



Getting started with Power BI

Presented by Heather Masters,

Microsoft Lead CSA

Modern Work

State and Local Government

About me

Heather Masters

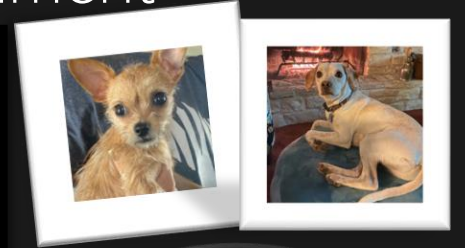
Cloud Solution Architect for Modern Work, State and Local Government

Career:

- Former Database Analyst and ERP/CRM Manager using SQL/Crystal Reports/.Net
- Began SharePoint career in 2008 and have worked on all on premise versions and SharePoint Online
- I specialize in Communication & Collaboration Teams, SharePoint, Viva, and Power BI
- Have a passion for Employee Engagement and Analytics

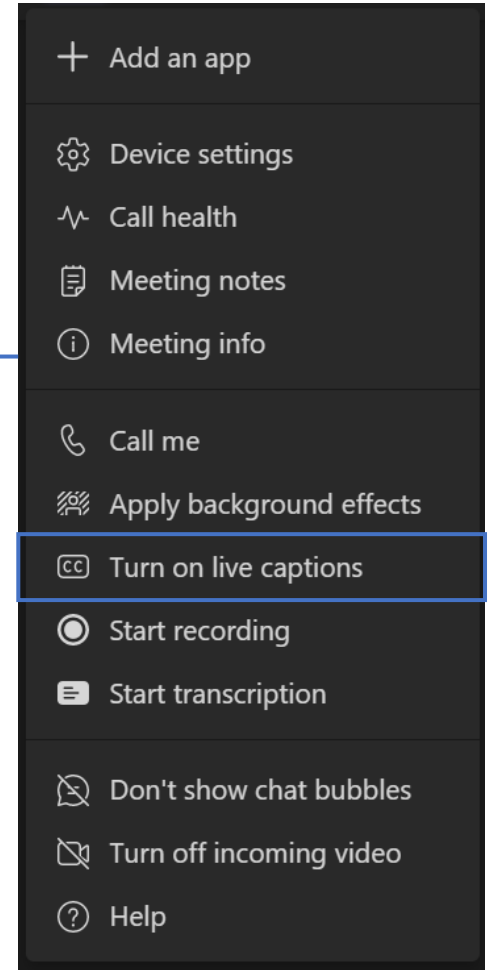
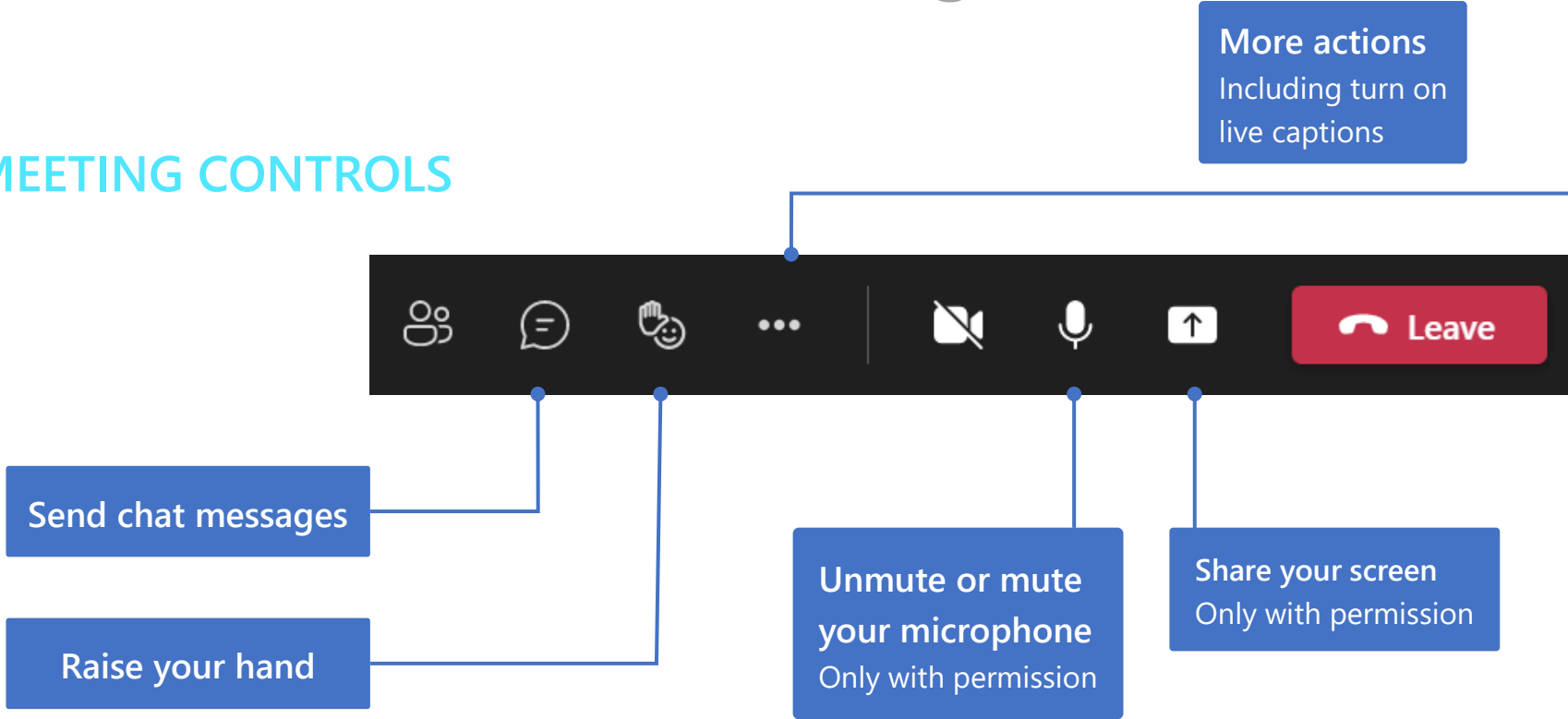
Life:

- I live in Austin, Texas, but originally from the Texas coast
- Love exploring new beaches, most recently in Belize
- I have 4 small dogs...2 Corgis and 2 Rescue mutts

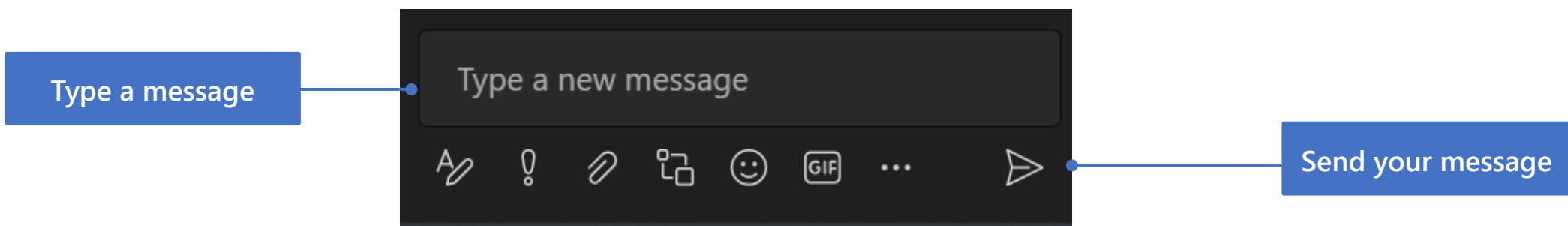


Microsoft Teams meetings

MEETING CONTROLS



CHAT OPTIONS



“Everyone should have a
personal **Power BI Dashboard**.
Data culture at your fingertips.”

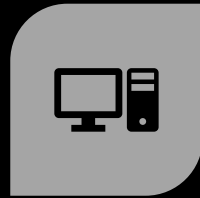
- Satya Nadella



Agenda



GETTING STARTED
WITH POWER BI



INSTALL POWER BI
DESKTOP



VISUALIZE SHAREPOINT
LIST DATA



CREATE REPORT



PUBLISH REPORT



UNDERSTANDING
WORKSPACES

Getting Started

In this section, you'll learn how to:

Install Power BI Desktop

Connect SharePoint Data to Power BI

Create and modify a simple visualization

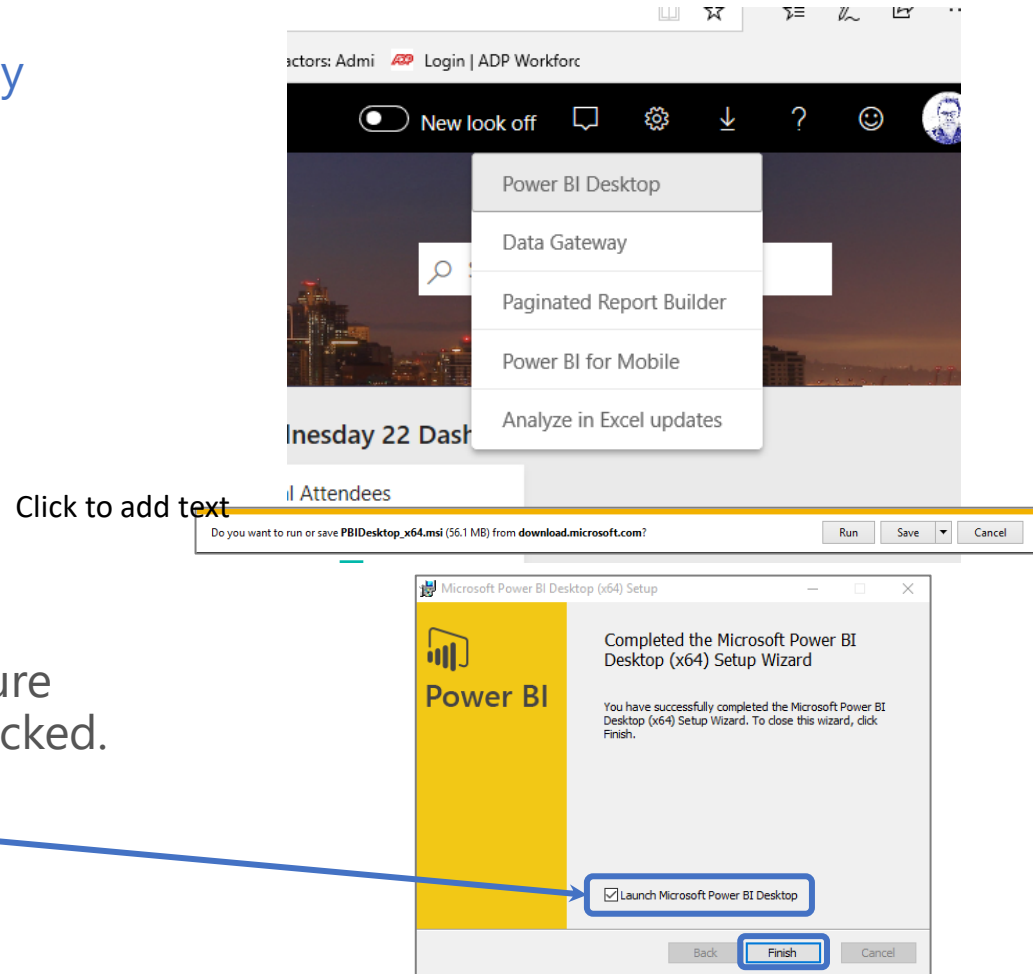
Save your report and publish to the Power BI service



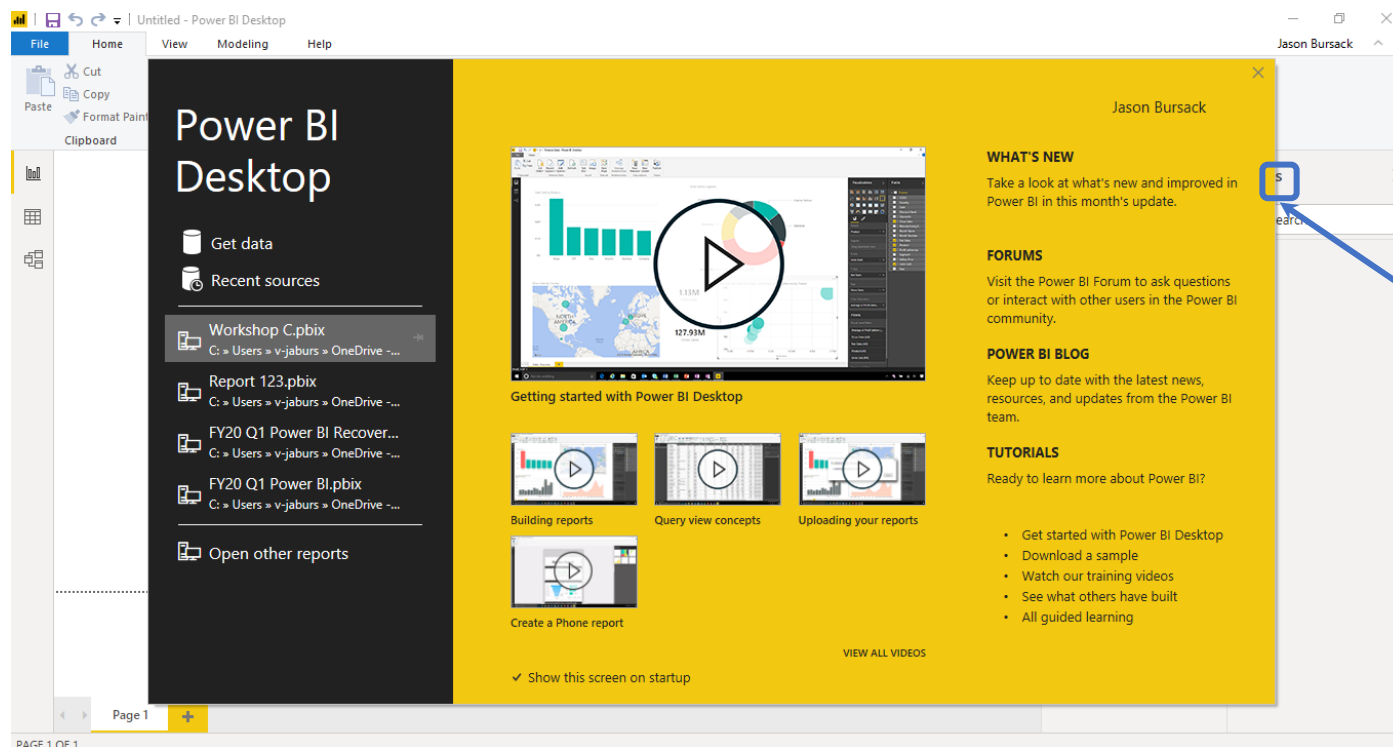
Install Power BI Desktop

Note: Skip the steps below if you have already installed the application.

1. Go to <http://app.powerbi.com>
If prompted, sign in with your @microsoft.com e-mail
 2. From the top-right menu, click on the downward arrow icon.
 3. Click **Power BI Desktop**.
 4. Click **Run** in the pop-up to install the application.
 5. Follow the steps in the installation wizard.
 6. When the installation is complete make sure **Launch Microsoft Power BI Desktop** is checked.
 7. Click **Finish**.
- Power BI Desktop will automatically launch.



Install Power BI Desktop



- A large yellow and black **"Getting Started"** window with links to videos and other resources to help you learn all of the rich features of Power BI Desktop may appear.
- If this black and yellow window appears, click **x** in the top right corner to close it.
- You can explore this information on your own later.

Power BI Terms

Dashboard

- A dashboard is a single page that shows visualizations of the most important elements from one or more reports.

Report

- A report is made up of one or more pages. In most cases, each page is designed to tell a story and that story is told with visualizations, text, shapes, and images.

App

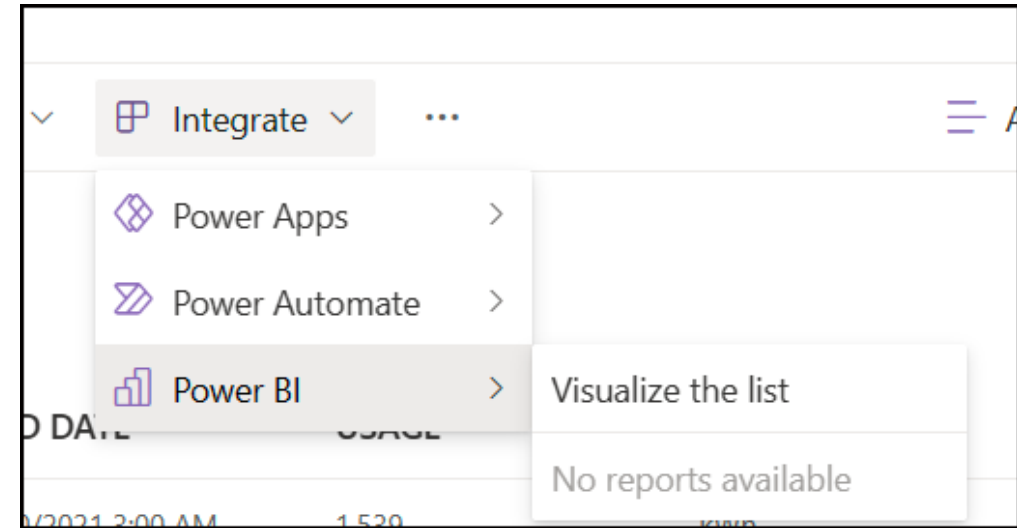
- Packaged content with managed permissions for different audiences.
Containing Reports and Dashboards

Visualize SharePoint List Data

Navigate to
SharePoint
List

Integrate >
Power BI >
Visualize the
list

Create
Report



Create Report

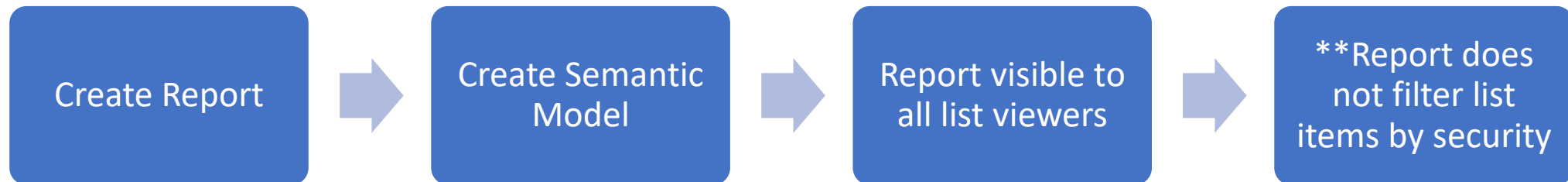
Create a Power BI report and semantic model from this SharePoint list? ✕

If you continue, data you have access to in the report and associated semantic model will be visible to anyone who can view the list. This remains true for individual list items that have item-level permissions that only you have access to.

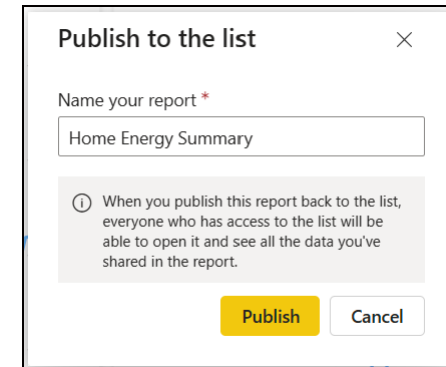
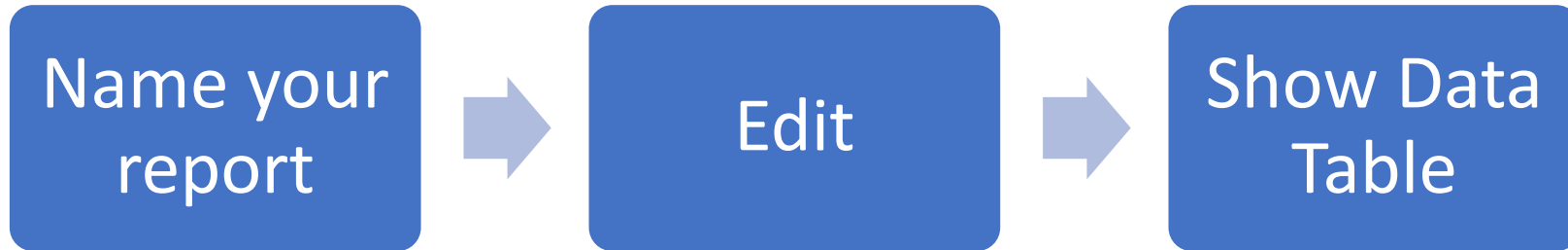
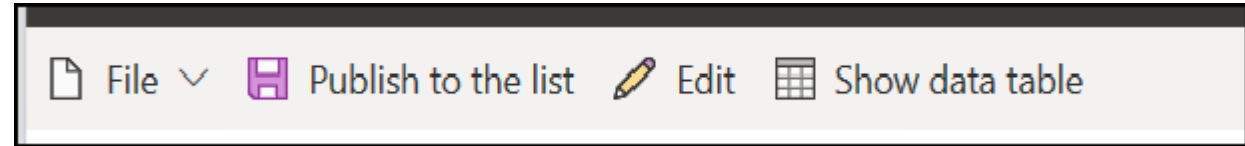
If a semantic model already exists for the SharePoint list, it will automatically be reused.

If you encounter this message without first selecting **Visualize the list** on a SharePoint list, select **Cancel**.

Create a report **Cancel**



Publish Report



- Edit your report to have access to more visualizations, change visualizations, change fields in the report
- Report lives within the list and cannot be accessed through Power BI Service or Desktop
- It also cannot be embedded in a SharePoint page or published elsewhere

If you need more from your SharePoint List Data

Go to Power BI Desktop

- Connect to SharePoint Online List as Datasource

Full control over

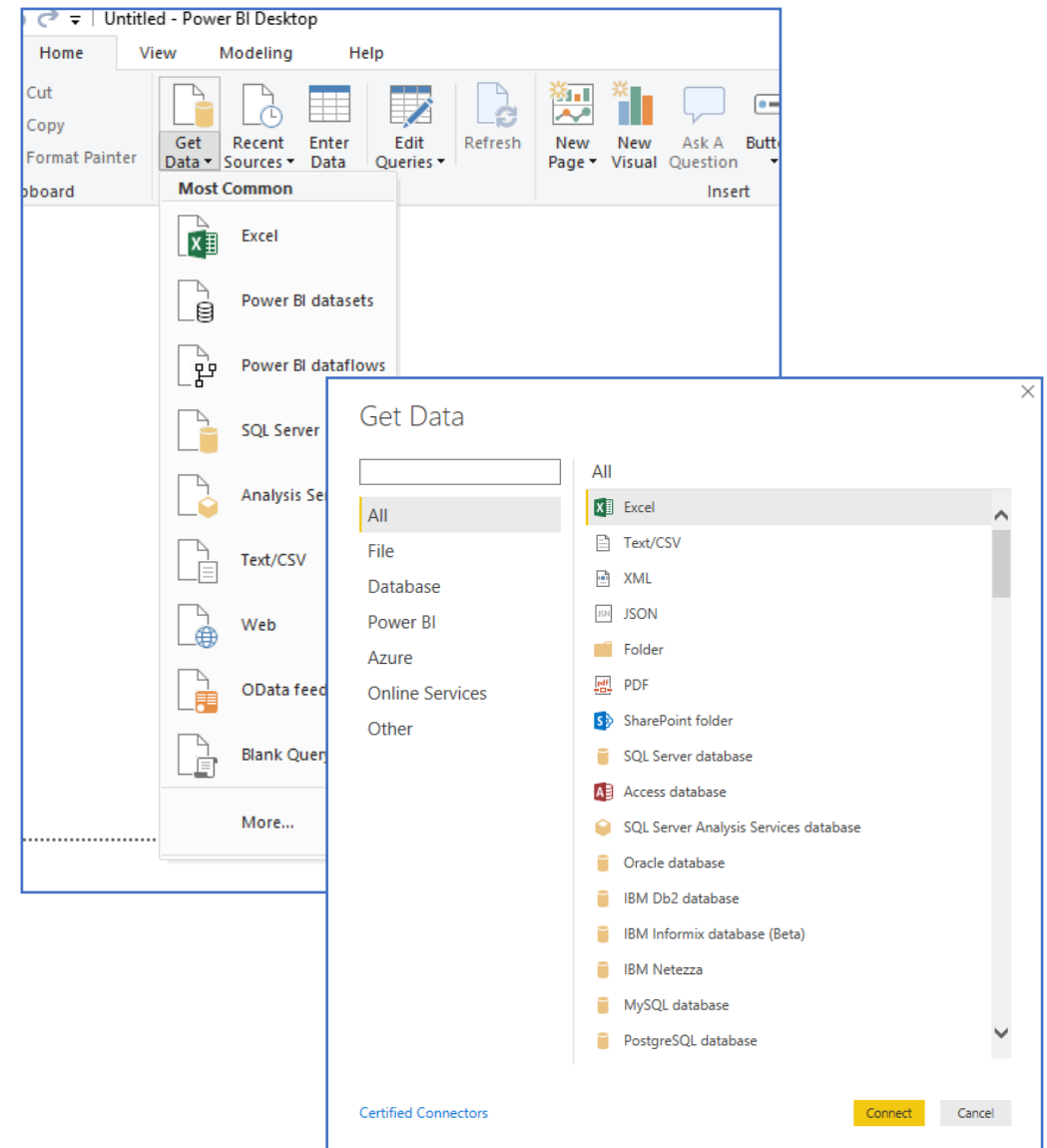
- Visualizations
- Permissions
- Embedding

Import data

After installing Power BI and closing the Getting Started window, you will see the blank canvas of the Power BI Desktop application.

- If you are not on the blank canvas, navigate to or launch Power BI Desktop now.
- In the main ribbon menu, click the **Get Data** icon (not the arrow pointing downward.)

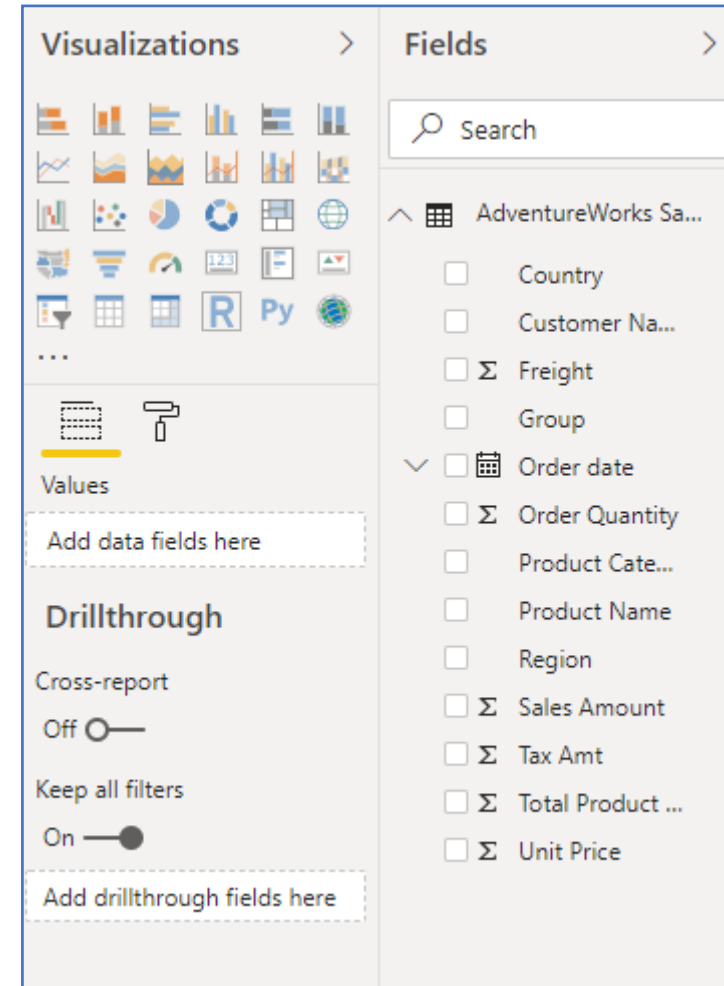
Power BI Desktop will open the data.



Locate data in the field list

Power BI Desktop loads the data, and shows the imported object, our table, in the right navigation menu, under **Fields**.

Note: a table can have many fields. Fields are usually the table's columns.

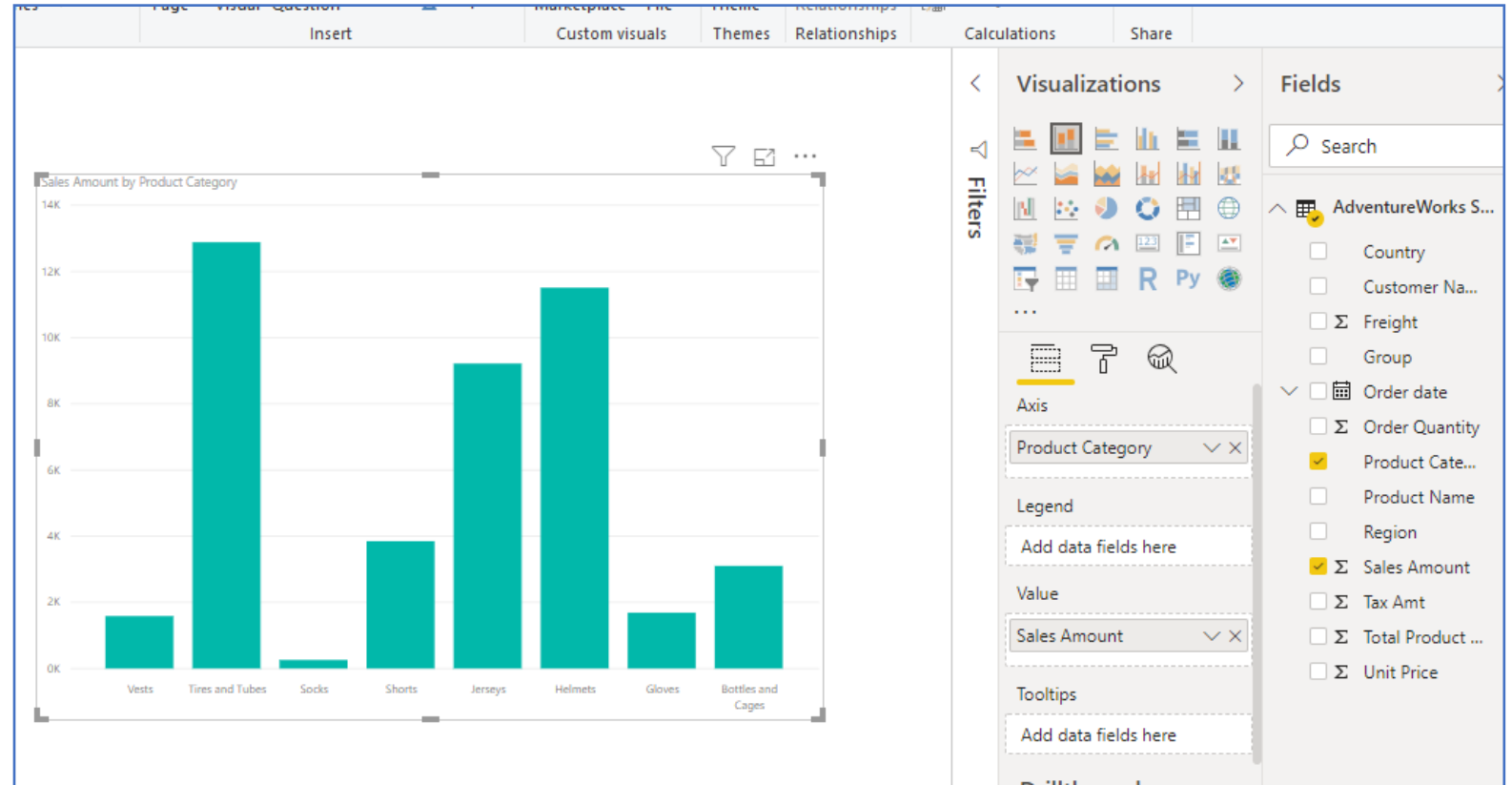


Create a visualization

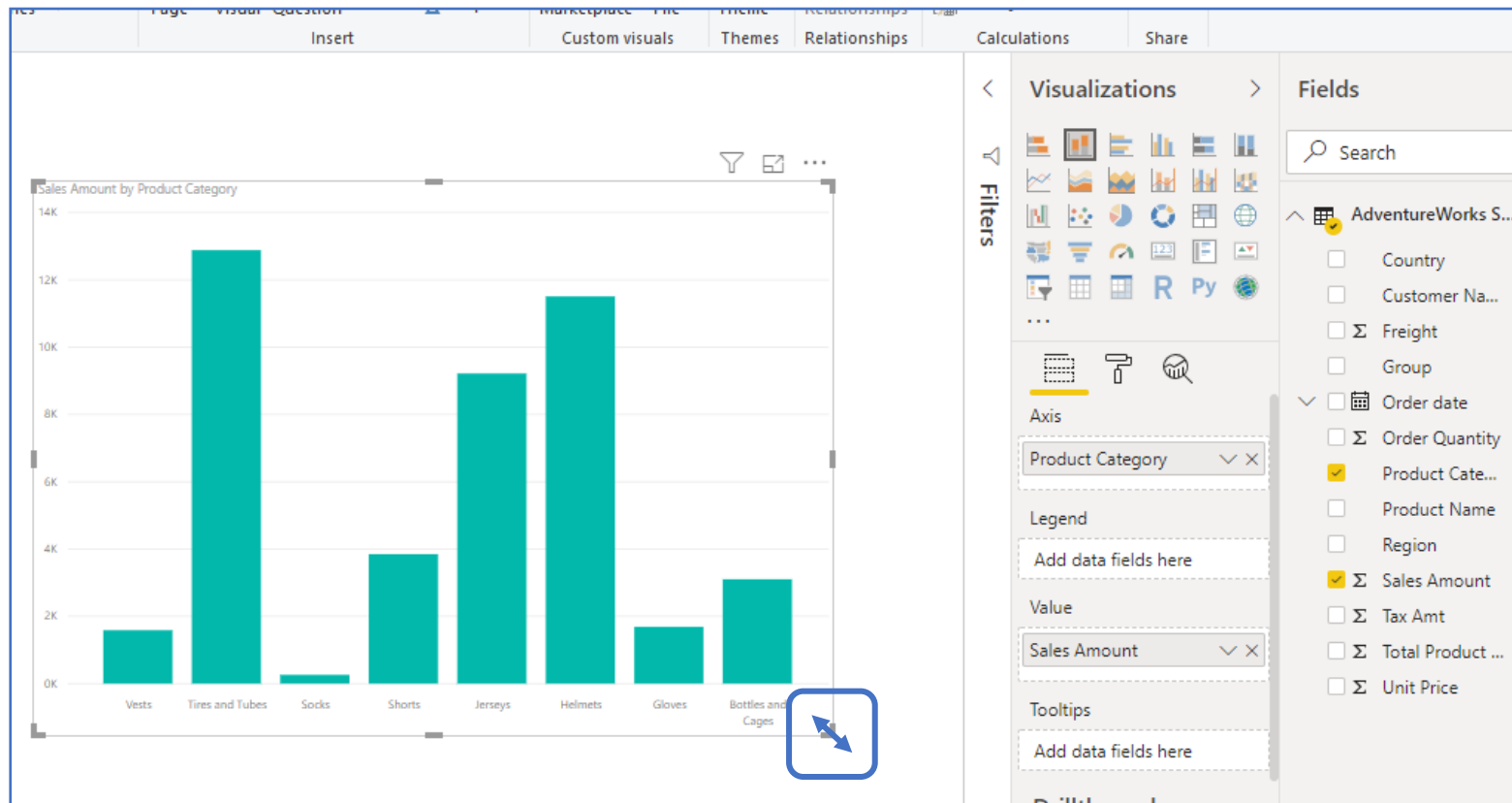
Now, let's create a visualization.

Drag fields and drop them in the empty area of the canvas.

A chart will appear.



Modify a visualization

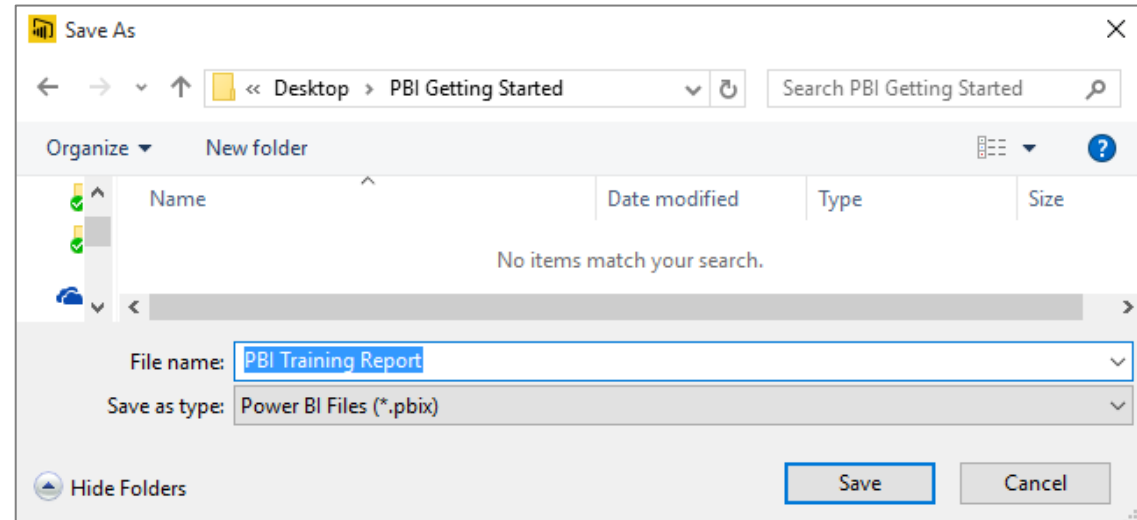


Note: handles can be used on the bar chart visualization edges to resize it for better viewing.

Save the report

We have successfully imported data and created a report with a visualization.

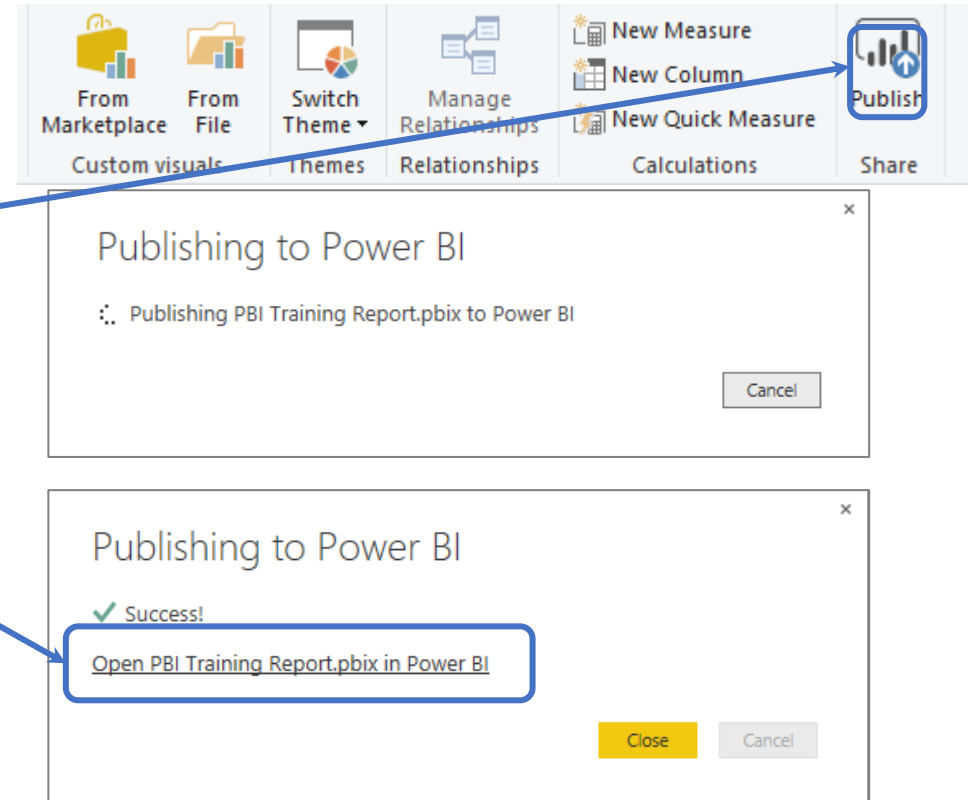
Let's save the report.



Publish to the Power BI service

Let's publish the report and its associated dataset in the Power BI service (<http://app.powerbi.com>):

- In the ribbon menu **Home**, click the **Publish** button.
If prompted, sign in with your @microsoft.com e-mail.
- When the publishing is complete click the link in the pop-up window to view the report you just published.



Finding the report in Power BI

In the left menu you will see your list of dashboards, reports and datasets.

The screenshot displays the Microsoft Power BI web interface. At the top, there is a browser address bar with several open tabs including 'Azure ML', 'NCS Timesheet Login', 'Approved fictitious n...', 'Demo SharePoint', 'Demo Com Site', 'SuccessFactors LMS /', 'SuccessFactors: Admi', and 'Login | ADP Workforc'. Below the browser bar is the Power BI navigation bar, which includes the Microsoft logo, 'Power BI', a user profile icon, and the path 'My workspace > Workshop C'. To the right of the navigation bar are various utility icons such as 'New look off', a share icon, a comment icon, a settings gear, a download arrow, a help question mark, a smiley face, and a user profile picture. A secondary navigation bar below the main one contains menu items: 'File', 'View', 'Edit report', 'E...', 'R...', 'Pin a li...', 'Reset to...', 'Co...', 'Bo...', 'Usage ...', 'View ...', 'F...', 'Su...', and 'S...'. On the left side, a vertical navigation menu is visible with options: 'Home', 'Favorites', 'Recent', 'Apps', 'Shared with me', 'Workspaces', and 'My workspace'. The main content area features a world map titled 'Sales Amount by Country'. The map uses green circles of varying sizes to represent sales data for different regions: North America, Europe, South America, Africa, Asia, and Australia. The map is set against a light blue background with labels for the Atlantic Ocean and Indian Ocean. A 'Filters' panel is partially visible on the right edge of the map area. At the bottom left of the map is the Bing logo, and at the bottom right is a copyright notice: '© 2019 HERE. © 2019 Microsoft Corporation. | Terms'.

Navigating the Power BI Service

Power BI Home

The ultimate Power BI, Microsoft Fabric, SQL & AI learning event! Join us in Las Vegas from March 26-28, 2024. Use code MSCUST for a \$100 discount. Register now Dismiss 1 more Close All

New items saved to: My workspace

Recommended

- Explore basic Power BI concepts**
Getting started with Power BI
- Explore the 100 most useful productivity ti...**
Explore this data story
- Cancer statistics in the USA**
Explore this data story
- Intro—What is Power BI?**
Getting started with Power BI

Open Open Open Open

Recent Favorites My apps

Filter by keyword Filter



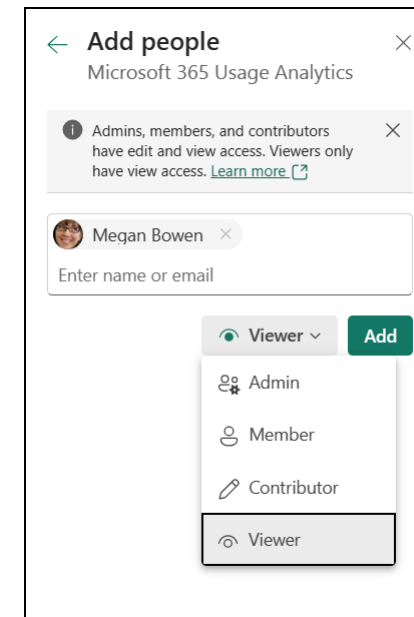
Workspace Contents

Workspaces provide access to multiple resources

- Users and Groups can be assigned workspace roles

Contents of a Workspace

- Datasets – **Now Semantic Models**
- Dataflows
- Datamarts
- Reports
- Paginated Reports
- Metrics
- Dashboards



Understanding Workspaces

My Workspace

- Think of this as your OneDrive for Power BI. It can be shared, but is not meant for collaboration

Workspaces

- Shared and Governed
- Available for both Premium and Pro Licenses
- Premium Capacity has more computing power and is available to all users in your tenant with or without licensing (with permission)

Practice

[Create reports and dashboards in Power BI - documentation - Power BI | Microsoft Learn](#)

Download the Contoso Sales Sample and complete the tutorial

- [Learn DAX basics in Power BI Desktop - Power BI | Microsoft Learn](#)

