

## Power BI User Guide

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*Updated April 28, 2025*

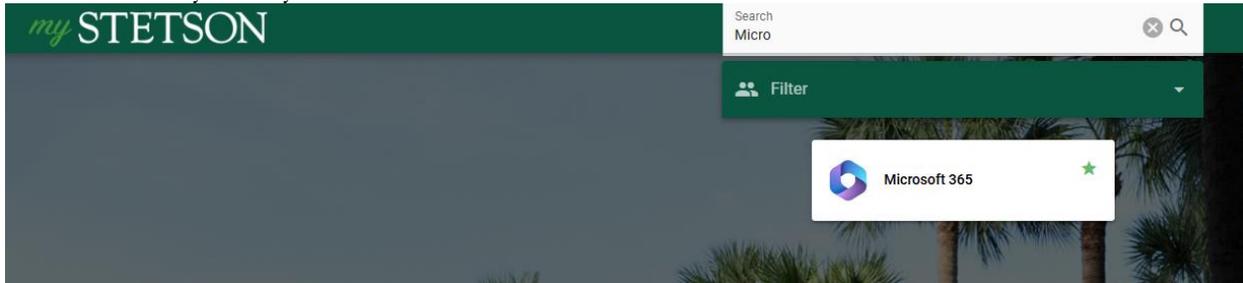
Power BI is a Microsoft product that consists of data visualization software where users can create dashboards (“reports”) from a wide variety of data sources. Users can then upload their dashboards to share with others at Stetson or publicly on a webpage.

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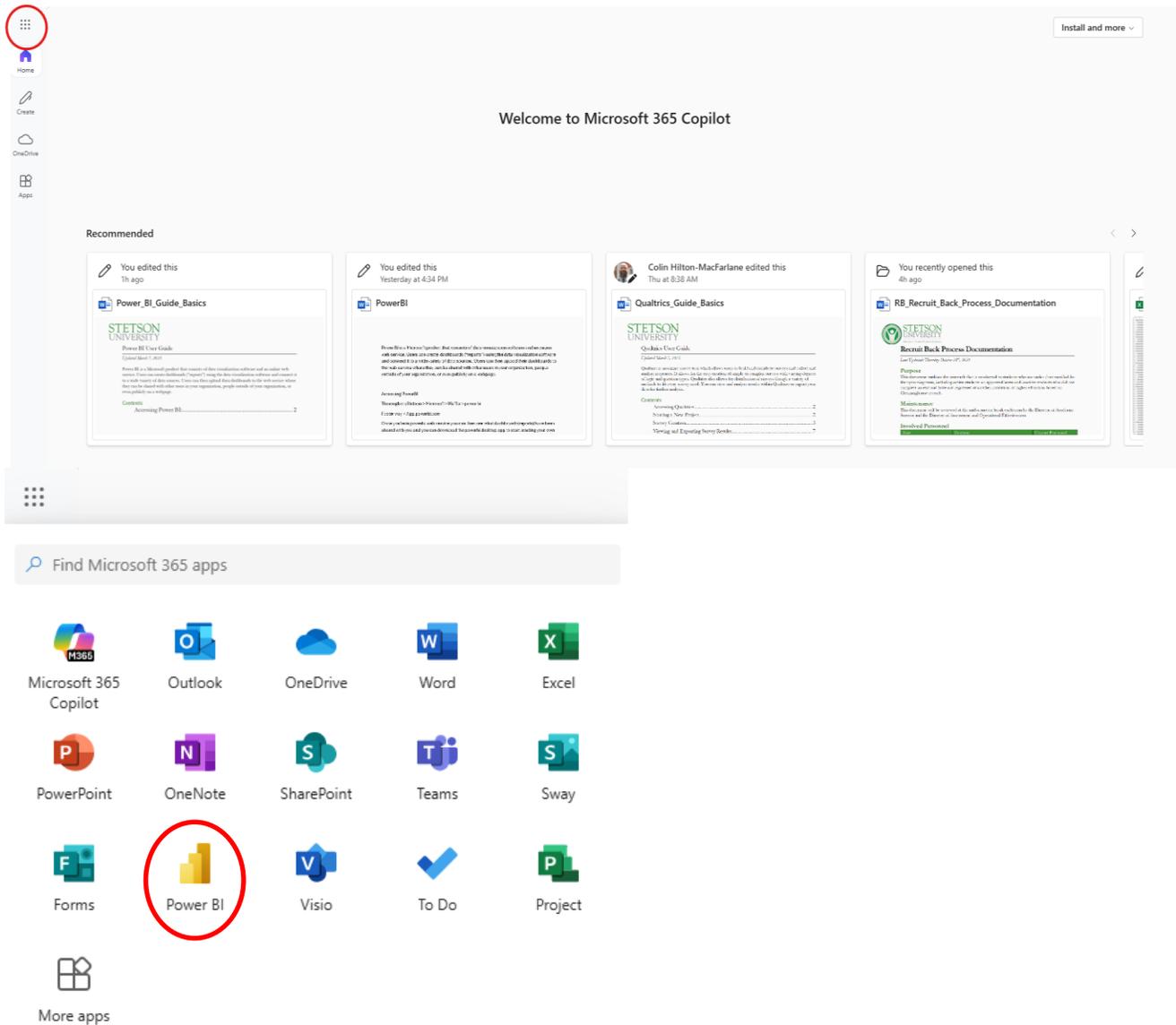
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## Accessing Power BI:

1. You can access Power BI just like you would access any other Microsoft apps on the web.
  - 1.1. Go to your MyStetson and search and click on the Microsoft 365 tile.



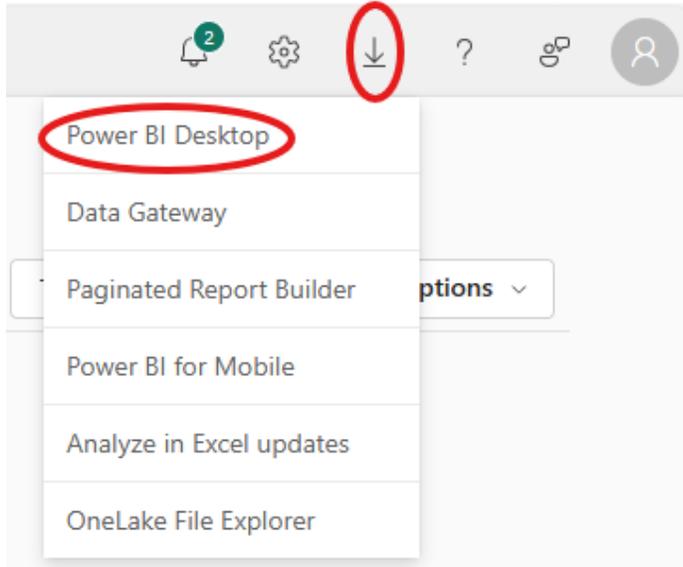
- 1.2. Click on the waffle in the left-hand corner and then select Power BI



- 1.3. This will take you to the Power BI web service.
2. You can also access the Power BI web service directly, by going to <https://app.powerbi.com/>

3. Once you are in the Power BI web service, you can also download the desktop app to start creating your own reports.

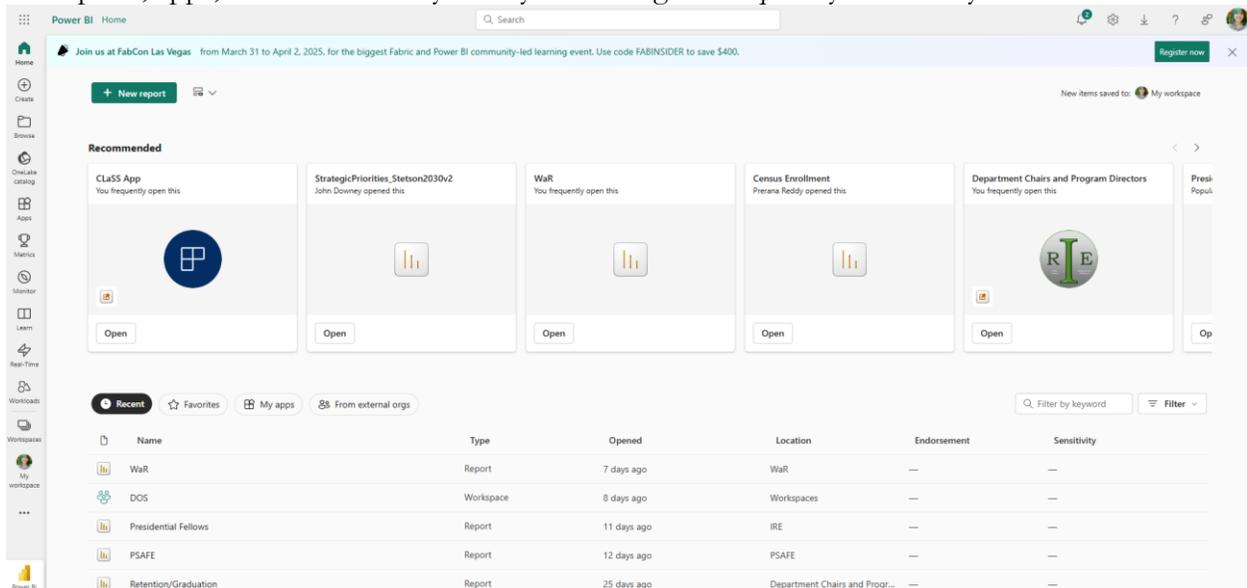
3.1. Select the download button in the right corner, and select Power BI Desktop



3.2. This will launch the Microsoft app store where you can download and install the desktop app.

### Navigating the Power BI Web Service

1. Your Power BI home page will display reports and datasets that you have recently visited and additional reports that you have access to. It also features a recommended carousel that contains reports, apps, or data sets that you or your colleagues frequently or recently visited.



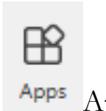
2. The home page also features numerous side buttons for navigation.

2.1.  Create—make a report using the web service report builder.

2.1.1. This report builder is limited compared to building reports using the Power BI desktop app. I would only recommend using this builder for very quick visualizations utilizing datasets already within the Power BI web service.

2.2.  Browse—displays all reports that you have recently visited, favorited, or that have been shared with you.

2.3.  OneLake—the Power BI data hub that displays all datasets you have permissions for

2.4.  Apps—Displays all the apps shared with or created by you.

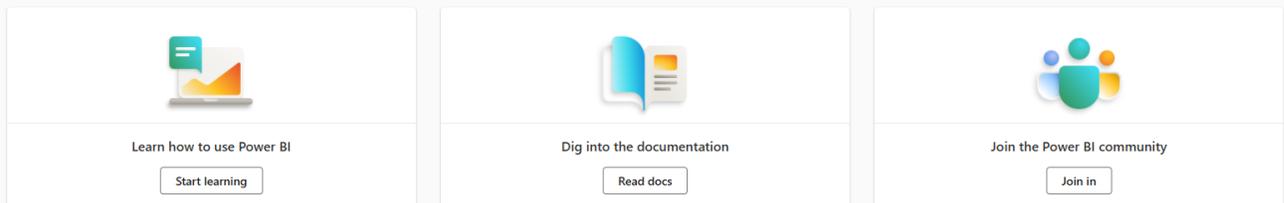
2.5.  Metrics—allows users to create and manage goals within “scorecards.”

2.6.  Monitor—allows users to view and track the status of activities across workspaces.

2.7.  Learn—browse Microsoft’s Power BI trainings, documentation and connect to the Power BI community.

Learning center

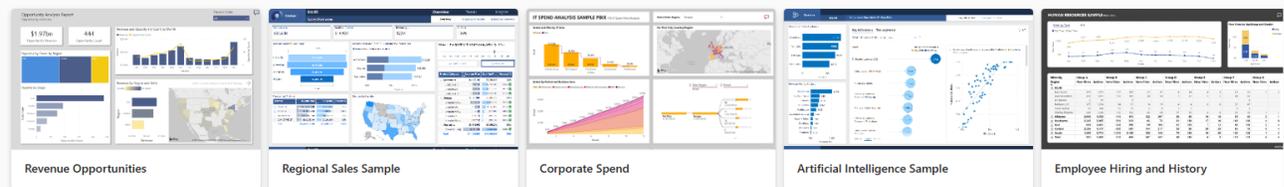
Your hub for all Power BI training



The Learning center section features three main navigation cards:

- Learn how to use Power BI:** Includes a 'Start learning' button.
- Dig into the documentation:** Includes a 'Read docs' button.
- Join the Power BI community:** Includes a 'Join in' button.

Sample reports



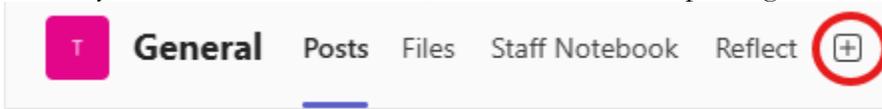
The Sample reports section displays five report thumbnails:

- Revenue Opportunities
- Regional Sales Sample
- Corporate Spend
- Artificial Intelligence Sample
- Employee Hiring and History

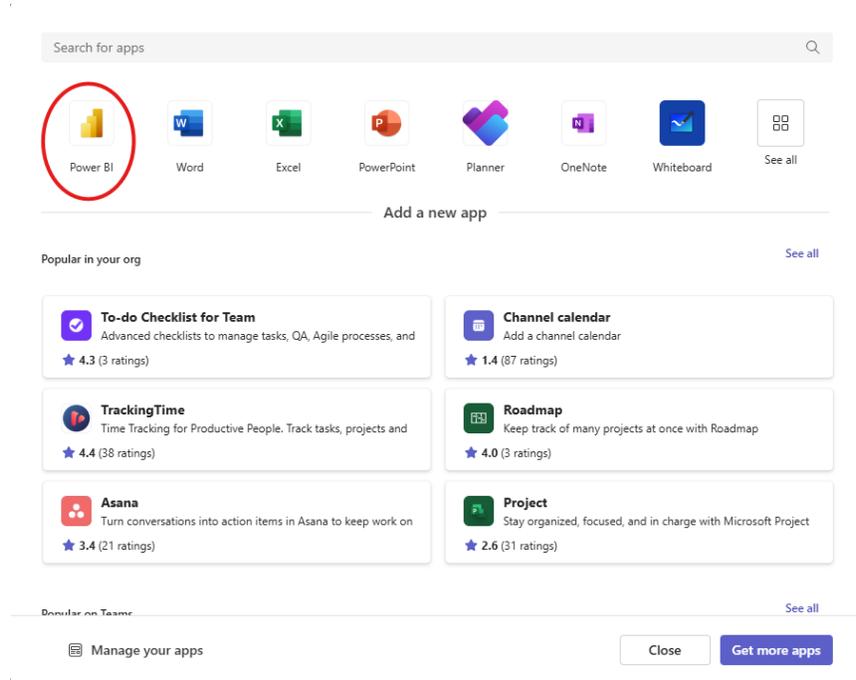
2.8.  Workspaces—used to navigate to different workspaces that you are a part of

## Pinning a Report in Teams

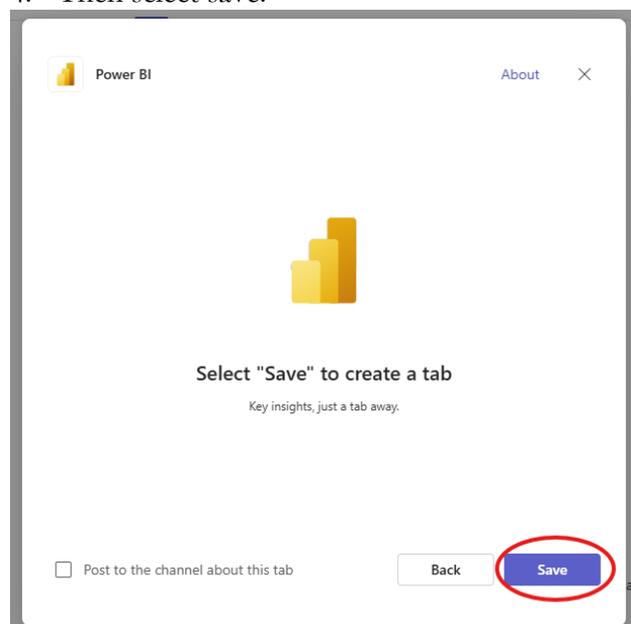
1. Reports (or Dashboards) can be pinned within Teams so that you can view your report within a team or chat with ease.
  - 1.1. Please note that other members within the Team or chat must have access to the same report to be able to view it in Teams.
2. Within your chosen team, channel, or chat click on the plus sign.



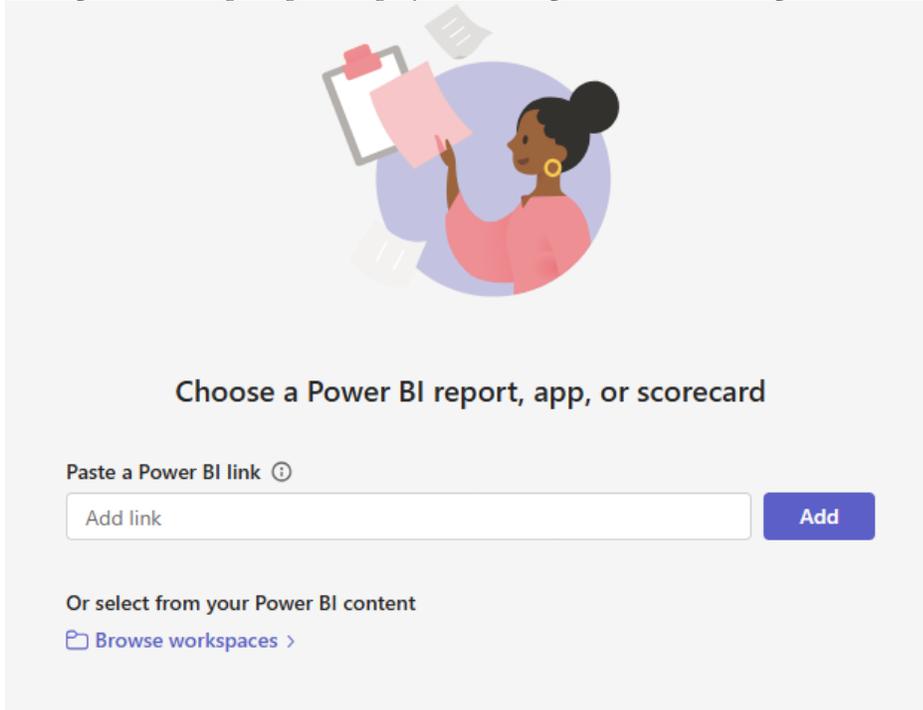
3. Then select Power BI



4. Then select save.



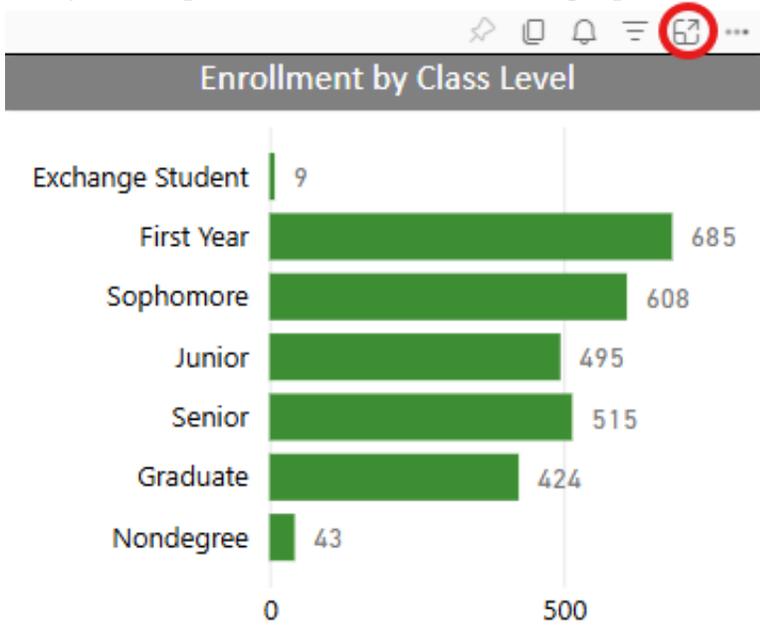
- Once the tab is created, you can either connect your Power BI report by pasting the link to the report or navigating through your workspace to find the report.



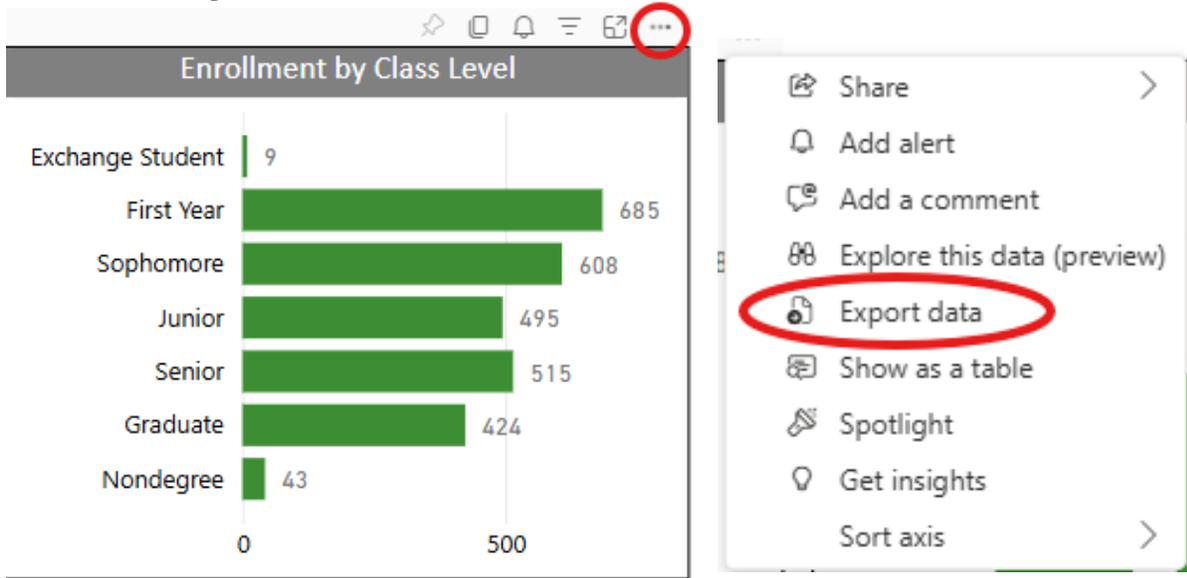
- Your tab in the team or chat will then automatically change the name to the name of the report, you can rename it, if necessary, by clicking on the name then “rename.”

### Exporting Data from a Power BI report

- When viewing a Power BI report, you can enlarge a visualization to easily take a screen capture by selecting the focus mode icon in the top right corner above the visualization.



- To export data, click on the more options icon in the top right corner above the visualization and select export data.



- 2.1. This will then prompt you to choose a file format and export the data, the data will be saved in your downloads file.

### Which data do you want to export?



Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more about exporting data](#)

**Data with current layout**

ⓘ This option is only available for table and matrix visuals

**Summarized data**

Export the summarized data used to create your visual (for example, sums, averages, and medians).

**Underlying data**

ⓘ The report author turned off this option

File format:

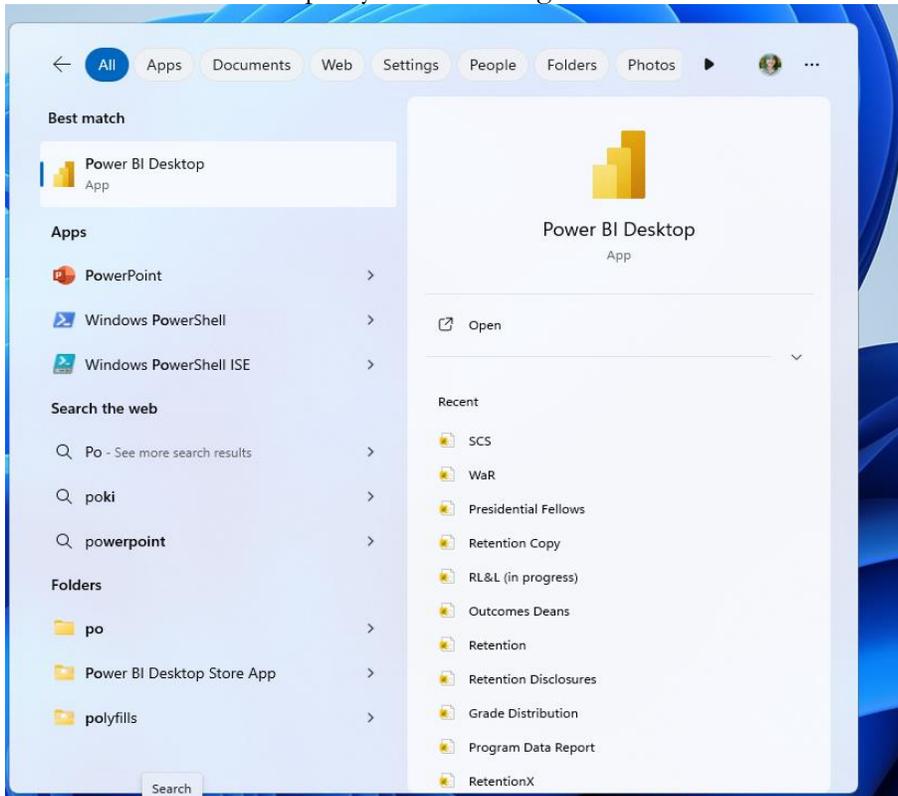
.xlsx (Excel) with live connection (500,000 row max) ▾

Export

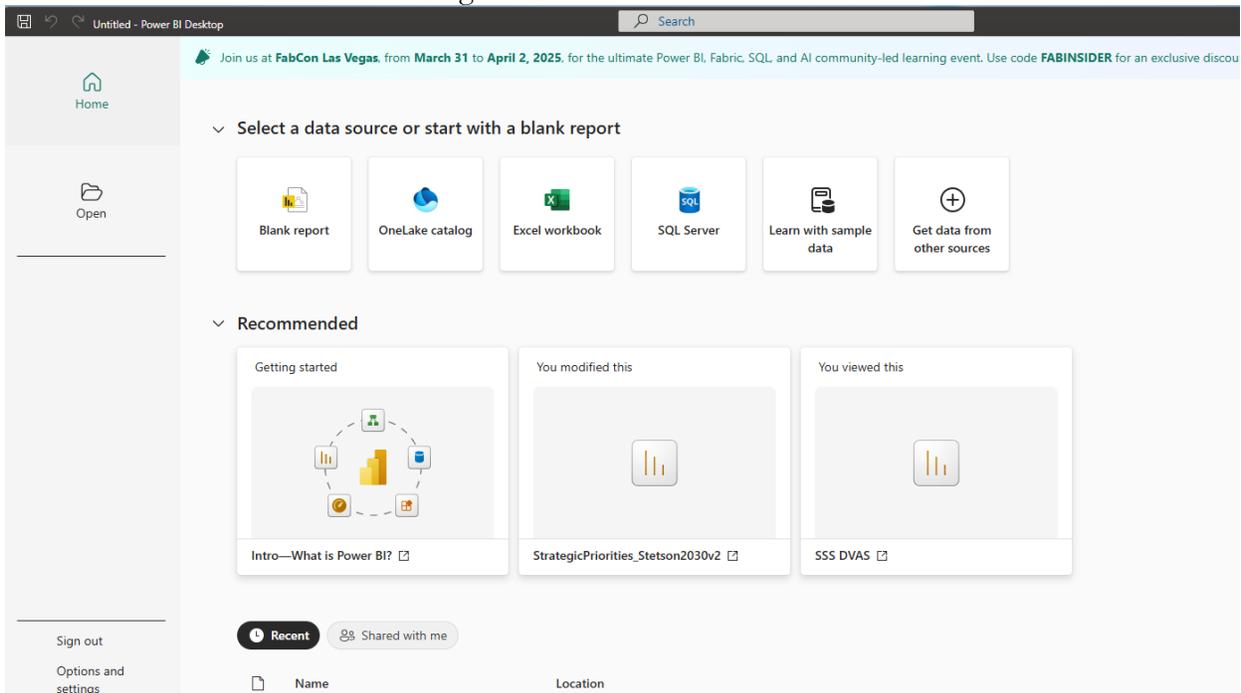
Cancel

## Creating a Power BI report in the Desktop App

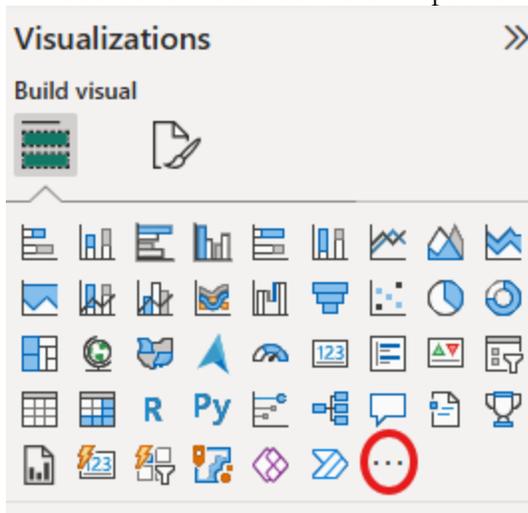
1. Once you have downloaded the desktop app you will be able to create your own reports and dashboards utilizing numerous data sources. You will want to finish the installation and search for Power BI desktop in your file manager or task bar.



2. You can begin with a blank report, or by creating a report with a data source already in Power BI web service with OneLake catalog.



3. Once you've started your report, select the "get data" button to explore the different data types you can connect to. A few data sources of note are:
  - 3.1. SharePoint Folder—will allow the user to connect to folders and data on any Microsoft Teams folders they have access to
  - 3.2. Web connections—allow the user to connect to various sources online. We can connect ARGOS datablocks directly to Power BI using this tool. If you have a datablock in ARGOS, you would like to use as a source in your Power BI report please contact [Iro@stetson.edu](mailto:Iro@stetson.edu) for implementation assistance.
4. Use the visualization pane to select a visualization and drag and drop your data into the values.
  - 4.1. If you don't see a visualization that you are looking for, click on the three dots to browse additional visualizations or import a visual from a file.



5. Once you have completed your dashboard, click on the publish button in the ribbon to publish it to the Power BI web service.



6. Once your report is published to the web service you can then share it as needed.