

Getting Started with Power BI 8 Easy Steps



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Getting Started with Microsoft Power BI

An easy to follow guide for beginners and end users – like me!

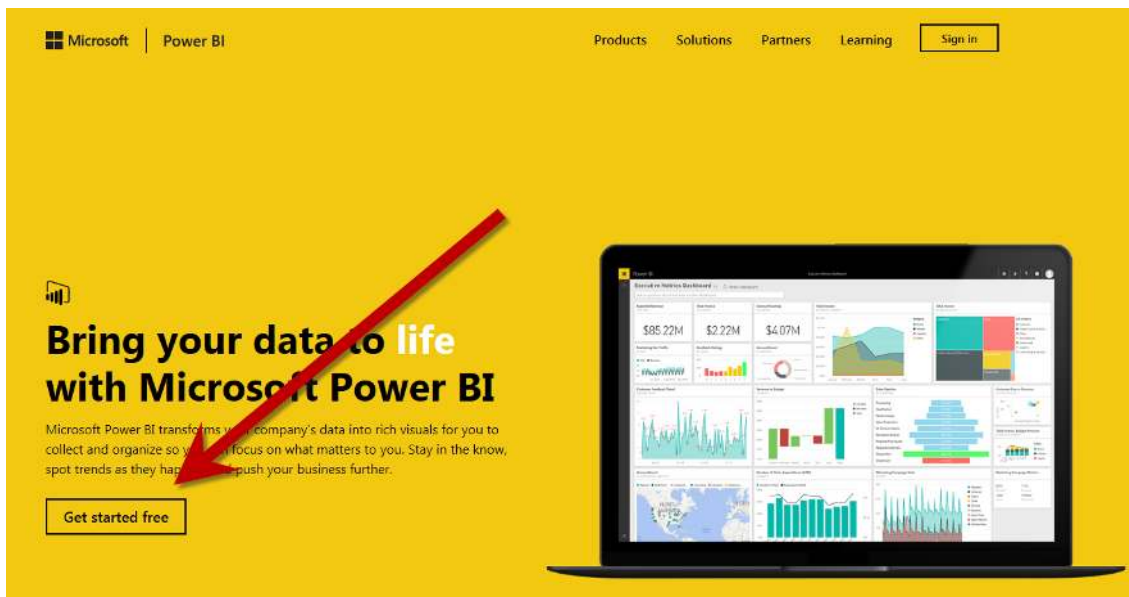
This guide is designed for end users like me, to help you to get up and running with Power BI. Maybe you've heard of Microsoft Power BI and even tried playing around with it. However, I find if you don't have a bunch of time upfront, it probably went to the wayside.

Power BI really is a great tool, and with our help, you too can get those reports and dashboards you've dreamed of. In this handy guide, I will explain some basic, need to know concepts, and get you started with timesaving, easy to use templates.

Need-to-know Basics:

Which Power BI is for you? We recommend you start with the Power BI Service.

1. Power BI Service (online) – general use – * Recommended.
 2. Power BI Desktop – used for more advanced options. You can easily move to this later on.
1. Sign up for Power BI – It's FREE
Go to [Power BI](#) and click on the Get started free button



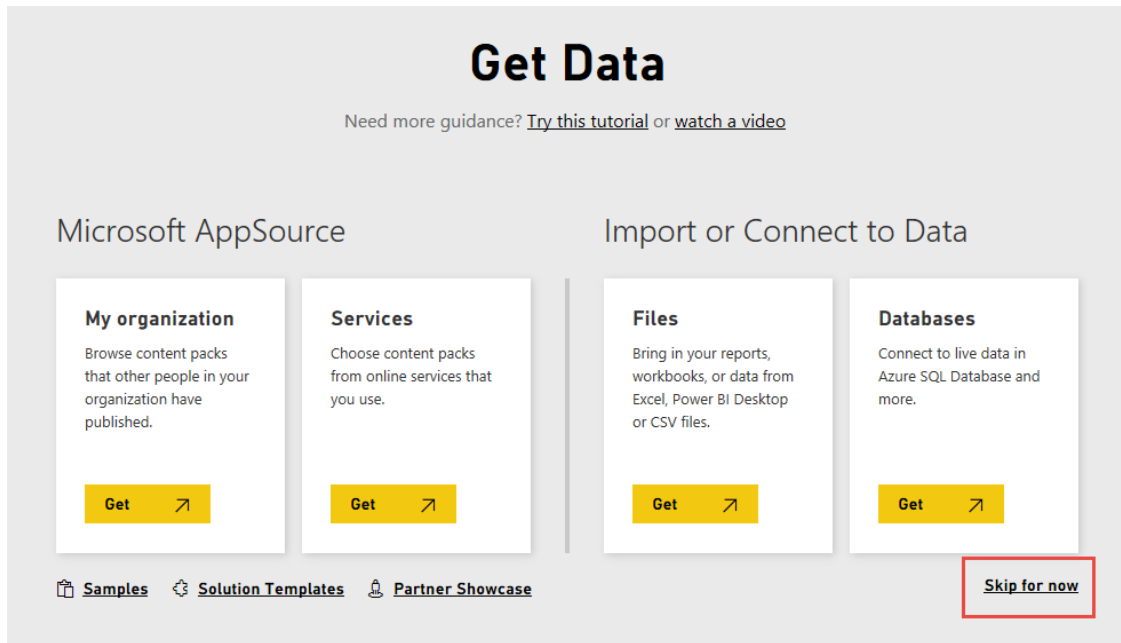
Have questions or need some help with getting started? Microsoft has a [great support](#) page if you need assistance.

Understanding the pieces of Power BI:

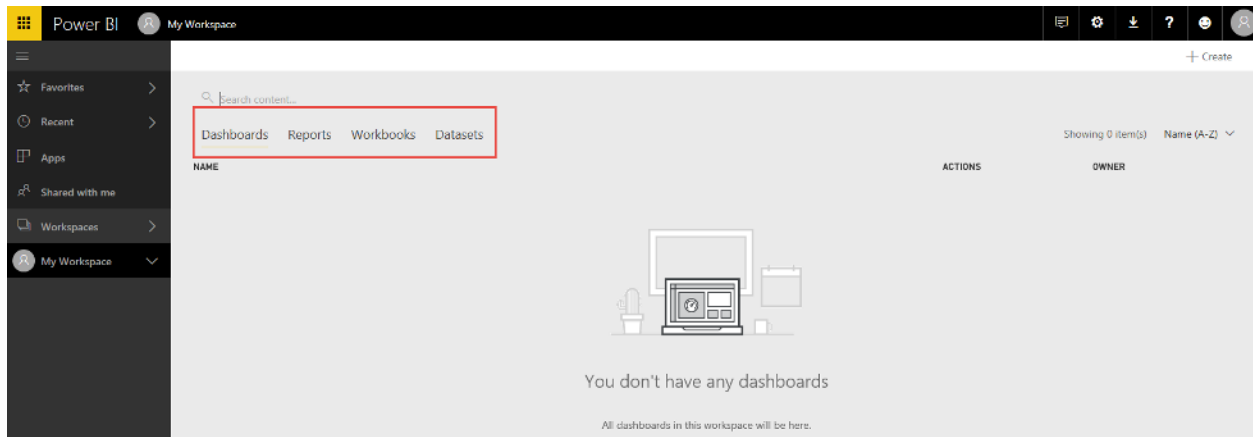
1. **Datasets** – your data, like Dynamics GP or CRM. You set up a data set, which is a connection to your data, and you can use that over and over again. You're not changing data, just connecting to it to display it in different ways.
2. **Reports** – a visual way of showing your data – lists, charts, & graphs.
3. **Dashboards** – a screen that has different sections (widgets) on it. Usually these widgets pull in a report. So, you might have 5 reports pulled onto 1 screen. This is the part you then can publish and share with others in your business.

I'm ready to start!

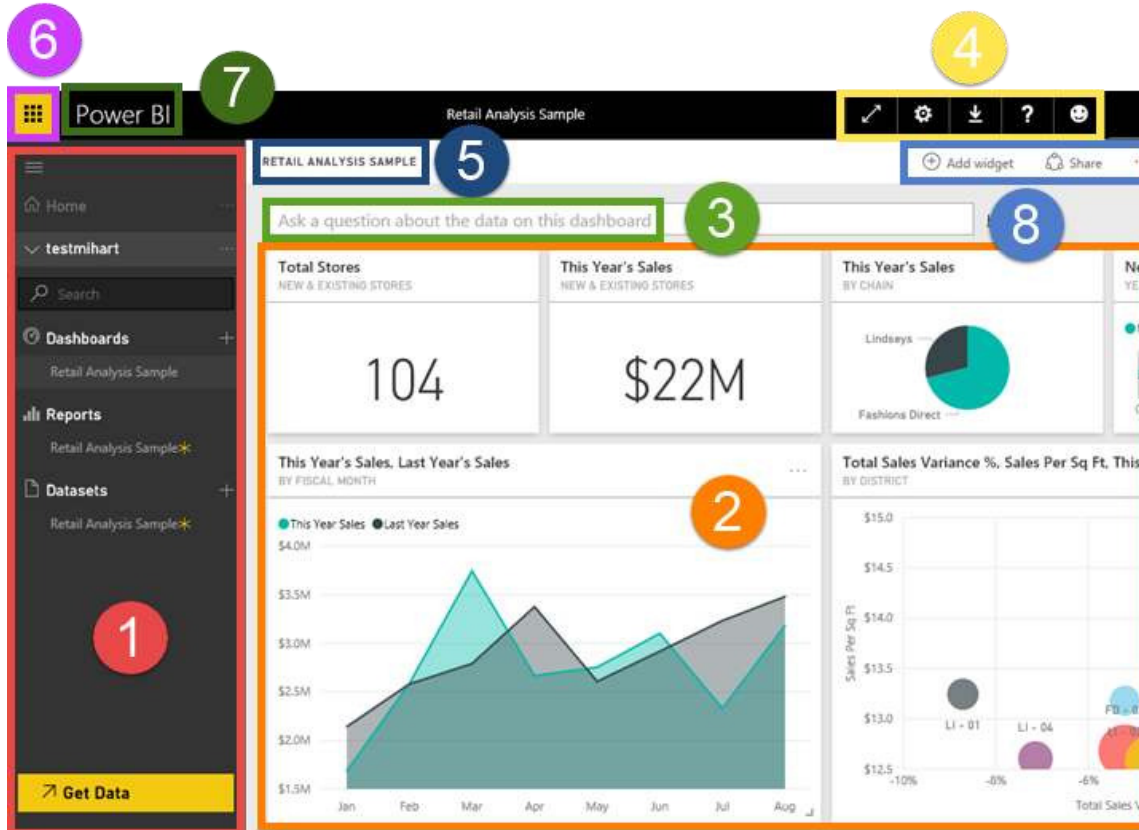
First, when you open the Power BI service (online version), you will probably get prompted to get data.



If you skip this part, "Skip for now", you will see the dashboards area. However, you might not have any dashboards yet. Here you'll see your dashboards, reports, workbooks, and datasets.



If you do have existing items in Power BI, you'll see a **dashboard** displayed. Dashboards are something that differentiates the Power BI service (online) from the desktop version.



You will want to get familiar with the Power BI screen:

1. Navigation bar
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 buttons
8. Additional dashboard actions

Getting Data

First, you need to specify some data to use. This means connect to a datasource.

2. Setting up a Data Connection

Data is at the heart of Power BI. No matter what you are doing, all those visualizations are coming from the underlying data, your data source. Let's take a look at a couple data types you are likely to use.

Let's take a look at a couple different types of data sources you can connect to with Power BI. Keep in-mind, there are many other types of data sources you can get data from, too. But, for now, we are going to focus on data types people like you generally start with. These are data sources you can connect to right from Power BI easily.

To start, click on: **My Workspace** and you will be prompted to **Get Data**. (or this screen might already be showing)

Get Data

Need more guidance? [Try this tutorial](#) or [watch a video](#)

Microsoft AppSource

Import or Connect to Data

| | | | |
|--|---|---|---|
| My organization Browse content packs that other people in your organization have published. Get | Services Choose content packs from online services that you use. Get | Files Bring in your reports, workbooks, or data from Excel, Power BI Desktop or CSV files. Get | Databases Connect to live data in Azure SQL Database and more. Get |
|--|---|---|---|

[Samples](#) [Solution Templates](#) [Partner Showcase](#)

[Skip for now](#)

AppSource Data or Import / Connect to Data:

AppSource (Content Packs) – Recommended! Many apps are creating content packs for you to use with Power BI. These are great! Think of these as a pre-set data connection and ready-made report templates. For example, Acumatica, Dynamics 365, and many more come with easy, downloadable content packs. Microsoft Dynamics GP is scheduled to release a content pack this year too.

Just click on the yellow “Get” button and you will be prompted to choose your content pack. Here are some examples. I typed dynamics in the upper right search box. See if there’s one available for your needs.

The screenshot shows the AppSource interface with a search bar containing 'dynamics'. Below the search bar, there are two rows of app cards. Each card includes an icon, a title, a subtitle, a description, and a 'Get it now' button.

| App Name | By Microsoft Power BI | Description |
|---|-----------------------|---|
| Sales Analytics for Dynamics 365 | By Microsoft Power BI | Explore your past sales performance, activities, sales pipeline and more |
| Customer Service Analytics for Dynamics 365 | By Microsoft Power BI | Get insights about your customer service performance, activities and active cases |
| Microsoft Dynamics NAV | By Microsoft Power BI | Immediately gain access to business performance insights |
| Microsoft Dynamics 365 for Financials - Jobs List Report | By Microsoft Power BI | Analyze monthly costs and view the most recent status of your jobs. |
| Microsoft Dynamics 365 - Social Engagement | By Microsoft Power BI | Get insights about engagement and team performance on social media with Microsoft Social Engagement |
| Microsoft Dynamics 365 for Finance and Operations - Jobs | By Microsoft Power BI | Immediately gain access to Jobs data |
| Microsoft Dynamics 365 for Financials | By Microsoft Power BI | Immediately gain access to business financial insights |
| Microsoft Dynamics 365 for Financials - CRM | By Microsoft Power BI | Immediately gain access to sales opportunities |
| Microsoft Dynamics 365 for Financials - Customers List | By Microsoft Power BI | Analyze sales activity, balance due and available credit for your |
| Microsoft Dynamics 365 for Financials - Purchase Invoice List | By Microsoft Power BI | Gain insights into the purchase lines that make up a purchase |

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