Dashboard in a Day – Lab 4 Publishing & Accessing

by Power BI Team, Microsoft
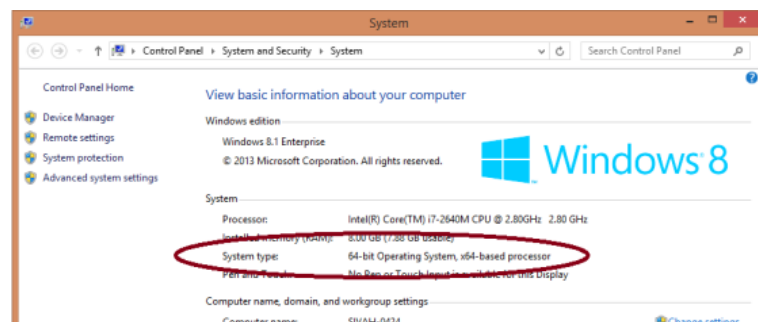
Contents

Lab Prerequisites

Following prerequisites and setup must be complete for successful completion of the exercise:

- You must be connected to the internet.
- You must have Microsoft Office installed.
- **Signup for Power BI:** Go to http://aka.ms/pbidiadtraining and sign up for Power BI with a business email address. If you cannot sign up for Power BI, let the instructor know. If you have an existing account, please use the same url as above.
- At minimum, a computer with 2-cores and 4GB RAM running one of the following versions of Windows: Windows 8 / Windows Server 2008 R2, or later.
- If you choose to use Internet Explorer it will require version 10 or greater, you can also use Edge or Chrome.
- Verify if you have 32-bit or 64-bit operating system to decide if you need to install the 32-bit or 64-bit applications.
  - Search for computer on your PC, right click properties for your computer.
  - You will be able to identify if your operating system is 64 or 32 bit based on "system type" as shown below.

- **Download the Power BI Content:** Create a folder called **DIAD** on the C drive of your local machine. Copy all contents from the folder called **Dashboard in a Day Assets** to the **DIAD** folder you just created (C:\DIAD).
- **Download and install Power BI Desktop** using any one of the options listed below:
  - If you have Windows 10, use Microsoft App Store to download and install Power BI Desktop app.
  - Download and install Microsoft Power BI Desktop from http://www.microsoft.com/en-us/download/details.aspx?id=45331.
  - If you already have Power BI Desktop installed ensure you have the **latest version** of Power BI downloaded.
- **Download and install Power BI Mobile App on your mobile device**
  - If you are using an Apple product download and install the Microsoft Power BI Mobile app from the Apple store or this link https://apps.apple.com/us/app/microsoft-power-bi/id929738808
  - If you are using an Android product download and install the Microsoft Power BI Mobile app from the Google Play store or this link https://play.google.com/store/apps/details?id=com.microsoft.powerbim

Document Structure

This document is lab 04 of 05 labs in total.

If you are joining the DIAD at this point or were unable to complete previous labs, please start this lab with the provided: "Lab 3 Solution.pbix" file you can find in the Reports folder.

At the end of this lab you will have learned how to create a mobile view in Power BI Desktop. You will also know how to create a workspace in Power BI Service and publish your final report to this workspace. In Power BI Service you will learn how to build a dashboard and get quick insights from your data.

The document flow is in a table format. On the left panel are steps the user needs to follow and in the right panel are screenshots to provide a visual aid for the users. In the screenshots, sections are highlighted with red boxes to highlight the action/area user needs to focus on.
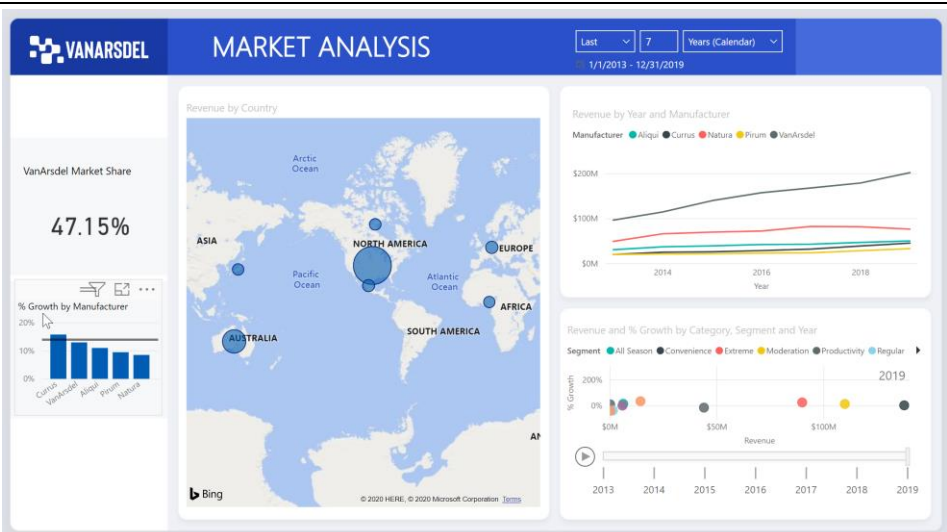
NOTE: This lab is using real anonymized data and is provided by ObviEnce LLC. Visit their site to learn about their services: www.obvience.com .

This data is property of ObviEnce LLC and has been shared for the purpose of demonstrating Power BI functionality with industry sample data. Any uses of this data must include this attribution to ObviEnce LLC.
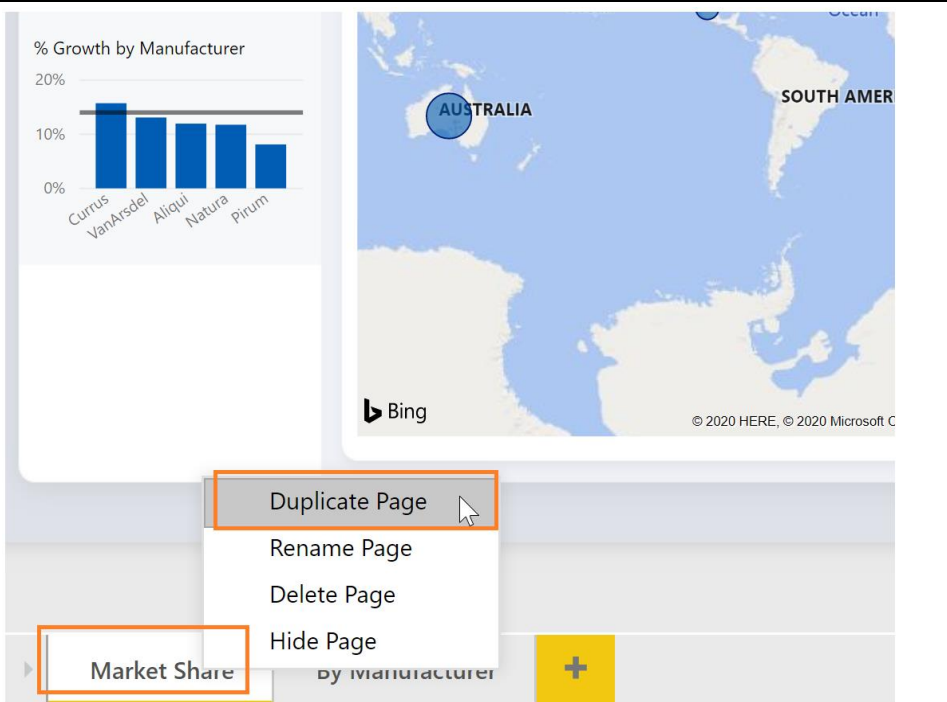
Power BI Desktop – creating mobile view

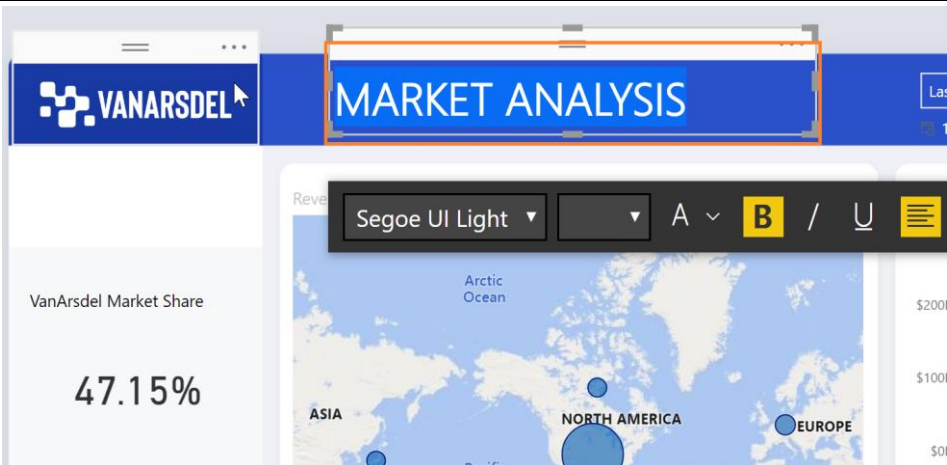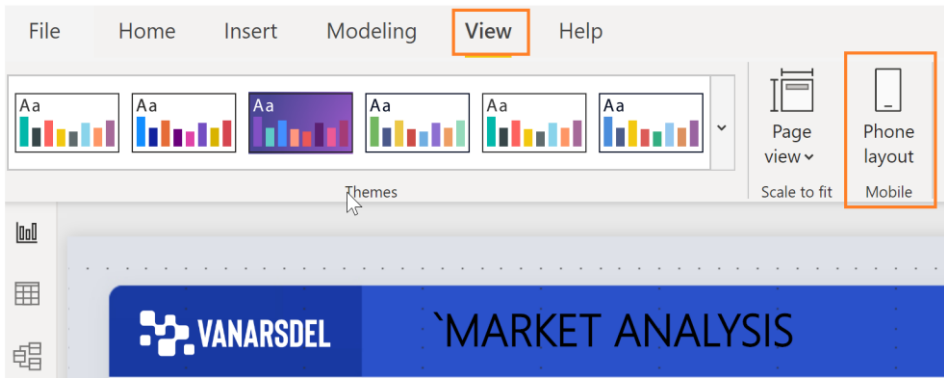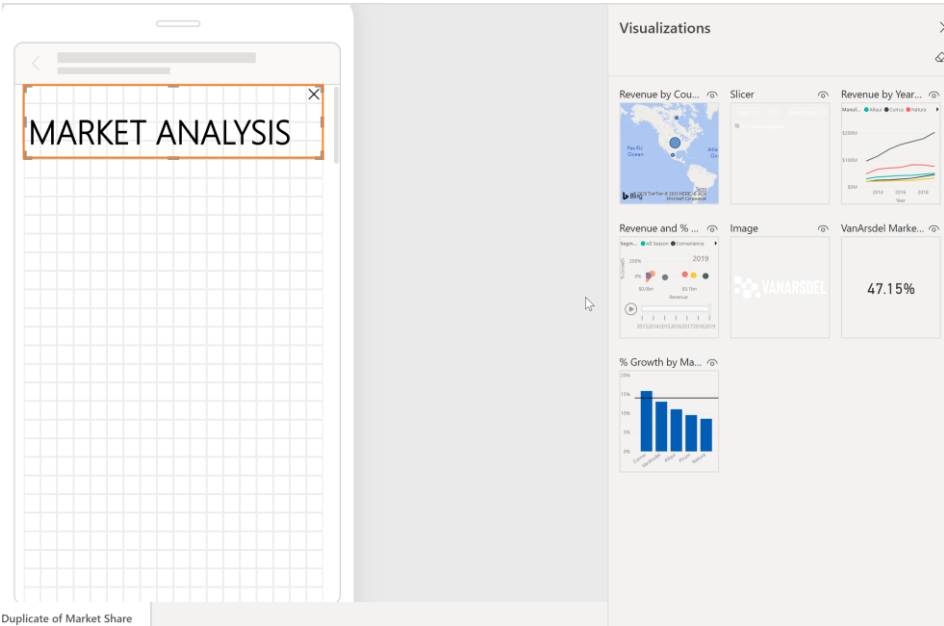|	
1. Navigate to **/DIAD/Reports** folder. 2. **Open DIAD Final Report.pbix** file. This file uses the same dataset that you used for the lab. We have added a few more visuals and formatted the reports. Feel free to explore the report.	
3. Right click on the Market Share tab and select **Duplicate Page**	
4. Highlight the Market Analysis title and change the font to black	

|	
5. Click on the **View** ribbon and click **Phone Layout**	
6. Drag the **Market Analysis** title to the top of the phone layout	
7. Drag the **Market Share card** onto the phone layout and resize	

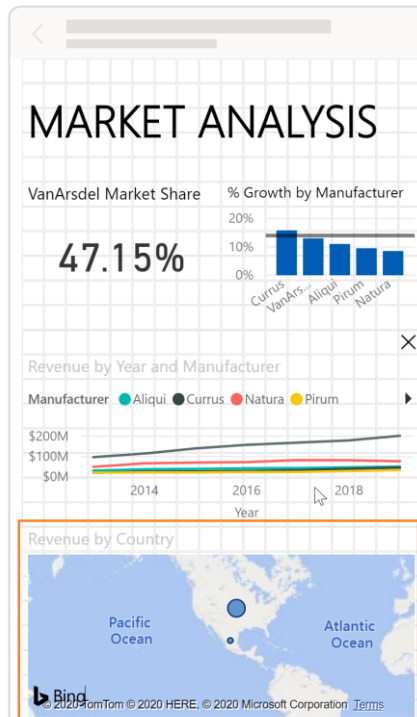|	
8. Drag the **% Growth by Manufacturer** chart next to the card on the phone layout	
9. Drag the **Revenue by Year** and Manufacturer line chart below the card on the phone layout 10. Resize the line chart to stretch across the phone layout	
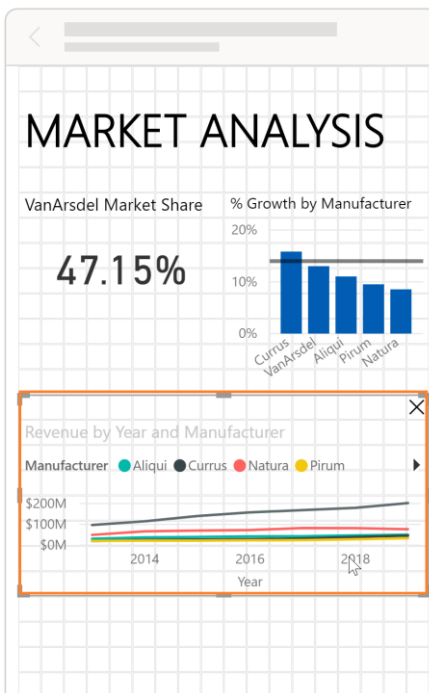
11. Drag the map below the line chart on the phone layout
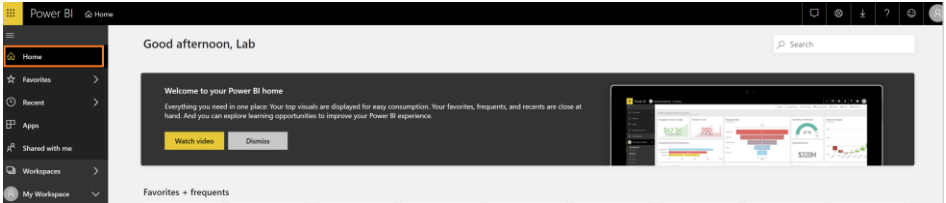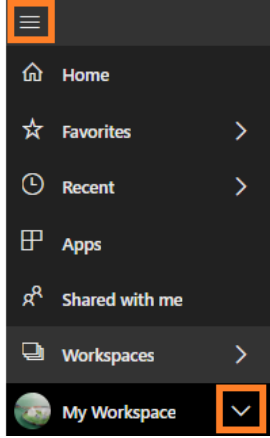12. Resize the map
13. Save the file.

Note: Mobile layout allows you to overlay charts telling a story with bookmarks.

MARKET ANALYSIS

VanArsdel Market Share

47.15%

% Growth by Manufacturer

Revenue by Year and Manufacturer

Manufacturer ● Aliqui ● Currus ● Natura ● Pirum
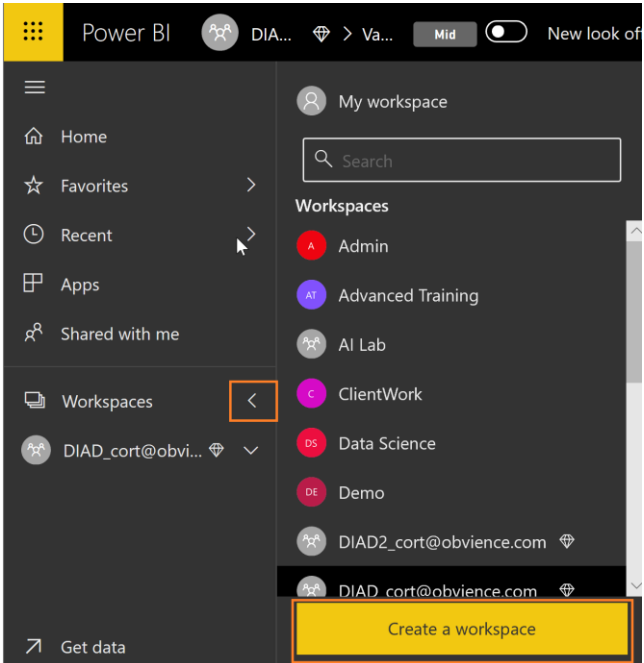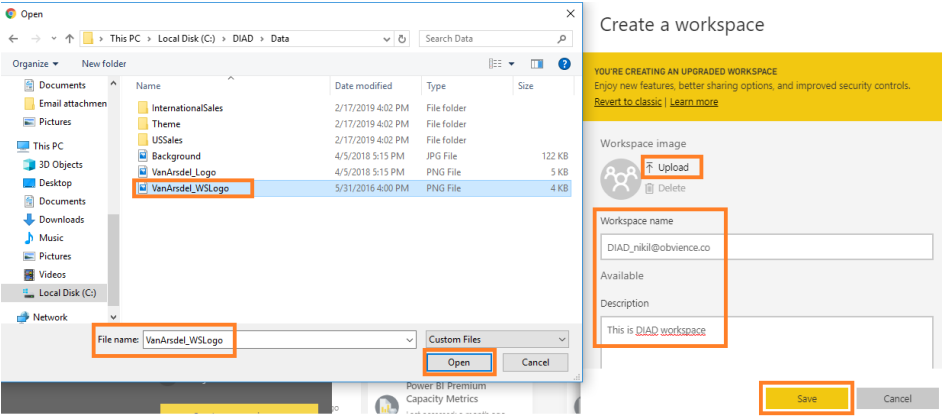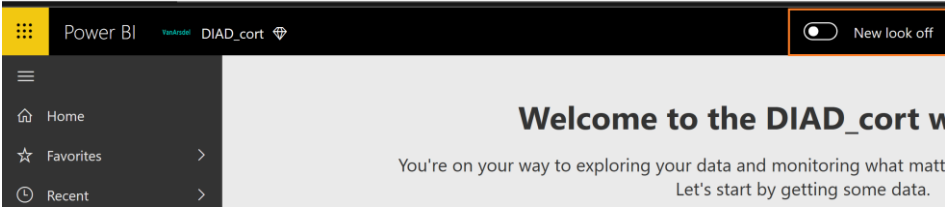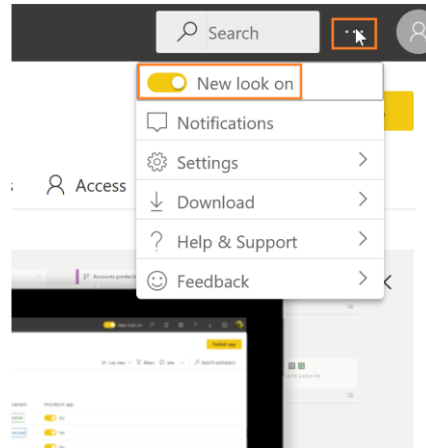
Revenue by Country

Power BI Service

You will now leverage the report authored using Power BI Desktop and create a dashboard for VanArsdel data analysis team and share it with the CMO. A Power BI Desktop file with additional reports / visuals is provided. Please use this for the next section of the lab.

Power BI Service – Publishing Report

1. If you have not signed up for a Power BI account, go to http://aka.ms/pbidiadtraining and sign up for Power BI with a business email address. 2. If you have not already opened app.powerbi.com page, please open the browser and navigate to http://app.powerbi.com. 3. Sign in to Power BI using your user account. Once logged in, you will be navigated to the **Home** screen. **Note**: If you have previously signed into Power BI, then your Home screen will list your Favorites + frequents and recent reports and dashboards.	

4. If the left navigation is collapsed, select ![icon] icon below Power BI on the top left of the screen to expand the left navigation.
Following options are listed in the left navigation:
    Home: This is one-stop shop for all your content. It lists your favorite and recent content (reports, dashboards and apps), as well as the latest content that was shared with you, etc.
    Favorites: Lists all your favorite content (we will create a favorite in a later section).
    Recent: Lists the most recent content you have viewed.
    Apps: List all the apps you have installed.
    Shared with me: Lists the content that are shared with you (we will share dashboards in a later section).	

Workspaces: Lists all the workspaces you are assigned. By default, you are assigned My Workspace. 5. Select the down arrow next to **My Workspace**. Notice DASHBOARDS, REPORTS, WORKBOOKS and DATASETS sections. Let's import a Power BI Desktop file and create dashboards.	
My Workspace is your personal workspace. We need to create a workspace where we can collaborate with team members and distribute content to end users. Let's create a workspace. 6. In the left panel, select **Workspaces -> Create a workspace**. Create a workspace dialog opens. **Note**: Creating workspace is a **Pro feature**. If you do not have Pro license, please choose the trial option.	
7. In the Create a workspace dialogue box, select **Upload**. 8. File browser dialog opens. Browse to **/DIAD/Data** folder. Select **VanArsdel_WSLogo** file. 9. In **Name your workspace** text area, enter **DIAD_<youremailaddress>**. **Note**: you are entering your email address as part of the workspace name to keep it unique. 10. In **Description** text area, enter "**This is DIAD workspace**". 11. Select **Save** to create the workspace. 12. Click on the **New look off** button to turn the new look on 13. Ensure New look is on by clicking on the ellipsis in the upper righthand corner to make sure New look on is selected	

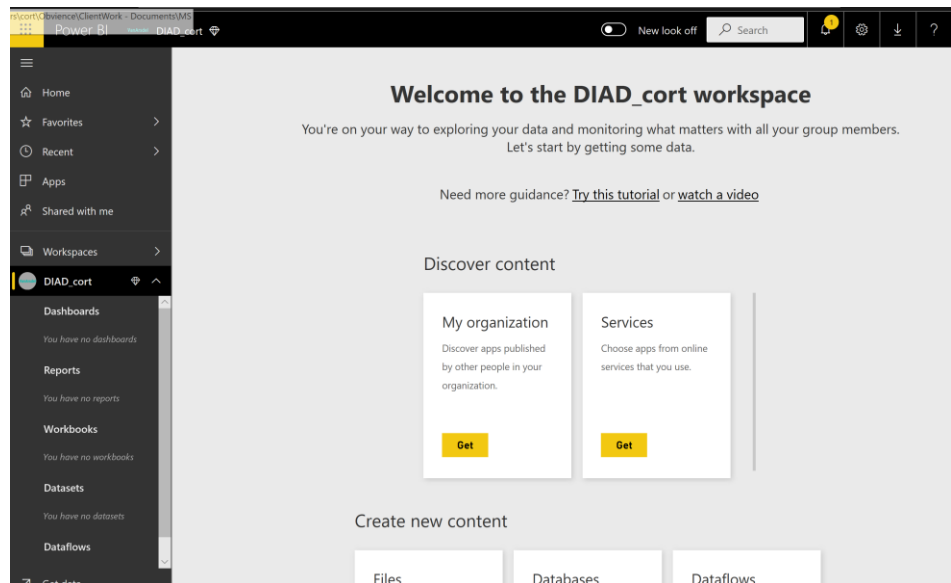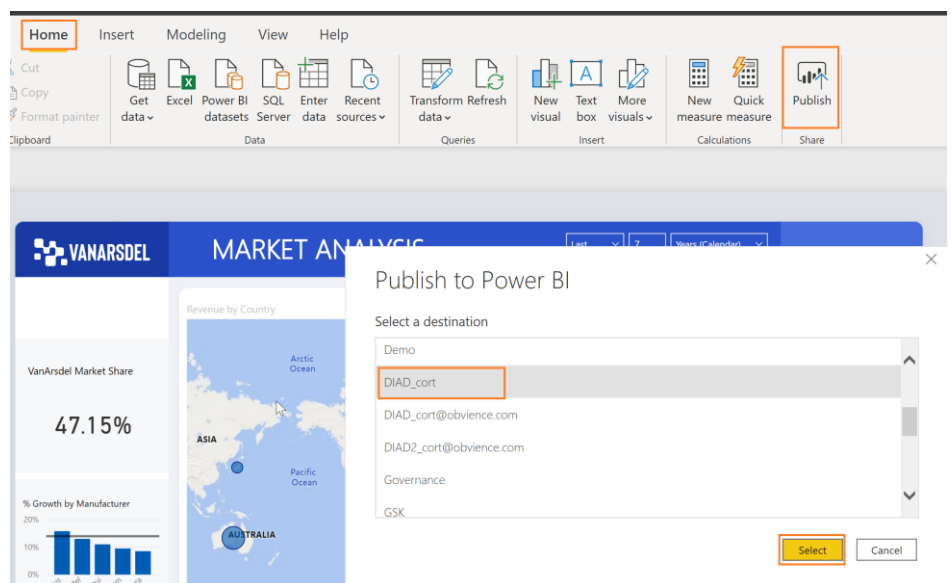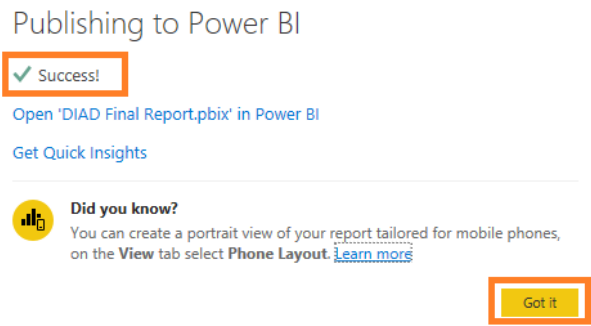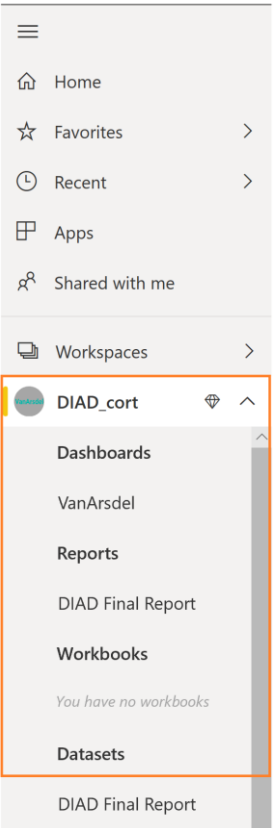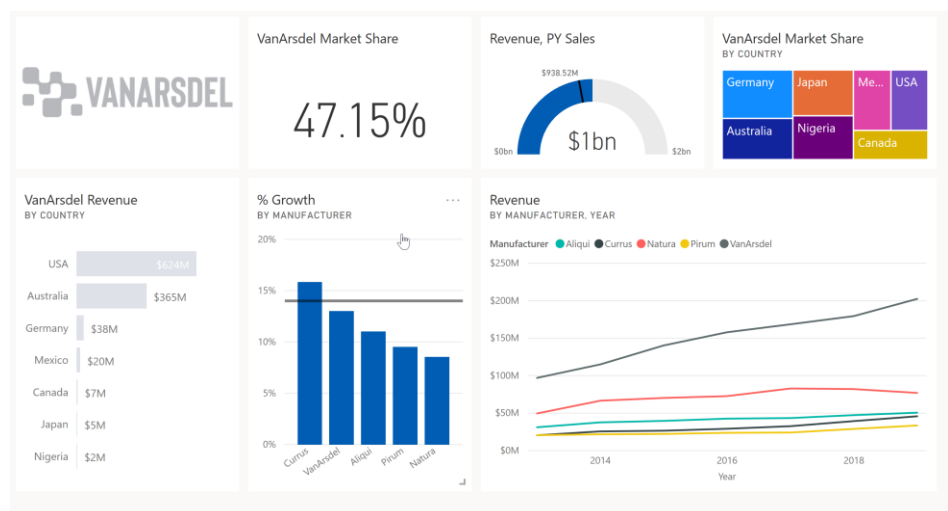|	
Note: Once you've turned the new look on it will remain on for all future visits to the site unless it is turned off.	
Notice you are now navigated from My Workspace to the workspace you just created. You are in the Welcome screen with options to discover or create content. Discover content has options to connect to apps that are shared by your organization or the online services. Create new content has options to connect to Files, Databases and Dataflows. There are two options to publish the Power BI Desktop report we created. • Get option under Files. • Publish from Power BI Desktop. We are going to use the 2nd option.	
Let's publish the report to Power BI Service and then we will come back to the browser. 14. Navigate back to the **DIAD Final Report** 15. Ensure **Mobile View** is **off** 16. From the **Home** tab select **Publish** 17. If you have not already logged into Power BI, a **Sign in** dialog opens. Please sign in. 18. Once you are signed in, Publish to Power BI dialog opens. Select **DIAD_<youremailaddress>** from the dialog. 19. Click **Select**.	

Publishing to Power BI dialog opens. Once completed, a success message is displayed. 20. Select **Got it** to close the dialog. Now we have published the report to Power BI service. Let's navigate back to the browser and start exploring.	Publishing to Power BI ✓ Success! Open 'DIAD Final Report.pbix' in Power BI Get Quick Insights **Did you know?** You can create a portrait view of your report tailored for mobile phones, on the **View** tab select **Phone Layout**. Learn more Got it
Once you are in the browser, in the left panel notice under **DIAD_<youremailaddress>**, you will see **REPORTS -> DIAD Final Report** and **DATASETS -> DIAD Final Report**.	☰ ⌂ Home ☆ Favorites ＞ 🕐 Recent ＞ ▦ Apps 👥 Shared with me 🖵 Workspaces ＞ ⬤ DIAD_cort ◈ ︿ **Dashboards** VanArsdel **Reports** DIAD Final Report **Workbooks** *You have no workbooks* **Datasets** DIAD Final Report

Power BI Mobile – Building a Dashboard

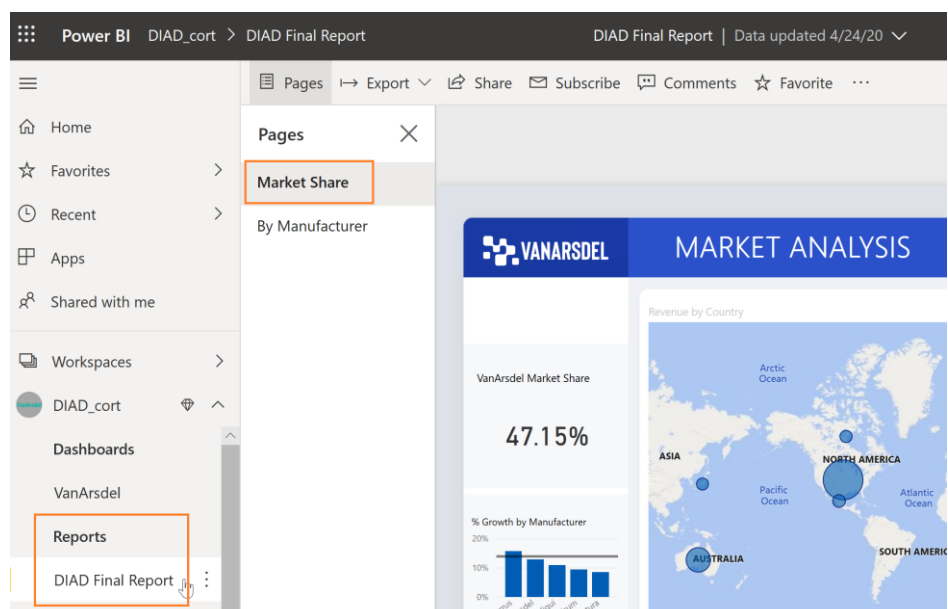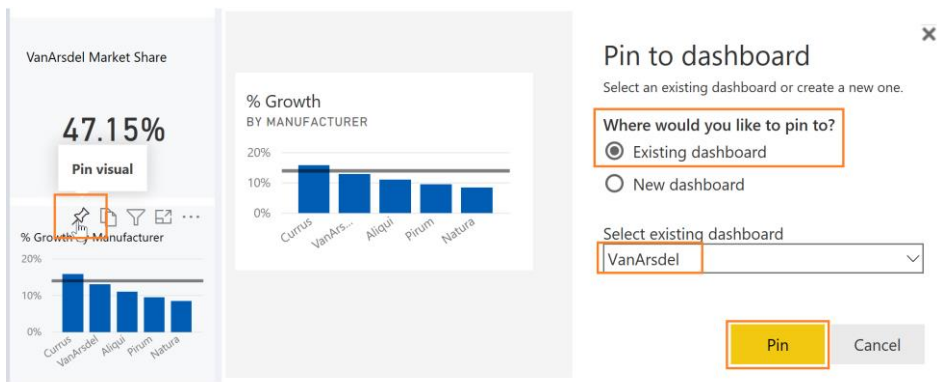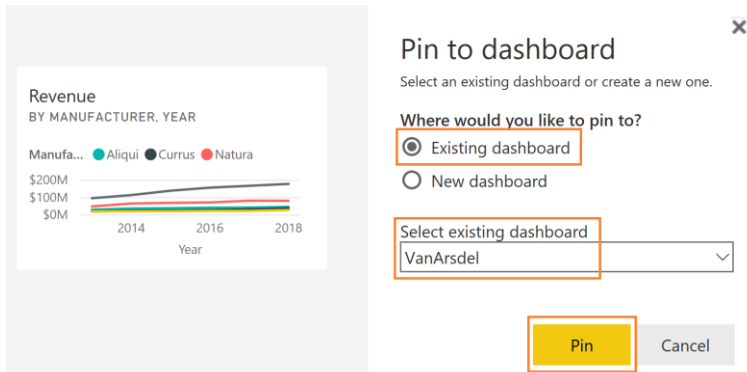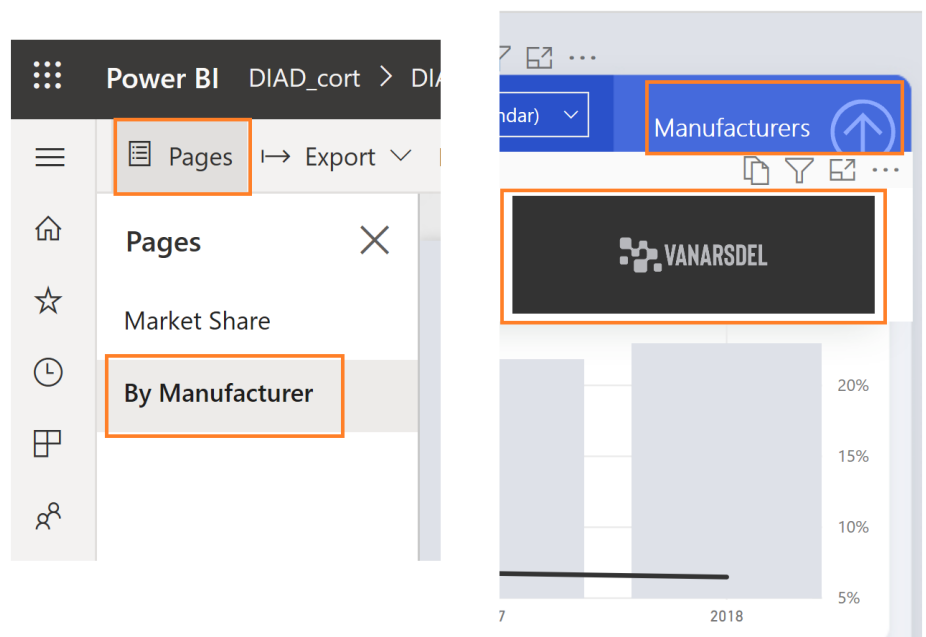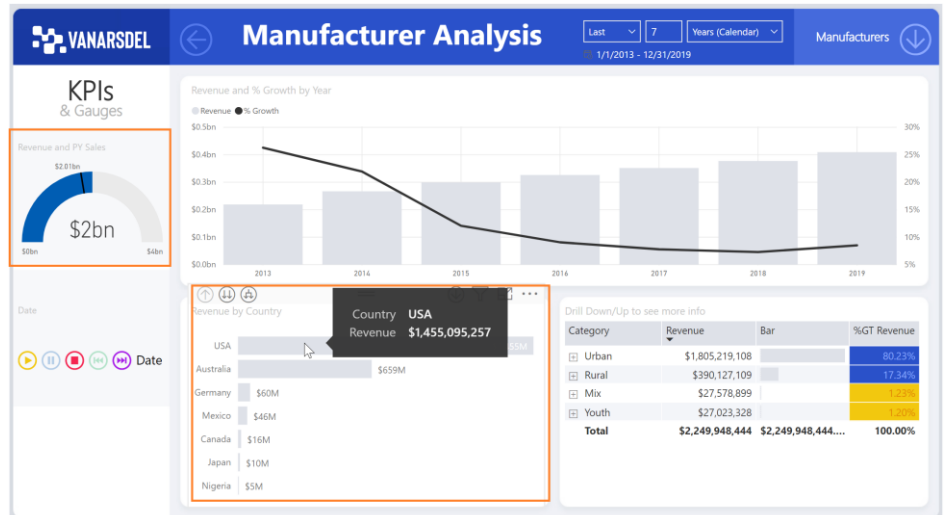|	
In this section, we will create a dashboard that will combine data from the Market Share report as well as Social report. At the end of the section, we will create a dashboard that looks like the screenshot.	
21. From the left menu, select **REPORTS -> DIAD Final Report.** You will be navigated to the report you just uploaded. 22. In the **map visual**, enable drill down by **hovering** over the visual. 23. Select the **down arrow** on the top right corner of the visual. Select **Australia** to drill down to **State level**.	
Let's pin visuals to the dashboard. 24. Hover over **VanArsdel Market Share** card visual. 25. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens. 26. We do not have a dashboard yet. Let's create one. With **New dashboard** selected, enter **VanArsdel** in the text box. 27. Select **Pin**. Notice alert messages are displayed stating the dashboard is ready to view.	
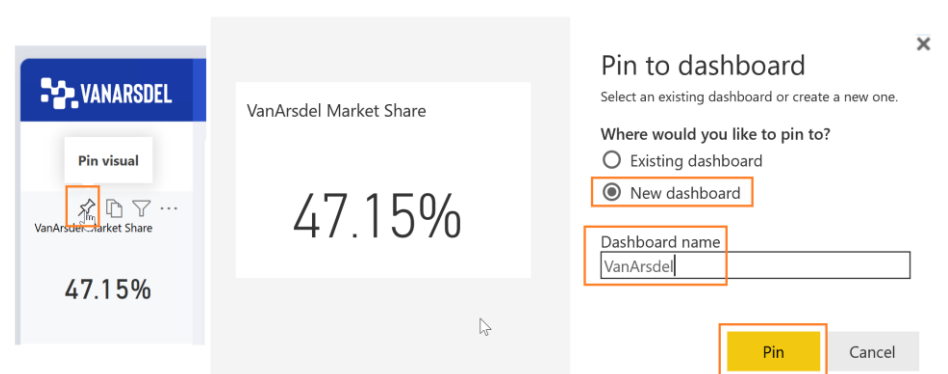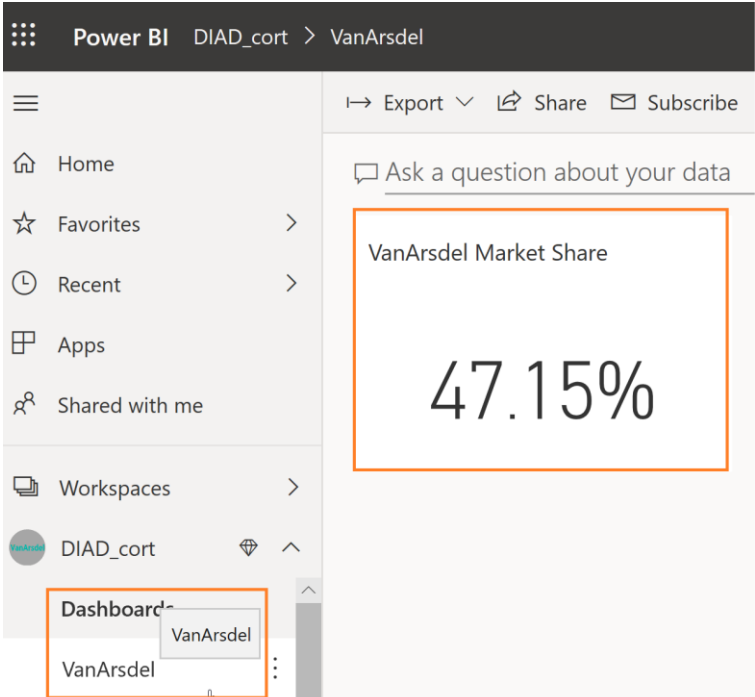
Notice in the left panel, VanArsdel Dashboard is created under DASHBOARDS. 28. From the left panel, select **DASHBOARDS -> VanArsdel**. Notice the VanArsdel Market Share tile is pinned to the dashboard. 29. Click on **VanArsdel Market Share,** notice you are navigated to the report. Tiles in dashboard are not interactive.	
30. Hover over **% Growth by Manufacturer** visual. 31. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens. 32. Make sure **VanArsdel** is selected in the dropdown. 33. Select **Pin**.	
34. Close out alert dialogs. 35. Hover over **Revenue by Year and Manufacturer** visual. 36. Select the **pin icon** on the top right of the visual. Pin to dashboard dialog opens. 37. Make sure **VanArsdel** is selected in the dropdown. 38. Select **Pin**.	

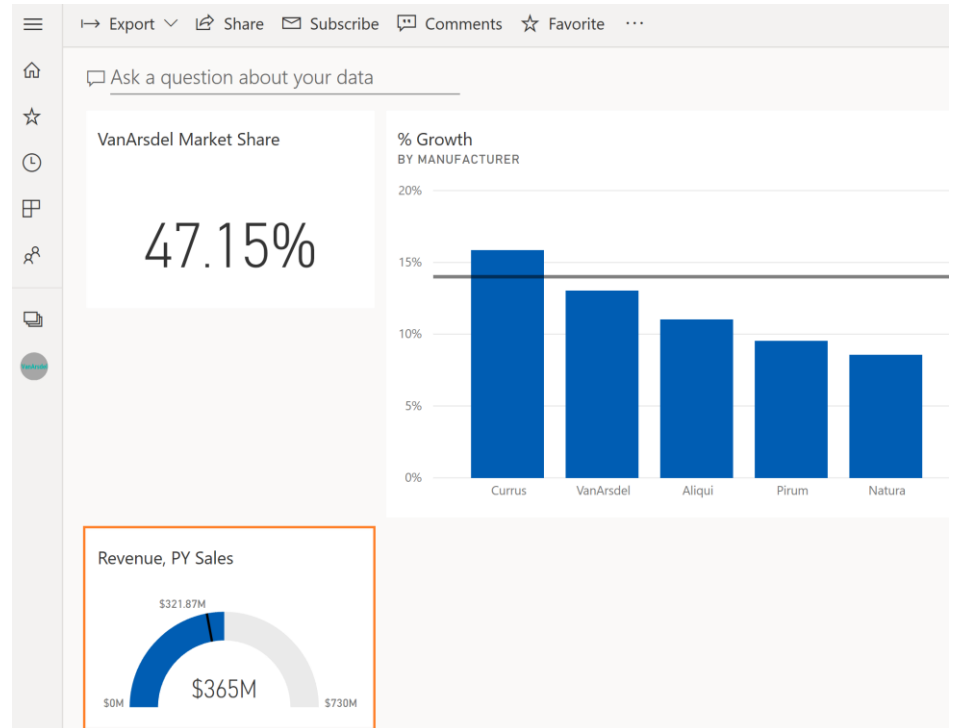|	
39. Close out alert dialogs. 40. Navigate to **By Manufacturer** page. 41. From the top right corner, select the **down arrow**. Notice manufacturer slicer displays. 42. Select **VanArsdel** from the slicer. This will filter the visuals. 43. From the top right corner, select the **up arrow**. Notice manufacturer slicer collapses.	
44. **Pin** the **gauge visual** to the dashboard. 45. **Pin Revenue by Country** visual to the dashboard. 46. Close out alert dialogs. Note: VanArsdel filter is applied to the tile that is pinned to the dashboard.	
47. From the left panel select the three lines in the upper left hand corner, select **DASHBOARDS -> VanArsdel**. Notice all the visuals are pinned as tiles to the dashboard. You will see the visuals on the dashboard like the screenshot. Each visual on the dashboard is called a tile. The tiles represent the data chosen and will be kept up to date as the data in the data model updates. Tiles are not interactive. Let's organize the dashboard now.	
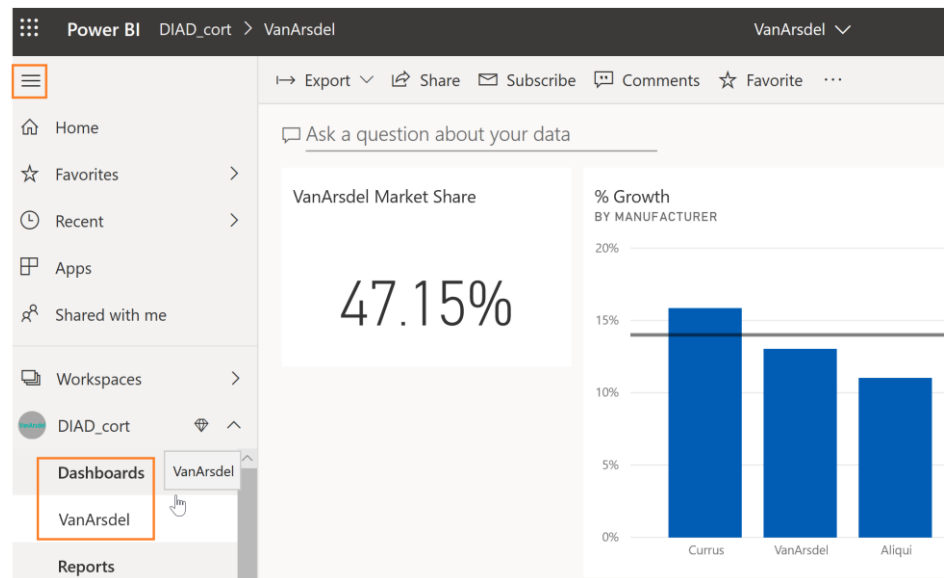
48. Resize and move the **gauge tile** as shown in the screenshot. 49. Select the **bottom right corner** of the tile and move it diagonally to change the image size. Tiles can be of **various sizes (1x1 to 5x5)**. Drag the tile using the bottom right corner to resize. As you are dragging, note the gray shadow which indicates the size of the tile when you stop dragging.	
50. Click on the ellipsis and select **Add tile**. Add tile dialog opens. 51. Select **Image** as the source. 52. Select **Next**. 53. In **URL** text box, enter https://raw.githubusercontent.com/CharlesSterling/DiadManu/master/Vanarsdel.png **Note: URL is case sensitive.** 54. Select **Apply**. Notice a new tile with VanArsdel logo is added to the dashboard.	
55. **Resize** and **rearrange** the tiles as shown in the screenshot.	
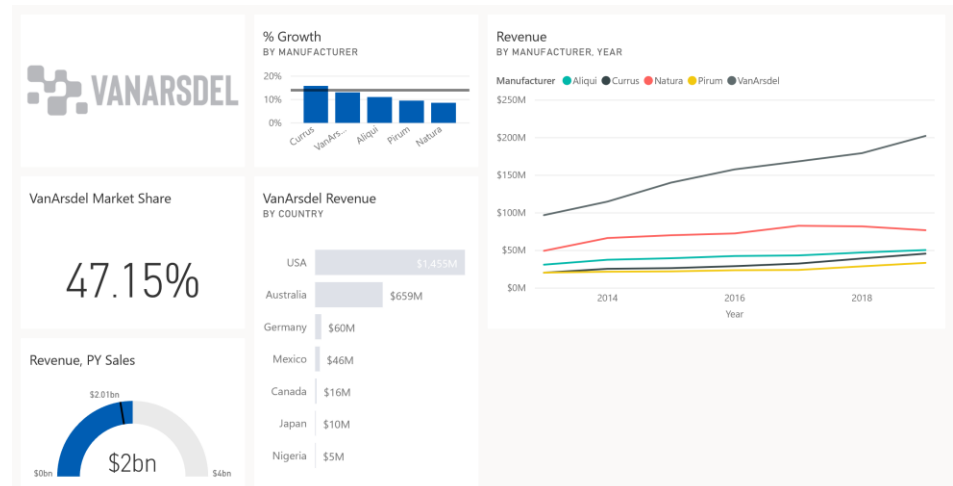
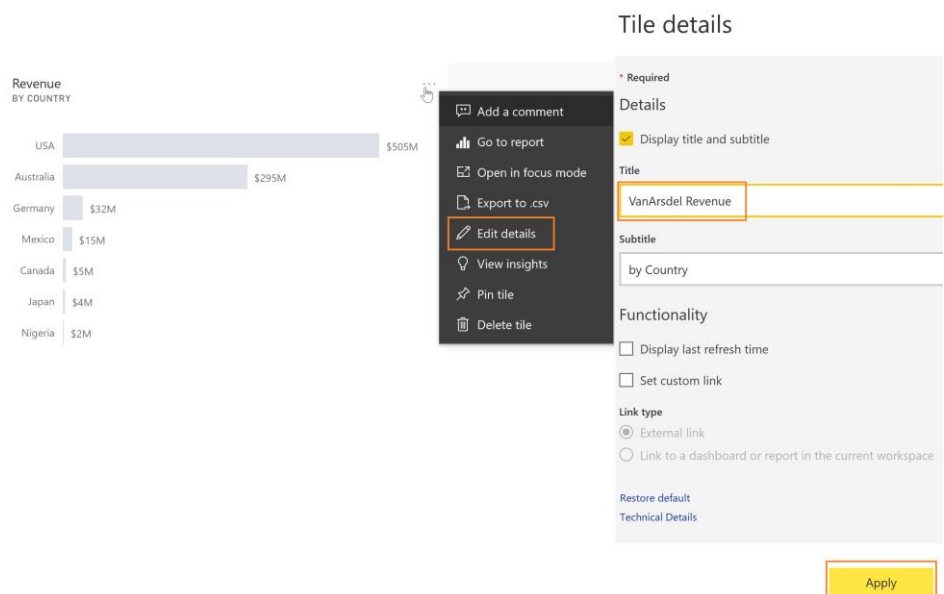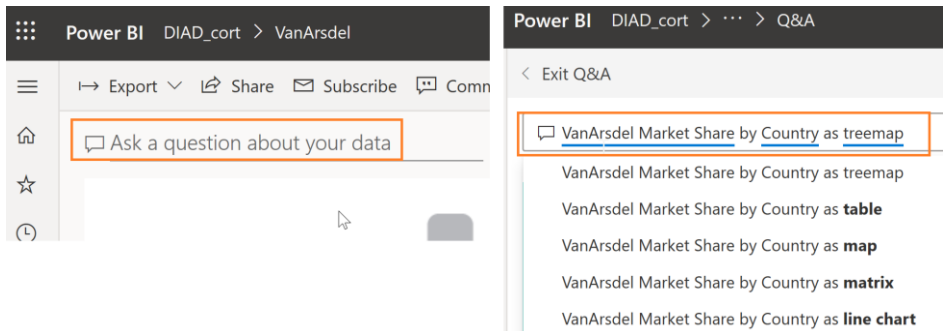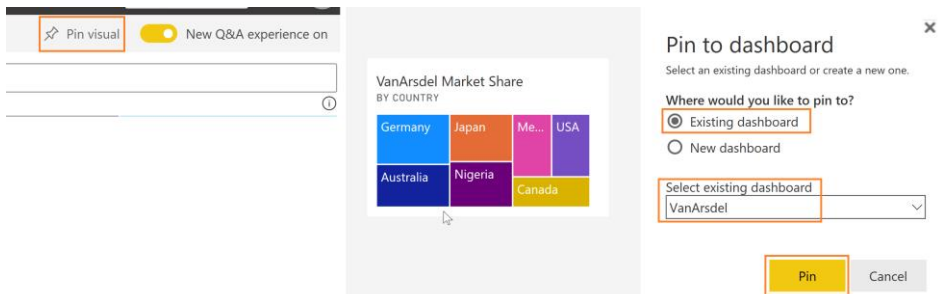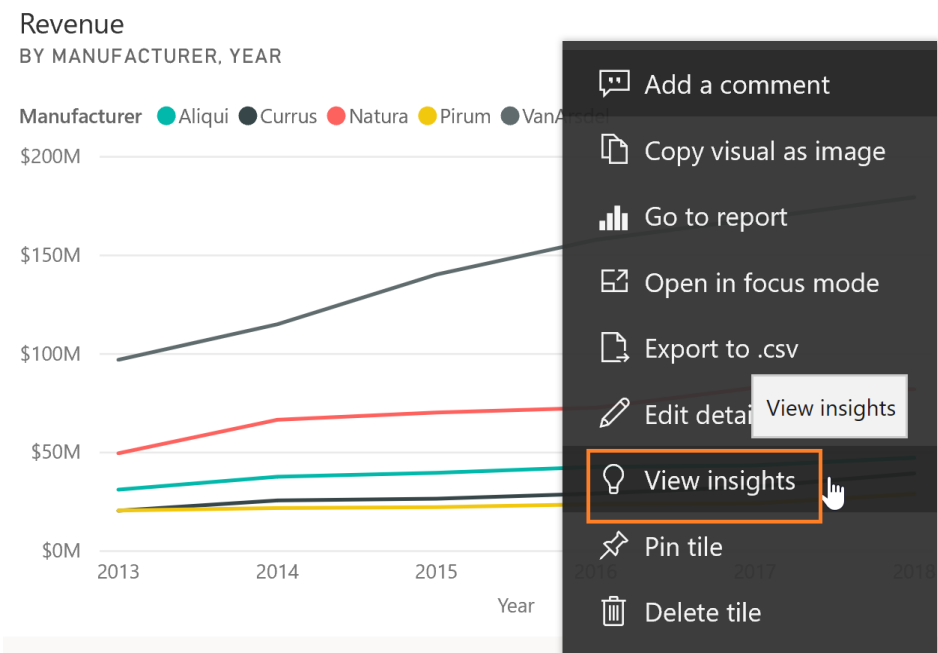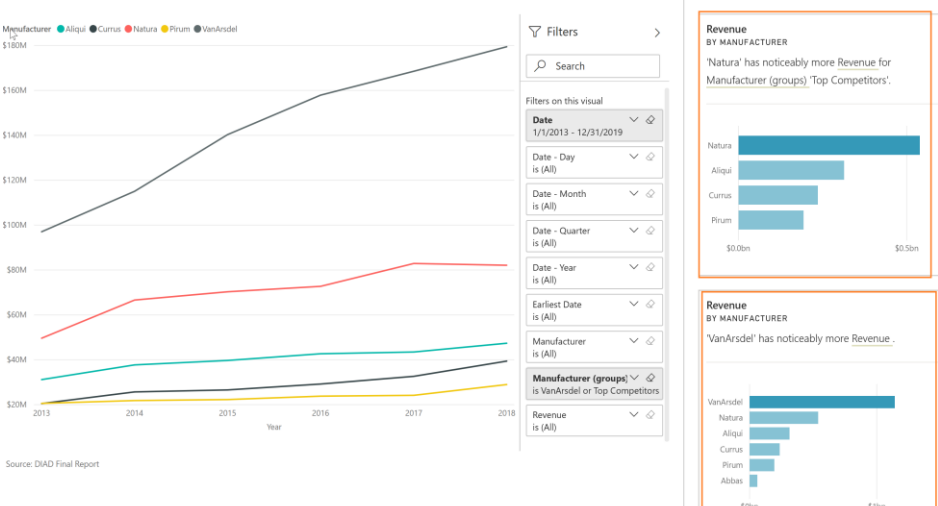|	
Revenue by Country tile shows Revenue by Country for VanArsdel, so let's rename it. 56. **Hover** over Revenue by Country tile. 57. Select the **ellipsis** on the top right corner of the tile. 58. Select **Edit Details**. Tile Details dialog opens. 59. Change **Title** to **VanArsdel Revenue**. 60. Select **Apply**.	
It will be nice to have a visual that represents Market Share by country. Notice on the top of the visual, there is an option to **Ask a question about your data**. This is similar to Ask a question in the desktop. 61. In the text box start typing, **VanArsdel market share.** Notice a card visual is created. 62. Continue typing **VanArsdel market share by country**. Notice a bar chart is created. 63. Continue typing **VanArsdel market share by country as treemap**. Notice a treemap visual is created. **Note**: Remember we renamed tables. One of the reasons we did it is to make it user friendly for Q&A.	
64. From the top right of the screen, select **Pin Visual**. 65. Pin to dashboard dialog opens. Select **Pin** to pin the visual to VanArsdel dashboard. 66. Close the alert dialogs. 67. Select **Exit Q&A** to navigate back to the dashboard. Notice the visual is added as tile to the dashboard. Clicking on the tree map	

visual will navigate you back to the Q&A section.

Power BI quickly searches different subsets of your dataset while applying a set of sophisticated algorithms to discover potentially-interesting insights. You can run insights against a dataset or dashboard tile. Let's generate insights on a dashboard tile. When we run insights on a dashboard tile, instead of searching for insights against an entire dataset, search is narrowed to the data used to create a single dashboard tile. This is often referred to as scoped insights.

68. Hover over the **line chart** on the dashboard.
69. Select the **ellipsis** on the top right corner.
Select **View Insights**.

You will be navigated to **Focus mode** for the line chart.
70. **Scroll** on the Insights panel to review the various insights Power BI can generate. Notice that there is an option to pin insight visuals to the dashboard.
71. Click on **Exit Focus mode** on the top left to navigate back to the dashboard.

We want to be notified when VanArsdel's Market Share goes above or below a threshold. We can set up alerts to achieve this.

72. Hover over **VanArsdel Market Share** tile.

73. Click on the **ellipsis** on the top right corner of the tile.

74. Select **Manage alerts**. Manage alerts dialog opens.

75. Select **Add alert rule dialog**.

Notice you can add Above and Below threshold and notification frequency can be set.

This is an introduction to managing alerts. Complete functionality is not covered in this lab.

76. Select **Cancel** to close the dialog.

77. Select **Don't Save**.

78. Click on **VanArsdel Market Share** tile to navigate to the report.

79. In map visual, right click on Australia bubble and select **Drillthrough -> By Manufacturer**.

80. You will be navigated to By Manufacturer page of the report with Australia filter applied to the report page.

81. Hover over **matrix** visual. 82. Select **focus mode icon** on the top right corner of the visual. 83. Click on the double down arrow to drill down 84. Click **Back to report**	
85. From the top menu, select **Bookmarks** and select **Show more bookmarks**. Bookmark pane opens on the right. There are 2 options, Personal bookmarks and Report bookmarks. **Report bookmarks:** are the bookmarks report author created (we did this in Power BI Desktop). **Personal bookmarks**: Report consumer can create their own bookmarks. 86. Select **View** in the Report bookmarks pane. Notice you can view and navigate through the bookmarks using the arrow in the bottom of the screen. The behavior is like in Power BI Desktop. Select **Exit** in Bookmark pane to close it.	

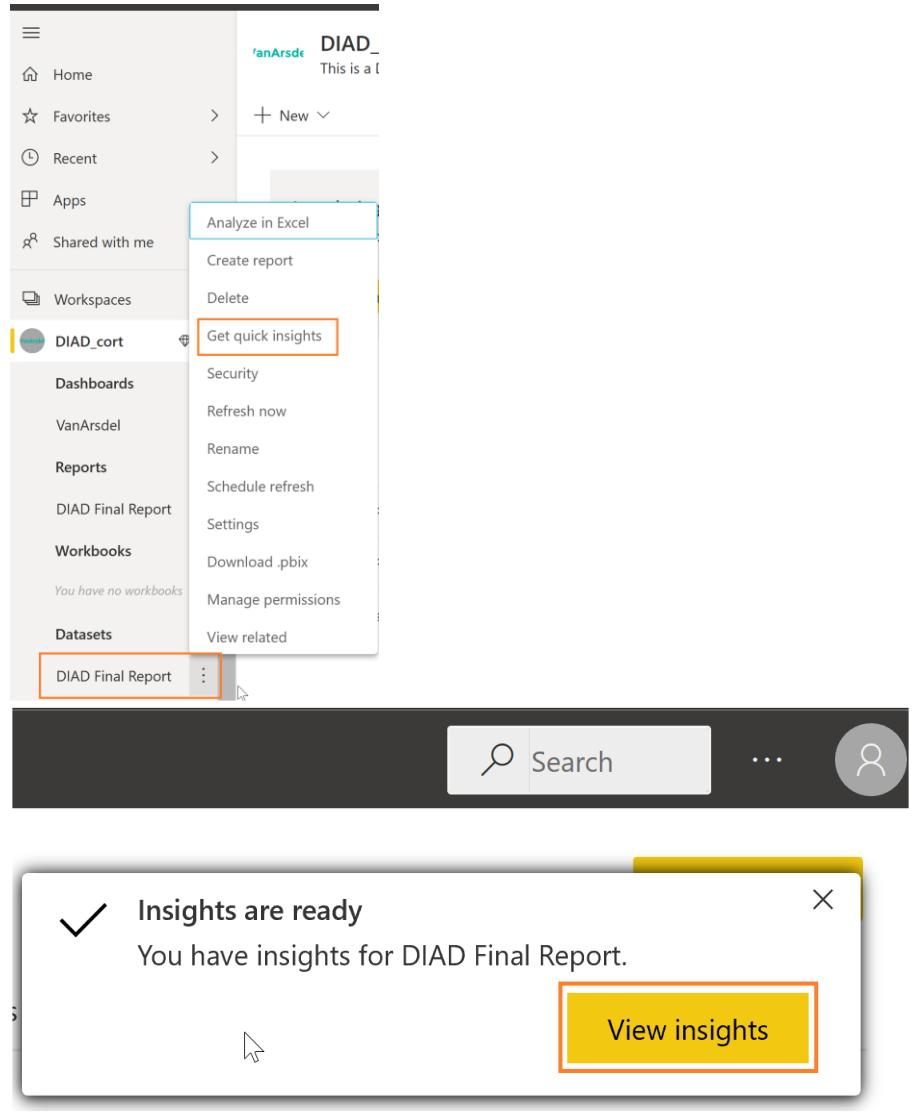Power BI provides an option to get quick insights into the complete dataset.

87. Navigate back to Power BI Service, In the left panel, hover over **DATASETS -> DIAD Final Report**.
88. Select the **ellipsis**.
89. Select **Get quick Insights**.

It might take a few minutes for the insights to be created. Once insights are ready a message appears of the top right corner.
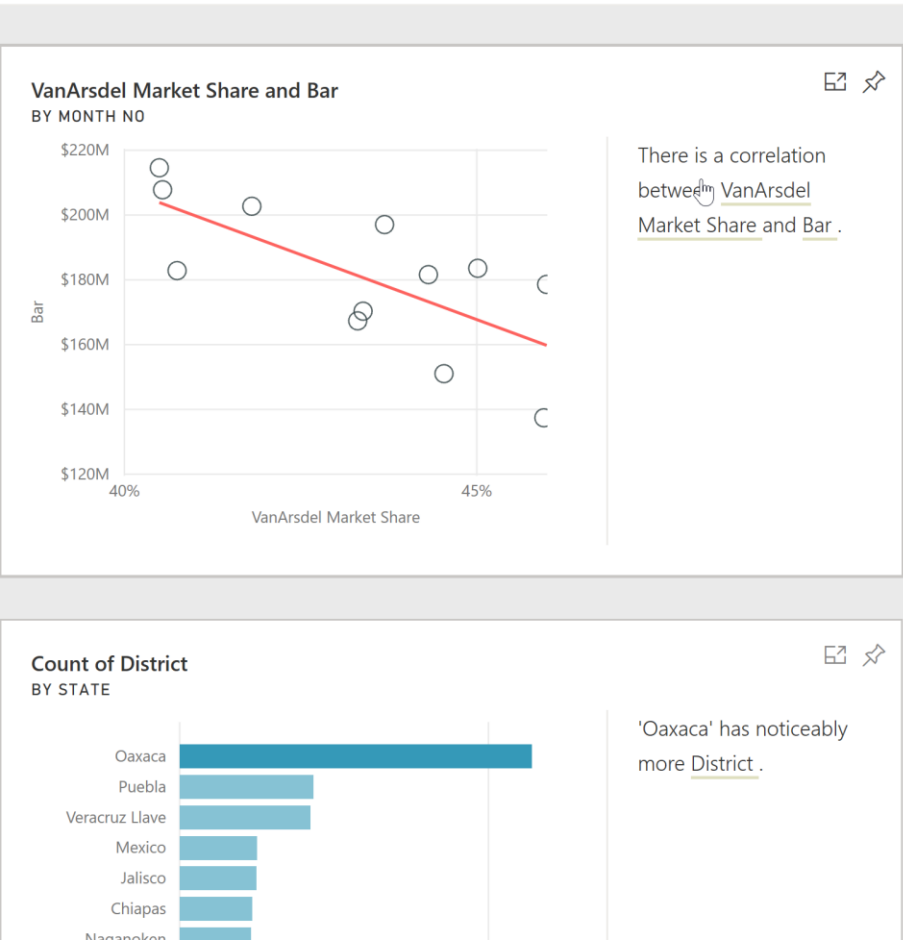
90. Select **View insights.**

A quick insights report is displayed based on the dataset. This provides insights into data you may have missed and helps to get a quick start with creating dashboards.

Hovering over each report provides an option to Pin it to a dashboard.

Quick Insights for DIAD Final Report

A subset of your data was analyzed and the following insights were found. Learn more

VanArsdel Market Share and Bar
BY MONTH NO

There is a correlation between VanArsdel Market Share and Bar .

Count of District
BY STATE

'Oaxaca' has noticeably more District .

References

Dashboard in a Day introduces you to some of the key functionalities available in Power BI. In the ribbon of Power BI Desktop, the Help section has links to some great resources to help you as needed.
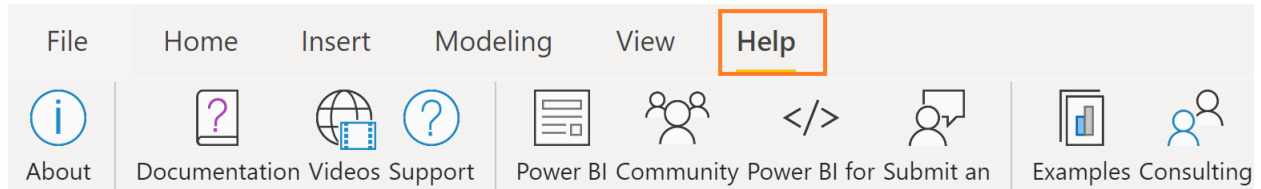
Here are a few more references that will help you with your next steps with Power BI.

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

OR CONCEPTS. YOUR EXPERIENCE WITH USING SUCH FEATURES AND FUNCITONALITY IN A PHYSICAL ENVIRONMENT MAY ALSO BE DIFFERENT.

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