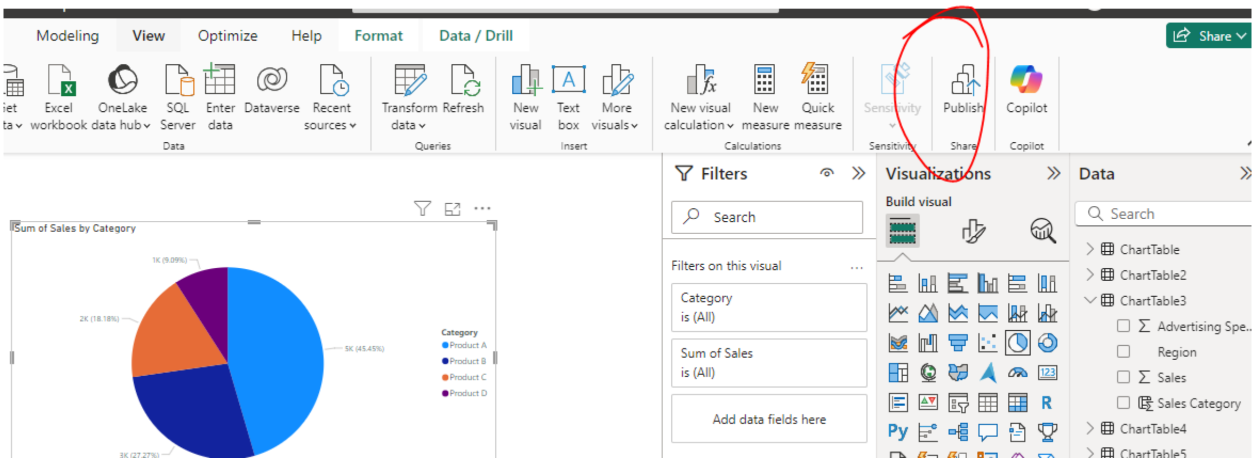
Chapter-23 Publishing Dashboards and Charts in Power BI

Once you've created your dashboards and charts in Power BI Desktop, you can publish them to the **Power BI Service** for sharing, collaboration, and viewing on various devices. Publishing allows you to make your reports and dashboards accessible to others in your organization, or externally if necessary.

Here's how to publish dashboards and charts in Power BI:

Steps to Publish Dashboards and Charts from Power BI Desktop



Step 1: Save Your Work in Power BI Desktop

1. **Save your Power BI file (PBIX)** to ensure that all your changes are captured before publishing. This file includes your charts, dashboards, and other visualizations.

Step 2: Sign In to Power BI Service

1. Open **Power BI Desktop**.
2. In the **Home** tab, click the **Sign In** button.
3. Sign in using your **Power BI** or **Microsoft 365** account. If you don't have an account, you will need to sign up or use a work/school account that has Power BI Pro or a premium license.

Step 3: Publish Your Report

1. Once signed in, go to the **Home** tab in Power BI Desktop and click **Publish**.
2. A pop-up window will appear asking you to choose a workspace where you want to publish the report.
   - **My Workspace**: This is your personal workspace.
   - **Other Workspaces**: These could be shared workspaces within your organization.
3. Select a **workspace** to publish the report to. You can create a new workspace if needed by clicking **Create a new workspace** in the dialog.
4. After selecting the workspace, click **Select**. Power BI will upload the report to the selected workspace in the Power BI Service.
5. You'll receive a confirmation message once the report has been successfully published.

Step 4: Access the Published Report in Power BI Service

1. Go to **Power BI Service** by navigating to Power BI Service.
2. Sign in to your Power BI account.
3. Go to the workspace where you published your report.
4. You will see the report in the **Reports** section. You can open it to view, interact with, and further edit it.

Creating and Publishing Dashboards in Power BI Service

After publishing your reports, you can create dashboards by pinning charts and other visuals to a new or existing dashboard. Dashboards provide a high-level view of your data and allow you to aggregate multiple visualizations from different reports into one cohesive display.

Step 1: Open Your Published Report in Power BI Service

1. In Power BI Service, go to the **workspace** where your report is stored.
2. Open the **Report** that you want to use to create your dashboard.

Step 2: Pin Visuals to a Dashboard

1. Once the report is open, you can pin individual charts and visuals to your dashboard.
2. **Pinning to Dashboard**:
   - Hover over the visualization you want to add.
   - Click the **Pin** icon (the pushpin symbol).
   - Choose whether to pin the visual to an **existing dashboard** or create a **new dashboard**.
   - If you select **New Dashboard**, give the dashboard a name and click **Pin**.
3. Repeat this process for each visual you want to pin to the dashboard.

Step 3: Customize the Dashboard Layout

1. Once all visuals are pinned to the dashboard, go to the **Dashboard** section of Power BI Service.

2. Open the newly created dashboard. You will see all your pinned visuals arranged on a grid.
3. Drag and resize the tiles to organize the layout of your dashboard. Arrange visuals so they are easy to interpret and follow a logical flow.

Step 4: Share the Dashboard

Once your dashboard is created and organized, you can share it with others.

1. Open the dashboard in **Power BI Service**.
2. Click on the **Share** button in the top-right corner.
3. In the dialog box, enter the email addresses of the people you want to share the dashboard with.
4. You can select to allow recipients to share the dashboard, build new content, and interact with it. Choose the appropriate permissions for the users.
5. Click **Share** to send the invitation.

Step 5: Schedule Data Refresh (Optional)

If your dashboard uses data that needs to be updated regularly, you can schedule automatic data refreshes.

1. Go to the **Datasets** section in your workspace.
2. Find the dataset that is being used by your report or dashboard.
3. Click on the **ellipsis (three dots)** next to the dataset and select **Schedule Refresh**.
4. Configure the refresh schedule (e.g., daily, weekly) and ensure that your data stays up to date.

Publishing to Power BI Mobile

Power BI dashboards and reports are fully interactive on mobile devices through the **Power BI Mobile app**. To access your published dashboards on mobile:

1. **Install the Power BI Mobile App**: Download the Power BI app from the **App Store** (iOS) or **Google Play** (Android).
2. **Sign In**: Open the app and sign in with the same Power BI credentials you use in Power BI Service.
3. **View Your Published Dashboards**: You will see the dashboards and reports you've published in your workspace. Tap to view, interact, and drill down into the data.

Best Practices for Publishing Dashboards and Reports

1. **Organize Workspaces**: Use workspaces to organize your reports, dashboards, and datasets. This makes sharing and collaboration easier, especially in team or organizational environments.

2. **Set Permissions Carefully**: Be mindful of the permissions when sharing reports and dashboards. Ensure that only the appropriate people or groups have access.
3. **Optimize for Mobile**: Ensure your dashboards and reports are mobile-friendly by using simple, clear visuals and avoiding clutter. You can also use Power BI's mobile view to optimize layouts specifically for smaller screens.
4. **Regular Data Refresh**: If your reports rely on up-to-date data, set up a **schedule for data refresh** to ensure that your visualizations reflect the most current information.
5. **Monitor Usage**: After sharing, you can track how users are interacting with the dashboard by using **usage metrics** in Power BI Service. This allows you to see which reports are being viewed and how often.
6. **Document the Purpose**: Provide context to your reports and dashboards by including **descriptive titles**, **text boxes**, and **annotations** that help users understand the data presented.