



# COMMUNITY SUMMIT

## POWER PLATFORM

### Introduction to Power BI

San Antonio, Texas  
October 13-17, 2024

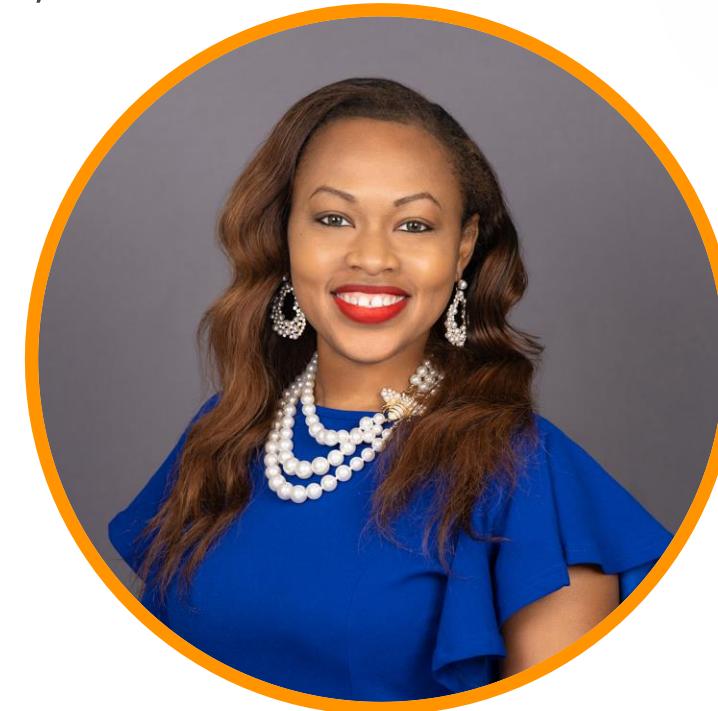


The largest independent innovation, education, and training event for Microsoft Biz Apps



# Introduction to Power BI

A Dynamics-First,  
'For User, By User'  
Event.



# About the speaker

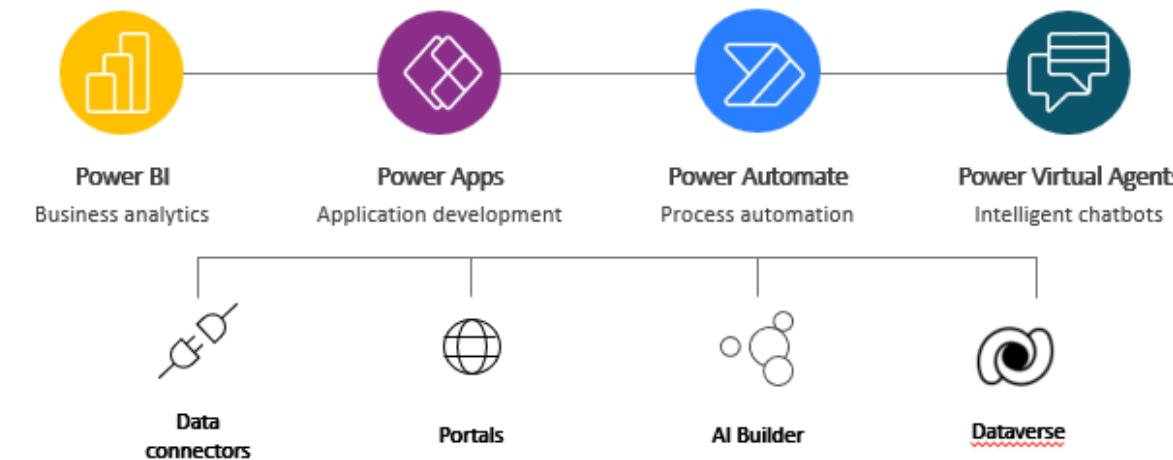
- Courtney Watts is a Data Scientist with a Master's in Statistics and Data Analytics. Courtney is a leader in Advanced Analytics, bringing over 13 years of comprehensive experience across all aspects of Machine Learning, Analytical Solutions & Reporting, and software training. With a robust skill set that includes Power BI, Machine Learning, R Programming, SQL Programming, Technical Training, and D365 Embedded Analytics, Courtney offers a unique blend of technical expertise and practical insights.
- Courtney also emphasizes and understands the critical importance of establishing data governance within analytics and software development, ensuring a solid foundation before leveraging Advanced Analytics or Reporting solutions

# Agenda

- 1. The Power Platform**
- 2. Overview of Power BI**
- 3. Data Example (Excel)**
- 4. Data Connectivity**
- 5. Data Transformation**
- 6. Visualizations**
- 7. Interactive Dashboards**
- 8. Collaboration and Sharing**

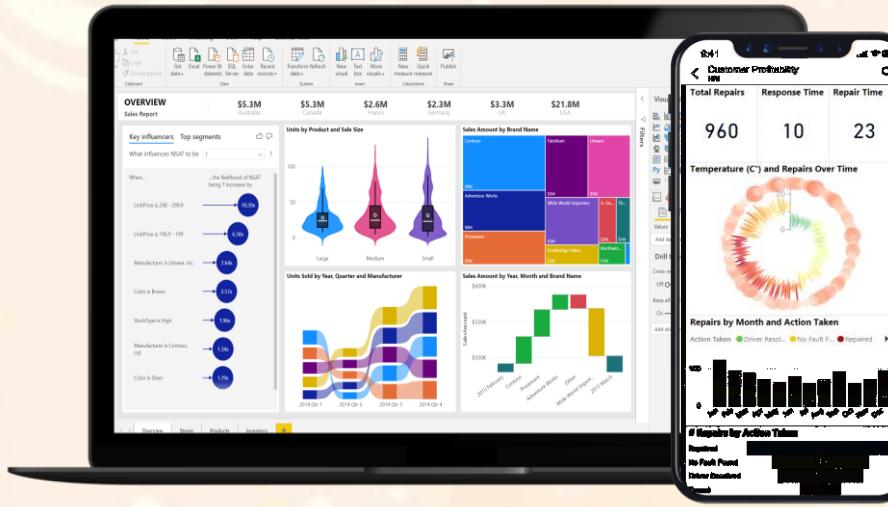
# The Power Platform

- The Power Platform is a SaaS services that enables users to Analyze, Act, and Automate their data and workflows



# Power BI

Power BI is user-friendly and designed to be accessible for a wide range of users across various teams. Its intuitive interface allows individuals with varying levels of expertise to effectively harness its capabilities for data analysis and visualization



# Power BI

Power BI Desktop is free

Easily Integrated with Excel, Power Point,  
and SSMS

You can create custom visualization or  
themes for data analysis and visualization

# Key Features



## Data Connectivity:

Power BI can connect to a wide range of data sources, including Excel, SQL Server, cloud services (like Azure, Google Analytics), and many others.

## Data Transformation:

Using Power Query, users can clean, transform, and shape their data before creating reports. This includes filtering rows, adding columns, merging tables, and more.

## Visualizations:

Power BI offers a variety of visualizations such as bar charts, line charts, pie charts, maps, and custom visuals. Users can easily drag and drop to create engaging dashboards.

## Interactive Dashboards:

Dashboards can be created with multiple visualizations that interact with each other, allowing users to drill down into specific data points for deeper insights.

will interpret and generate the appropriate visuals.

## Collaboration and Sharing:

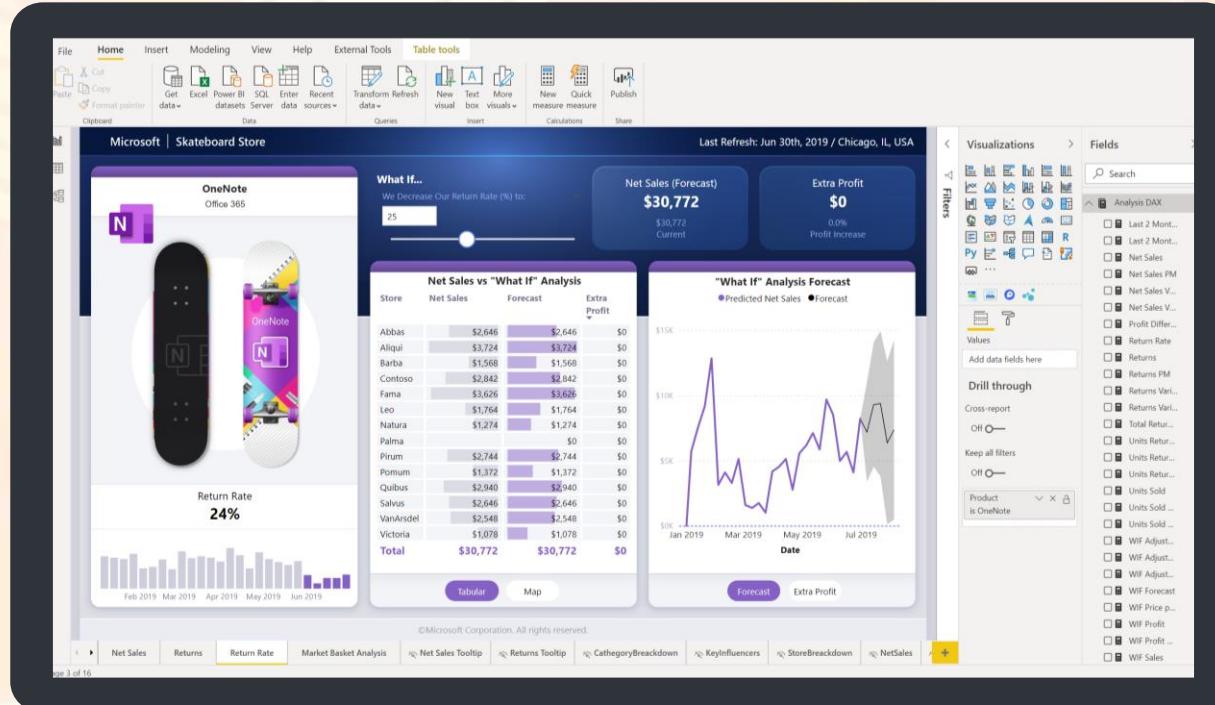
Reports and dashboards can be shared with others in the organization via the Power BI service. You can set up row-level security to ensure that users only see data relevant to them.

## Mobile Access:

Power BI has mobile apps that allow users to access reports and dashboards on the go, ensuring they can stay informed anytime, anywhere.

## Integration with Other Microsoft Products:

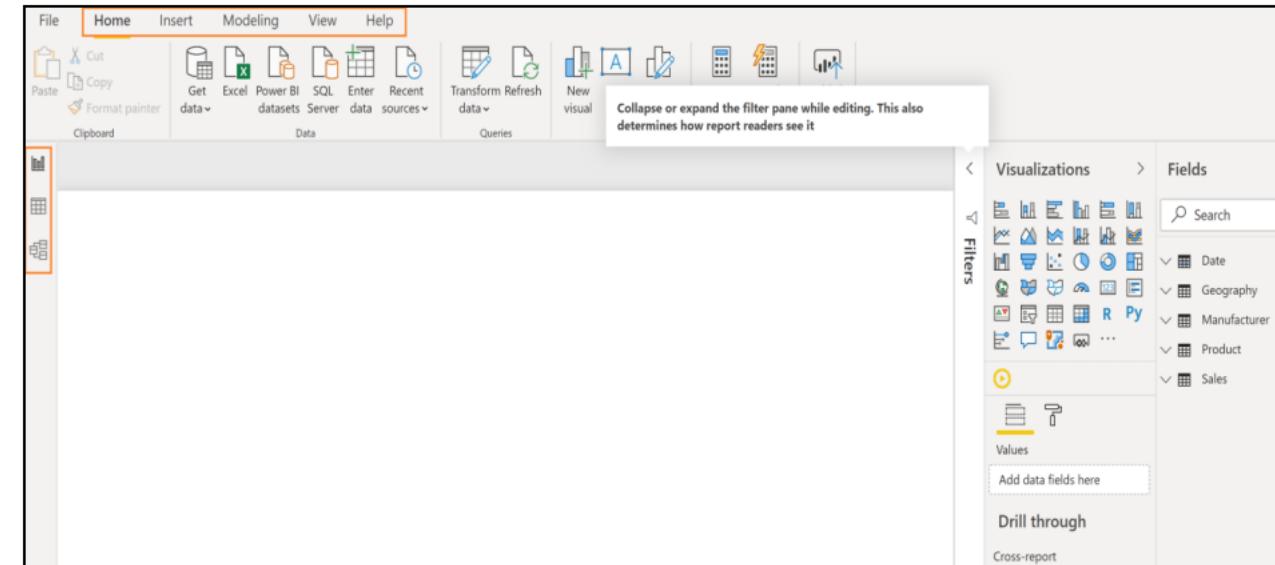
Seamlessly integrates with other Microsoft tools like Excel, SharePoint, Teams, and more, enhancing productivity.



# Power BI Layout



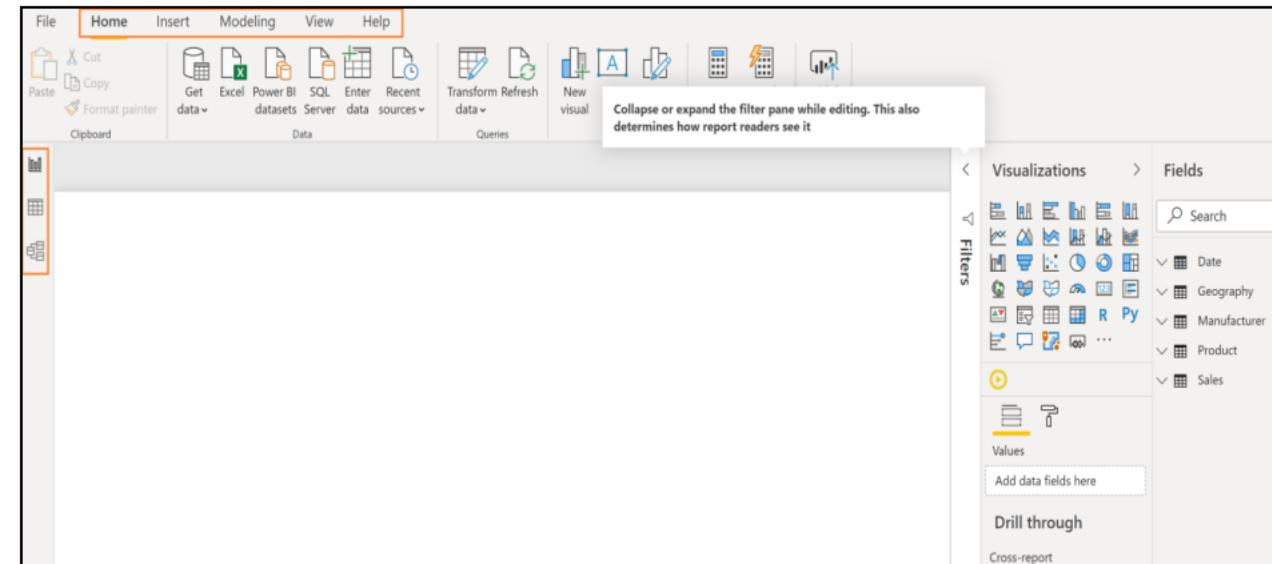
1. The Home tab is where the most common operations you perform are available.
2. The Insert tab in the ribbon allows you to insert shapes, a text box or new visuals
3. The Modeling tab in the ribbon enables additional data modelling capabilities like adding custom columns and calculating measures.
4. The View tab has options to format the page layout.



# Power BI Layout Cont'd



1. The Help tab provides self-help options like guided learning, training videos, and links to online communities.
2. On the left side of the window, you have three icons, **Report**, **Data**, and **Model**. If you hover over the icons, you can see the tooltips. Switching between these allows you to see the data and the relationships between the tables.
3. The center white space is the canvas where you will be creating visuals



# Sample Data



**File Type: Excel**

**Columns:**

1. Customer Name
2. Company Size
3. Customer Group
4. Payment Terms
5. Credit Rating
6. State
7. Parent Company
8. Sales Rep
9. Revenue

	A	B	C	D	E	F	G	H	I	J
1	Customer Name	Company Size	Customer Group	Payment Terms	Credit Rating	State	Parent Company	Sales Rep	Revenue	
2	John Doe	Small	Bronze	30 B	80	New York	ABC Corp	Alice Johnson	10,000.00	
3	Jane Smith	Medium	Silver	60 A	80	California	XYZ Inc.	Bob Smith	5,000.00	
4	Emily Johnson	Large	Gold	90 A+	80	Texas	123 Industries	Carol Lee	8,000.00	
5	Michael Brown	Small	Bronze	30 C	80	Florida	Acme Corp	David Brown	5,000.00	
6	Sarah Davis	Medium	Silver	60 B+	80	Illinois	Global Solutions	Emma White	7,000.00	
7	David Wilson	Large	Gold	90 A	80	Washington	Tech Innovations	Frank Green	2,000.00	
8	Jane Doe	Medium	Silver	60 A	80	Texas	TZY Corp	Alice Johnson	2,000.00	
9	Michael Davis	Small	Bronze	30 A	80	Texas	ABF Corp	Bob Smith	3,000.00	

# Obtaining Data



Data types are organized in the following categories:

- All
- File
- Database
- Microsoft Fabric
- Power Platform
- Azure
- Online Services
- Other

The All category includes all data connection types from all categories.

- The File category provides the following data connections:
- Excel
- Text/CSV
- XML
- JSON
- Folder
- SharePoint Folder

Get Data

The screenshot shows the 'Get Data' interface with the 'All' category selected. The list includes:

- Excel Workbook
- Text/CSV
- XML
- JSON
- Folder
- PDF
- Parquet
- SharePoint folder
- SQL Server database
- Access database
- SQL Server Analysis Services database
- Oracle database
- IBM Db2 database
- IBM Informix database (Beta)
- IBM Netezza
- MySQL database

At the bottom are 'Certified Connectors' and 'Template Apps' buttons, and 'Connect' and 'Cancel' buttons.

# Data Connectivity:

A screenshot of the Microsoft Power BI ribbon interface. The "Home" tab is selected. In the "Clipboard" section, the "Get data" option is highlighted. A dropdown menu titled "Common data sources" is open, listing various data connection options. The "Date" connection is selected, showing a preview of a date table with data from January 1, 2013, to January 21, 2013. The status bar at the bottom indicates "Table: Date (3,287 rows)".

File **Home** Help Table tools

Paste **Get data** **Clipboard** Excel OneLake SQL Enter data Dataverse Recent sources Transform data Refresh data Relationships New measure Quick New measure column New table Manage roles View as Security

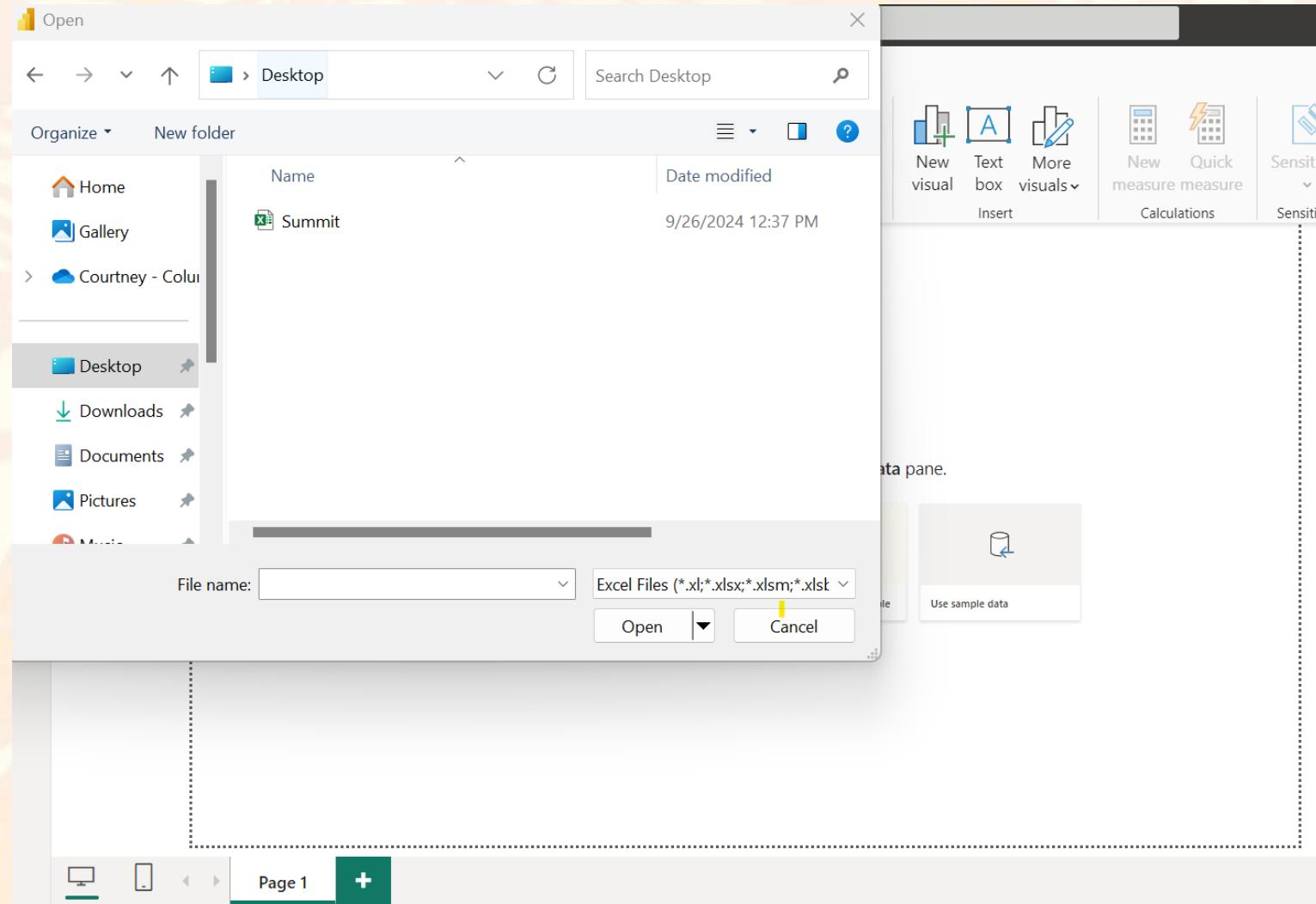
**Common data sources**

- Date
- 01/01/2013
- 01/02/2013
- 01/03/2013
- 01/04/2013
- 01/05/2013
- 01/06/2013
- 01/07/2013
- 01/08/2013
- 01/09/2013
- 01/10/2013
- 01/11/2013
- 01/12/2013
- 01/13/2013
- 01/14/2013
- 01/15/2013
- 01/16/2013
- 01/17/2013
- 01/18/2013
- 01/19/2013
- 01/20/2013
- 01/21/2013
- More...
- Power BI Template Apps

Table: Date (3,287 rows)

- Select the Home Ribbon
- Select Get Data

# Data Connectivity:



- Select the sample excel file created
- Select Open

# Data Connectivity:

A screenshot of the Power BI Data Load screen. On the left, the "Display Options" sidebar shows "Summit.xlsx [1]" with "Sheet3" selected. The main area displays a table titled "Sheet3" with the following data:

Customer Name	Company Size	Customer Group
John Doe	Small	Bronze
Jane Smith	Medium	Silver
Emily Johnson	Large	Gold
Michael Brown	Small	Bronze
Sarah Davis	Medium	Silver
David Wilson	Large	Gold
Jane Doe	Medium	Silver
Michael Davis	Small	Bronze

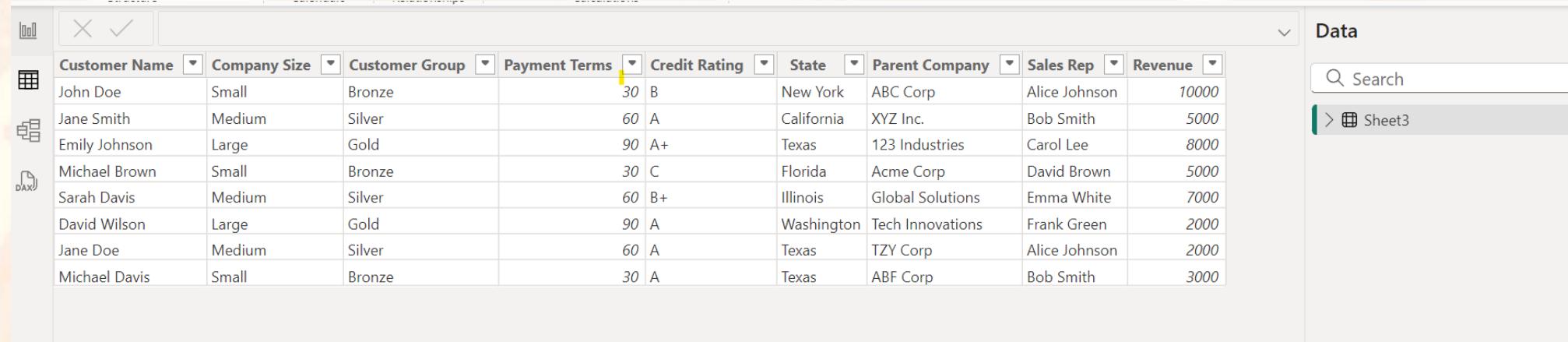
At the bottom are buttons for "Load" (green), "Transform Data" (white), and "Cancel" (white).

- In the Navigator Screen select load
- Your dataset is now within Power BI

# Data Connectivity:



- In the Navigator Screen select load
- Your dataset is now within Power BI

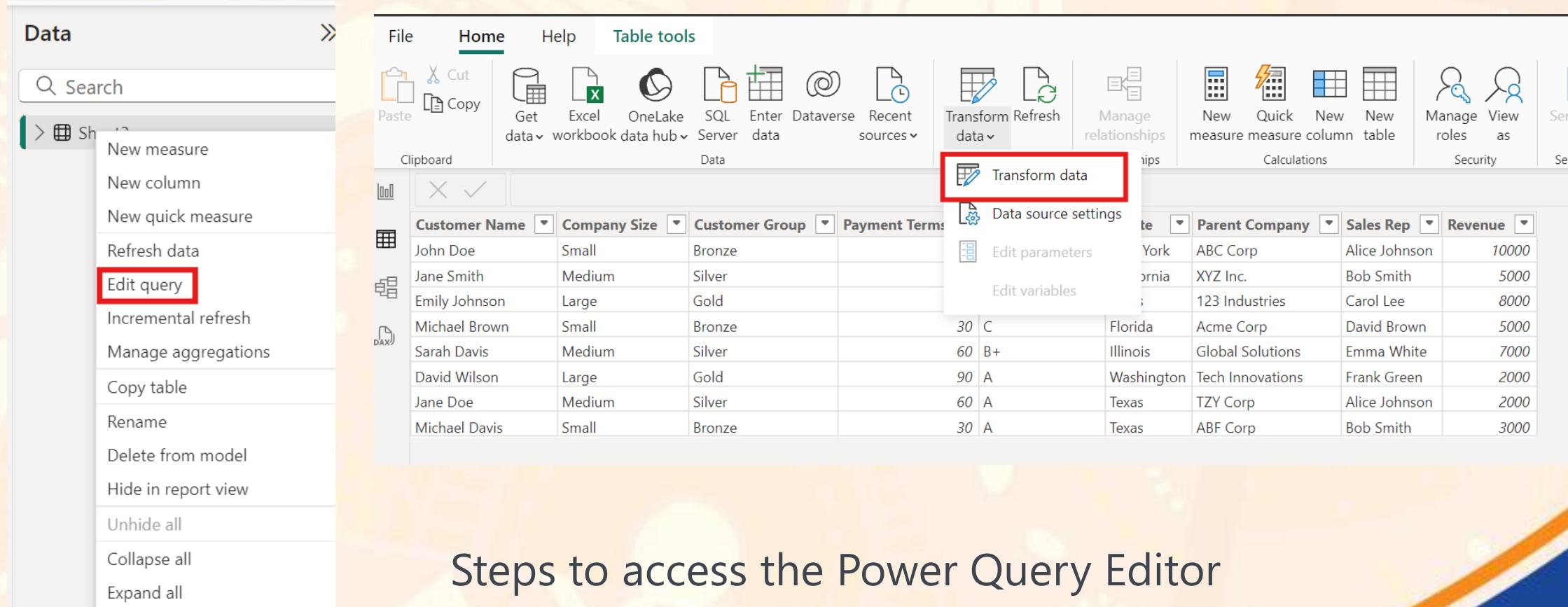


A screenshot of the Power BI Data view. On the left, there are navigation icons for 'Data', 'Visuals', 'Groups', and 'DAX'. The main area displays a table with the following columns: Customer Name, Company Size, Customer Group, Payment Terms, Credit Rating, State, Parent Company, Sales Rep, and Revenue. The table contains 8 rows of data. The 'Payment Terms' column is currently selected, indicated by a yellow highlight.

Customer Name	Company Size	Customer Group	Payment Terms	Credit Rating	State	Parent Company	Sales Rep	Revenue
John Doe	Small	Bronze	30	B	New York	ABC Corp	Alice Johnson	10000
Jane Smith	Medium	Silver	60	A	California	XYZ Inc.	Bob Smith	5000
Emily Johnson	Large	Gold	90	A+	Texas	123 Industries	Carol Lee	8000
Michael Brown	Small	Bronze	30	C	Florida	Acme Corp	David Brown	5000
Sarah Davis	Medium	Silver	60	B+	Illinois	Global Solutions	Emma White	7000
David Wilson	Large	Gold	90	A	Washington	Tech Innovations	Frank Green	2000
Jane Doe	Medium	Silver	60	A	Texas	TZY Corp	Alice Johnson	2000
Michael Davis	Small	Bronze	30	A	Texas	ABF Corp	Bob Smith	3000

# Data Transformation

# Data Transformation:

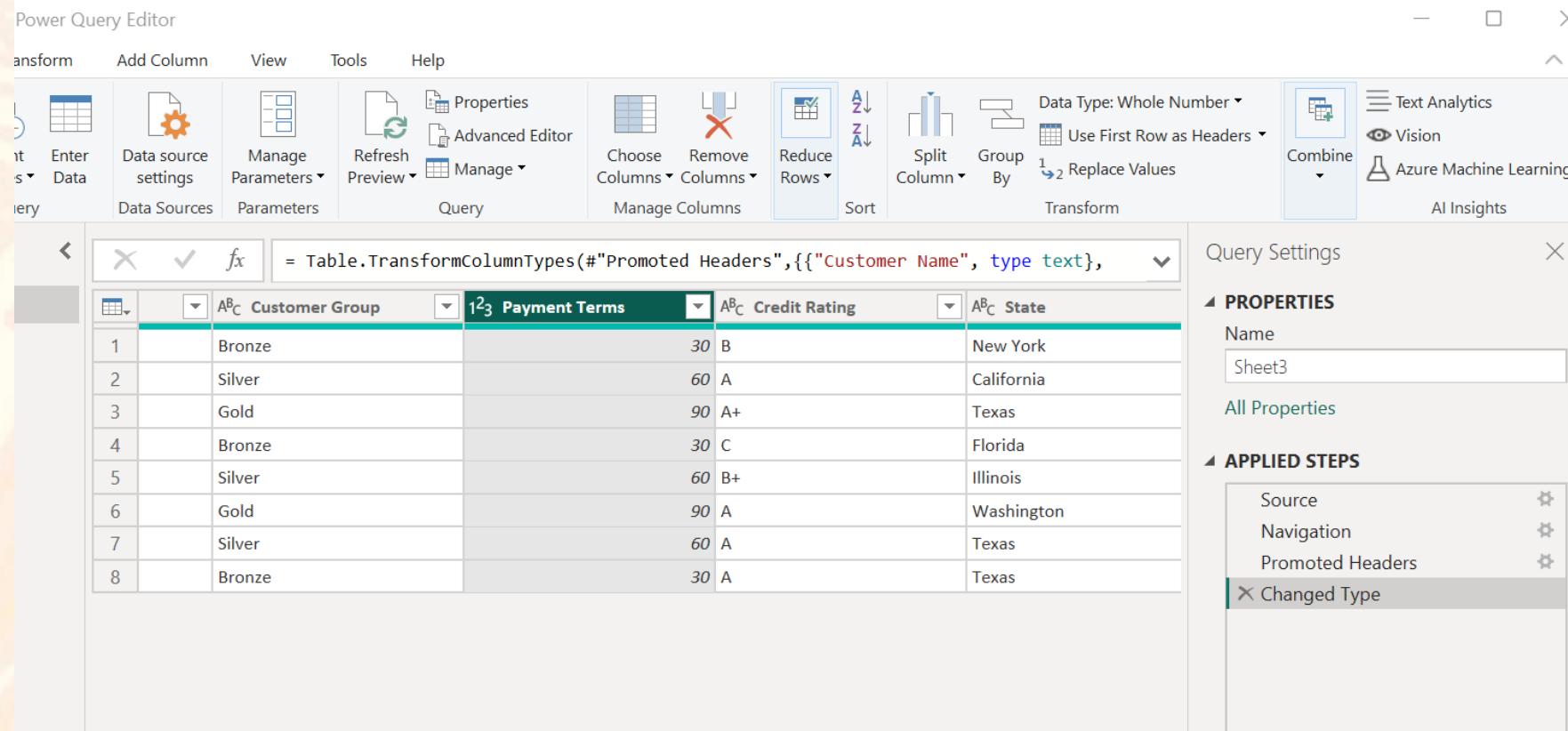


The screenshot shows the Power BI desktop application interface. On the left, a context menu is open for a table named 'Customer'. The menu items include: Data, Search, New measure, New column, New quick measure, Refresh data, **Edit query** (which is highlighted with a red box), Incremental refresh, Manage aggregations, Copy table, Rename, Delete from model, Hide in report view, Unhide all, Collapse all, and Expand all. On the right, the main workspace shows a table with columns: Customer Name, Company Size, Customer Group, Payment Terms, Age, Grade, State, Parent Company, Sales Rep, and Revenue. The 'Edit query' option in the context menu and the 'Transform data' button on the Home tab ribbon are both highlighted with red boxes. The ribbon tabs shown are File, Home (which is selected), Help, and Table tools. Under the Home tab, the Data section is active, showing icons for Paste, Cut, Copy, Get data (with sub-options for Excel, OneLake, SQL Server, Data hub, and Data), Enter data, Refresh data, Transform data (which is highlighted), Manage relationships, New measure, Quick measure, New column, New table, Manage roles, and View as.

Customer Name	Company Size	Customer Group	Payment Terms	Age	Grade	State	Parent Company	Sales Rep	Revenue
John Doe	Small	Bronze					York	ABC Corp	10000
Jane Smith	Medium	Silver					California	XYZ Inc.	5000
Emily Johnson	Large	Gold					Illinois	123 Industries	8000
Michael Brown	Small	Bronze		30	C	Florida	Acme Corp	David Brown	5000
Sarah Davis	Medium	Silver		60	B+	Illinois	Global Solutions	Emma White	7000
David Wilson	Large	Gold		90	A	Washington	Tech Innovations	Frank Green	2000
Jane Doe	Medium	Silver		60	A	Texas	ZY Corp	Alice Johnson	2000
Michael Davis	Small	Bronze		30	A	Texas	ABF Corp	Bob Smith	3000

Steps to access the Power Query Editor

# Data Transformation:

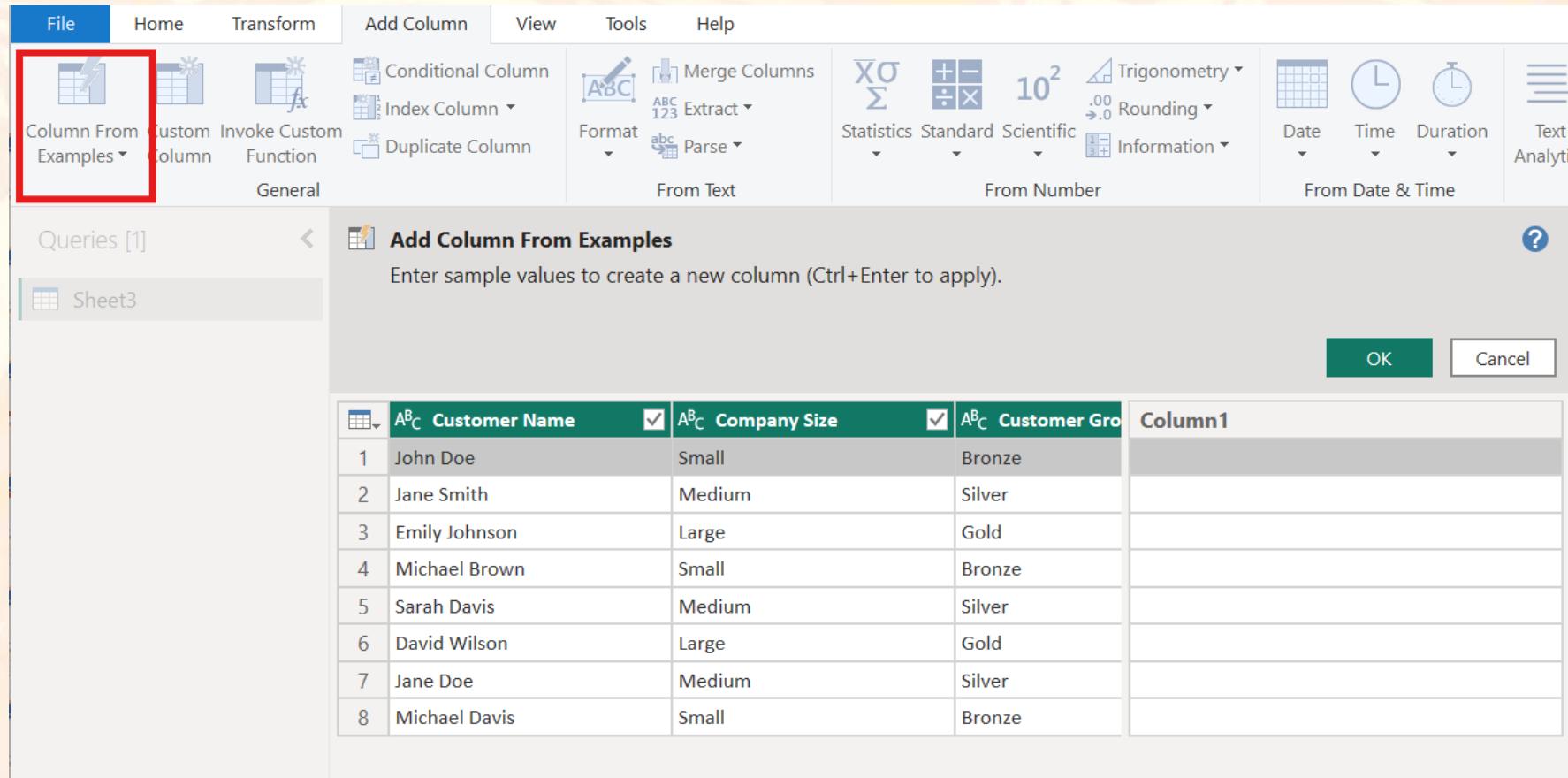


The screenshot shows the Power Query Editor interface with a table of data and a query bar at the top. The table has four columns: Customer Group, Payment Terms, Credit Rating, and State. The query bar contains the formula: `= Table.TransformColumnTypes(#"Promoted Headers",{{"Customer Name", type text},`. The 'Transform' ribbon tab is selected, showing various data transformation tools like Sort, Split Column, Group By, and Replace Values. The 'Properties' pane on the right shows the query name is 'Sheet3' and the applied steps include 'Promoted Headers' and 'Changed Type'.

	Customer Group	Payment Terms	Credit Rating	State
1	Bronze	30	B	New York
2	Silver	60	A	California
3	Gold	90	A+	Texas
4	Bronze	30	C	Florida
5	Silver	60	B+	Illinois
6	Gold	90	A	Washington
7	Silver	60	A	Texas
8	Bronze	30	A	Texas

- Clean Data
- Update First Row as Headers
- Format text

# Data Transformation:



File Home Transform Add Column View Tools Help

Column From Examples **Custom Column** Invoke Custom Function General

Conditional Column Index Column **Duplicate Column**

Format From Text From Number From Date & Time

Statistics Standard Scientific Trigonometry Rounding

Parse Information Date Time Duration Text Analytics

Queries [1] **Add Column From Examples**

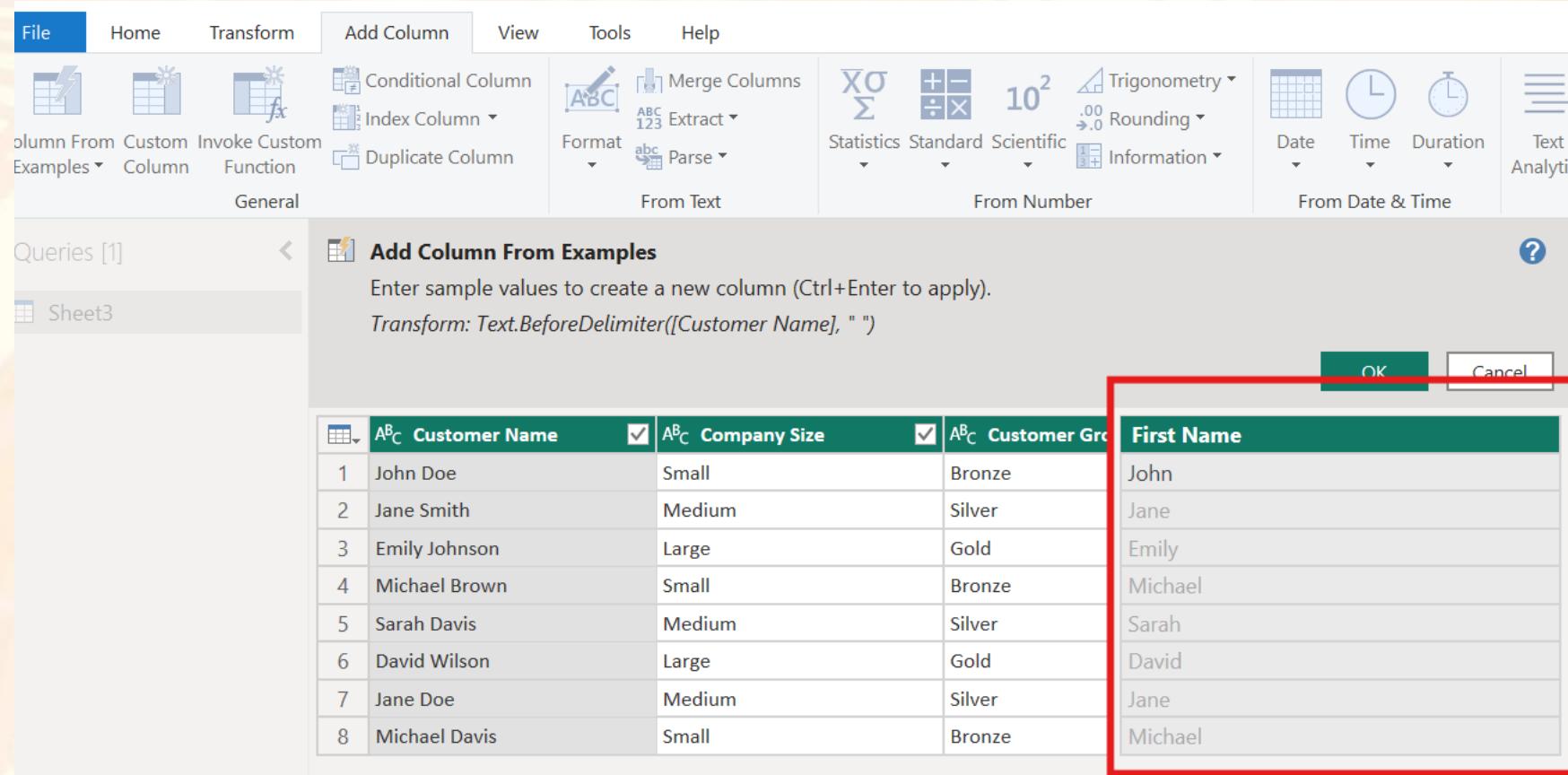
Enter sample values to create a new column (Ctrl+Enter to apply).

OK Cancel

	Customer Name	Company Size	Customer Group	Column1
1	John Doe	Small	Bronze	
2	Jane Smith	Medium	Silver	
3	Emily Johnson	Large	Gold	
4	Michael Brown	Small	Bronze	
5	Sarah Davis	Medium	Silver	
6	David Wilson	Large	Gold	
7	Jane Doe	Medium	Silver	
8	Michael Davis	Small	Bronze	

- Adding custom columns is simple
- Ability to create custom columns or columns from examples

# Data Transformation:



The screenshot shows the Power BI Data Transformation interface. The 'File' tab is selected in the ribbon. The 'Add Column' tab is active in the ribbon. The 'From Text' section of the ribbon is highlighted. The 'Add Column From Examples' dialog is open, showing a preview of the 'First Name' column extracted from the 'Customer Name' column. The preview table contains the names: John, Jane, Emily, Michael, Sarah, David, Jane, and Michael.

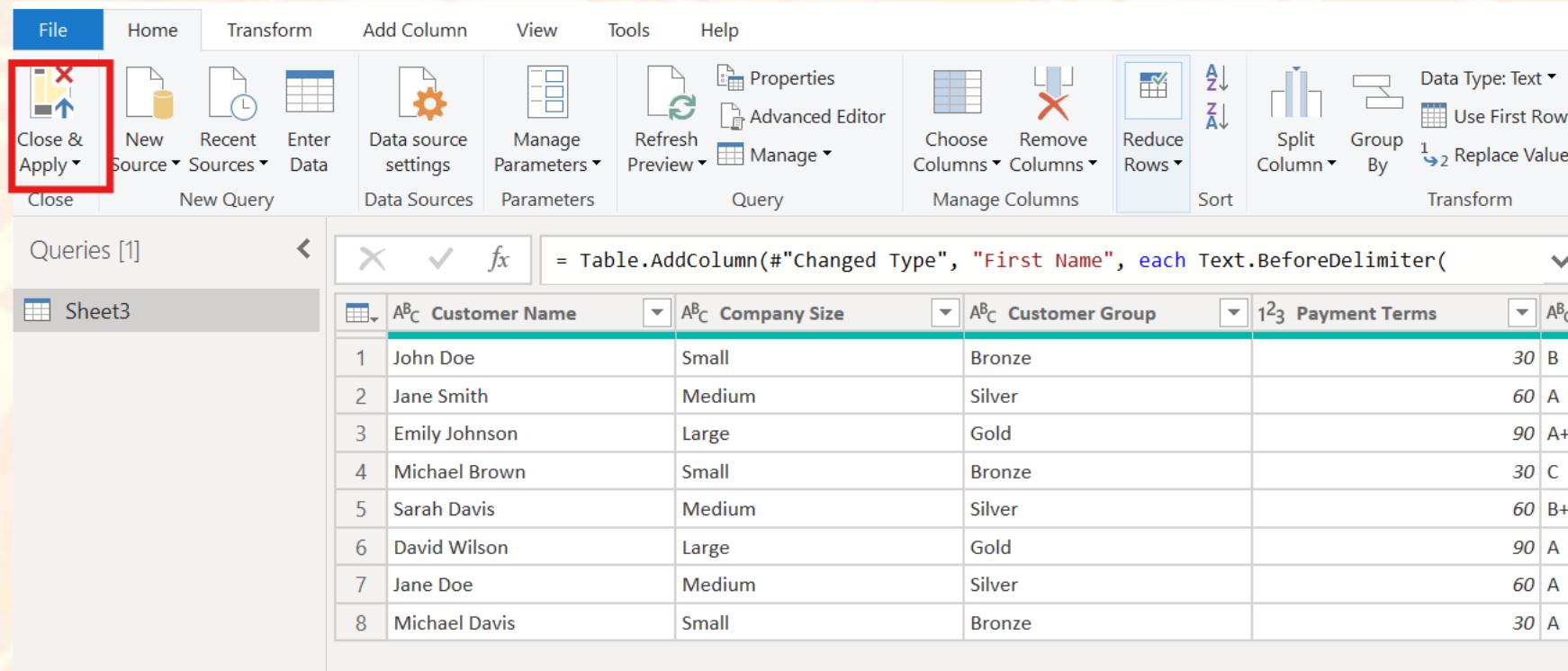
	Customer Name	Company Size	Customer Gr	First Name
1	John Doe	Small	Bronze	John
2	Jane Smith	Medium	Silver	Jane
3	Emily Johnson	Large	Gold	Emily
4	Michael Brown	Small	Bronze	Michael
5	Sarah Davis	Medium	Silver	Sarah
6	David Wilson	Large	Gold	David
7	Jane Doe	Medium	Silver	Jane
8	Michael Davis	Small	Bronze	Michael

- Adding Column from example
- Adding Customer first name

# Data Transformation



- Select Close and Apply



The screenshot shows the Microsoft Power Query Editor interface. The ribbon at the top has tabs for File, Home, Transform, Add Column, View, Tools, and Help. The Home tab is selected. The Close & Apply button in the Close section of the ribbon is highlighted with a red box. The main area displays a table with the following data:

	Customer Name	Company Size	Customer Group	Payment Terms
1	John Doe	Small	Bronze	30 B
2	Jane Smith	Medium	Silver	60 A
3	Emily Johnson	Large	Gold	90 A+
4	Michael Brown	Small	Bronze	30 C
5	Sarah Davis	Medium	Silver	60 B+
6	David Wilson	Large	Gold	90 A
7	Jane Doe	Medium	Silver	60 A
8	Michael Davis	Small	Bronze	30 A

A formula bar at the top of the table area shows the formula: = Table.AddColumn(#"Changed Type", "First Name", each Text.BeforeDelimiter(."First Name", ",")).

# Data Transformation Demo

# Visualizations

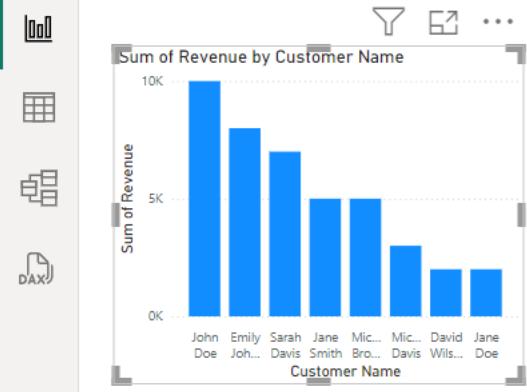
# Visualizations



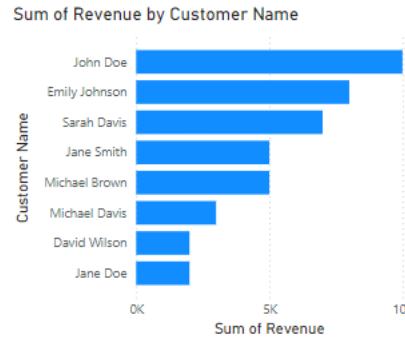
The screenshot shows the Microsoft Power BI desktop interface. The ribbon at the top has several tabs: Home, Insert, Transform, Page, and Visualizations. The 'Visualizations' tab is currently selected, indicated by a red box. The main workspace is titled 'Build visuals with your data' and shows a report canvas with a dashed box and a data grid. To the right is the 'Visualizations' pane, also with a red box around it, containing a 'Build visual' section with a grid of visualization icons (e.g., bar charts, line charts, pie charts) and a 'Filters' section. Below these are sections for 'Values' and 'Add data fields here'. The 'Data' pane on the far right lists various data fields with checkboxes: Company Size, Credit Rating, Customer Group, Customer Name, First Name, Parent Company, Payment Terms, Revenue, Sales Rep, and State.

There are many **Out of the Box** Visualizations in Power BI Desktop

# Visualizations (Bar Charts)



Sum of Revenue by Customer Name



Customer Name	Sum of Revenue
John Doe	10K
Emily Johnson	8K
Sarah Davis	7K
Jane Smith	5K
Michael Brown	4.5K
Michael Davis	3K
David Wilson	2K
Jane Doe	2K

Filters

Visualizations

Data

Build visual

Sum of Revenue by Customer Name

Customer Name is (All)

Sum of Revenue is (All)

Add data fields here

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Customer Name

Y-axis

Search

Search

Sheet3

Company Size

Credit Rating

Customer Group

Customer Name

First Name

Parent Company

$\sum$  Payment Terms

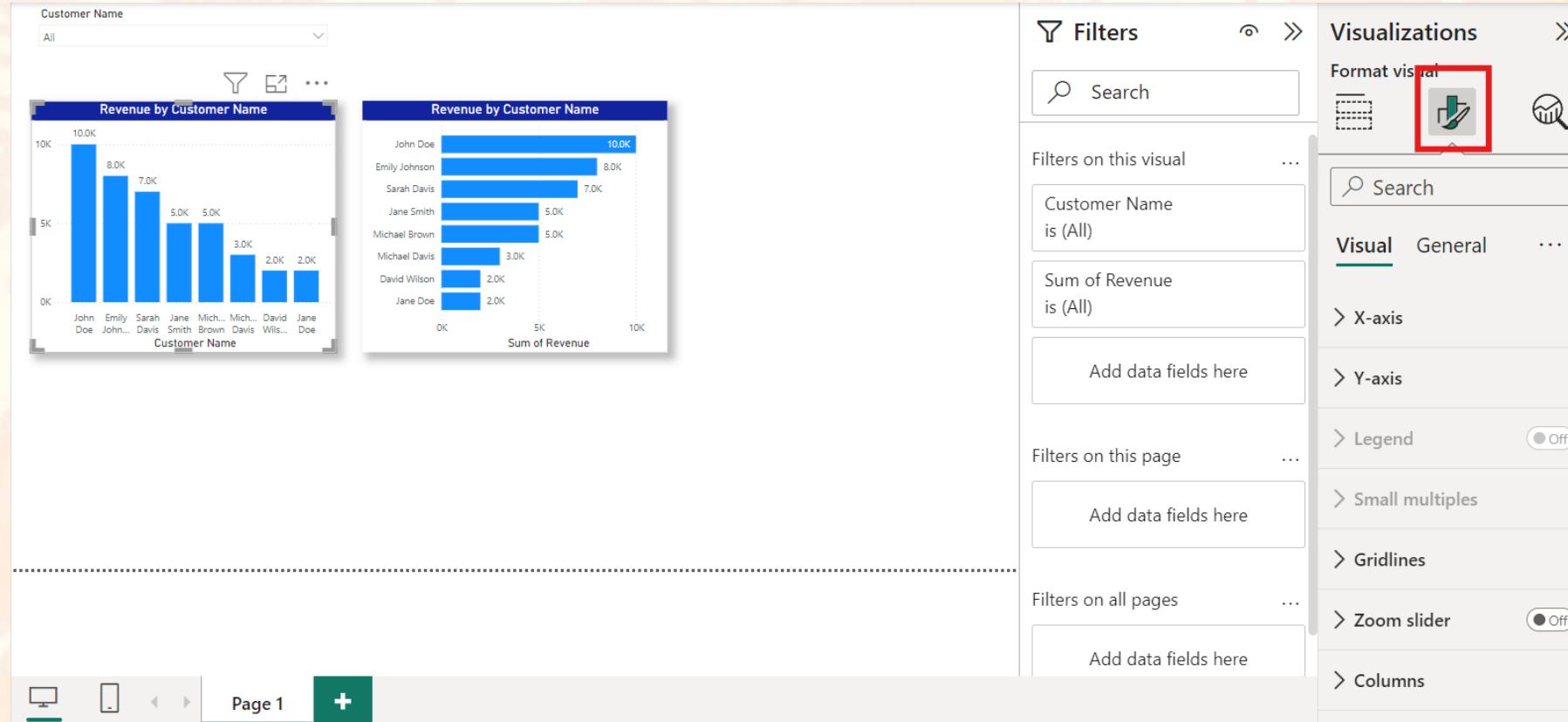
$\sum$  Revenue

Sales Rep

State

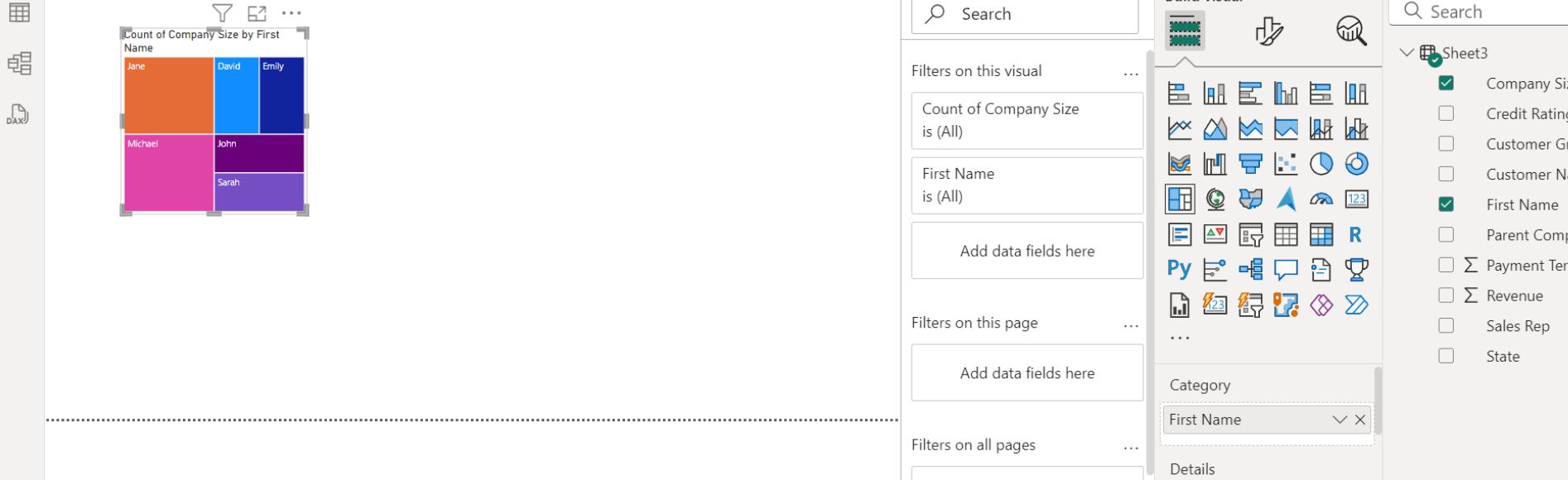


# Visualizations (Customizing Bar Charts)



# Visualizations (Tree Map)

- A wonderful way to display hierarchical data
- Data is displayed as set of nested rectangles.



The screenshot shows the Power BI desktop interface with the following components:

- Left Sidebar:** Contains icons for Home, Report, Data, and Page.
- Top ribbon:** Shows the ribbon tabs: Home, Insert, Page, and View.
- Matrix Visual:** A 3x2 matrix visual titled "Count of Company Size by First Name". The columns are labeled "Company Size" (orange, blue, dark blue) and the rows are labeled "First Name" (Jane, David, Emily; Michael, John, Sarah). The matrix cells are colored orange, blue, dark blue, pink, purple, and dark purple.
- Filters Panel:** Located on the right, it includes sections for "Filters on this visual", "Filters on this page", and "Filters on all pages". Each section has a "Search" bar and a "Add data fields here" button.
- Visualizations Panel:** Shows a list of visualization types with corresponding icons.
- Data Panel:** Shows a list of data fields with checkboxes: Company Size (checked), Credit Rating, Customer Group, Customer Name, First Name (checked), Parent Company, Payment Terms, Revenue, Sales Rep, and State.
- Page Footer:** Includes icons for monitor, smartphone, back, forward, and search, followed by "Bar Charts", "Page 1", and a green plus sign.

# Visualizations (Line Charts)



The screenshot shows the Power BI interface with two line charts and a visualizations pane.

**Visual 1: Sum of Revenue by Customer Name**  
A line chart showing the sum of revenue for each customer. The Y-axis is "Sum of Revenue" (0K to 10K) and the X-axis is "Customer Name". The data shows a general downward trend from John Doe to Jane Doe.

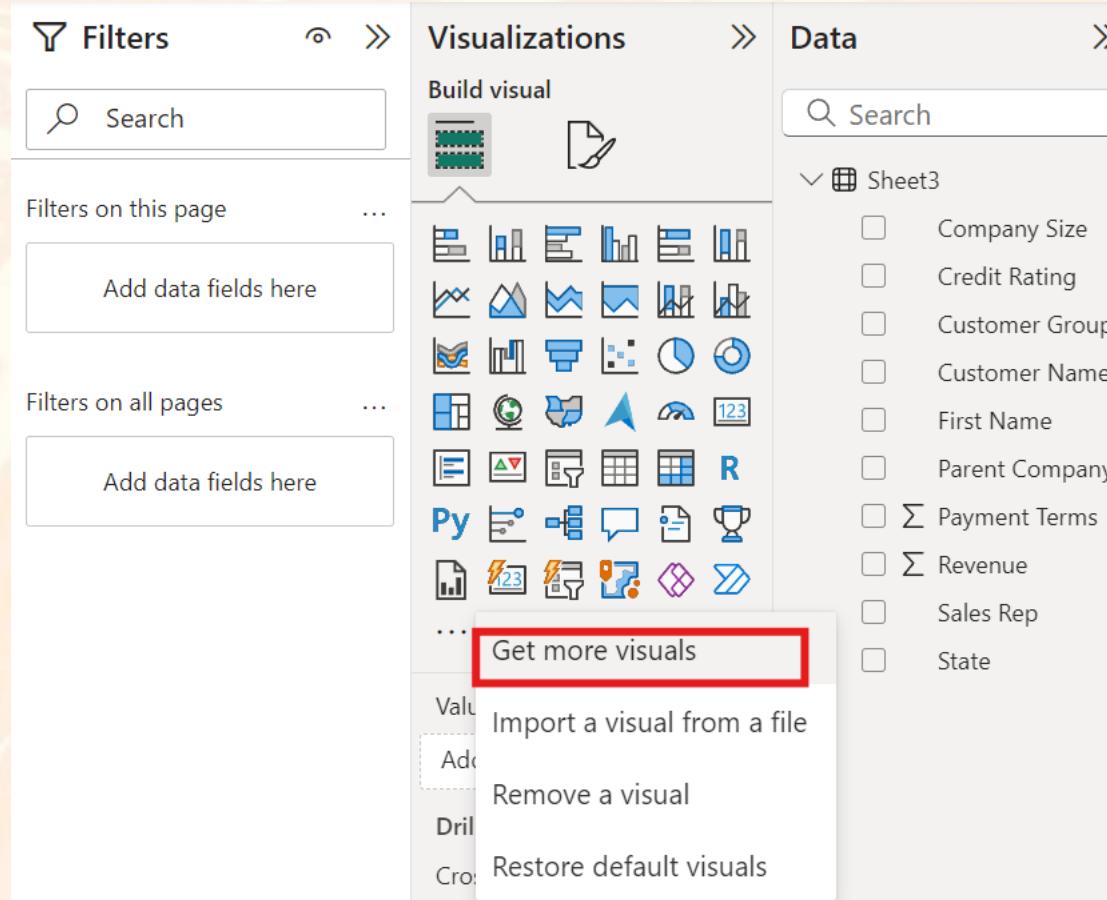
Customer Name	Sum of Revenue
John Doe	10K
Emily Johnson	8K
Sarah Davis	7K
Jane Smith	5K
Michael Brown	5K
Michael Davis	3K
David Wilson	2K
Jane Doe	2K

**Visual 2: Sum of Revenue and %GT Min of Revenue by Customer Name**  
A chart with two data series: "Sum of Revenue" (blue bars) and "%GT Min of Revenue" (black line). The Y-axis has two scales: "Sum of Revenue" (0K to 10K) and "%GT Min of Revenue" (100% to 500%). The X-axis is "Customer Name". The bars show revenue levels, and the line shows the percentage growth or minimum relative to the first customer.

Customer Name	Sum of Revenue	%GT Min of Revenue
John Doe	10K	100%
Emily Johnson	8K	200%
Sarah Davis	7K	250%
Jane Smith	5K	300%
Michael Brown	5K	350%
Michael Davis	3K	400%
David Wilson	2K	450%
Jane Doe	2K	500%

**Visualizations pane**  
The pane on the right contains settings for the visual, including filters, format visual, and various chart options like X-axis, Y-axis, and legend.

# Visualizations (Custom Charts)



The screenshot shows the Power BI interface with the 'Visualizations' pane open. The 'Build visual' section displays a grid of visualization icons. A context menu is open over one of the icons, with the 'Get more visuals' option highlighted by a red box. Other options in the menu include 'Import a visual from a file', 'Remove a visual', and 'Restore default visuals'. To the right of the visualization pane is the 'Data' pane, which lists various data fields with checkboxes next to them. The 'Filters' pane is also visible on the left.

- Many additional custom visualizations available
- Many additional Appssource visualizations are available

# Visualizations (Custom Charts)

## Power BI visuals

By clicking 'Add' and/or 'Download Sample' and downloading a visual, you agree to the provider's Terms and Conditions and Privacy Policy on the visual's page and agree Microsoft can share your account details to provider for their transactional purposes. Use of Microsoft's AppSource is subject to the [Microsoft Commercial Marketplace Terms](#) and [Privacy Statement](#).

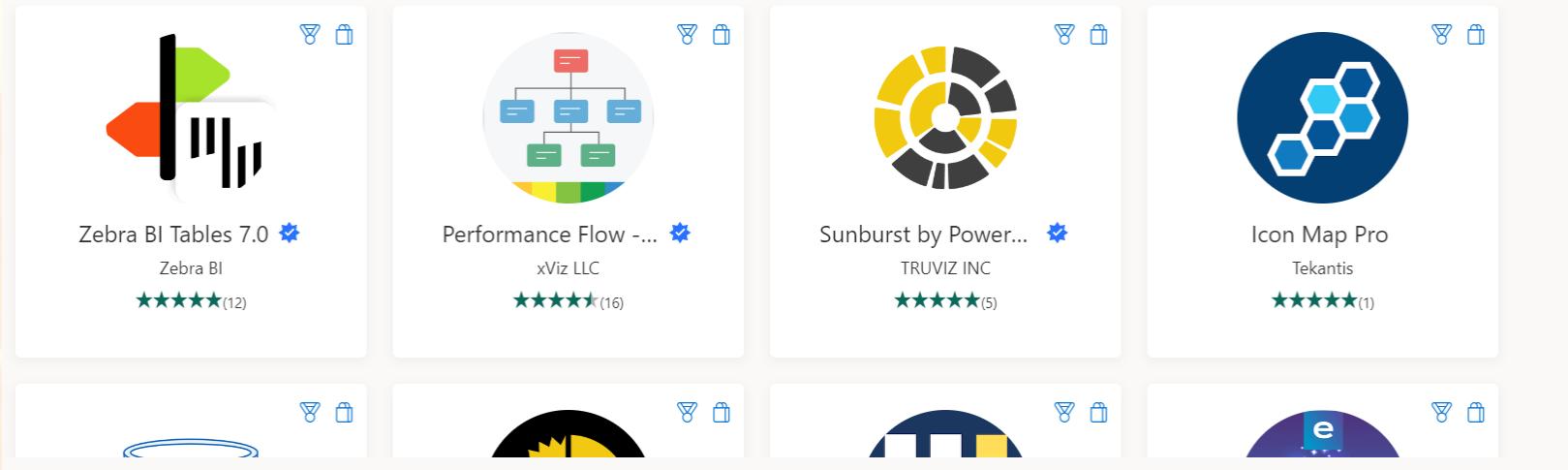
All visuals   Organizational visuals   AppSource visuals

Search

Enhance your Power BI experience using tested and approved visuals [Learn more](#)

Filter by

Sort by: Popularity

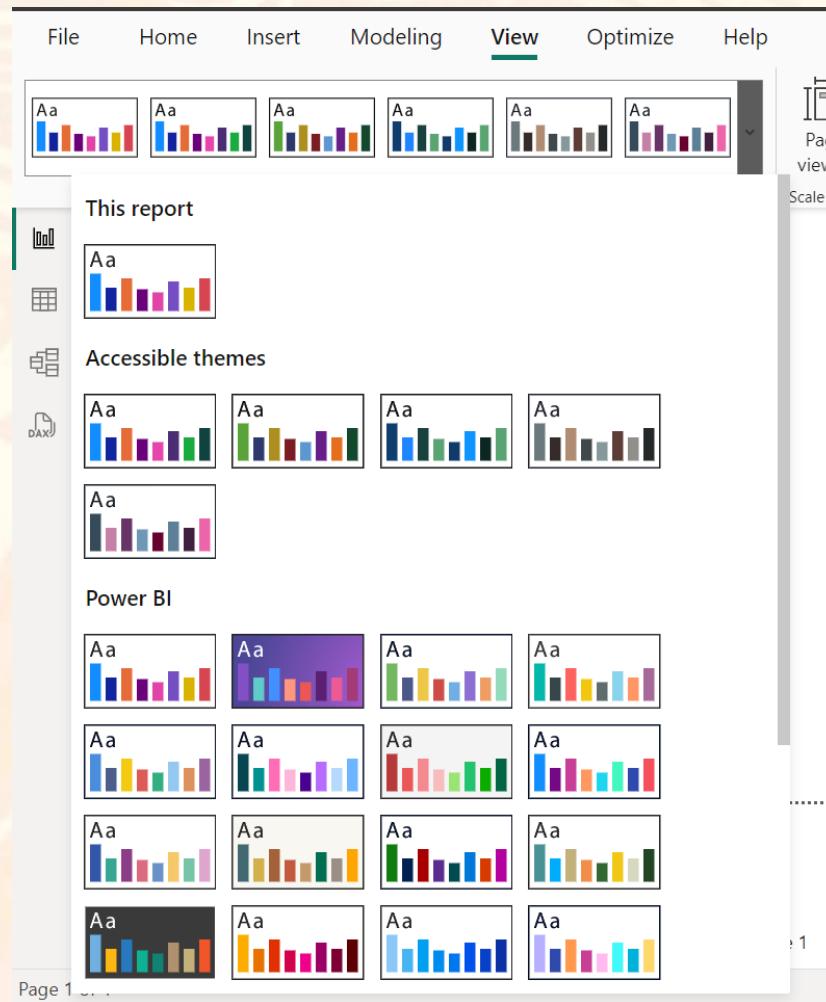


Visual	Provider	Rating
Zebra BI Tables 7.0	Zebra BI	★★★★★ (12)
Performance Flow	xViz LLC	★★★★★ (16)
Sunburst by PowerBI	TRUVIZ INC	★★★★★ (5)
Icon Map Pro	Tekantis	★★★★★ (1)

# Visualizations Demo

# Themes

# Themes



- Power BI allows users to customize their report with custom themes which include graph and title colors and fonts
- You can also import themes

# Themes

Power BI forums > Galleries

## Themes Gallery

Recently Posted

Featured

Top Kudos

All Themes ▾

Submit a report theme

Options ▾



Metrix Light



Power\_Viz ↳ 0



Stellar Light



Table Visual



Digital Marketing Dashboard | Marketing Dashboard Template



Financial Analytics Report Insights



World Stats



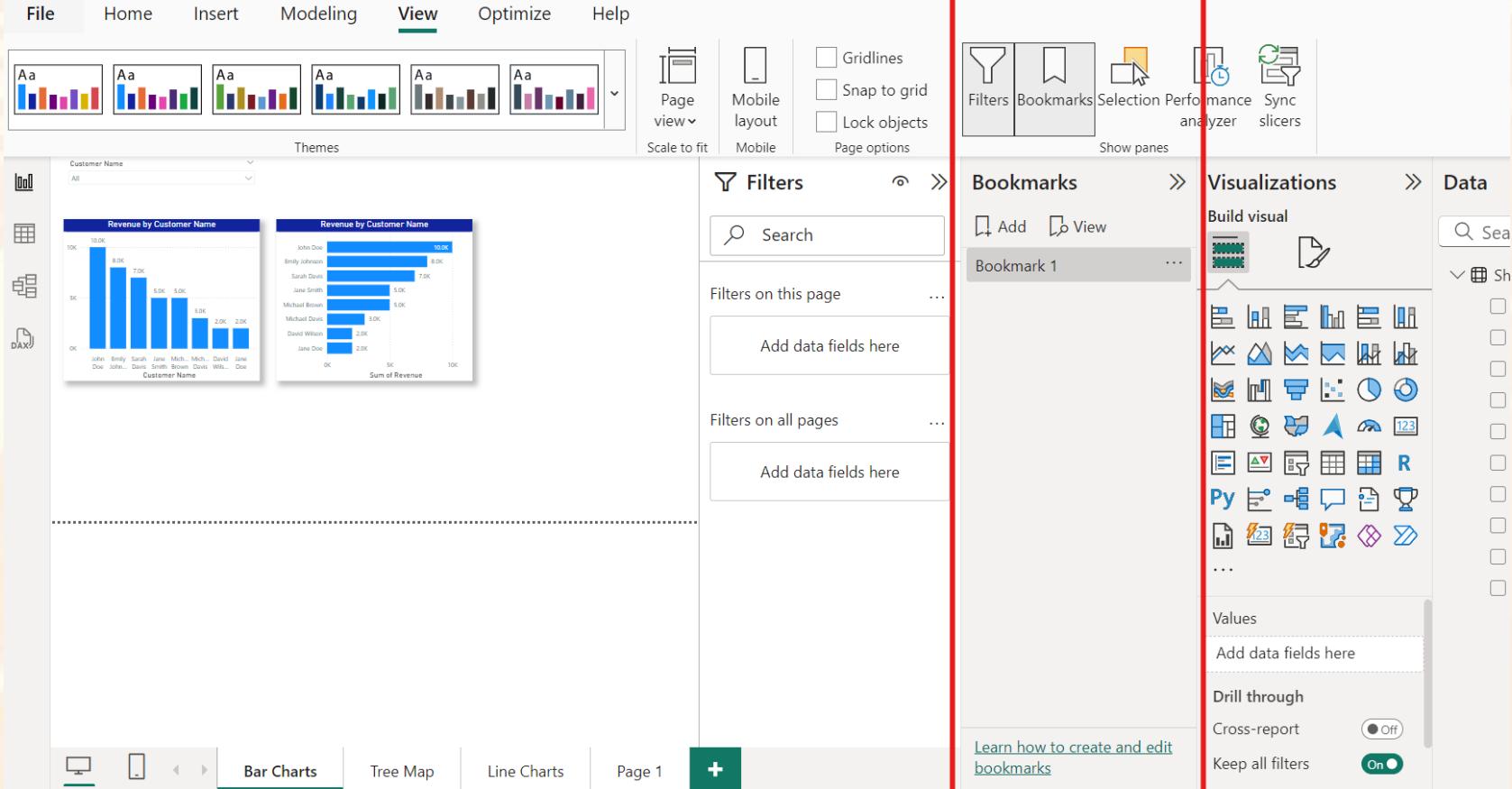
Mokkup ↳ 0



Shehab ↳ 0

Access the Microsoft Theme Library and download custom themes

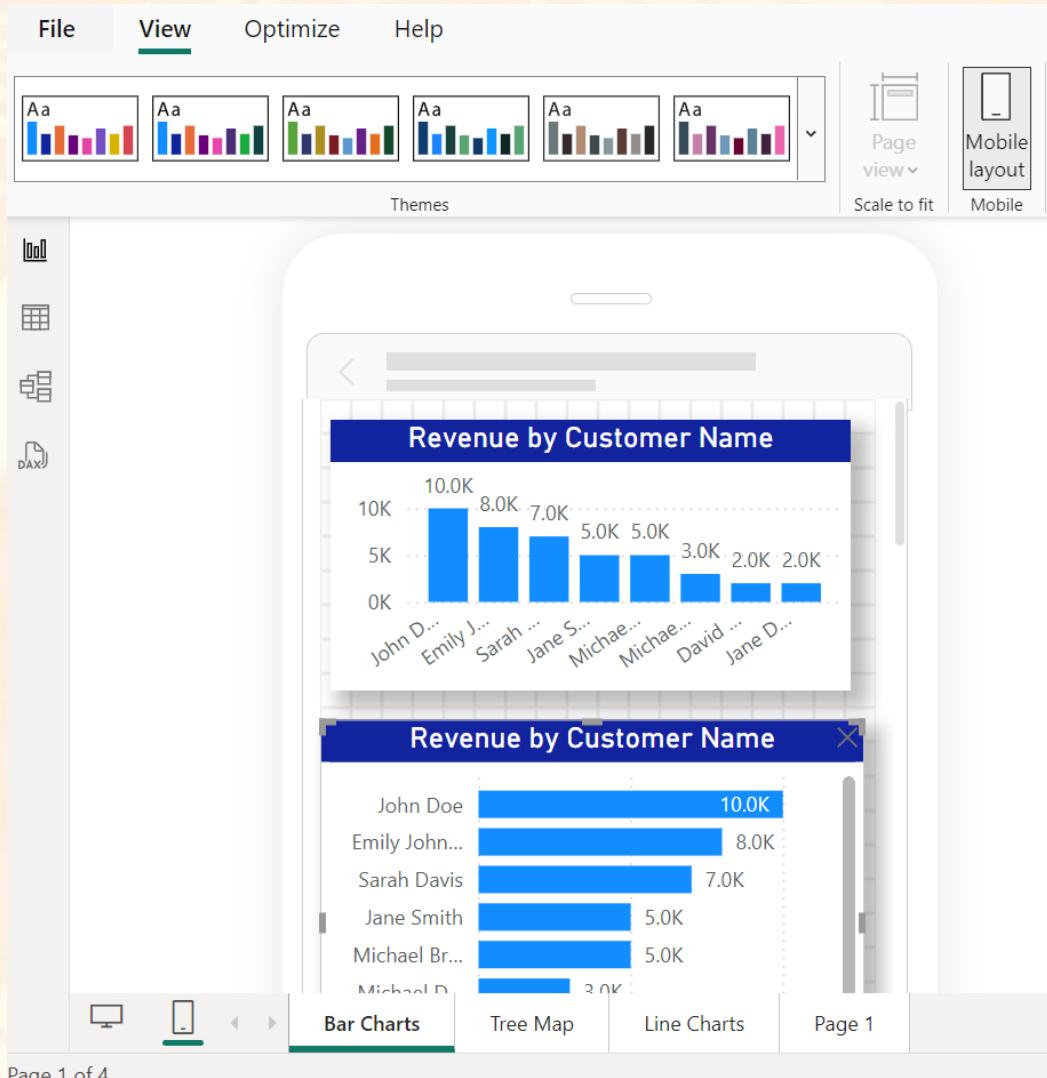
# Bookmarks



The screenshot shows the Microsoft Power BI desktop application. The 'View' ribbon is selected. A red box highlights the 'Bookmarks' icon in the ribbon and the 'Bookmarks' section of the ribbon's dropdown menu. The main area displays two bar charts titled 'Revenue by Customer Name' and a list of bookmarks. The list includes 'Bookmark 1' (selected), 'Bookmark 2', 'Bookmark 3', and 'Bookmark 4'. The 'Bookmarks' section of the dropdown menu also includes 'Add' and 'View' options.

- Bookmarks are great tools to add to your report
- Bookmarks allow users to save the current state of a report page including filters

# Mobile Layout



The screenshot shows the Power BI desktop interface with the 'Mobile' layout selected in the top ribbon. A preview of a mobile phone screen displays a bar chart titled 'Revenue by Customer Name' with data for several customers. The chart is then shown in a larger, detailed view below, with the same data. The bottom navigation bar indicates the chart type is 'Bar Charts'.

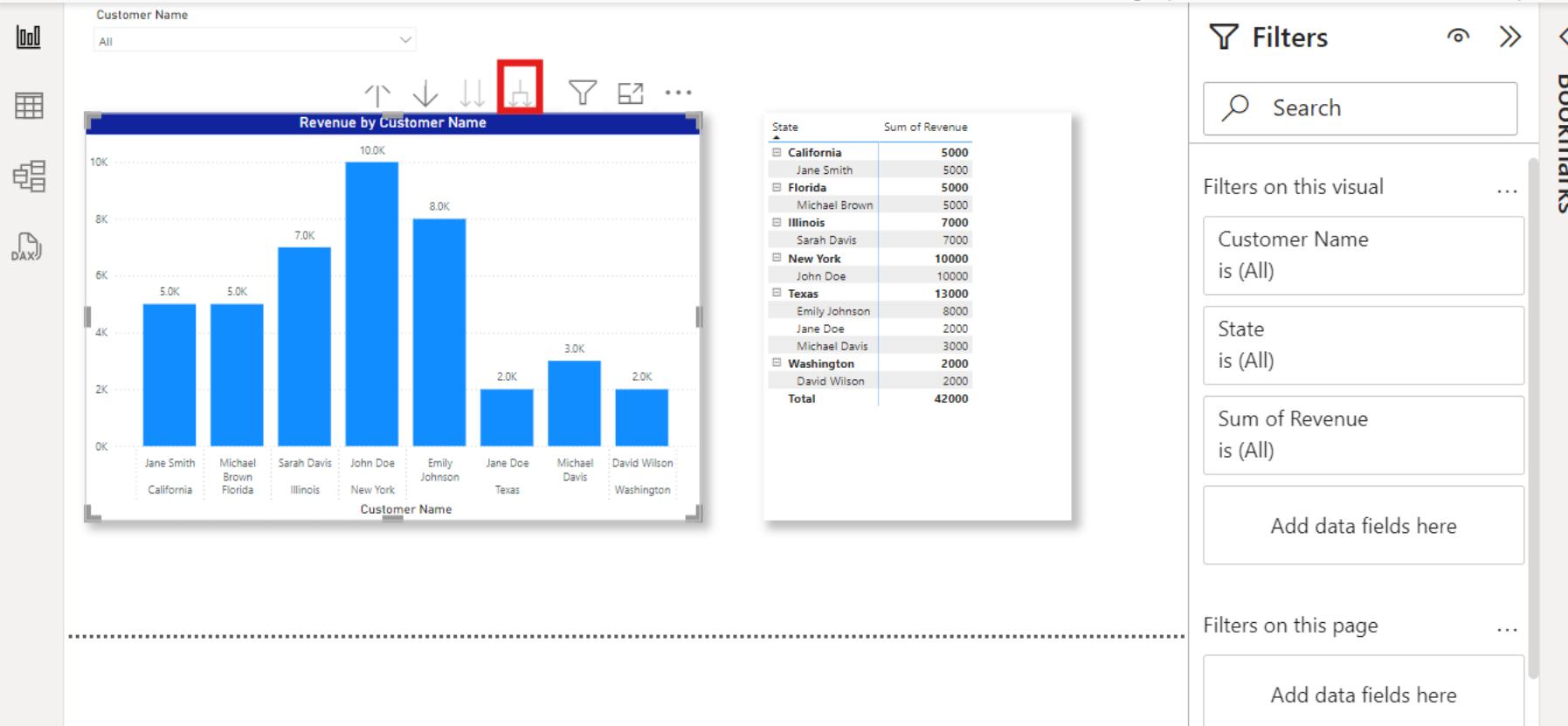
Customer Name	Revenue
John Doe	10.0K
Emily John...	8.0K
Sarah Davis	7.0K
Jane Smith	5.0K
Michael Br...	5.0K
Michael D...	2.0K
Jane D...	2.0K

- Mobile layout is a wonderful tool
- Mobile layout is also great for Sales teams, and it allows insights on the go

# Themes, Bookmarks, and Mobile Layout Demo

# Interactive Dashboards

# Interactive Dashboards: Drill Down



The screenshot displays a Power BI dashboard with the following components:

- Bar Chart:** Titled "Revenue by Customer Name". The Y-axis represents revenue in thousands, ranging from 0K to 10K. The X-axis lists customer names with their respective states: Jane Smith (California), Michael Brown (Florida), Sarah Davis (Illinois), John Doe (New York), Emily Johnson (New York), Jane Doe (Texas), Michael Davis (Texas), and David Wilson (Washington). The chart shows revenue values: 5.0K, 5.0K, 7.0K, 10.0K, 8.0K, 2.0K, 3.0K, and 2.0K. A red box highlights the "More" icon in the chart's ribbon.
- Table:** Titled "Sum of Revenue". It lists the total revenue for each state. The data is as follows:

State	Sum of Revenue
California	5000
Jane Smith	5000
Florida	5000
Michael Brown	5000
Illinois	7000
Sarah Davis	7000
New York	10000
John Doe	10000
Texas	13000
Emily Johnson	8000
Jane Doe	2000
Michael Davis	3000
Washington	2000
David Wilson	2000
<b>Total</b>	<b>42000</b>

**Filters Panel:** Located on the right side of the dashboard, it includes a search bar and sections for "Filters on this visual", "Filters on this page", and "Bookmarks".

- Power BI allows users to create hierarchies
- Power BI allows users to view data in different ways even in regard to calendar dates

# Report Publishing

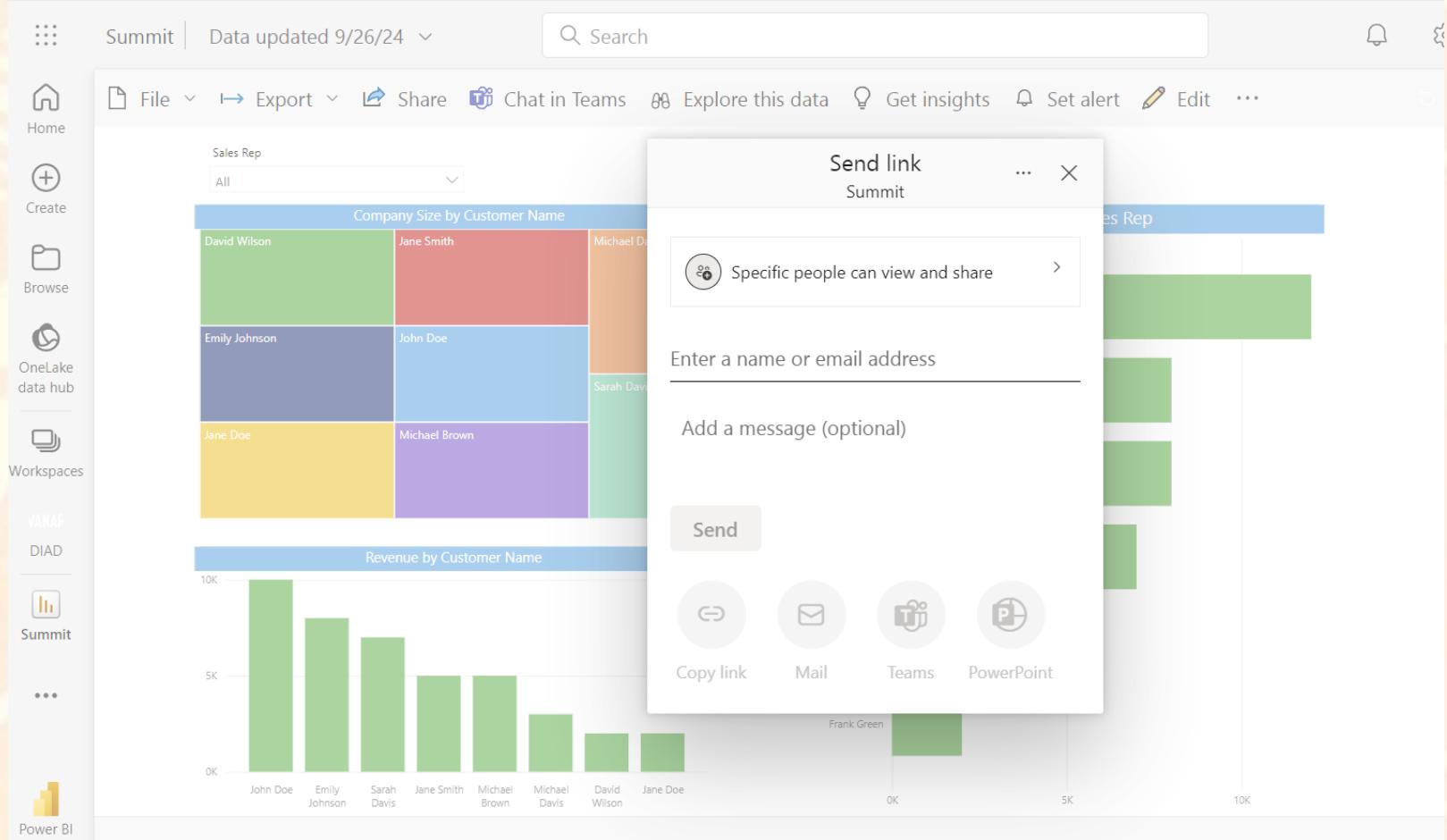


The screenshot shows the Power BI desktop interface with three visualizations:

- Company Size by Customer Name:** A treemap visualization with categories like David Wilson, Jane Smith, Michael Davis, Emily Johnson, John Doe, Sarah Davis, Jane Doe, Michael Brown, and a large yellow category.
- Revenue by Sales Rep:** A horizontal bar chart showing revenue for sales representatives Alice Johnson, Bob Smith, Carol Lee, Emma White, David Brown, and Frank Green.
- Revenue by Customer Name:** A vertical bar chart showing revenue for customers John Doe, Emily Johnson, Sarah Davis, Jane Smith, Michael Brown, Michael Davis, David Wilson, and Jane Doe.

The ribbon menu is open, with the **Share** button highlighted by a red box. The menu also includes options for Paste, Cut, Copy, Format painter, Get data, Excel, OneLake, SQL Server, Enter data, Data, Transform, Refresh data, Recent sources, New visual, Text box, More visuals, New calculation, Quick measure, Sensitivity, and Publish.

# Collaborating and Sharing



The screenshot shows the Power BI Service interface. On the left, a sidebar menu includes options like Home, Create, Browse, OneLake data hub, Workspaces, DIAD, and Summit. The main content area displays a report titled "Sales Rep" with two visualizations: a treemap chart titled "Company Size by Customer Name" and a bar chart titled "Revenue by Customer Name". A sharing modal window titled "Send link" is open, showing the URL "app.powerbi.com/report/sales-rep". It includes fields for "Enter a name or email address" and "Add a message (optional)", and buttons for "Send", "Copy link", "Mail", "Teams", and "PowerPoint".

Collaborate and share your report on the Power BI Service (app.powerbi.com)

# **Demo: Report Publishing, Collaborating, and Sharing**



# Thank you for attending!



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