



Getting Started

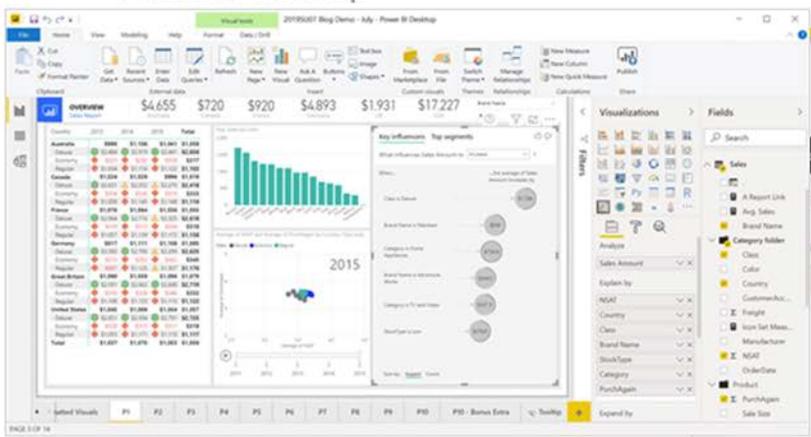
Power BI

From Zero to Hero in 1 Hour

WHAT IS POWER BI?

Power BI is a technology-driven business intelligence tool provided by Microsoft for analyzing and visualizing raw data to present actionable information.

Power BI Desktop

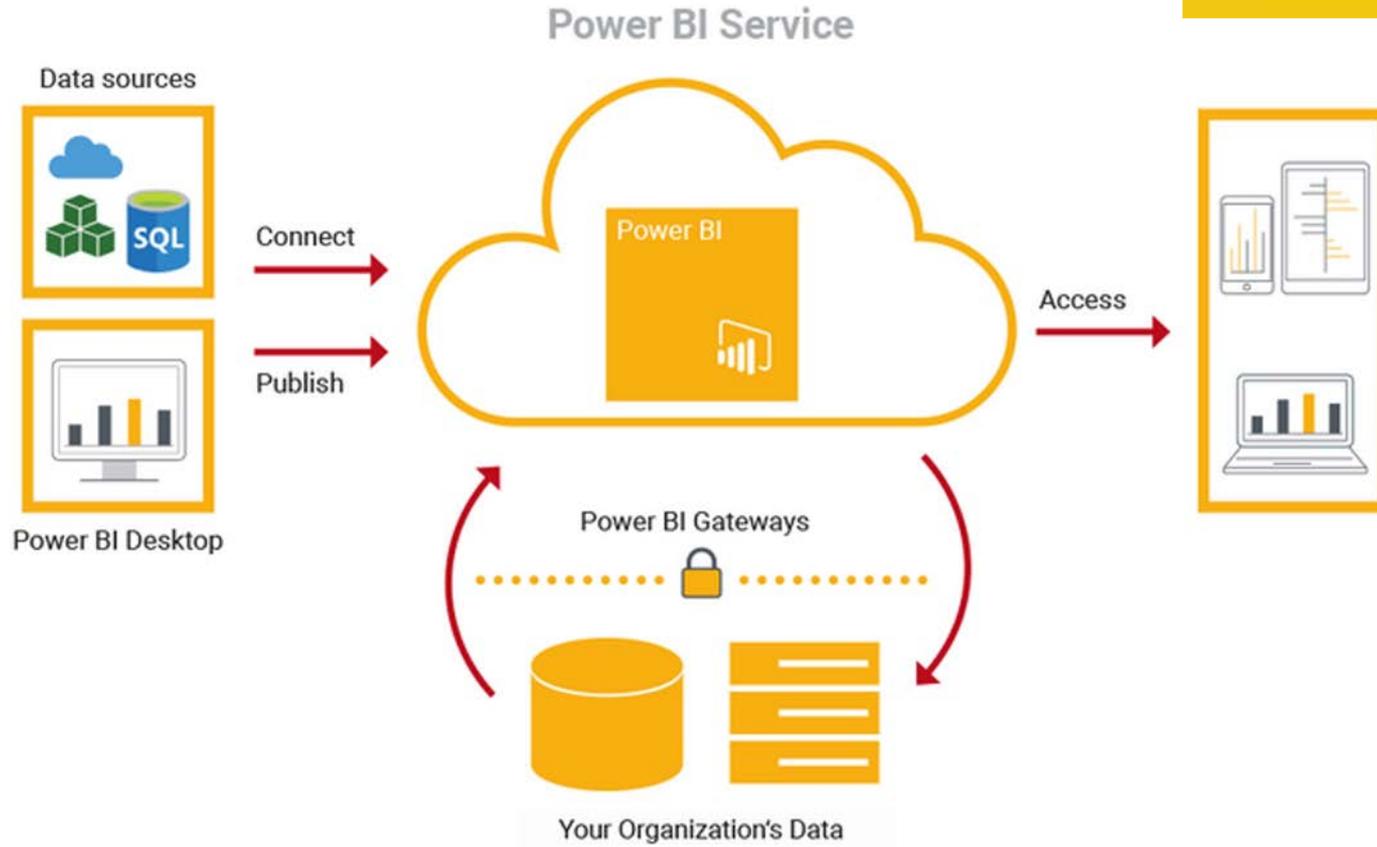


Power BI service



Power BI Mobile







Power BI and MinistryPlatform

What we doing today?

TODAY

- Overview of Power BI
- Installation
- Configuration
- Create Dataset / Publish
- Auto Generate Report



Prerequisites

What you need before you
get started

MICROSOFT ACCOUNT

As you might imagine, you are going to need a Microsoft Account to login to Microsoft Services. You can use a personal account, but it is recommended to go ahead and get an organization configured so other staff can share in the delicious dashboards you create.

LICENSING

You are going to need to get a PowerBI License. You can start with the trial, but will quickly need to get your license provisioned. You will need Power BI Pro as minimum.

We all know Microsoft Licensing is super fun. Our friends at IT ONE can take the pain out of getting your license. Just ask for TEAM WEST.

<https://it1.com/>



MP SQL Server Access

You will need access to your MP SQL Server. You will need to login to the server directly to configure the Gateway, but after that, you just need access to SQL.

If you are hosted on Higher Ground, the team can and will install your Gateway, but you will still need to login and configure it.



MinistryPlatform

Installation

All the Technical Bits

POWER BI GATEWAY



If your MP server is hosted by Higher Ground, then simply send them a ticket and request the Gateway to be installed. If you don't have access to the server, then you will need RDP access and VPN access.

If you Self-Host your server, please download and install the Power BI Gateway:

learn.microsoft.com/en-us/data-integration/gateway/service-gateway-install

Power BI Desktop

Download and install Power BI Desktop on the computer you will use to create datasets and initial dashboards:

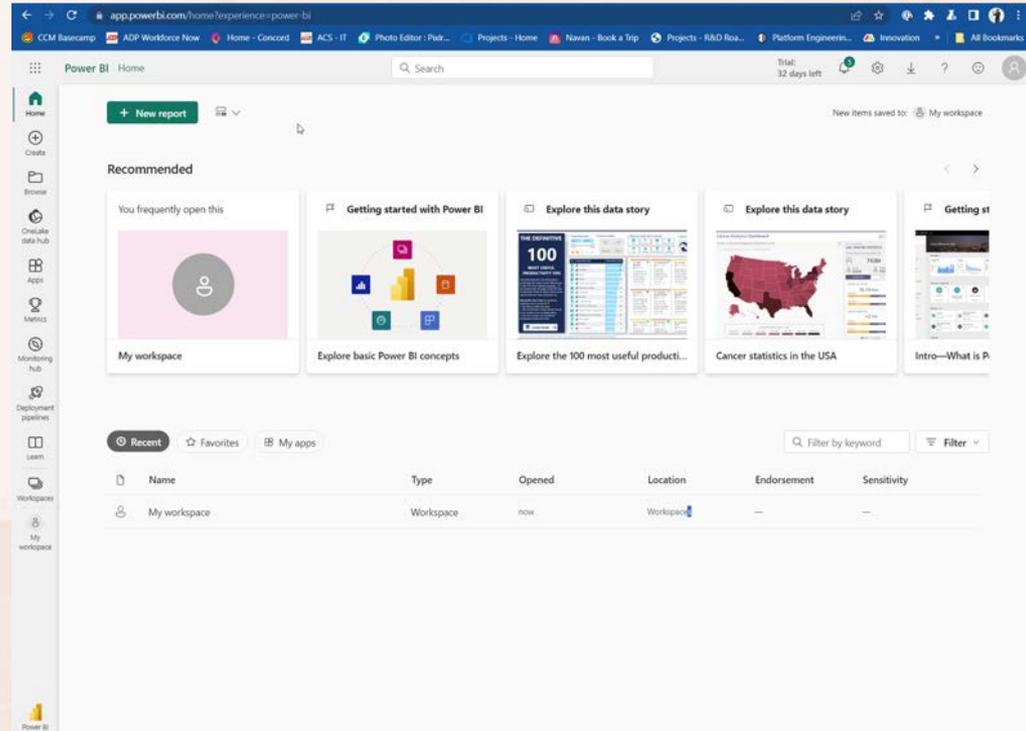
powerbi.microsoft.com/en-us/downloads

Do **NOT** install the Power BI Desktop on your Higher Ground hosted SQL Server. We have experienced issues with this causing memory issues when running in production.

Power BI Online

Nothing to install here, but the Power BI website allows your users to engage with reports and has some nice authoring tools too.

app.powerbi.com



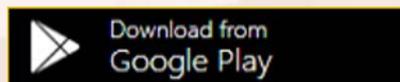
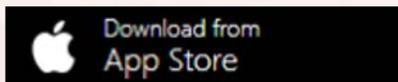
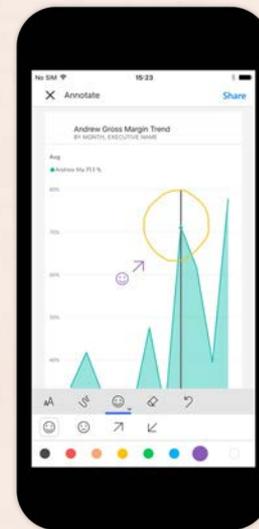
The screenshot shows the Power BI Online home page. The interface includes a navigation sidebar on the left with options like Home, Create, Browse, On-premise data hub, Apps, Metrics, Monitoring hub, Deployment pipelines, Learn, and Workspaces. The main content area features a 'New report' button, a search bar, and a 'Recommended' section with five report cards: 'My workspace', 'Getting started with Power BI', 'Explore this data story' (100 most useful products), 'Explore this data story' (Cancer statistics in the USA), and 'Getting started with Power BI' (Intro—What is Power BI). Below the recommendations is a 'Recent' tab and a table of workspaces.

Name	Type	Opened	Location	Endorsement	Sensitivity
My workspace	Workspace	now	Workspace	—	—

Power BI Mobile (optional)

Take your creations on the go with Power BI Mobile

powerbi.microsoft.com/en-us/mobile



Watchguard VPN (Higher Ground)

Contact Higher Ground to get a VPN Username / Password and a link to download the Watchguard SSL VPN client.



MinistryPlatform

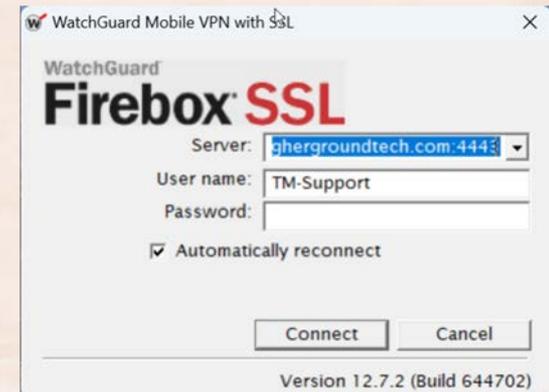
Configure

Let's make it all work

Connect to the VPN

Connect to the Higher Ground VPN using the username and password provided for your organization / account.

You will need to request all the connection info from Higher Ground Team.

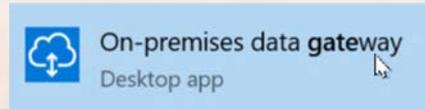


Configure the Gateway

Connect to your SQL Server via RDP using:

- Server IP
- Username
- Password

Open the Gateway Configuration from the main menu.



Login using the same credentials you will use for your Power BI software license.

Configure the Gateway

The image displays four sequential screenshots of the 'On-premises data gateway' configuration wizard:

- Top Left:** 'Almost done.' Installation was successful. Email address to use with this gateway: `chrisk@acst.com`. Next, you need to sign in to register your gateway. [Sign in options](#)
- Top Right:** You are signed in as `chrisk@acst.com` and are ready to register the gateway.
 Register a new gateway on this computer.
 Migrate, restore, or takeover an existing gateway.
 - Move a gateway to a new computer
 - Recover a damaged gateway
 - Take ownership of a gatewayThe old gateway will be disconnected.
- Bottom Left:** You are signed in as `chrisk@acst.com` and are ready to register the gateway.
New on-premises data gateway name*: `CCM MP Gateway`
 Add to an existing gateway cluster [Learn more](#)
Recovery key (8 character minimum)*: `*****`
 This key is needed to restore the gateway and can't be changed. Record it in a safe place.
Confirm recovery key*: `*****`
We'll use this region to connect the gateway to cloud services: East US 2 [Change Region](#)
[Provide relay details \(optional\)](#) By default, Azure Relays are automatically provisioned.
Buttons: **Configure**, Cancel
- Bottom Right:** Status: The gateway CCM MP Gateway is online and ready to be used.
Gateway version number: 3000.182.5 (July 2023)
Diagnostics: Help us improve the on-premises data gateway by sending usage information to Microsoft. [Read the privacy statement online](#)
Network:
Connectors: **Logic Apps, Azure Analysis Services** [Create a gateway in Azure East US 2](#)
Recovery Keys: **Power Apps, Power Automate** East US 2 Ready
Power BI Default environment Ready
Buttons: Close

Connect Power BI Desktop to SQL



The next step is to connect Power BI Desktop to your SQL Server. You **MUST** be on the VPN or the same network as your SQL Server.

Connect SQL to Power BI Desktop



SQL Server database

Server

Database (optional)

Data Connectivity mode Import
 DirectQuery

Advanced options

OK Cancel

SQL Server database

Windows
10.206.0.74;ministryplatform

Database

Microsoft account

User name

Password

Select which level to apply these settings to

Back Connect Cancel

Encryption Support

We were unable to connect to the data source using an encrypted connection. To access this data source using an unencrypted connection, click OK.

OK Cancel

CREATE DATASET

Navigator

Display Options ▾

- Pocket_Platform_Analytics
- Pocket_Platform_Analytics_Summaries
- Pocket_Platform_Announcement_Butto...
- Pocket_Platform_Announcement_Stacks
- Pocket_Platform_Announcement_Types
- Pocket_Platform_Announcements
- Pocket_Platform_Categories
- Pocket_Platform_Curriculum
- Pocket_Platform_Curriculum_Link_Types
- Pocket_Platform_Curriculum_Links
- Pocket_Platform_Devices**
- Pocket_Platform_Filters
- Pocket_Platform_GCE
- Pocket_Platform_Group_Messages
- Pocket_Platform_Group_Messages_Co...
- Pocket_Platform_Group_Messages_Dis...
- Pocket_Platform_Group_Messages_Gro...
- Pocket_Platform_Group_Messages_Meta
- Pocket_Platform_Icons
- Pocket_Platform_Lists

Pocket_Platform_Devices

Device_ID	Domain_ID	Hardware_ID	User_ID	Firs
2	1	005A1AAD-D67D-4B17-9E46-5ED5F719529E		null
3	1	014A4097-32D4-4393-A597-C879C034B1C6		null
4	1	0440511ab5a98acb		9411
5	1	05A580AE-71F2-42A7-B9CE-14328A1F81FE		null
6	1	06D1B1DE-543F-4742-ABD2-7CE7F19A4020		7097
7	1	070B04AD-B1F1-487D-9B1C-3042A645AEC7		null
8	1	073886bf25e2fcb2		null
9	1	0779C8D9-0B00-4EFF-BC40-57B38D7CB55C		386
10	1	082F9CDB-C4B6-4217-8074-547064ADDF90		4157
11	1	08C04FA5-331B-4874-9AEA-AAC6A41209B4		40708
12	1	0973BC89-EBCA-466A-9CCC-2061D4932056		744
13	1	09C1025A-7064-428E-9739-AB347C120522		37778
14	1	0a4aa94c989bfa8c		43531
15	1	08A31681-2A7D-4A52-A240-6E613FCA0ACE		38568
16	1	0D36BE01-6D43-498A-B663-735EAF59A7C3		26317
17	1	0d6443c9379f9c4d		null
18	1	0eea0bfff233ef2a		30063
19	1	1399A270-27AF-4585-8304-3B0D4E9AE635		null
20	1	13DB2ECO-49BD-47C1-945C-35CB4B376EE6		67
21	1	1532CEC5-1E0F-4DDA-A13D-33F963FD8AA5		3490
22	1	157D98B7-DDC6-43C6-98B2-D5C1F6B300CC		404
23	1	16608D57-2224-43B7-B3B8-4B2E286EBF98		null
24	1	1675CB97-815A-46CD-90BB-F706B23D04B2		32970

Select Related Tables
Load
Transform Data
Cancel

FIRST REPORT



We will use the Auto-generate Report Feature to see what Power BI can glean and generate on its own from the data we selected.

NEXT STEPS

This puts the basic infrastructure in place and tools to create
Learn more about datasets and creating reports and dashboards

powerbi.microsoft.com

Dashboard in a Day



Access free learning

Quickly start building reports and dashboards with help from free online learning resources and tutorials that you can share across your business.



Power BI Dashboard in a Day

YouTube · 3Cloud
Jun 10, 2022