User Guide – Office 365 Power BI

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**Introduction**

Microsoft Power BI helps you stay up to date with the information that matters to you. With Power BI, dashboards help you keep a finger on the pulse of your business. Your dashboards display tiles that you can click to explore further with reports. Connect to multiple datasets to bring all of the relevant data together in one place.

1. navigation pane
2. dashboard with tiles
3. Q&A question box
4. help and feedback buttons
5. dashboard title
6. Office 365 app launcher
7. Power BI home
Power BI concepts

The 3 major building blocks of Power BI are: **dashboards**, **reports**, and **datasets**. You can't have dashboards or reports without data (well, you can have empty dashboards and empty reports, but they're not very useful until they have data.)

Datasets

A dataset is something that you import or connect to. Use Power BI to bring all of your data together. See it all in one place and access it from all of your devices.

In the navigation pane, the datasets you've connected to are listed under the **Datasets** heading. Each listed dataset represents a single source of data, for example, an Excel workbook on OneDrive, or an on-premises SSAS tabular dataset, or a Salesforce dataset. There are many different data sources supported, and we’re adding new ones all the time.

To connect to a dataset, select **Get Data** (at the bottom of the navigation pane) or select the plus icon (next to the **Datasets** heading).
Reports

A Power BI report is one or more pages of visualizations (charts and graphs). Reports can be created from scratch within Power BI, can be imported with dashboards that colleagues share with you, or can be created for you when you connect to datasets from Excel, Power BI Desktop, databases, and SaaS applications and content packs.
Dashboards

A dashboard is something you create or something a colleague creates and shares with you. It is a single canvas that contains one or more tiles. Each tile displays a single visualization that was created from the data in one of the underlying dataset(s).

- **A dashboard can be created from scratch** -- create a new blank dashboard and then get some data.
- **You, or a colleague, can create a dashboard and share it** - when you accept the invitation, the shared dashboard (and associated report and dataset) is added to your navigation pane.
- **Sometimes dashboards are imported with the dataset or are created as you connect to the dataset.**
Navigation Pane

- My Workspace
  - Filter content
- Dashboards
  - Retail Analysis Sample
- Reports
  - Retail Analysis Sample
- Datasets
  - Retail Analysis Sample

↑ Get Data
• Click **Get Data** to add datasets to Power BI.
• Use the filter to limit what is shown on the navigation pane.
• Click the plus icon \( + \) to create a new dashboard or get a new dataset.
• The listed **Dashboards, Reports, and Datasets** are available for you to use. Shared dashboards are read-only and display a lock icon \( \text{🔒} \).
• Dashboard, report, and dataset names usually match the name of the underlying dataset file -- but you can rename them.
• Right-click a dashboard, report or dataset to display the context-sensitive menu.

![Dashboard, Report, and Dataset Navigation](image)

• **Single-click**
  - a heading to collapse or expand it
  - a dashboard to display it
  - a report to open it in Reading View
  - a dataset to explore it
Dashboard tiles

Dashboards are composed of visualization tiles. Tiles are created either in report Editing View or Q&A. The tiles that appear on a dashboard were specifically put there by a report creator/owner. The act of adding a tile to a dashboard is called pinning.

Q&A question box

One way to explore your data is to ask a question and let Power BI Q&A give you an answer, in the form of visualization.

- Q&A cannot be used to add content to a report
- Only to add content, in the form of tiles, to dashboards.

Q&A looks for an answer in the dataset(s) connected to the dashboard. A connected dataset is one that has at least one tile pinned to that dashboard.
Help and feedback buttons

The icons in the top right corner are your resources for settings, downloads, getting help, and providing feedback to the Power BI team.

Office 365 app launcher

The app launcher is designed to help you get to your Office 365 apps.

Power BI home

Click to return to the dashboard that you viewed most recently.
Get data

1. Select **Get Data** at the bottom of the left navigation pane.

2. Select **Files**.

   **Files**
   
   Bring in your reports, workbooks, or data from Excel, Power BI Desktop or CSV files.
3. Select **Local File**, browse to the file on your computer, and choose **Open**.
4. Power BI uploads the CSV file and adds it as a new dataset (the yellow asterisk indicates a new item). Since we did not already have a dashboard, Power BI also created a new dashboard for us. In the left navigation pane, the new dashboard is listed under the **Dashboards** heading, and the new dataset appears under the **Datasets** heading.
Explore your dataset

1. Select the dataset image on the dashboard to explore the data you just connected to.
2. In the Fields list on the right side of the page, select fields to build visualization. Click the checkbox beside **Gross Sales** and then **Date**.
3. Power BI analyzes the data and creates a visual. If you selected **Date** first, you'll see a table. If you selected **Gross Sales** first, you'll see a chart. Switch to a different way of displaying your data. Try changing to a line chart by selecting the line chart option.
4. When you have a visualization you want on your dashboard, hover over the visualization and select the **Pin** icon. When you pin this visualization, it will be stored on your dashboard so you can track the latest value at a glance.
5. Because this is a new report, you need to save it before you can pin a visualization from it to the dashboard, as a tile. Give your report a name (e.g., Sales Over Time) and select **Save and Continue**.

![Save Your Report](image)

The new report appears in the navigation pane under the Reports heading.

6. The new report appears in the navigation pane under the Reports heading.

![Pin to Dashboard](image)

- **Existing dashboard**: select the name of the dashboard from the dropdown.
- **New dashboard**: type the name of the new dashboard.
7. Select **Pin**.

![Pin to Dashboard dialog box](image)

A Success message (near the top right corner) lets you know the visualization was added, as a tile, to your dashboard.

![Pinned to Dashboard message](image)

8. Back on your dashboard, you can see your new visualization. Make your dashboard even better by renaming, resizing, linking, and repositioning tiles.

![Dashboard with pinned visualization](image)
9. For a quick exploration of your data, try asking a question in the Q&A box. For example, try typing "what segment had the most revenue".

10. Select the pin icon to show this visualization on your dashboard too.
11. Pin the visualization to the Financial Sample dashboard.
Reports in Power BI

Dashboards, reports, and datasets are at the heart of Power BI. A report is a multi-perspective view into your data, with visualizations that represent different findings and insights from that data. A report may have a single visualization or pages full of visualizations.

Create a new Power BI report

There are different ways to create a new report:

- From a dataset.
- From an existing report
Create a new report from a dataset

1. Open a report.
2. From the File menu, select Save As.

3. Type a name for the new report and select Save.

![Image of Power BI interface with Save As option highlighted]

A Success message lets you know that the new report was saved to Power BI.
4. Back in your Power BI navigation pane, select the new report to open it.

Add a page to a Power BI report

- Select the yellow plus icon and then type a new name for the page.
Delete a page from a Power BI report

- Hover over the tab of the page to delete and click the X (in the top right corner). Sometimes the X is hard to see.

Rename a report in Power BI

To rename a report

1. In the navigation pane, right-click the report and select Rename.

2. Type the new name.

To rename a report that is part of an organizational content pack

1. In the navigation pane, right-click the report and select Personalize > Save.

2. In the navigation pane, right-click the report and select Rename.
To save a report

1. If the file name in the top navigation bar has an asterisk next to it, you know the report has changed.

2. Select **FILE > Save** or **Save As**.
   If this is a new report, give it a descriptive name. That name will appear under **Reports** in the navigation pane.
To delete a report

1. In the left navigation pane, right-click the report to delete and select **Delete**.

   ![Delete button](image)

2. Confirm the deletion.
Dashboards in Power BI

Dashboards, reports, and datasets are at the heart of Power BI. Create personalized dashboards to monitor your most important data, at a glance. A dashboard combines on-premises and cloud-born data in a single pane of glass, providing a consolidated view across the organization regardless of where the data lives. Each metric, or insight, is displayed on the dashboard as a tile.

Create an empty dashboard

1. Click the plus sign next to the Dashboards heading.

2. Type a name for your new dashboard.
3. Connect to at least one dataset. You can use data from reports or datasets already in your Power BI, or you can add a new data source.

**Share (and unshare) a dashboard from Power BI**

1. Open the dashboard to share and select **Share Dashboard**.

2. To share with colleagues, select **Invite** and type the colleagues' email addresses in the top box and, optionally, modify the message.
3. To allow your colleagues to reshare your dashboard with others, check **Allow recipients to share your dashboard** (the checkbox is in the lower-right corner).

4. Select **Share**.

   Your colleagues will receive an email invitation with a link to the shared dashboard. Clicking the link adds the dashboard to their Power BI. If they haven't yet signed up for Power BI, they will be redirected to instructions to do so.

5. To see who the dashboard is shared with, select **Shared With**.

   ![Screen shot of shared dashboard settings](image-url)
Delete or remove a dashboard

Dashboards can be deleted and removed. Deleting and removing the dashboard does not delete the underlying dataset or any reports associated with that dashboard.

- If you are the owner of the dashboard, you can delete it. If you’ve shared the dashboard with colleagues, deleting does not remove the dashboard from their Power BI workspace.
- If a dashboard is shared with you and you no longer want to see it, you can remove it. Removing a dashboard does not remove it from anyone else’s Power BI workspace.
- If a dashboard is part of an organizational content pack, the only way to delete it is to delete the associated dataset.

To delete a dashboard

1. In the navigation pane, right-click the dashboard to delete.

2. Click **Delete**. Deleting the dashboard does not delete the underlying dataset or any reports associated with that dashboard.
To remove a shared dashboard

A sharing icon tells you that the dashboard is being shared with you. Shared dashboards are read-only and can't be deleted -- only removed. To remove a dashboard, follow the same steps as deleting, but select Remove.

Supported browsers for Power BI

- Microsoft Edge
- Internet Explorer 11
- Internet Explorer 10
- Chrome desktop latest version
- Safari Mac latest version
- Firefox desktop latest version
Reference links

1. Overview of Office 365 Power BI
   https://support.powerbi.com/knowledgebase/topics/63037-getting-started