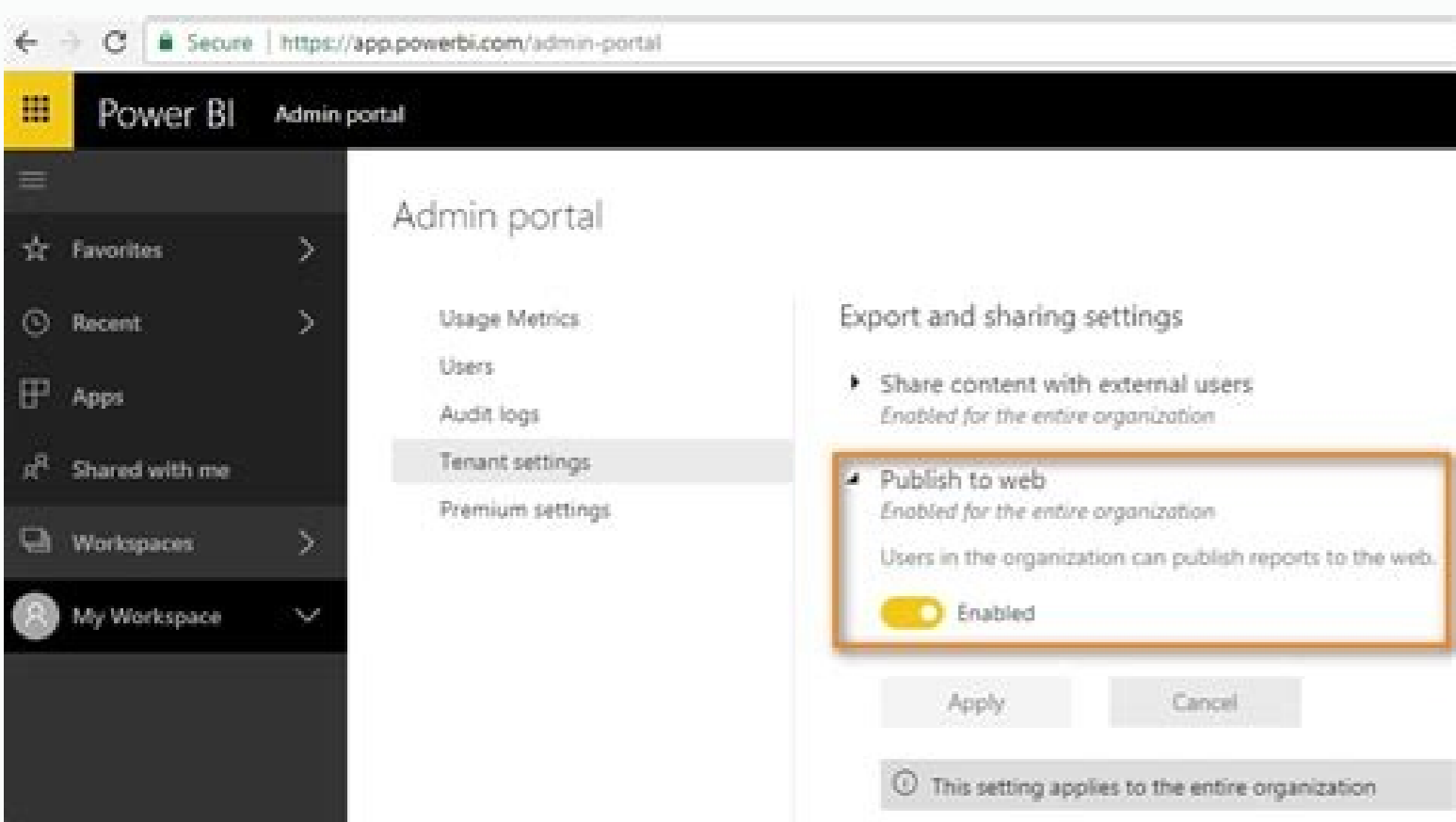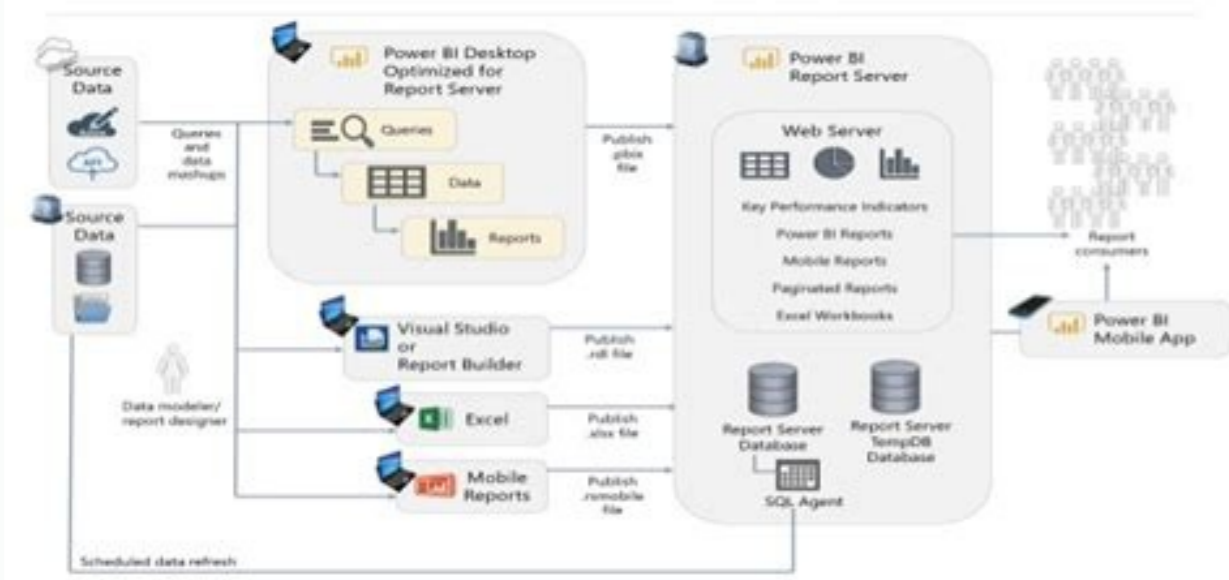# Publish power bi report server

I'm not robot!

On-Premises (Non-Cloud) Reporting Portal- Demo

In this chapter, you will learn how to share Power BI dashboard for report sharing, printing, publishing, etc. Using Power BI Desktop for Report Sharing Once BI reports are created in Power BI desktop, you can also share the reports with other business users. All BI reports, dashboards, and data can be shared with other colleagues and business users in the organization. You can share reports using the following methods – Publish reports using Power BI Service Content Packs combine dashboard, report, and datasets obtained in BI desktop tool Create Groups and assign specific rights to different users for report sharing Use Power BI mobile apps to access share dashboards and reports Let us see how to publish a BI report using Power BI desktop tool. Once the report is created, navigate to the Publish button on the Home tab in Power BI desktop. Once you select the Publish service, your visuals, custom measures and reports are all packaged and published to Power BI service. Power BI files have an extension .pbix files. When the upload is in process, you get a dialog box that Publishing is in process. Once the upload is complete, you will get a confirmation message announcing the "Success". You can also view Quick Insights and open the shared report from the dialog box. Printing Power BI Dashboards It is also required sometimes to take printouts of your reports and dashboards. With Power BI, you can take prints of your BI reports and dashboards. To take a Printout of the report, navigate to Power BI service and click the "..." option. It will open a Print dialog box. You can select the Printer on which you want to take the printout of the report. You can also select different Print options such as Portrait/Landscape, Margins, Header or Scale. Export Options In Power BI, you can also use different Export options to export data from BI report. To use the export option, navigate to Power BI service and select the BI report you want to export. When you click the Export to option, it generates a CSV file. In Power BI, you can also export/view a report directly by navigating to File → Print option. Publishing Report to Web In Power BI, it is also possible to publish a BI report to web or share it via email. To publish a report to the web, you have to navigate to Power BI service → My Workspace. Once you open the report that you want to publish, navigate to the File tab → Publish to Web. Once you select this option, it opens a new dialog that creates an embed code for this report to include in the website or email. Option says: Get a link or embed code that you can include on a public website. You may use publish to web functionality to share content on a publicly available website. You may not use this functionality to share content internally, which includes through your email, your internal network, or intranet site. Publish a live version that will remain synchronized with the source report in Power BI. Any changes you make to the report will immediately be reflected in the published public version. When you select - Create Embed code, Power BI prompts that you want to share your data with everyone on the internet. The following message is displayed: You are about to create an embed code for this report. Once published, anyone on the Internet will be able to access the report and the data it contains, and Microsoft may display the report on a public website or a public gallery. Before publishing this report, ensure you have the right to share the data and visualizations publicly. Do not publish confidential or proprietary information, or an individual's personal data. If in doubt, check your organization's policies before publishing. Note – You can publish the report as a web page and any user with the link can view it. The link can be sent via email or it can be used as an iframe in a web page. Deleting an Embed Code Let us say, you want to delete an embed code. Navigate to the Gear icon at the top of the screen as shown in the following screenshot. Then go to Manage Embed codes. To remove an embed code click the ellipsis mark (…) in front of the report name and select the Delete option. When you click the Delete option, it will ask you if you want to delete publish to web code. Once you are sure, click Delete. Using Content Pack In Power BI, you can also share dashboard, report, and dataset as a package with your colleagues. To create a content pack, click the Gear box icon in Power BI workspace as shown in the following screenshot. Once you select Create content pack, you will be prompted with a new dialog box. You can choose if you want to distribute this content pack with Specific Groups or My Entire Organization. If you want to share this with specific people, you have to enter email addresses. You can also add a Title and description of the content pack as shown in the following screenshot. At the bottom of the page, you have an option to select the components you want to publish. You can select from the following – Dashboards Reports Datasets Editing Content Pack When a content pack is created, you can also go back and edit the shared objects of the content pack. Whenever you update any dashboard, BI report, you are prompted if you want to update the shared content. Click the Gear box icon under My Workspace → View Content Pack. If you see a small icon in front of the name of the content pack, it shows that the content pack is updated. When you select the edit button, you will reach the home screen, where you can create a new content pack. Power BI accepts all the changes you make to the content pack and publishes the updated content pack to the content pack gallery. By: Eduardo Pivaral | Updated: 2019-08-09 | Comments | Related: > Power BI Problem Since information can come from a lot of different data sources (both structured and unstructured), you need a solution to be able to gather and visualize data then share your findings among your team in a clear-concise way. In Part 1 we discussed how to install and configure Power BI, also discussed how to create a basic dashboard and data connectivity modes. In Part 2 we covered Power Query, and how you can perform simple ETL processes within Power BI. In this tip we will learn how to publish your reports. Solution We learn how to use Power BI desktop, the application that allow us to create and edit the reports, but once we have them ready to use, we need a repository to publish and secure our reports. Microsoft provides two main options to host your .pbix reports: you can use an on-premises Power BI Report Server (out of scope on this tip), and the most commonly used Power BI Service that we will discuss in this tip. What is the Power BI Service? Is a collaborative platform that Microsoft provides to create, maintain and secure our reports and datasets via customizable dashboards, also you can package your dashboards via apps and make them available on the Power BI app source. It can be accessed accessing app.powerbi.com and it requires a subscription to use it. There are three subscription tiers so far: Power BI desktop - Free: once you create a Power BI account via Power BI desktop, you can use basic publish features for personal use. Power BI Pro - $9.99 / Month – Fully managed Power BI service, it offers more collaborative options. Power BI Premium - $4,995/Month – It offers all features and provides dedicated cloud computing and storage resources. For this tip, we will use the free version. For creating a free account, you can use the Power BI Desktop welcome screen, and click on Try Free: Once you have created an account and accessing the site app.powerbi.com, the main page looks like this: We will now see the most basic option, publish reports. Publishing Reports to Power BI Service Once you have your report configured and ready to use, publishing it is very simple, let us take this sample report using AdventureWorks2017 test database: Nothing complicated, just 2 charts for illustrative purposes. To publish it to your Power BI service, just click the Publish button on the Home tab: If you are logged in, in the workspace destination we will be asked, for this example, select the default workspace (we will see how to create more later): It will start the publishing process, and it will take some time depending on your report size: Once completed, the wizard will provide you the option to visualize it online: If you open the report, you can now visualize it online: Ok, that is the basic-static publishing operation, let us see some more options. Configuring Data Gateway The idea of using Power BI is to have updated data for your reports to be used, but until now, the data load (unless you are using DirectQuery) is done manually. Power BI service provides us a tool to connect your on-premises sources with the cloud service, allowing you to refresh your data sources without worrying about security or access issues. This tool is called Data Gateway, which is installed on a machine with internet connectivity, that has access to your Data Source and will act as a bridge between the source and the cloud service. To install the tool, download it from your Power BI Service homepage, on Downloads > Data Gateway: This will open a new window where you can download the installer. Once downloaded, run it on a machine that can be always online, with access to internet (or at least the power BI service) and with access to the data sources you plan to use. The first page of the installer will show you the recommendations we have discussed so far, click on Next. There are two types of gateway you can use: On-premises: Can be used for multiple users and support all features. This is the recommended type to use. Personal only: Can be used for the user that installs it, and only support data refresh, ideal if you are using only your personal machine and perform the refresh on-demand or a less frequent schedule. Wait for the installer to finish downloading all the required packages based on your choice: Select the path where you want to install the gateway, accept the terms and click on the Install button: Once the setup is finished, sign in to the Power BI service with your credentials, this will start the gateway: Once you are signed in, you can create a new gateway (by entering a name and a recovery key) or use an existing one, enter the required data and click on the Configure button. Once the gateway is configured, the gateway console will open (you can close it if you want now) and if you open the program again, you will see the service status: Once the gateway is up and running, we can configure our report dataset to connect to the gateway. Configuring and Refreshing your Dataset Once the gateway has been created and is running on the machine, access your Power BI Service, go to Settings > Manage Gateways. In this section, you can administer your gateways, and assign new administrators to it, by default, the account that configured the gateway is added as an administrator. To add a dataset, click on Add data sources to use the gateway: A new window will open, provide a meaningful name, and select the data source type and the connection details (for this example SQL Server), and once done, click on the Add button: Please note that for Server name we use (local), this is because Power BI service connects to the gateway agent installed on the machine, and from there, the connection to the specific resource is made. Once created we can see that the data source is now listed under the gateway: Once the data source is created, we need to bind it to the report we just uploaded, for this, go to Settings: In the new window, Select Datasets, and then select the dataset you want to configure: Click Gateway connection, then click on the triangle at the right under Actions. In there, select to which dataset you want to map the data source, and after that click on Apply: If everything is ok, after clicking apply, we will have the ability to refresh our report data. To do it, in the left menu, click on Datasets, select the dataset you just configured and click on Refresh Now: Depending on your dataset size this can take some time to complete, but if everything is ok, you will see the last refresh succeeded date changing. Now that everything is working fine, you can proceed to schedule an automatic refresh of your dataset (if you have used the Import option, for DirectQuery, a refresh is not needed), so now click on Refresh Schedule: In the new window, specify how often you want to refresh your data. Note that the smallest time interval is half an hour, if you want a more frequent refresh, you should consider using DirectQuery. Once you are ok with the refresh schedule you configured, click on Apply: Now you can pin your report to a dashboard, just keep in mind that a dashboard is a collaborative tool and is part of a Power BI Pro subscription. To pin to a dashboard, just open the report, and you can use the whole report or just a part of it, by clicking on the Pin Live Page icon: A new window will appear where you can select to add to an existing dashboard or create a new one, then click on Pin Live button: After that you have your first report configured as a collaborative dashboard up and running: Next Steps Check out Part 1 where we discuss how to create a report. Check out Part 2 to learn about Power BI ETL capabilities. Power BI desktop can be downloaded from here. You can see all Power BI tips here. Eduardo Pivaral is an MCSA, SQL Server Database Administrator and Developer with over 15 years experience working in large environments. View all my tips Article Last Updated: 2019-08-09

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