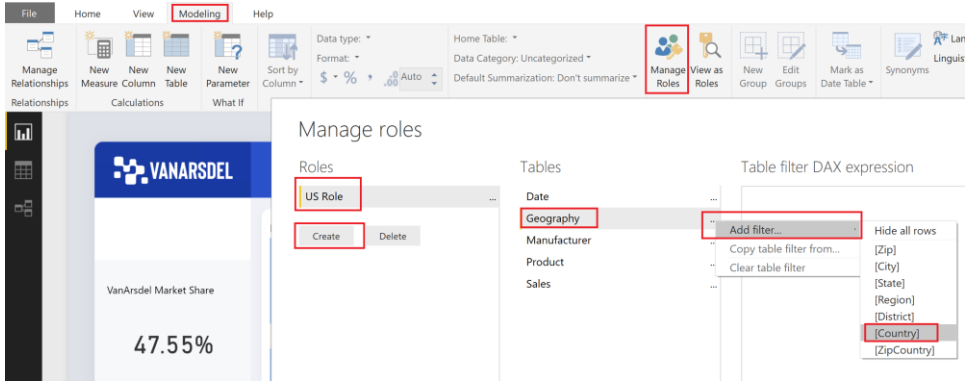
- 34. Once data is refreshed, navigate back to VanArsdel Final Report
- 35. Notice in the map visual we do not have any sales for Germany



Demo - Security

Now we have the model and report ready, we want to add security around it, so that individuals from a USA view only USA data and individuals from Mexico view only Mexico data and so forth.

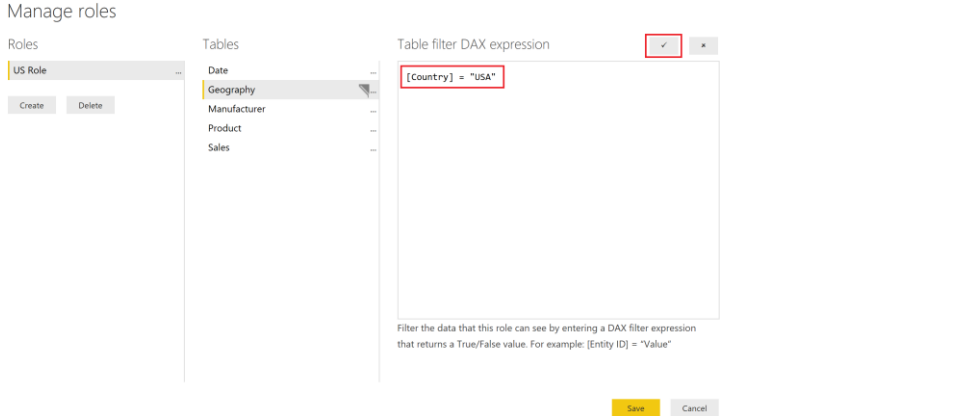
- 1. From the ribbon select Modeling -> Manage Roles.
- 2. Manage roles dialog opens. Click on Create button.
- 3. Name the role as US Role.
- 4. Click on the ellipsis next to Geography.
- 5. Select Add Filter -> [Country].



Notice a DAX Expression appears in the text area.

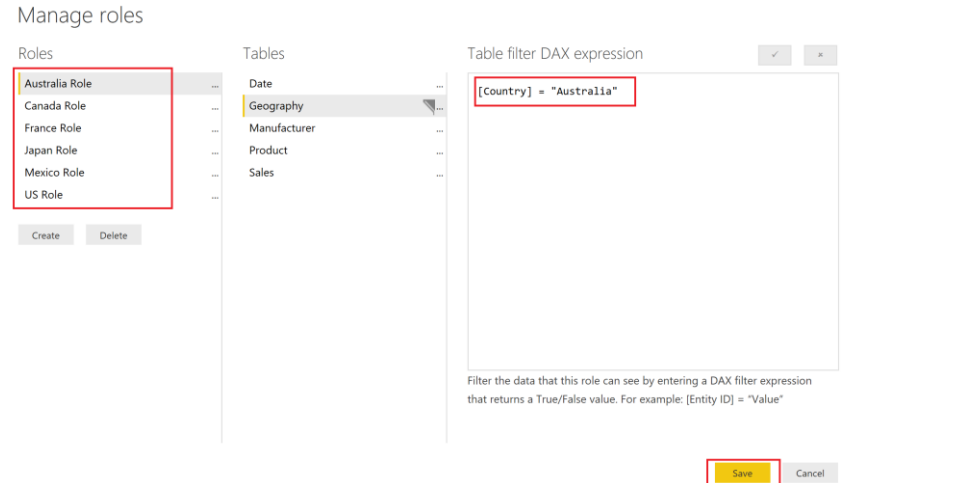
6. Edit the DAX Expression to [Country] = "USA".

Click on the check mark on the top right corner. This will validate the DAX expression.



Similarly add roles for Australia,Canada, France, Japan and Mexico using the following DAX Expressions.

Australia Role	[Country] = "Australia"
Canada Role	[Country] = "Canada"
Germany Role	[Country] = "Germany"
Japan Role	[Country] = "Japan"
Mexico Role	[Country] = "Mexico"
Nigeria Role	[Country] = "Nigeria"



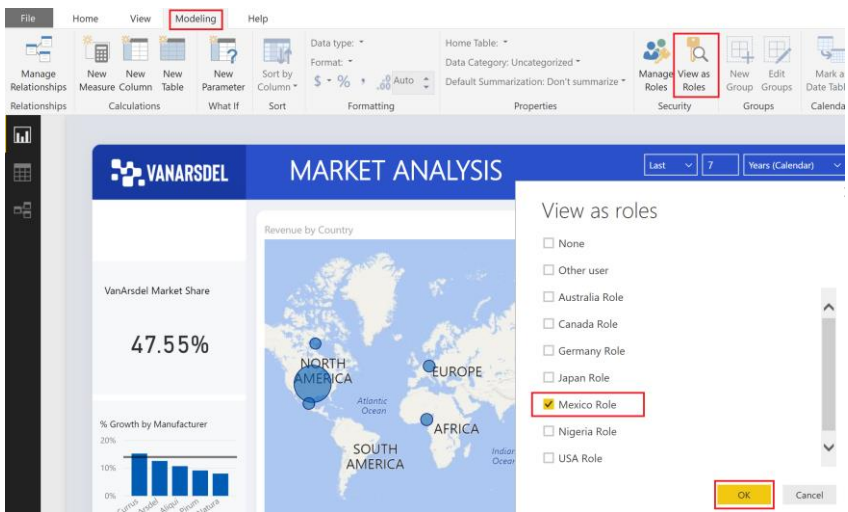
7. Once you add all the roles, click on **Save** button.

Power BI Desktop provides the capability to validate the roles you created. This helps us view the reports as a different role and make sure it's formatted right for that role.

8. From the ribbon, select Modeling -> View as Roles.

9. View as roles dialog appears. Select Mexico Role.

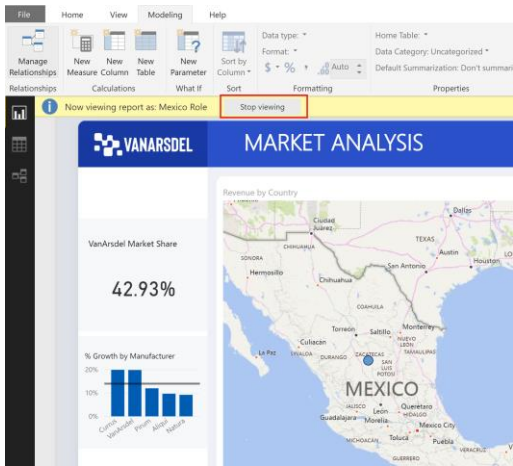
10. Click OK.



Notice now you are viewing as a person with Mexico Role would view.

11. Click on Stop viewing to exit Mexico Role view.

We will add users to these roles in the service. You should have already



As a pre-demo step you have published DIAD Final Report with RLS.pbix to the service

Navigate to DIAD Final Report with RLS dataset and select the ellipsis

Select SECURITY

Notice the roles we created in the pbix file are visible. This is where users can be assigned to roles.

When a user assigned to a role logs into the service, their experience will be like what we saw in View Roles feature.

Favorites

Recent

Apps

Shared with me

Workspaces

My Workspace

DASHBOARDS

VanArsdel

REPORTS

DIAD Final Report

DIAD Final Report with RLS

Social

WORKBOOKS

You have no workbooks

DATASETS

DIAD Final Report

DIAD Final Report with RLS

Social

Row-Level Security

Australia Role (0)

Canada Role (0)

Germany Role (0)

Japan Role (0)

Mexico Role (0)

Nigeria Role (0)

USA Role (0)

Members (0)

People or groups who belong to this role

Enter email addresses

Add

DIAD Final Report with RLS

LAST REFRESH SUCCEEDED:
Tue, Jun 19 2018 16:53:11 GMT-0500 (Central Daylight Time)
Refresh schedule is not enabled.

RENAME

REMOVE

SCHEDULE REFRESH

REFRESH NOW

ANALYZE IN EXCEL

DOWNLOAD .PBIX

SECURITY

MANAGE PERMISSIONS

Power BI Service

Walk through Power BI Service layout

Your Power BI service workspace is made up of:

navigation bar

dashboard with tiles

Q&A question box

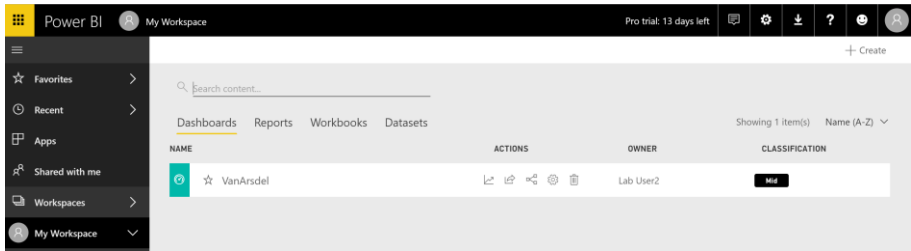
help and feedback buttons

dashboard title

Office 365 app launcher

Power BI home buttons

Additional dashboard actions



Talk about ability to publish the report to Power BI Service

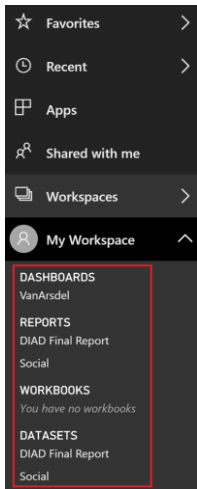
Navigate to the browser where <https://app.powerbi.com> is open

Talk about the 3 main sections in Power BI Service

Dashboards

Reports

Datasets

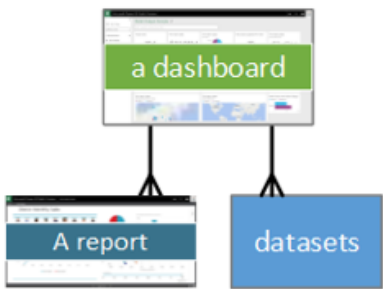


Power BI Service - Dashboards

Dashboards provides information that is most important to the business

In the navigation pane, your dashboards are listed under the Dashboards heading
Each listed dashboard represents a customized view of some subset of the underlying datasets

Dashboard is a collection of tiles that are pinned from Reports by mouse over the



ONE dashboard...

- can display visualizations from many different datasets
- can display visualizations from many different reports

<p>desired chart and clicking on the Push Pin Icon</p> <p>Each tile displays a single visualization that is created from the data in one of the underlying dataset(s)</p> <p>To permanently pin a tile to a dashboard, user must be the report owner</p> <p>Dashboards are not interactive the same way the reports are, they cannot be filtered</p> <p>Clicking on a tile links back to the report page where the chart resides</p> <p>Each tile in a dashboard can link to a different report. Each report connects to a specific data set. Hence a dashboard can be a collection of tiles from multiple data sets</p> <p>Tiles in a dashboard can be resized and rearranged</p>	
<p>Power BI Service - Reports</p>	
<p>Navigate to DIAD- Report Final and talk about features of Report</p> <p>Reports are a collection of charts</p> <p>A report can have multiple pages</p> <p>A page consists of a canvas that is used to view/edit charts and a filter</p> <p>Reports can be created from scratch within Power BI or can be imported with datasets and with shared dashboards</p> <p>There are 2 ways to view and interact with reports: Reading View and Editing View. Only the report creator can open Editing View for a report</p> <p>Reports are interactive – when an element of a chart is clicked, the rest of the report will update to reflect the relative contribution of the element that has been selected</p> <p>Each report connects to a specific data set</p> <p>Page level filters can be applied to a report. These filters apply to all the chart elements in the page</p> <p>Each chart can have its own filters that apply only to the chart</p> <p>Each chart has configuration options like Data Labels, Title, Data Colors, etc.</p>	<div data-bbox="646 909 1045 1192"> <pre> graph TD datasets[datasets] --- report[A report] dashboard[dashboard] --- report </pre> </div> <p>ONE report...</p> <ul style="list-style-type: none"> • can be associated with multiple dashboards (tiles pinned from that one report can appear on multiple dashboards). • can be created using data from one dataset. (the slight exception to this is that Power BI Desktop can combine more than 1 dataset into a single report and that report can be imported into Power BI)

Power BI Service - Datasets

Navigate to Datasets and talk about the features:

A dataset is data uploaded into the Power BI service from an online or on-premises data source. A dataset is created when Get Data is used to connect and upload data. In the navigation pane, the datasets you've connected to are listed under the **Datasets** heading.

To connect to a dataset, click **Get Data** (at the bottom of the navigation pane) or click the plus icon (next to the **Datasets** heading). Follow the instructions to connect to the specific source and have a dataset created. The new dataset is added to the left navigation pane with a yellow asterisk. Dataset can be refreshed on demand. Dataset can also be set on a scheduled refresh. Dataset can be scheduled to refresh daily or weekly. Multiple refreshes in a day or week can be scheduled.

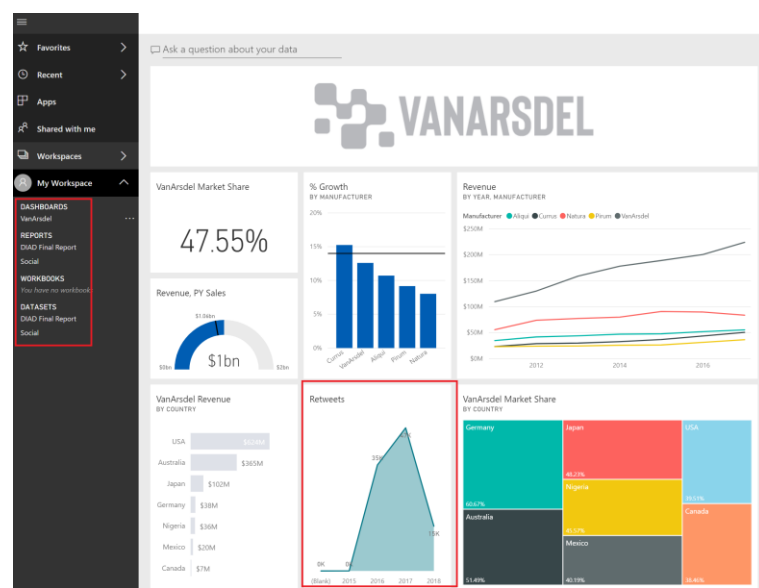


ONE dataset...

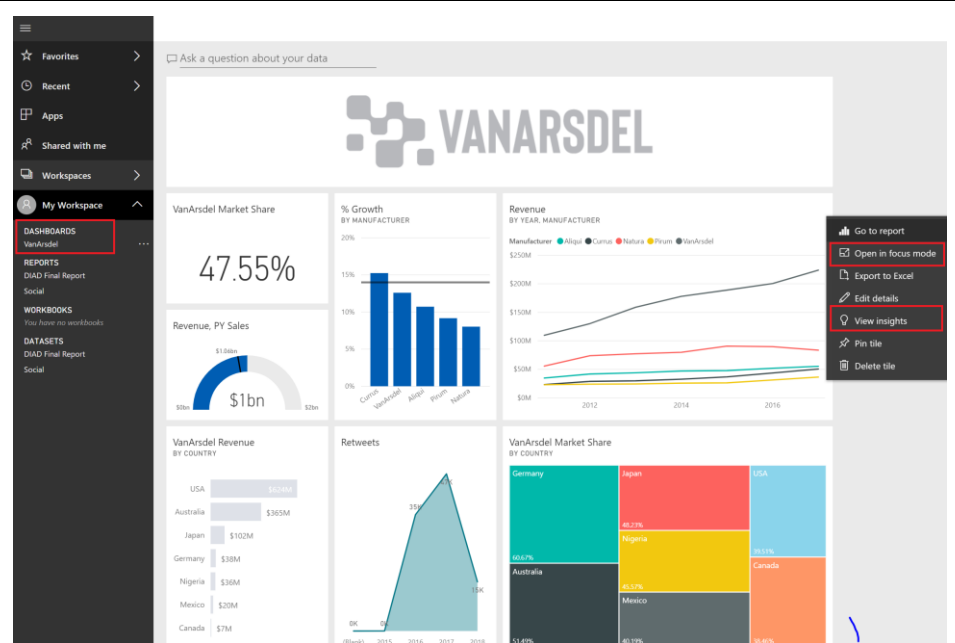
- can be used over and over.
- can be used in many different reports.
- Visualizations from that one dataset can display on many different dashboards

Power BI Service

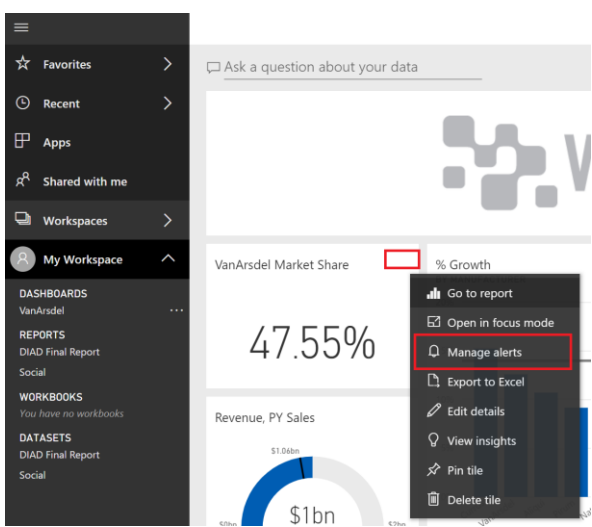
Navigate to VanArsdel dashboard
Using the VanArsdel dashboard, 2 reports - DIAD Final Report and Social and the 2 data sets DIAD Final Report and Social explain the relationship between the Dashboard, Reports and Datasets



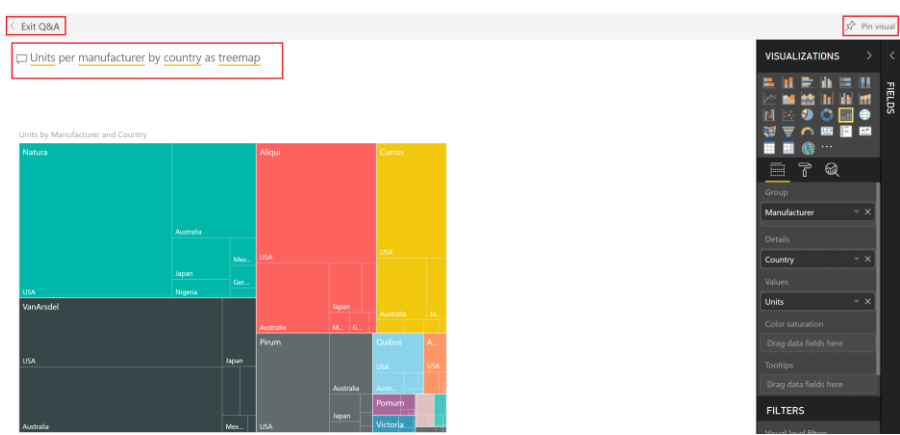
Talk about how the tiles have been created from the reports
Talk about how clicking on dashboard tile navigates to the respective report page
Using ...by Year, Manufacturer line chart talk about In **Focus mode** and **Quick Insights**



Using VanArsdel Market Share tile, talk about the ability to **Create and Manage alerts**

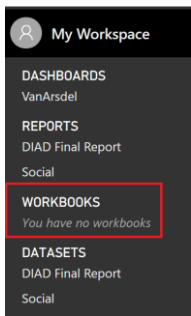


Talk about Q&A
Enter Units – talk about the card visual
Enter Units per manufacturer – talk about the bar chart
Units per manufacturer by country as treemap

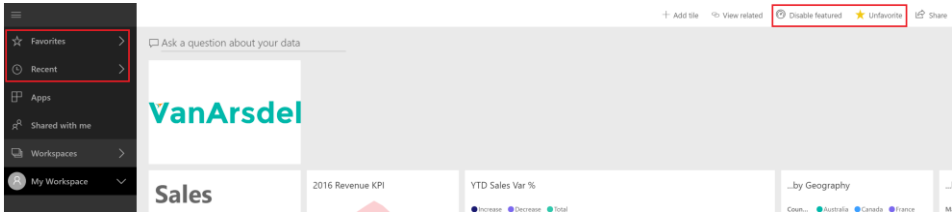
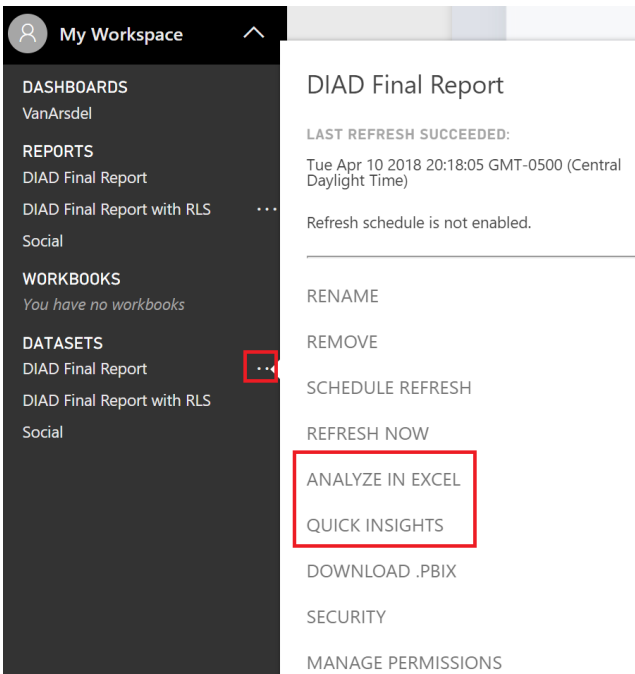


Power BI Service – Excel Workbooks

Navigate to WORKSBOOKS section and talk about the ability to publish excel workbooks



Power BI Service – Personization

<p>Talk about Featured Dashboard functionality</p> <p>Talk about Favorites functionality</p>	
<p>Power BI Service – Dataset Operations</p>	
<p>Click on the ellipsis next to Datasets -> DIAD- Final Report and talk about the ability to get QUICK INSIGHTS</p> <p>Talk about ANALYZE IN EXCEL</p>	

Click on the ellipsis next to Datasets ->
DIAD- Final Report with RLS and talk about
the ability to get **SECURITY**
Explain how row level security can be
achieved

The screenshot displays the Power BI Desktop interface. On the left, the navigation pane shows the 'Datasets' section with 'DIAD Final Report with RLS' highlighted. An ellipsis next to this dataset is clicked, opening a context menu. In this menu, the 'SECURITY' option is highlighted with a red box. To the right, the 'Row-Level Security' configuration window is open. It lists several roles: Australia Role (0), Canada Role (0), Germany Role (0), Japan Role (0), Mexico Role (0), Nigeria Role (0), and USA Role (0). Below this list, there is a section for 'Members (0)' with a text input field 'Enter email addresses' and an 'Add' button. At the bottom of the context menu, the 'SECURITY' option is highlighted with a red box. The 'DIAD Final Report with RLS' window also shows the last refresh status as 'LAST REFRESH SUCCEEDED: Tue Jun 19 2018 16:53:11 GMT-0500 (Central Daylight Time)' and a message 'Refresh schedule is not enabled.'.

Power BI Service – Refresh Data

Talk about Gateway and the two options
available – personal mode and non-personal
mode

The screenshot shows the 'Get Data' dialog box in Power BI Desktop. The 'Data Gateway' option is highlighted with a red box. The dialog box also shows the 'Power BI Desktop' option. Below the 'Data Gateway' option, there is a section for 'OWNER' with a list of roles: Australia Role (0), Canada Role (0), Germany Role (0), Japan Role (0), Mexico Role (0), Nigeria Role (0), and USA Role (0). The 'Data Gateway' option is highlighted with a red box.

Navigate to Schedule refresh page and talk about the refresh options

My Workspace

DASHBOARDS

VanArsdel

REPORTS

DIAD Final Report

Social

WORKBOOKS

You have no workbooks

DATASETS

DIAD Final Report

Social

DIAD Final Report

LAST REFRESH SUCCEEDED:

Tue Apr 10 2018 20:18:05 GMT-0500 (Central Daylight Time)

Refresh schedule is not enabled.

RENAME

REMOVE

SCHEDULE REFRESH

REFRESH NOW

ANALYZE IN EXCEL

QUICK INSIGHTS

DOWNLOAD .PBIX

SECURITY

MANAGE PERMISSIONS

Last refresh succeeded: Sat May 19 2018 16:03:38 GMT-0500 (Central Daylight Time)

Next refresh: Sat May 19 2018 18:00:00 GMT-0500 (Central Daylight Time)

Refresh history

Gateway connection

Data source credentials

Parameters

Scheduled refresh

Q&A and Cortana

Featured Q&A questions

Power BI Service – Share Dashboard

Navigate to Share Dashboard screen

Only users within your organizations are allowed to have access to the shared dashboard

After the dashboard has been shared, option is provided to send an email to the recipients with a link that they will have to click on to accept the share

Users accessing shared dashboard do not edit permissions

If a shared dashboard has reports, you will NOT see the report listed in the navigation pane

To open the report, from the shared dashboard, click one of the tiles. If the report owner created the tile from a report, the report opens. If the report owner created the tile from Q&A, the Q&A page opens

Share Dashboard

Not shared with anyone

Invite Shared With

Enter email addresses

Check out this dashboard I created to track our data.

Recipients will have access to the same data and reports as you have in this dashboard. Learn more

☒ Allow recipients to share your dashboard

☒ Send email notification to recipients

Share

Power BI Service – Collaboration and Distribution using Apps

Navigate to Create App Workspace screen and talk about Collaboration
Collaboration in Power BI is done by creating apps

Default group is My Workspace. This group is the user's personal workspace, it cannot be used for collaboration

Private or Public app is created for collaboration. In a private app only approved members have access

Creating a app also creates an Office 365 group with all the collaboration artifacts (OneDrive, mailbox, etc)

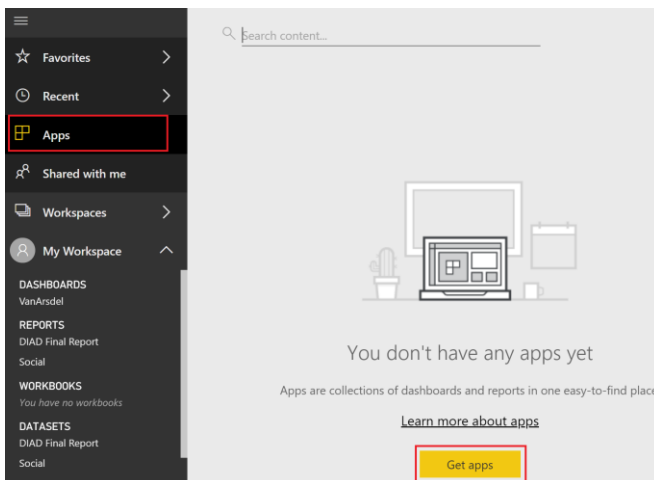
User can be a member of multiple apps

Members of an app can create/edit dashboards, reports, datasets based on the permission

Create an app workspace

The screenshot shows the 'Create an app workspace' form. It includes a text input field for 'Name your workspace', a dropdown menu for 'Private - Only approved members can see what's inside', and another dropdown menu for 'Members can edit Power BI content'. Below these is a section for 'Add workspace members' with a text input for 'Enter email addresses' and a yellow 'Add' button. At the bottom are 'Save' and 'Cancel' buttons.

Talk about the ability to distribute and install apps



Apps can be shared across organizations
Screenshot shows a sample email B2B invite

From: Microsoft Power BI (No Reply)
Sent: Tuesday, May 15, 2018 11:11 AM
To: Charles Sterling <chass@microsoft.com>
Subject: Charles Sterling has shared Power BI App 'DIAD' with you

Here's the App that Charles shared with you

View App in Power BI: [DIAD](#)



Microsoft Corporation
One Microsoft Way, Redmond, WA, 98052

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