

Power BI Service *for business users*



ADVISICON
"Helping You Build a Project Management Culture"



Quick Start Guide

Connect to, visualize, and analyze data with greater speed, efficiency, and understanding. Sign into your Microsoft account & select Power BI from the far left **App launcher** (☰). If you're not registered for Power BI, sign up for a free trial before you begin.

The navigation pane

On the nav pane, your content is organized by Favorites, Recent, Apps, and Shared with me. From here, you can view lists of content and select the heading of the section to open it.

- **Home canvas** will display by default and organize your favorite, frequent, recent, and recommended content, along with apps & workspaces.
- Click ☰ to expand/contract the pane.

Your playground

Content is organized within the context of a workspace.

Import data

Select an Excel or other data file to work with in Power BI.

The screenshot shows the Power BI Service home page. The navigation pane on the left is expanded, showing sections like Home, Favorites, Recent, Create, Datasets, Apps, Shared with me, Learn, Workspaces, and My workspace. The main content area displays a greeting "Good afternoon, Alina" and a table of recent reports. Below the table is a section for "Recommended apps" with various app tiles. At the bottom, there is a "Getting started with Power BI" section with a "Show getting started" link.

Name	Type	Opened	Location	Endorsement	Sensitivity
QB - Project Labor Hours Report	Report	a day ago	My workspace	—	—
Sales activities	Report	11 months ago	My workspace	—	—

Recommended apps: _PWA-DEMO1 Reporting, Advisicon Internal Dashboards, COVID-19 US Tracking Report, Advisicon Project Online Power BI, Advisicon Sales, Azure DevOps Dashboard, Demo - Azure DevOps Dashboard.

Search
By title, name, or keyword

Quickly begin designing a new report

Check out recommended apps

An *app* is a Power BI content type that combines related dashboards and reports, all in one place.

- **Organizational apps** are only available to people in your company.
- **Template apps** are published by Microsoft and the community for any Power BI user to install.

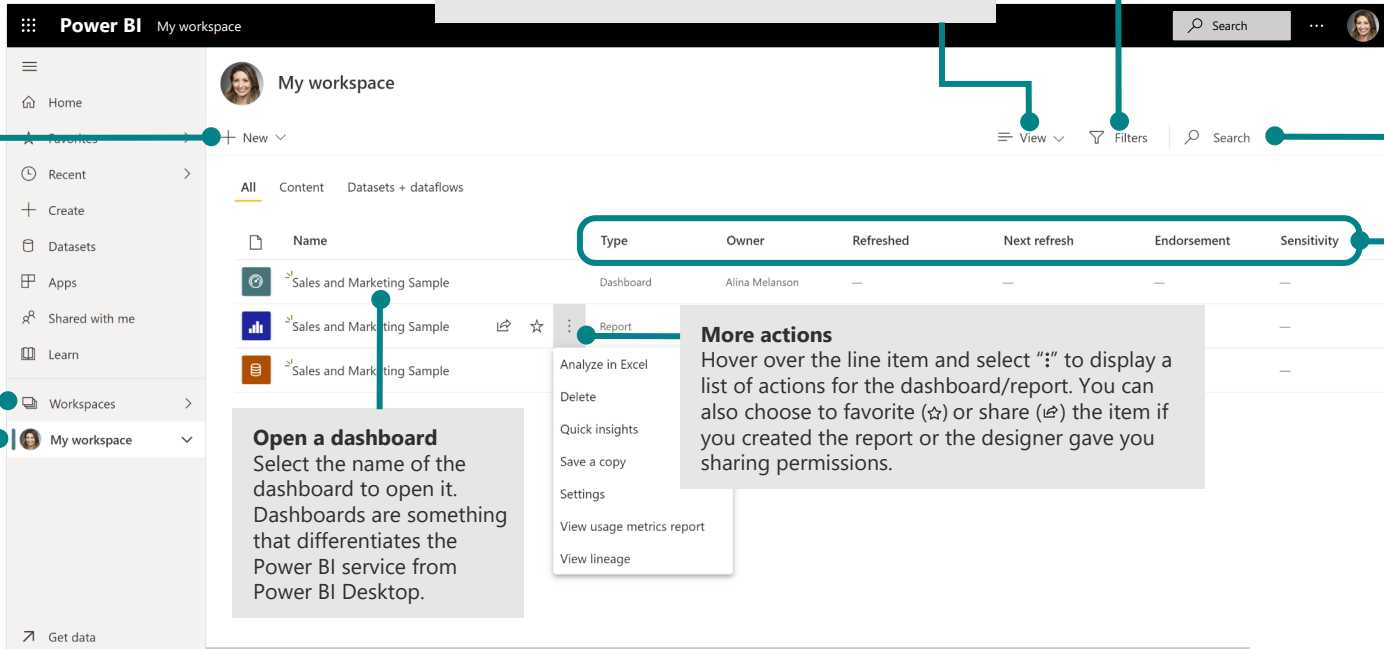
Beginner's tutorials

Everyone new to the Power BI service will have a **Getting started** section.

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Using a Workspace

Within workspaces, the Power BI service separates your content by type: dashboards and reports. In some cases, you'll also have workbooks and datasets. You'll see this organization when you select a **workspace** option in the left nav pane.



Get data
Select the + New button to connect to data, open files, and create new reports dashboards, etc.

Workspaces
Content that *others* have shared with you will appear here.

My workspace stores all the content that you own and create. For many Power BI *business users*, this remains empty since your job doesn't often involve creating new content.

Select a view
The new lineage view lets you see the connection between your dataflows, datasets, reports, dashboards, and their connections to other data sources

Simplify with filters
Narrow down your content to streamline your view.

Search the workspace
Find exactly what you're looking for.

Learn more about the workspace's dashboards and reports
Identify the content owner, last refreshed date, data sensitivity, endorsements (if any), and more.

Open a dashboard
Select the name of the dashboard to open it. Dashboards are something that differentiates the Power BI service from Power BI Desktop.

More actions
Hover over the line item and select "⋮" to display a list of actions for the dashboard/report. You can also choose to favorite (☆) or share (🔗) the item if you created the report or the designer gave you sharing permissions.

Type	Owner	Refreshed	Next refresh	Endorsement	Sensitivity
Dashboard	Alina Melanson	—	—	—	—
Report	—	—	—	—	—

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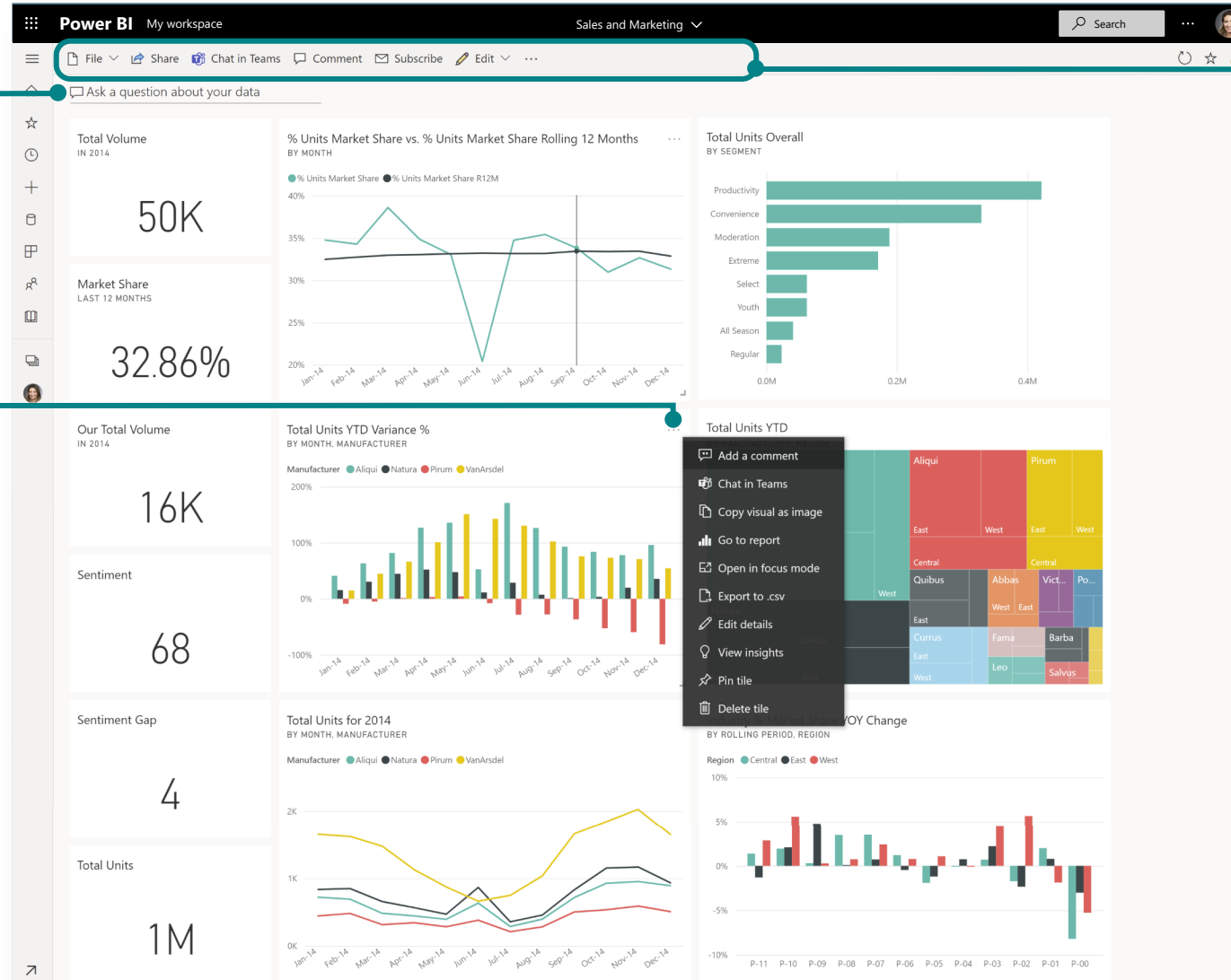
Using a Dashboard

Get data

Select the + New button to connect to data, open files, and create new reports dashboards, etc.

Dashboard tiles

- Hover over a dashboard tile and select "⋮" (**more options**) to see the options you have for interacting with that tile.
- Select a **dashboard tile** to open the **report** that was used to create that tile.



Take action

Your options with a dashboard are displayed in the top menu bar.

Navigating a Report

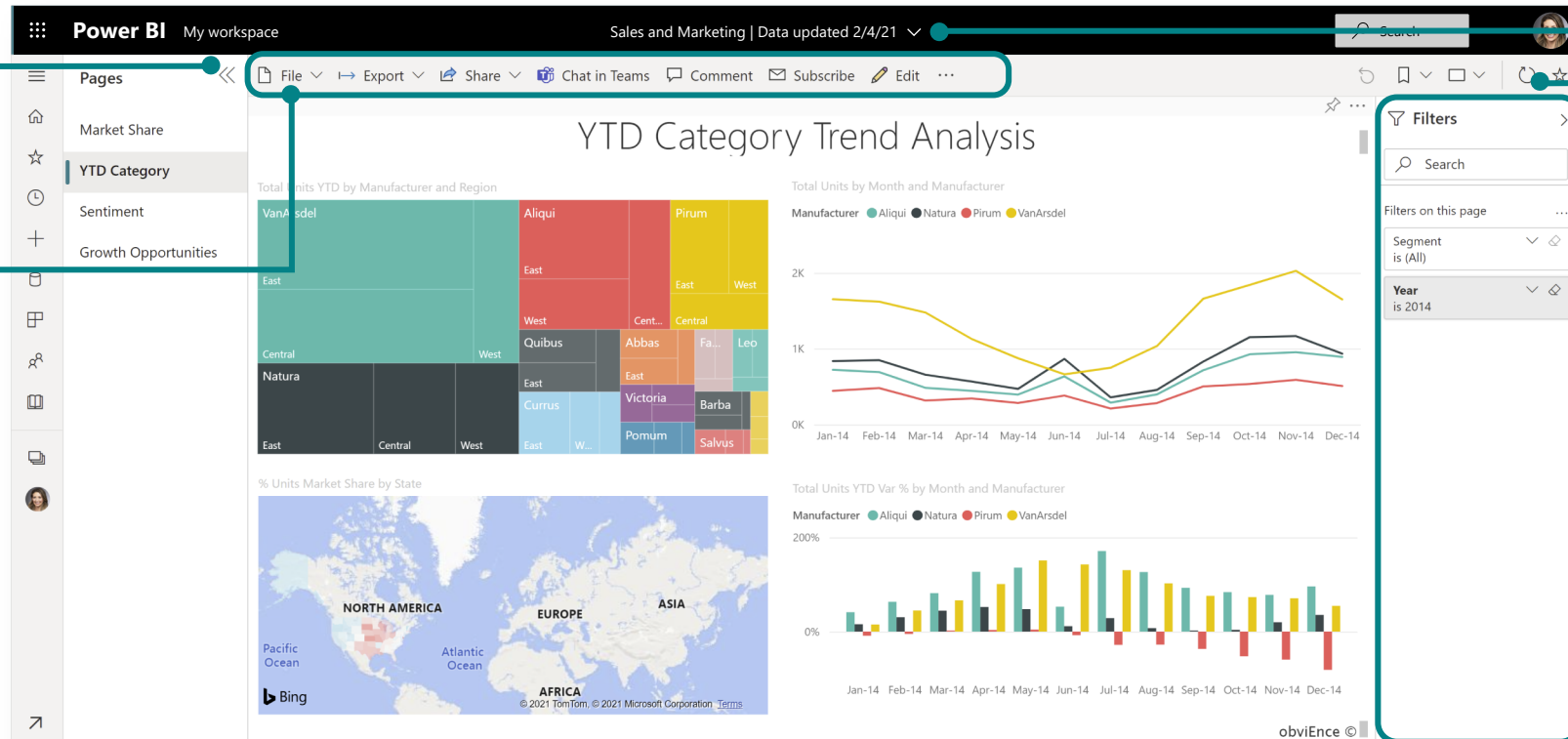
When you select a **dashboard tile**, the **report** that was used to create that tile populates. The **report** automatically opens to the **page** that contains the tile visual. Similar to the dashboard, there are actions that you can take for the entire report, for individual visuals, and also for a single report page.

The Pages pane

On the left is the clickable list of report pages. Click the << to collapse the pane, and your report will expand automatically to fill the space.

Everything's organized

Just like in the dashboard view, find report actions easily in the intuitively organized command bar. The options available will depend on the role and permission the *report designer* assigned you.



Find key info

One place, all the details—see the report title, data updated date, report contact info, and optional data sensitivity & endorsement labels at a glance.

Refresh visuals

When the data model has been updated, refreshing will update all visuals with the latest data.

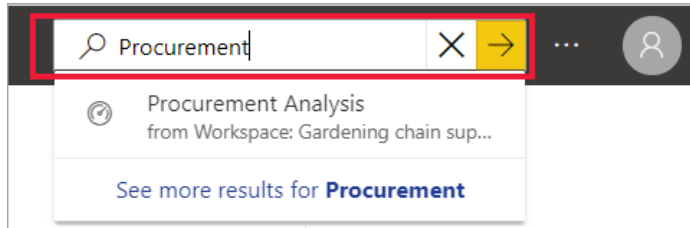
How is this data refined?

The **Filters pane** is found on the right side. Sort the filters, search them, or collapse the pane entirely by clicking ">" at the top right. Your center canvas will resize itself accordingly.

Search content

When you're new to the Power BI service, you'll have only a few pieces of content. But as colleagues begin sharing content with you and you begin downloading apps, you may end up with long lists of content. **Search** is vital and available from almost every part of the Power BI service. Just look for the search box or search magnifying glass icon.

In the Search field, type all or part of the name of a dashboard, report, workbook, app, or owner. Power BI searches all of your content.



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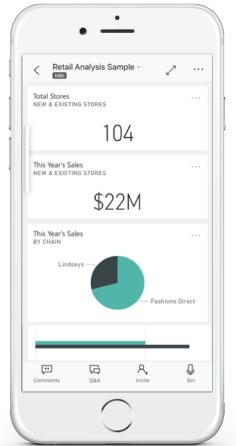
<https://go.microsoft.com/fwlink/?linkid=2008317>.



Advantages of apps

Apps are an easy way for *designers* to share different types of content at one time. App *designers* create the dashboards and reports and bundle them together into an app. The *designers* then share or publish the app to a location where you, the *business user*, can access it. Because related dashboards and reports are bundled together, it's easier for you to find and install in both the Power BI service (<https://powerbi.com>) and on your mobile device. After you install an app, you don't have to remember the names of a lot of different dashboards or reports because they're all together in one app, in your browser or on your mobile device.

With apps, whenever the app author releases updates, you either get a notification or you automatically see the changes. The author also controls how often the data is scheduled to refresh, so you don't need to worry about keeping it up to date.



Next steps with Power BI

See what's new in Power BI

Explore new & improved features, as well as sneak previews of what's to come in Power BI. Visit <https://powerbi.microsoft.com/en-us/blog/> for more information.

Get custom training, tips and tricks, and consulting help for Power BI

Ready to dig deeper into the capabilities that Power BI has to offer? Visit <https://advisicon.com/business-solutions/business-intelligence-reporting-and-analytics/> to explore our options or reach out directly at Contact@Advisicon.com.

Send feedback

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