Power BI Quick User Guide

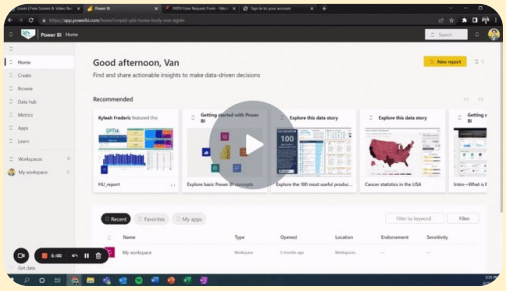
Last Updated: September 2022

This guide will demonstrate the initial account registration and setup for Microsoft Power BI. This guide will provide step-by-step instructions for how to set up your user account based on PATH's recommendations.

User Guide Contents

Video Tutorial

A video tutorial for a first-time login walkthrough is also available! The video will walk through all the steps detailed below, so we recommend watching it for a visual walkthrough of the process. Access the video here (4 minutes).



1. Complete the PATH User Request Form

To request a new user account, please complete the User Account Request Form. The form will ask you to provide the following information:

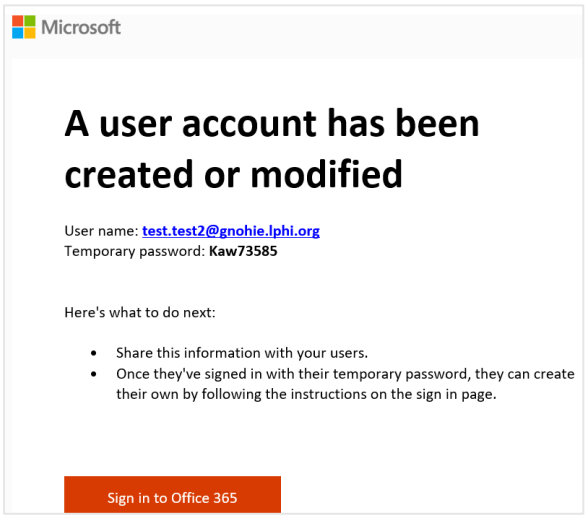
- Organization
- First and last name
- Work email address
- Phone number *(required by Microsoft to create the account; will not be used by GNOHIE team)*
    a. *We recommend using your cell phone or another phone that you have consistent access to*
- Select the report(s) you need access
- Select your email alert preferences
    a. *Email alerts include summary statistics from your report and a convenient link to Power BI login page*

Once the GNOHIE team begins processing your request, you will receive an email from gnohie_admin@lphi.org confirming your submission with further instructions and resource links.

2. Register your Microsoft Office 365 Account

Once the GNOHIE team has created your user account, you will receive an automated email from Microsoft to your work email address. The email will come from ms-noreply@microsoft.com with a subject line that reads, "Account information for new or modified users." The Microsoft email includes your **GNOHIE Microsoft username**, **temporary password**, and a **link** where you can login for the first time (see pictured on the next page).

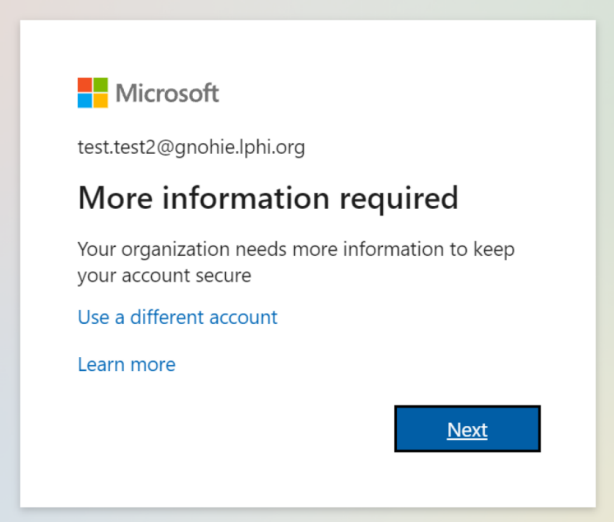
If you do not see the email, check your Spam folder and ensure the email has the correct sender address and subject line to confirm that it is a trusted email. If you do not receive an email, contact us at GNOHIETeam@lphi.org and our IT team and re-send the email to you, if necessary.



Click the "Sign in" button in the Microsoft email.

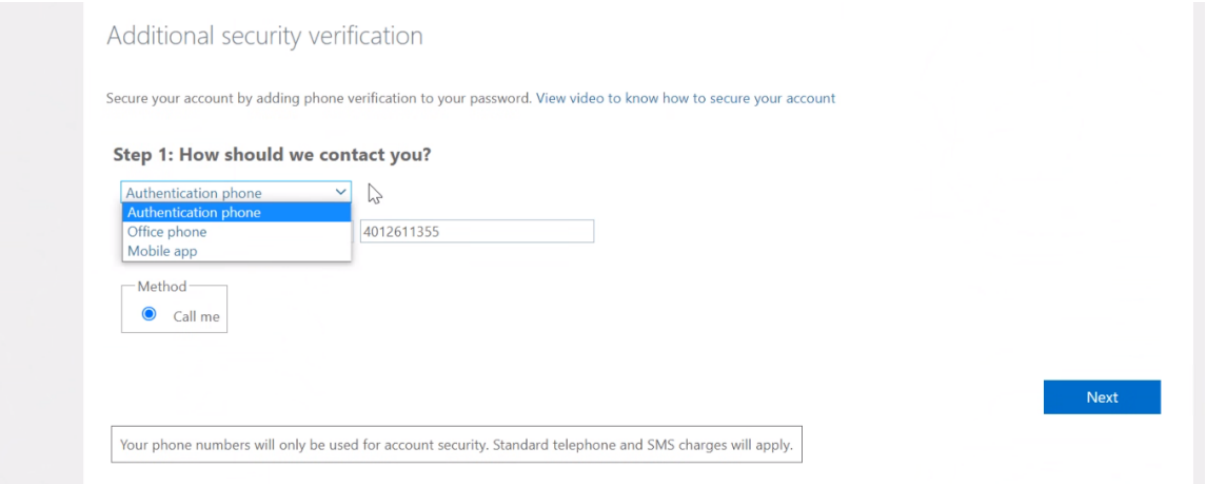
3. Set up Two-Factor Authentication

The sign in page will open in your web browser (as pictured below). Your username should be automatically populated. Click "Next." Then you will be prompted to enter your temporary password, which was provided to you in the Microsoft email. Please do not copy and paste the temporary password to login.



All users will be required to set up two-factor authentication, which prompts users to verify their identity before they can login to their account. Users can choose from 3 options for how Microsoft can contact you to confirm your identity for two-factor authentication (as pictured below). If you require additional assistance, watch this brief Microsoft tutorial on setting up two-factor authentication or contact us at GNOHIETeam@lphi.org.

The option you select here will remain as your preferred contact option moving forward so, please ensure that you pick the right option for you. Users will be prompted to complete two-factor authentication every 7 days.



If you select the “Authentication phone” options:

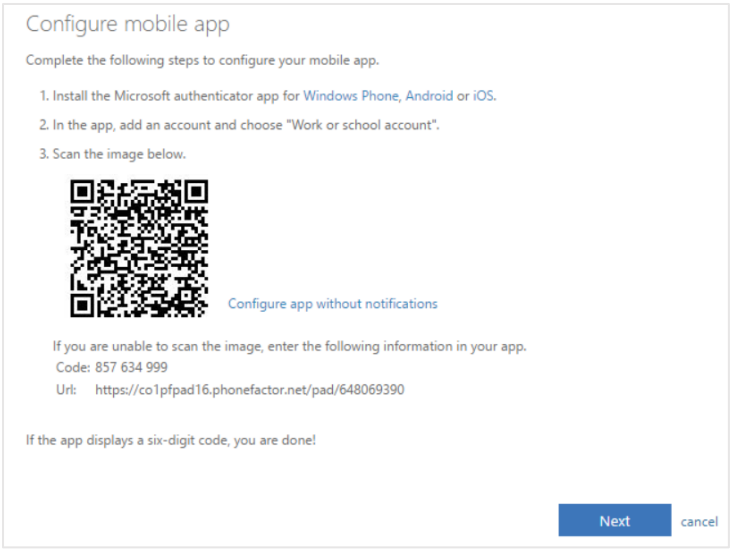
- *Pros:* You will receive an automated phone call from Microsoft, and you will be instructed to press a certain button on the keypad to verify your identity.
- *Cons:* These options are very easy to setup initially, but some may find the phone call disruptive on an ongoing basis.

If you select the “Mobile app” option:

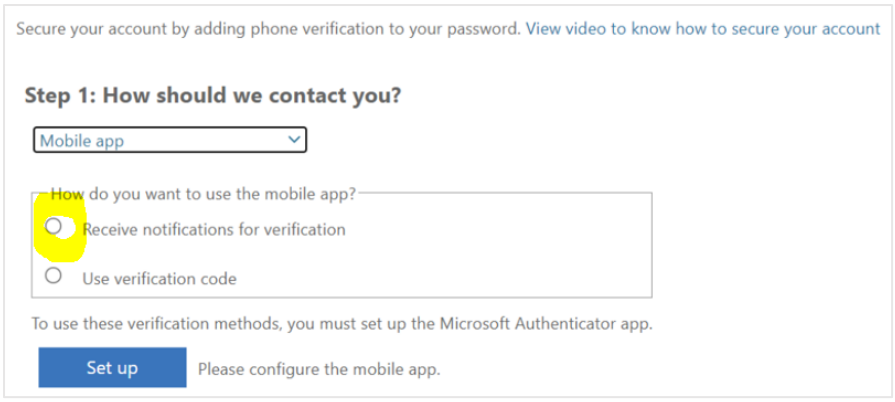
- *Pros:* You will receive an alert on your cell phone prompting you to either click a button or enter a code to verify your identity.
- *Cons:* This option requires you to download the Microsoft Authenticator app, which may be more effort for the initial setup, but most users find this option to be the easiest on an ongoing basis.

We do not recommend selecting “Office phone,” since those require inputting an extension and office phones can change more frequently.

If you select the Mobile app option, you will be given instructions to download the app and set up your account within the app (as pictured below). Once you complete the steps, click “Next.”

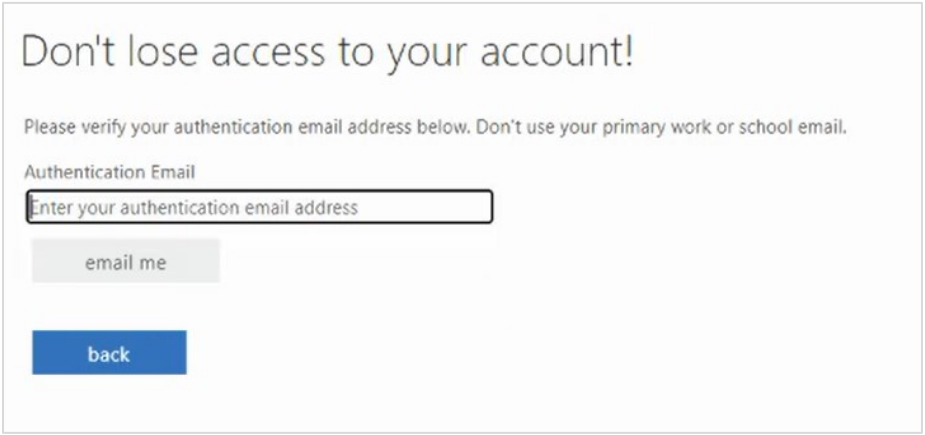


There are two options for how to set up the mobile app verification process (as pictured below). We recommend selecting the first option, which permits you to receive push notifications through your mobile device and simply press a button on your device to verify your identity.

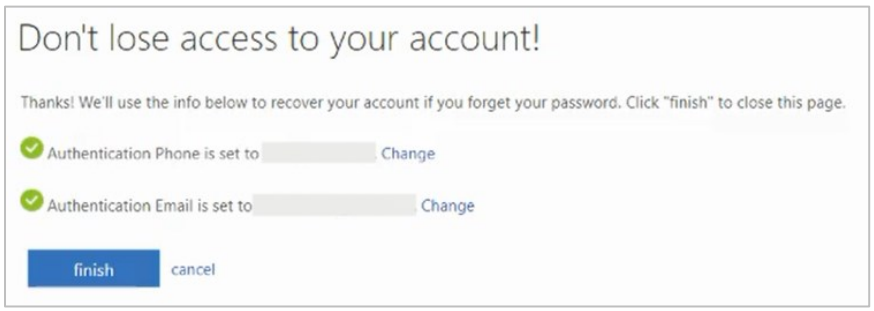


If you choose “Authentication phone,” Microsoft will call your phone and prompt you to press # to verify yourself.

Microsoft will prompt you to verify your authentication email. Microsoft recommends not using your primary work or school email. You’ll receive a verification code at this email address.



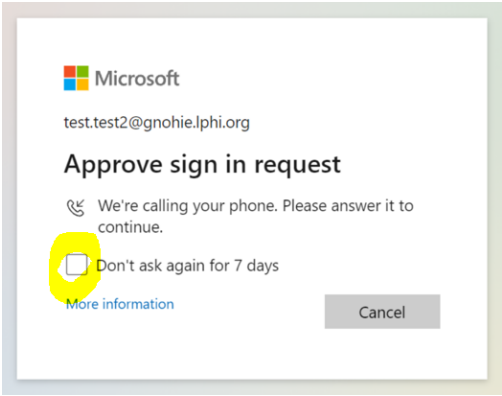
You may be asked to verify your phone another time either via text or call.



Click “Finish” to complete the two-factor authentication setup.

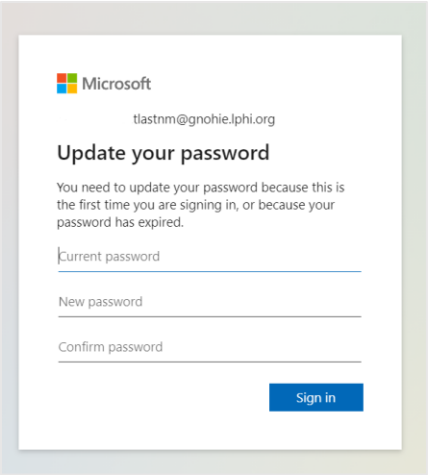
4. Login into Microsoft Office 365

After you complete the two-factor authentication process, Microsoft will allow you to defer the two-factor authentication for the next 7 days (as pictured below). We recommend checking this box to make it easier for you to access PATH reports on a regular basis.



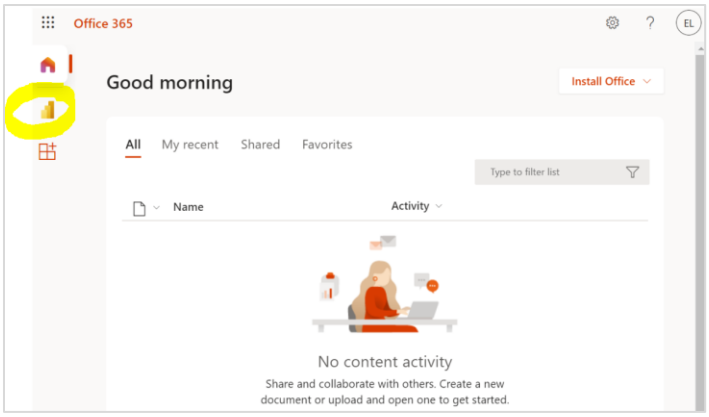
Tip: If you have more than one Microsoft account that you use regularly, we recommend making a separate browser profile using this guide to make it simple to switch between multiple Microsoft accounts.

The last step is to create a personalized password for your Power BI account. You must enter the temporary password sent to you in the email from Microsoft and then enter a new personalized password.



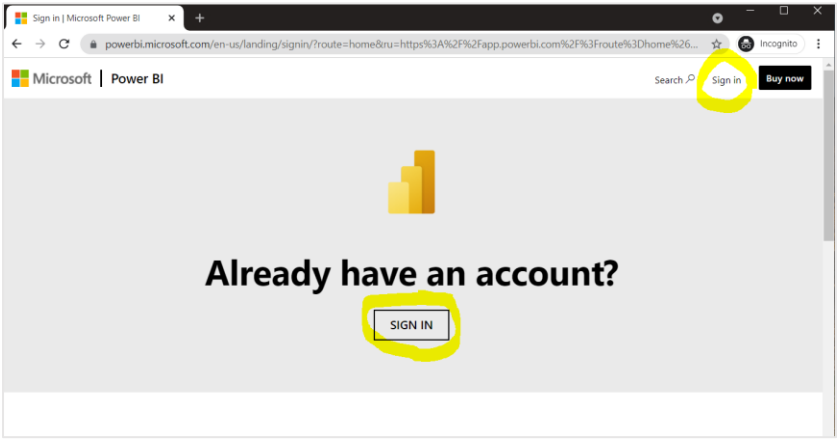
Note: After logging in for the first time, there will be a slight delay before you users can access to PATH reports. If you do not have access to the report immediately, try logging out and logging back in a few hours later. That process will work for most users.

After clicking "Sign In", you will be automatically directed to the Microsoft Office 365 homepage. You can click on the Power BI icon on the left-hand menu to open the Microsoft Power BI website (as pictured below and circled in yellow). After clicking the icon, you will be directed to the Power BI website.

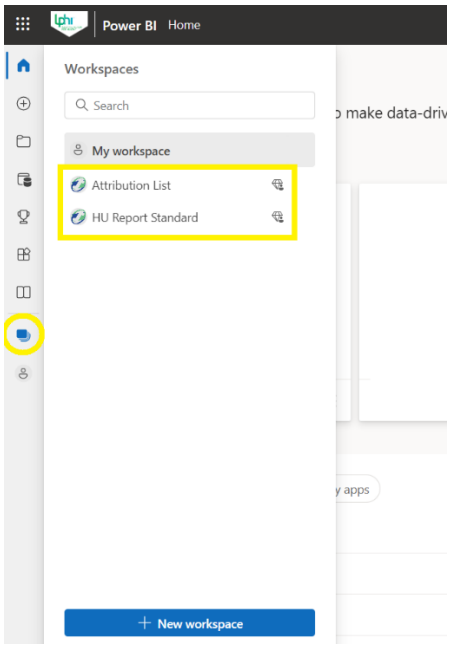


5. Navigating the Power BI Website

To visit the Power BI website, go to: https://app.powerbi.com/home. Please bookmark the site in your browser so you can easily access it later. If you have not yet logged in, click the sign in button (as pictured below and circled in yellow) and provide your username and password as requested.



To navigate to the reports, click on the “Workspaces” icon in the left-hand navigation bar (as pictured on the following page and circled in yellow). A menu will appear with a list of Workspaces (which are like folders) that you have access to. Depending on which reports your organization has selected. Click on the Workspace name to view the contents of the Workspace. Then click on the name of the report to open it.



Note: While users can download the Power BI desktop app for free, daily updates to the HU Report data will not occur through the desktop app. Users must access the HU Report through the Power BI website to view the most up-to-date data.

6. Ongoing Security Requirements

The GNOHIE team has several ongoing security measures and requirements, described below, to ensure the privacy and security of protected health information contained in the reports.

- **Two-Factor Authentication:** All users will be required to set up two-factor authentication upon logging in for the first time. This will prompt users to verify their identity every 7 days or whenever logging in on a new device. Detailed instructions and user tips are provided in Section 3 of this user guide.
- **Password Update Every 90 Days:** All users will be required to update their password every 90 days. When your password is about to expire, you will receive an email from Microsoft informing you of the expiration date and prompting you to update your password.
- **Notify GNOHIE within 7 Days of User Transitions:** Member organizations should promptly inform the GNOHIE team if a user is leaving your organization or transitioning to a different role that does not require access to reports. In accordance with the GNOHIE user access control policy, members must notify the GNOHIE team within 7 business days of a user’s employment or contract ending. The GNOHIE team will promptly deactivate the user account to prevent unnecessary or unauthorized access to reports.