

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.

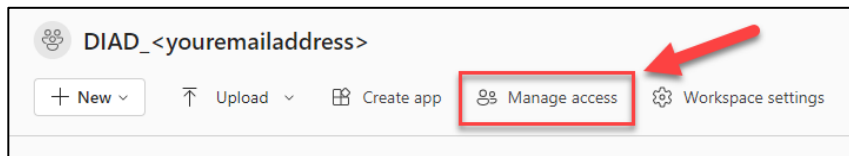
The lab includes steps for the user to follow along together with associated screenshots that provide a visual aid. In the screenshots, sections are highlighted with red or orange boxes to indicate the area the user needs to focus on.

NOTE: This lab uses real, anonymized data provided by ObviEnce, LLC. Visit their site to learn about their services: www.obvience.com. 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 <http://app.powerbi.com> to access your workspace.
2. From the navigation pane to the left of the screen, select **Workspaces**.
3. Select the workspace **DIAD_<youremailaddress>**.
4. Select the **Manage Access** button at the top of the page



5. The **Manage Access** dialog opens and you should select the **+ Add people or groups** button. Enter the email addresses of the colleagues with whom you want to collaborate. Each user can belong to one of three roles as follows:

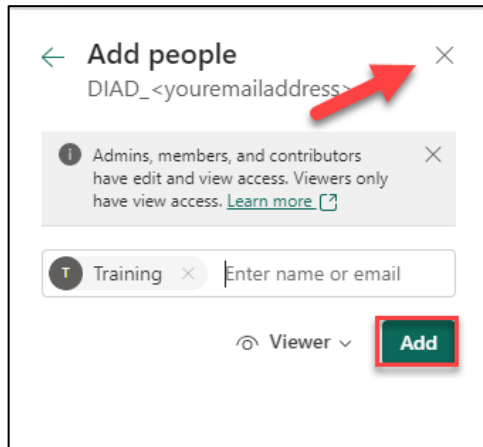
Contributor	Add/edit/delete content within workspace.
Member	Everything a Contributor can do. Re-share. Publish & update Apps.
Admin	Everything a member can do. Can change/delete workspace.
Viewer	Can add Admins. View/interact Read data stored in workplace Data Flows

6. Select the appropriate role and then select **Add**.

7. Once you have finished adding your colleagues, select **Close** at the top right.

Note: If you don't have a colleague's email, please close without submission.

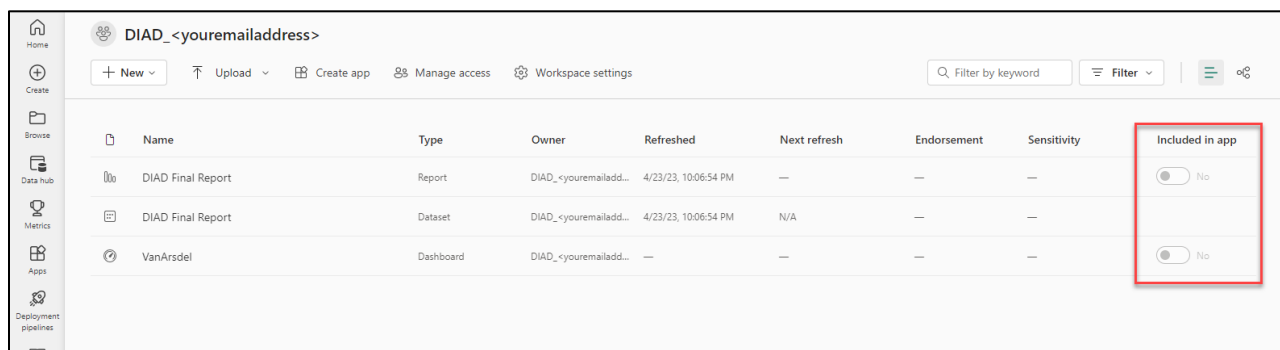
If you do have a colleague's email to provide in the box, and after you have selected the **Add** button, you can ask your colleague to login and access the workspace.



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.

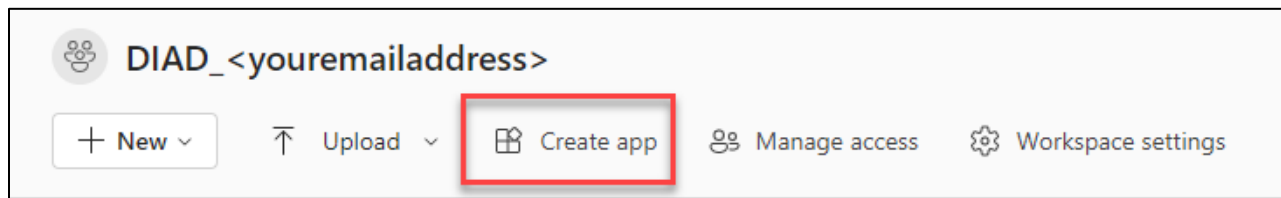
8. Navigate back to your workspace called **DIAD_<youremailaddress>**.

9. On the **Workspace** page, notice there is an option named **Included in app** which can be selected to include the Dashboard in the App. Once we have created the App, the **Included in app** toggle will become enabled.



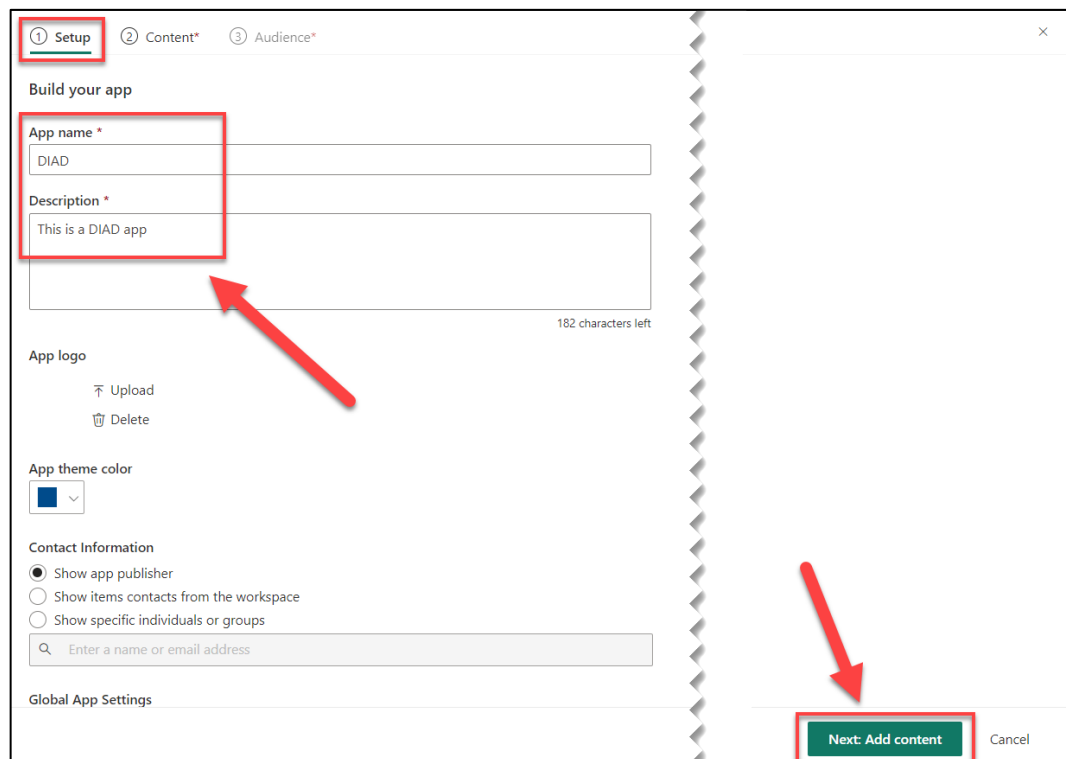
If you have reports and dashboards included in your workspace that you do not want to share with report viewers, an option will appear later to exclude these items.

10. In the top part of your screen, select the **Create app** button.

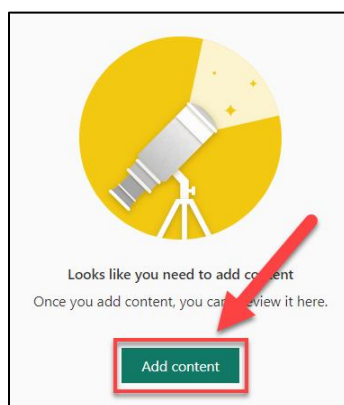


11. On the **Build your app** page, under the **Setup** tab, rename the app **DIAD**, and type **This is a DIAD app** in the **description** field.

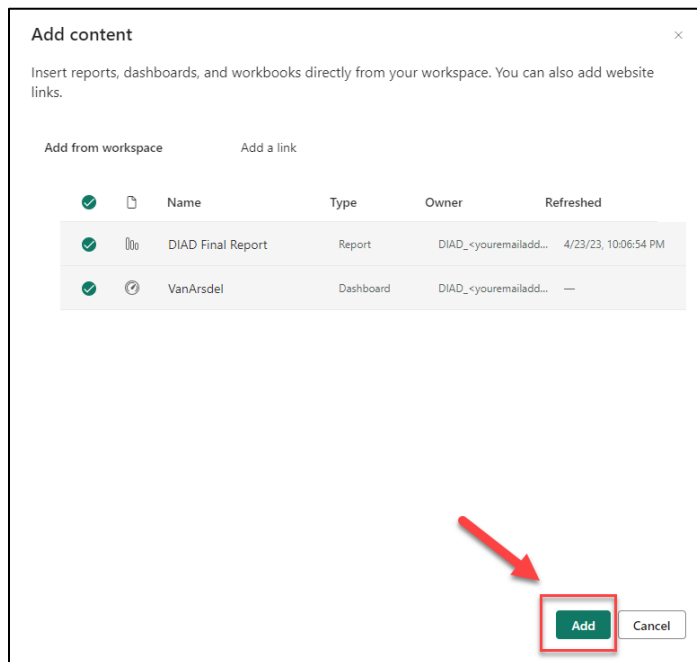
12. Then, select the **Next: Add content** button located in the bottom right corner of the Setup page.



13. Select the green colored **Add content** button located in the middle of the screen.

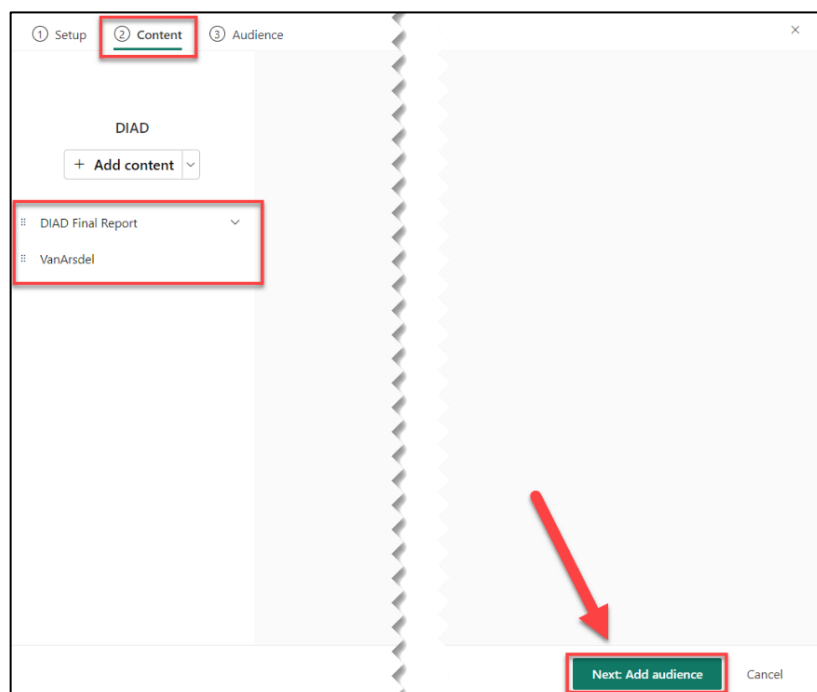


14. In the **Add content** dialog box that appears, select **DIAD Final Report (report)** and **VanArsdel (dashboard)**. Then, select the **Add** button located in the bottom right corner of the dialog box.



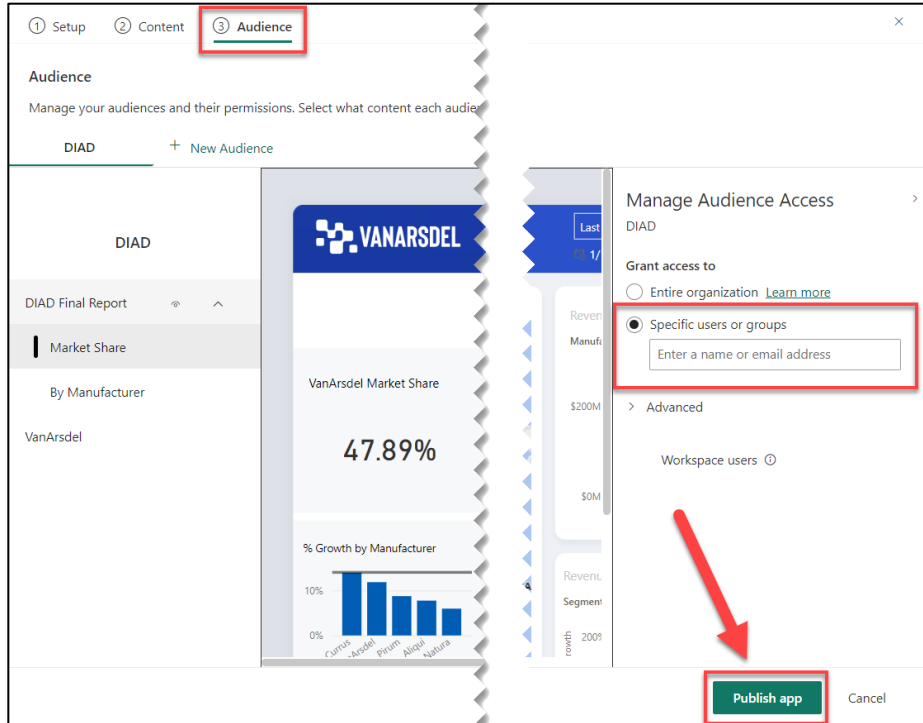
15. Notice that the newly added dashboard and report have been added to the list in the Content pane to the left.

16. Next, select the **Next: Add audience** button located in the bottom right corner of the Content page.



17. In the **Edit Audience** pane, enter the email(s) to whom you want to give access in **Specific users or groups** text box. Then, select the **Publish app** button located in the bottom right corner of the pane.

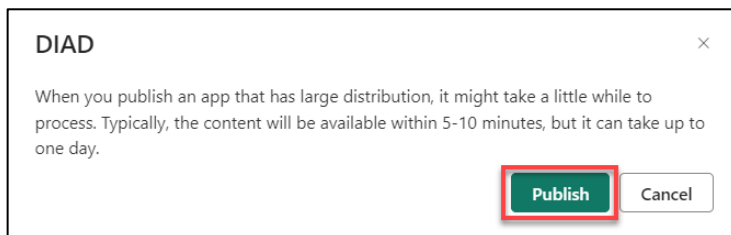
Note: If you do not have an email to share the app with, continue by selecting the *Publish app* button.



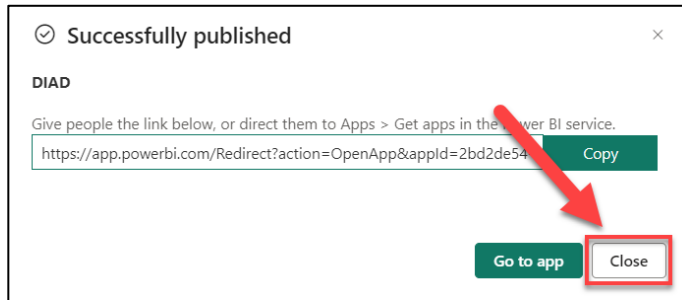
With Audiences, the authors can decide which content artifact such as reports, dashboards, etc. should be shared with specific audience groups within an App using a single workspace. This allows fine-grained access permissions for the App consumers who can consume various artifacts in the App based on their group permissions and minimizes operational overhead for the App authors.

18. The **Ready to publish** dialog appears, select **Publish**.

19. Once the App is published, a success dialog will appear.

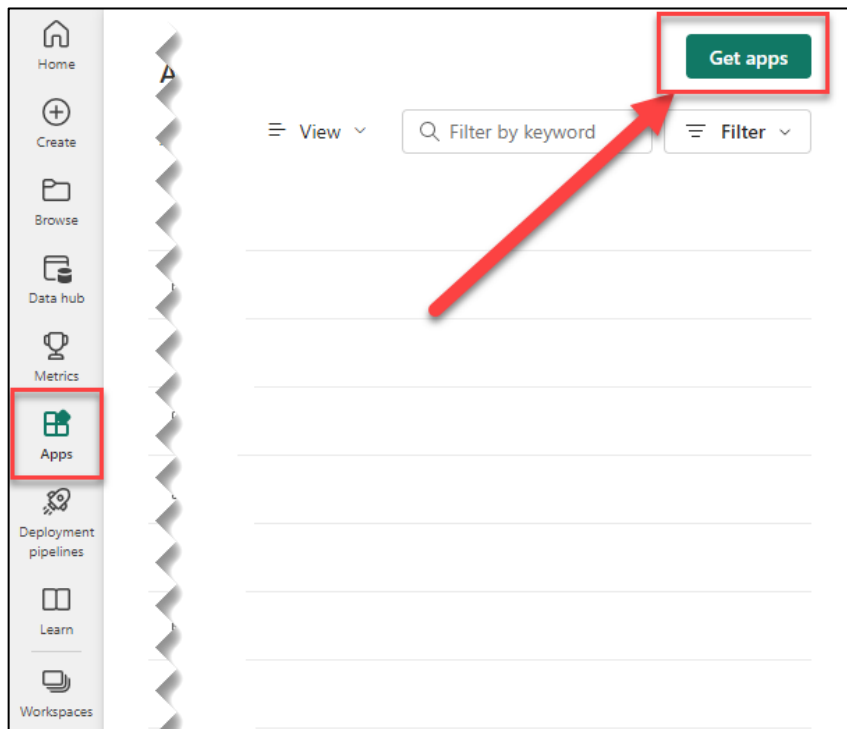


20. In the **Successfully published** dialog box, you can copy the link to the App and share it with individuals via email. Select the **Close** button.



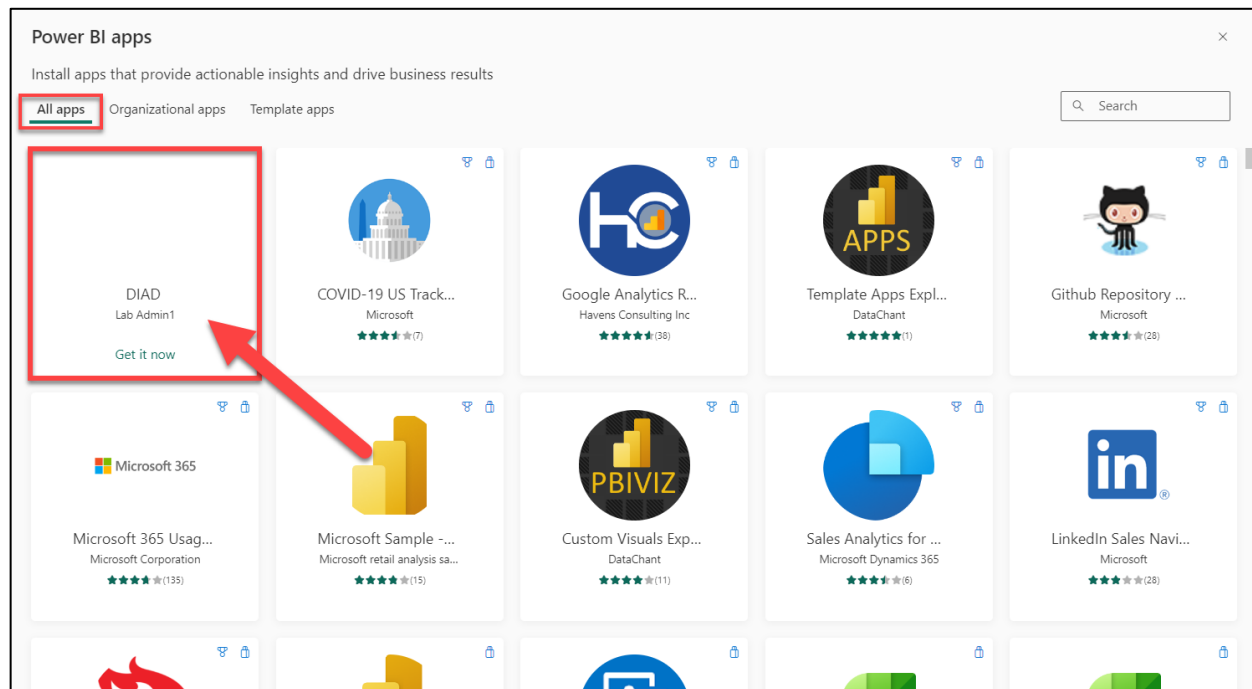
A better way for report viewers to consume the App is by logging onto Power BI Service and registering the App. Let's impersonate a report viewer:

21. From the navigation pane to the left, select **Apps**.
22. Then, select **Get apps**.

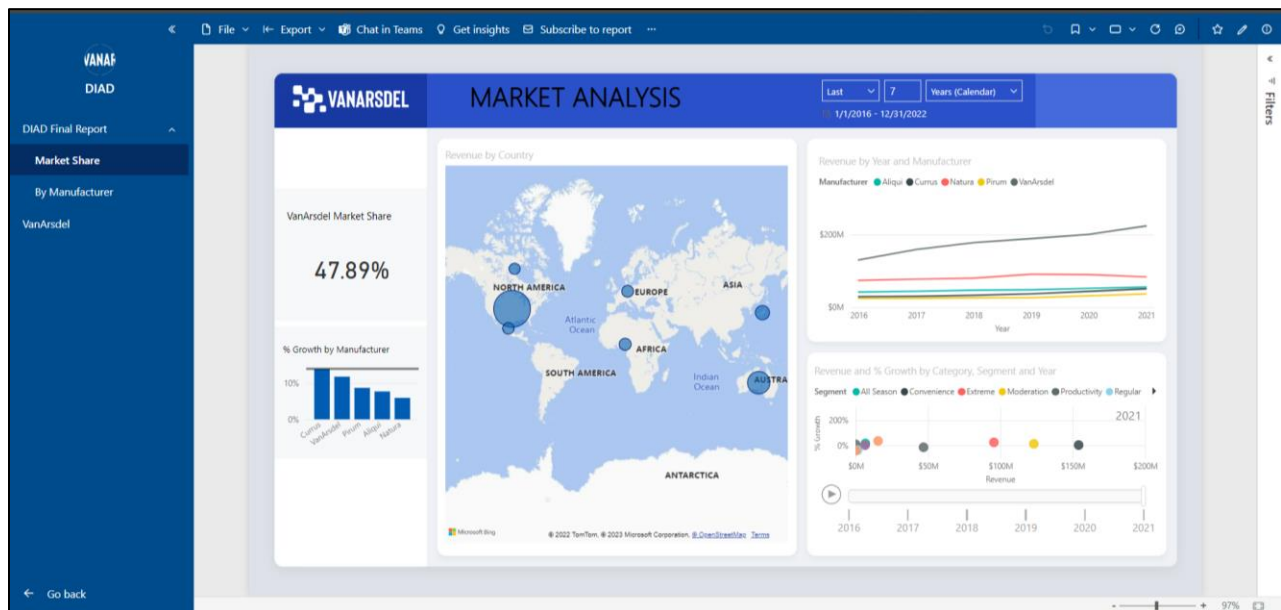


23. The **Power BI apps** dialog box opens. You will notice the **DIAD** app is listed under the **All apps** tab. Select the newly added **DIAD** app.

This is a one-time registration. Going forward, when you select **Apps** in the left pane, you will see the **DIAD** app in the list of Apps you have registered.



Your newly created DIAD app should look similar to the one in the figure below:

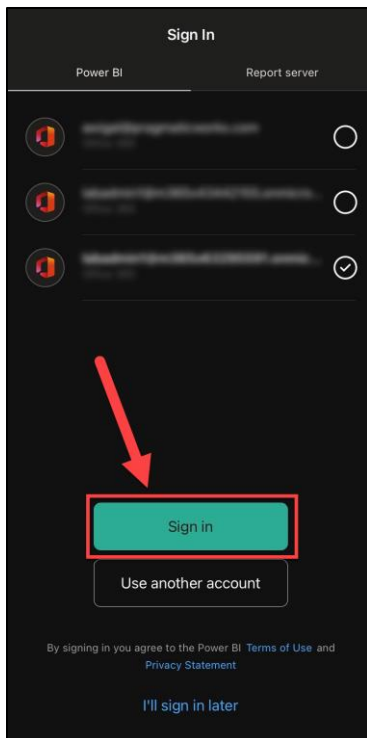


Power BI Mobile – Accessing Report on Mobile Device

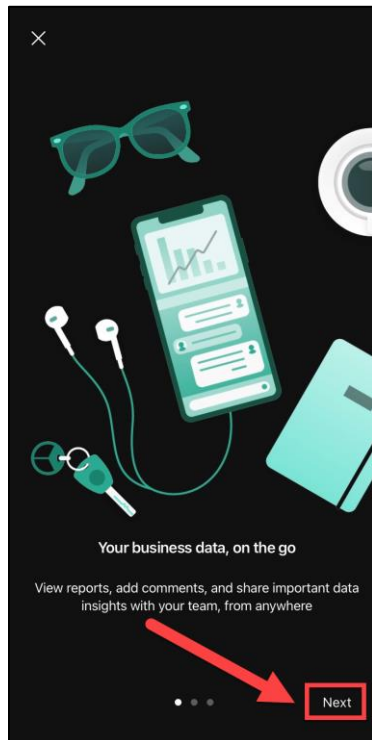
1. Open the **Power BI Mobile app** on your mobile device



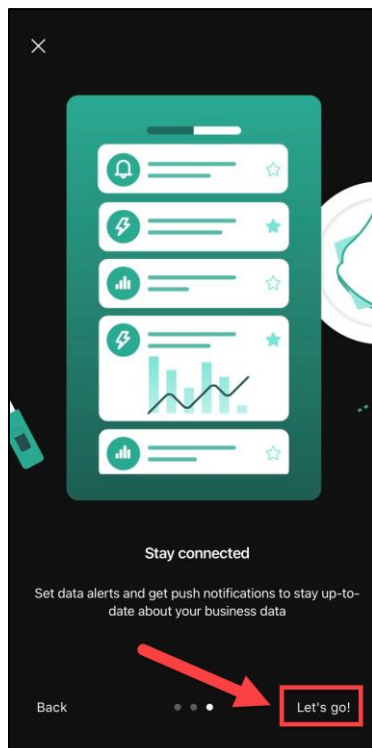
2. Select **Sign in** and follow the steps for entering your credentials.



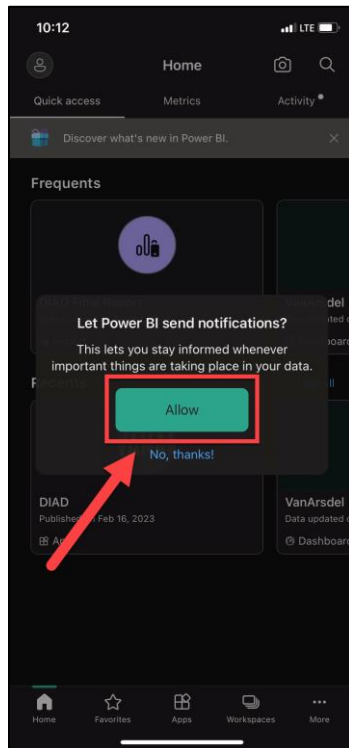
3. Once you have signed in, you will be prompted through a **walk-through of the app**. Select **Next** to continue through the app walk-through.



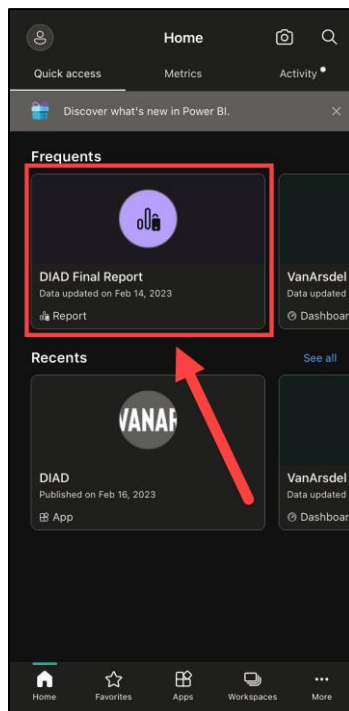
4. On the last page of the walk-through, select **Let's go!** to navigate to the **home** screen of the mobile app.



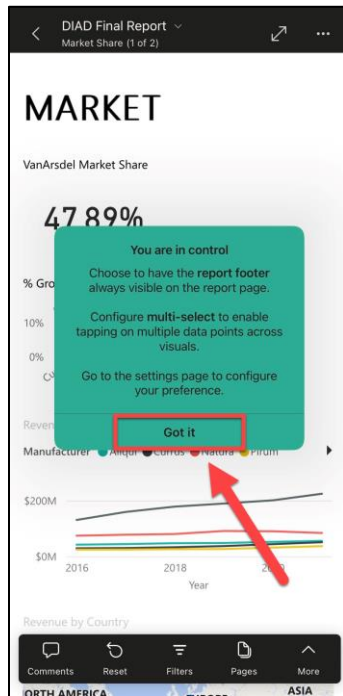
5. A dialog box will appear asking if you want to allow notifications from Power BI on your mobile app. Select **Allow** or **No, thanks!**



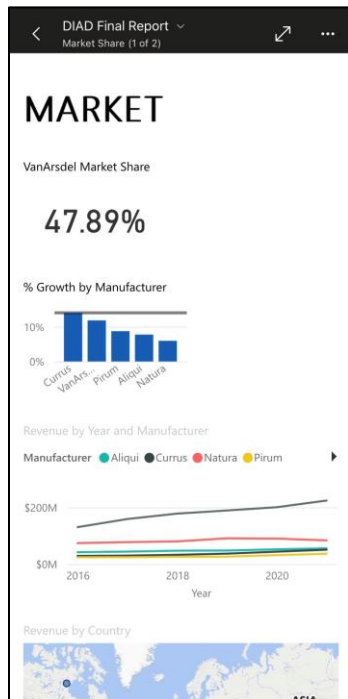
6. Once you have made the choice to allow notifications or not, you will see the main home screen of the Power BI mobile app. Under the **Frequents** section, select the **DIAD Final Report** (report).



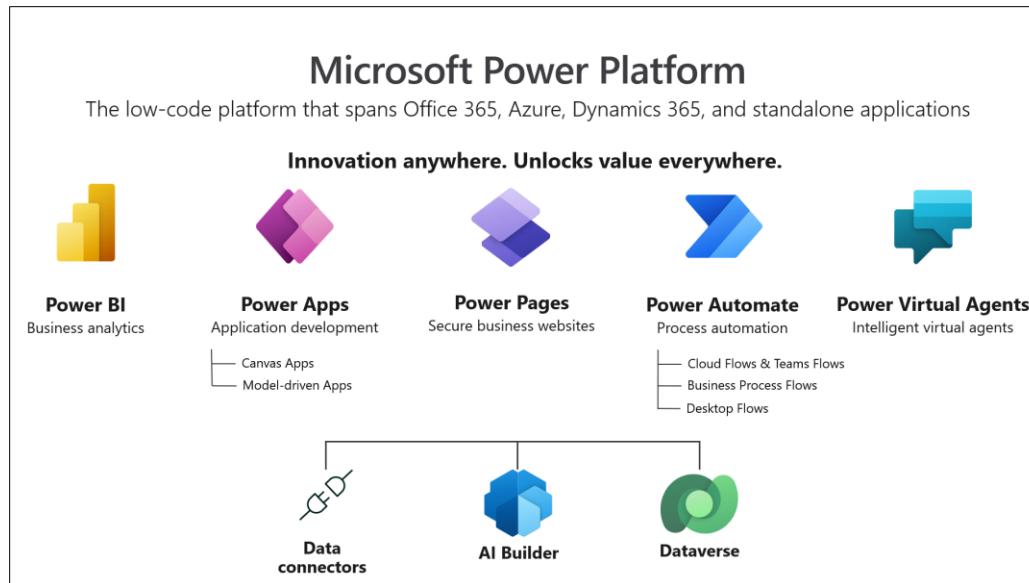
- Once you have selected the DIAD Final Report, a **You are in control** dialog box will appear. Select **Got it**.



- Lastly, you should see the mobile view you published from Power BI Desktop.



Further Exploration – Power Platform

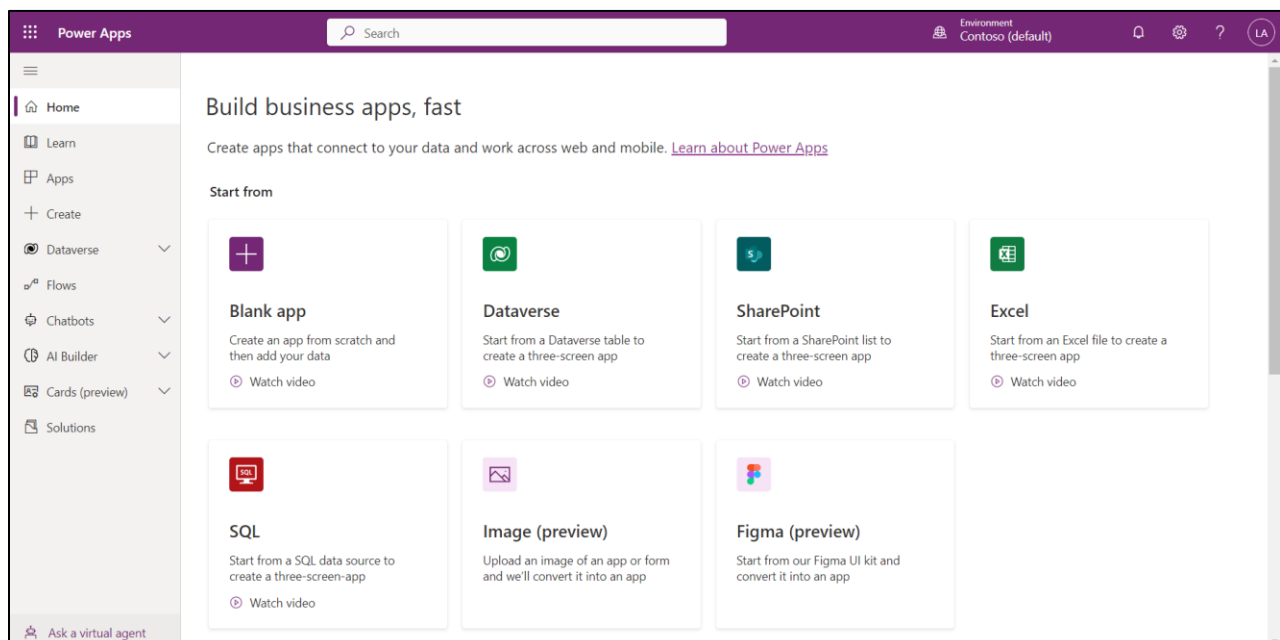


Power Apps

[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/>

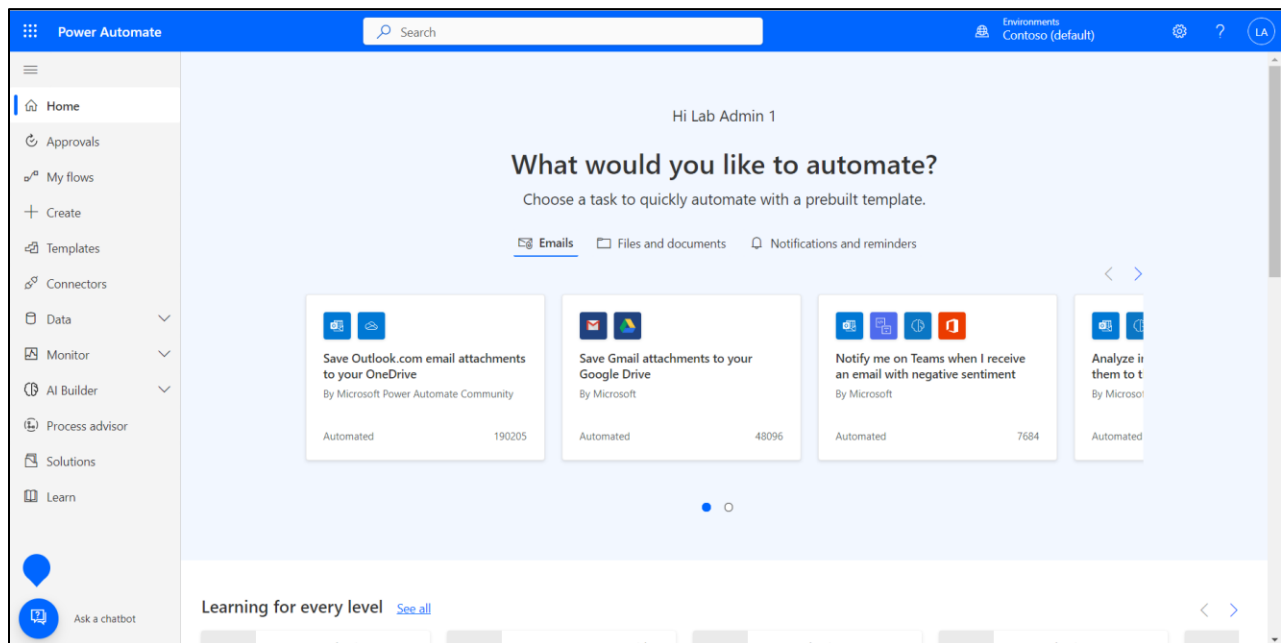
[Microsoft Power Platform: Learning Resources](#) | [Microsoft Power Apps](#)

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](#)

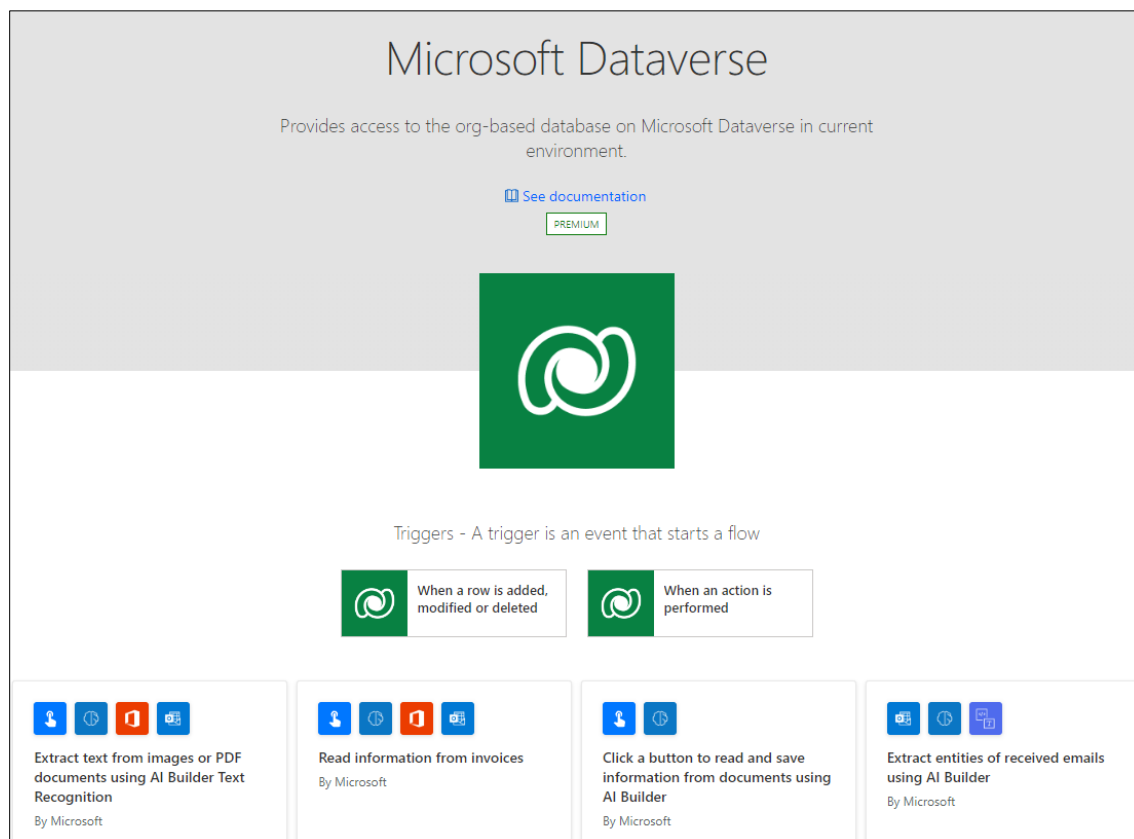
Dataverse

[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 Dynamic 365 applications.

Why use Dataverse?

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

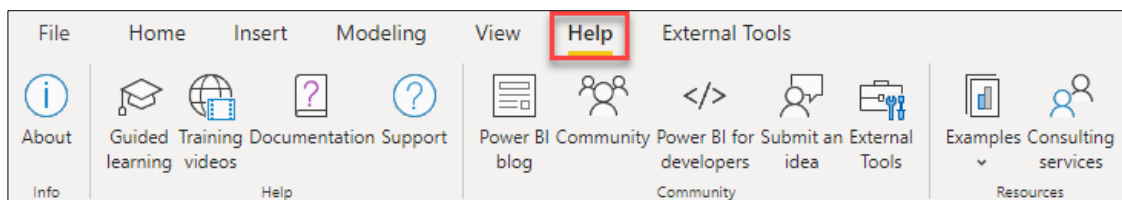


Additional Dataverse training

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

References

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



Here are a few more resources 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>
- 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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