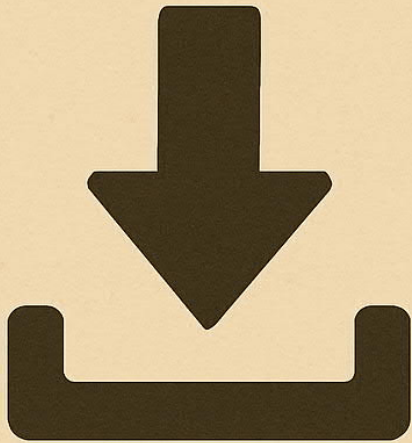# Platform Publishing Power

Presented by: Rebekyah Brewer

Date: May 21, 2025

Session: #37083

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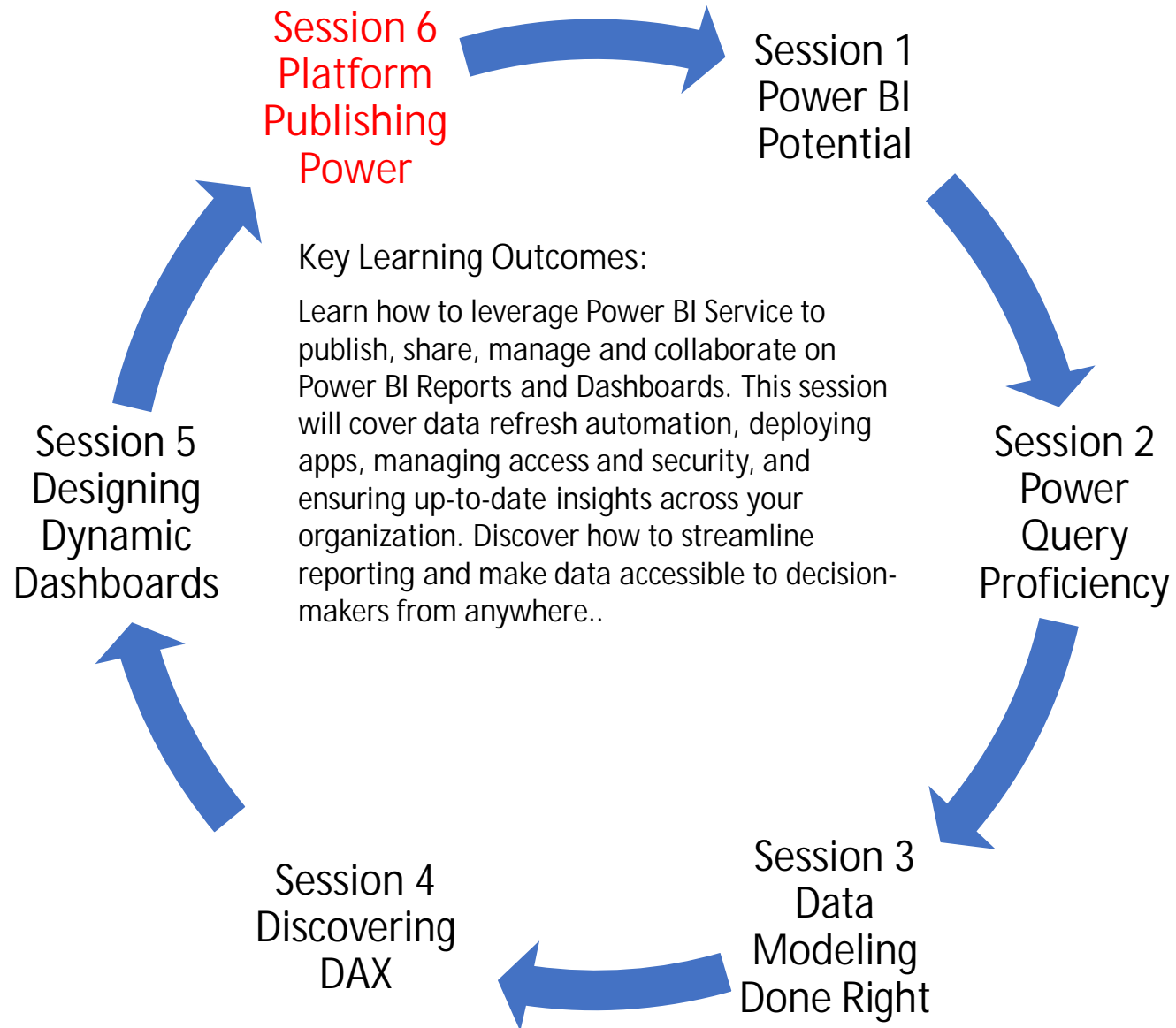
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Session 6
Platform
Publishing
Power

Session 1
Power BI
Potential

Session 2
Power
Query
Proficiency

Session 3
Data
Modeling
Done Right

Session 4
Discovering
DAX

Session 5
Designing
Dynamic
Dashboards

Key Learning Outcomes:

Learn how to leverage Power BI Service to publish, share, manage and collaborate on Power BI Reports and Dashboards. This session will cover data refresh automation, deploying apps, managing access and security, and ensuring up-to-date insights across your organization. Discover how to streamline reporting and make data accessible to decision-makers from anywhere..

Prerequisites – Technical

Software Requirements

- Power BI Desktop (Free) – Power Query is built into Power BI for data transformation.
- Windows OS (Windows 10 or later recommended) – Power Query in Power BI is optimized for Windows.

Required:

- Power BI Service (Pro or Premium Per User License) – If publishing reports online, you'll need a Power BI account and your users will need a Power BI Pro license.

Prerequisites – Technical

Computer Capabilities & Performance Considerations

Power BI Service will handle the processing load of your Power BI report once you upload to the cloud.

- Internet Speed – If working with cloud data, a stable internet connection is necessary.
- RAM – 8GB minimum; 16GB+ recommended for handling large datasets.
- Processor – Intel i5/i7 or AMD Ryzen 5/7 or higher for better performance.
- Storage (SSD Recommended) – Faster SSD drives improve data processing speed compared to HDD.

Who is Platform Publishing Power For?

|	User Group	How Power BI Benefits Them
1	Power BI Report Developers	Anyone developing building Power BI dashboards and publishing them.
2	Self-Service BI User	Will use the online Power BI Service and Workspace.
3	Power BI Consumers	Will utilize the online apps and subscriptions.

Platform Publishing Power
Session Overview

- Introduction & Prerequisites
- Publishing to Power BI Service
- Power BI Workspace
- Managing Published Content
- Power BI Apps & Dashboards
- Power BI Subscriptions & Embedding
- Best Practices & QA
- Further Resources
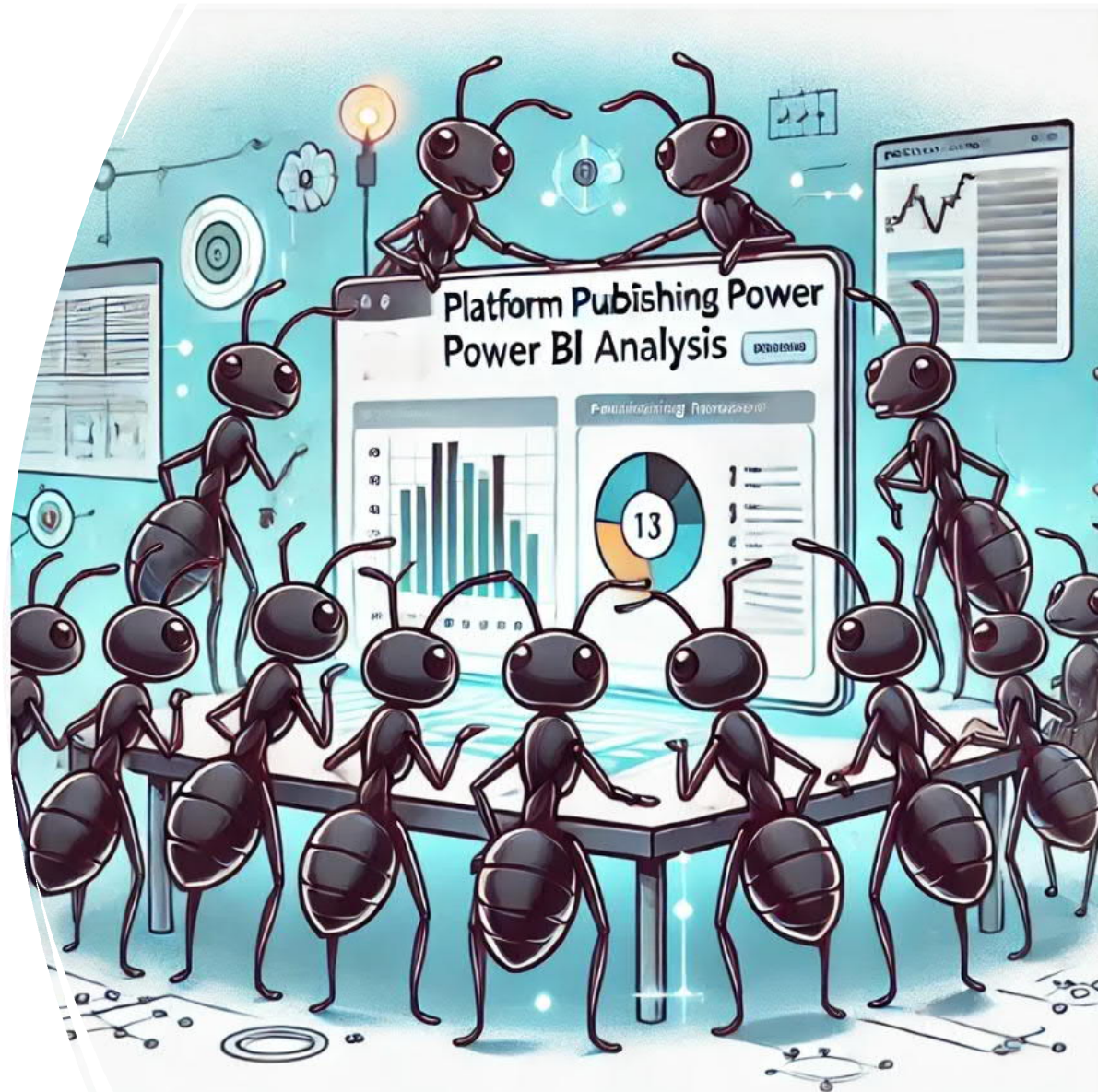
Steps to Publish a Report
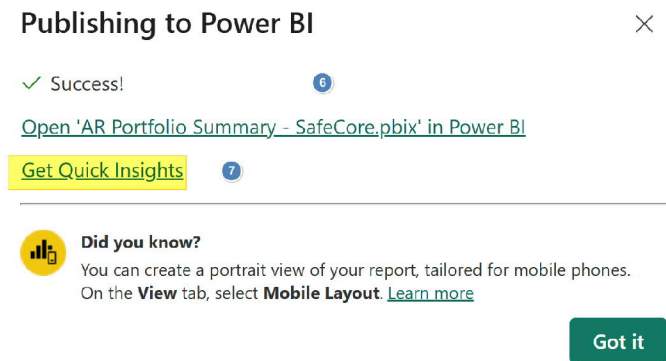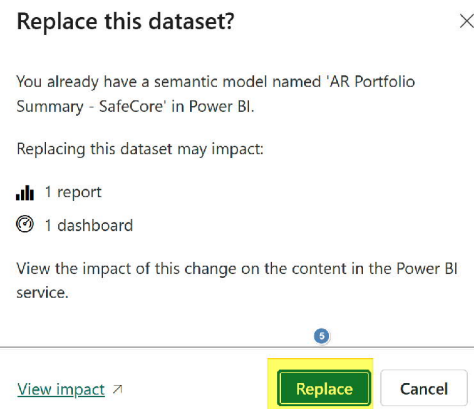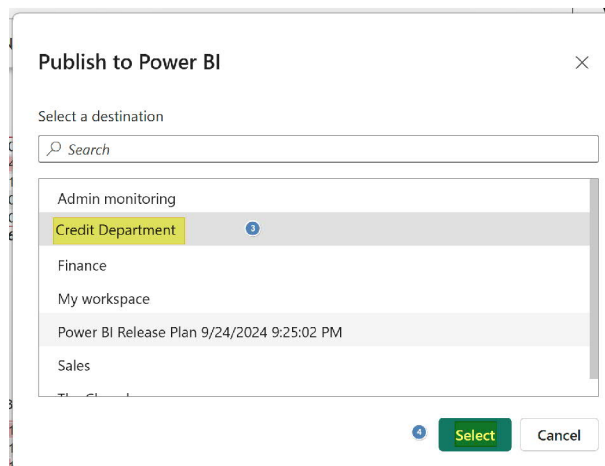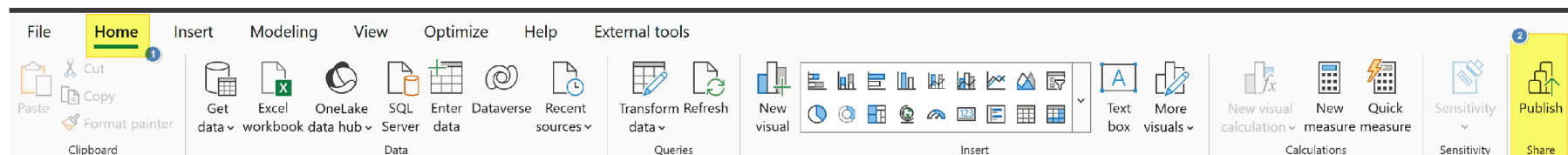
Understanding Workspaces

Types of Workspaces
My Workspace
- Intended for Personal Power BI's
- Works for Testing
- Can share a report with others.

Department Workspaces
- Intended for Teams & Collaboration
- Published Power BI
- Assign Users to Workspace & Role:
- Power BI Maintenance

Understanding Workspaces

Workspace Roles & Permissions

Roles help manage access and permissions within a workspace:

- Admin – Full control, including adding/removing members and modifying permissions.

- Member – Can edit content but cannot change workspace settings or manage access.

- Contributor – Can create and edit content but cannot publish an app.

- Viewer – Read-only access to reports and dashboards.

Understanding Workspaces

Workspace vs Apps

•Workspaces serve as a <u>collaborative</u> development area where reports, dashboards, and datasets are built and managed.

•Apps are <u>published versions</u> of workspace content that can be shared with end-users in a controlled way.

We will talk more about the benefit of publishing to an App later.

Understanding Workspaces

Dataset Management

• A dataset in a workspace can be used by multiple reports and report types, Semantic Models, Reports, Dashboards, Dataflows.

• You can configure scheduled refreshes for datasets.

• Create Dashboards

• Power BI supports dataflows to manage and reuse data transformation logic across workspaces. (This is now Fabric)
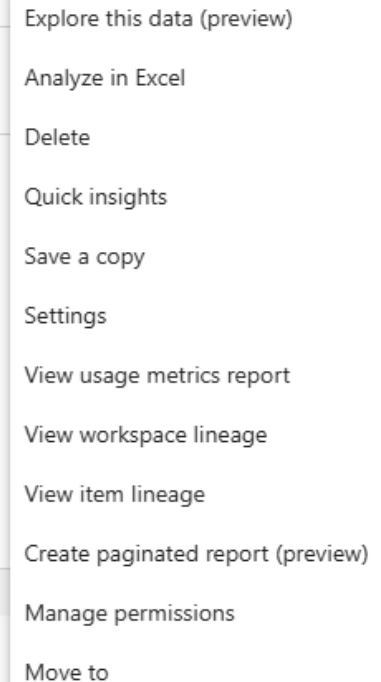
	Name	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
	Adventure Works DW 2020	Report	—	Credit Department	3/1/2025, 8:50:22 PM	—	—	—	No
	Adventure Works DW 2020	Semantic model	—	Credit Department	3/1/2025, 8:50:22 PM	N/A	—	—	
	AR Portfolio Dashboard	Dashboard	—	Credit Department	—		—	—	Yes
	AR Portfolio Summary - SafeCore	Report	—	Credit Department	3/8/2025, 12:34:11 PM	—	—	—	Yes
	AR Portfolio Summary - SafeCore	Semantic model	—	Credit Department	3/8/2025, 12:34:11 PM	3/9/2025, 7:00:00 AM	—	—	

Understanding Workspaces

Power BI Service Published Report Options

- Access Control
- Explore & Analyze Data
- Quick insights
- View Usage & Metrics Report
- View workspace or item lineage
- Create Dashboards
- Create Paginated Reports

- Sensitivity labels can be applied to data to ensure compliance with security policies.

Explore this data (preview)

Analyze in Excel

Delete

Quick insights

Save a copy

Settings

View usage metrics report

View workspace lineage

View item lineage

Create paginated report (preview)

Manage permissions

Move to

Understanding Workspaces

Power BI Service Semantic Report Options

Power BI Report Options Menu +
- Create Report
- Auto-create Report
- Delete
- Rename
- Refresh History
- Move Report

| Explore this data (preview) |
| Analyze in Excel |
| Create report |
| Auto-create report |
| Create paginated report (preview) |
| Delete |
| Get quick insights |
| Security |
| Rename |
| Open data model |
| Settings |
| Refresh history |
| Download this file |
| Manage permissions |
| View workspace lineage |
| View item lineage |
| Move to |
| Write DAX queries |
| Version history |

...   Semantic model   —
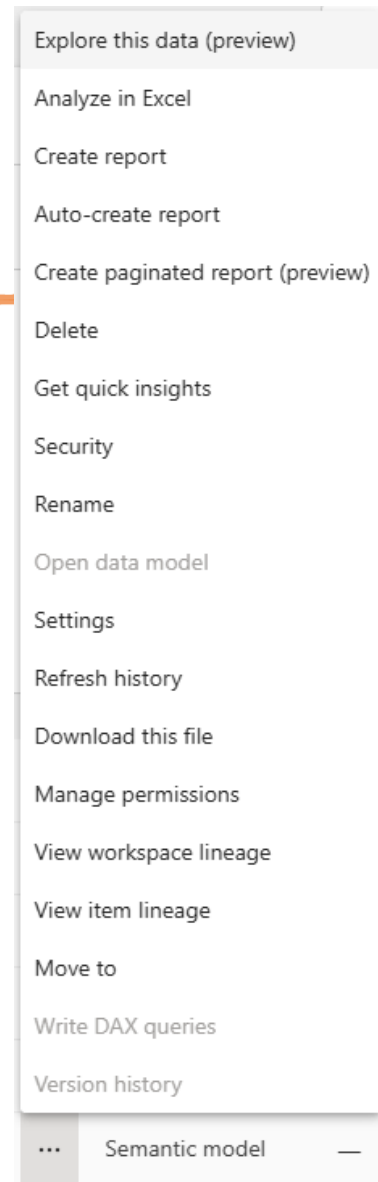
Understanding Workspaces

Licensing Considerations

- A Power BI Pro license is required for users to collaborate in Workspaces
- Free users can only access shared content if it is hosted on Microsoft Fabric capacity or Power BI Premium Per User (PPU).
- Workspaces operate on Power BI service capacity, which can be either Pro (shared capacity) or Premium (dedicated capacity).
- Power BI Premium Per User (PPU) or Premium Capacity enables advanced capabilities like larger datasets, Dataflows and AI features.
- Power BI Premium Per Capacity (P-SKU) is being phased out in favor of Microsoft Fabric capacities:

Understanding Workspaces

Monitoring & Governance

- Audit logs and Usage Metrics help track report performance and user activity.

- Deployment Pipelines (for Premium users) enable a Dev-Test-Prod workflow for publishing content.

- Data lineage in Power BI shows how reports and datasets are connected.

Power BI Apps

What is a Power BI App?

A Power BI App is a packaged collection of Power BI reports and dashboards that can be shared with users in an organization.

- Apps help in organizing and managing content more efficiently than sharing individual reports or dashboards.

Power BI Apps

Why Use Power BI Apps?

- Better Distribution Control – You can share reports and dashboards with specific groups or users.
- Read-Only Access – Users can interact with reports but cannot edit them, ensuring data integrity.
- Version Management – Updates to reports can be made in the background and only published when ready.
- Simplified User Experience – Users access the content in one place rather than managing multiple shared links.

Power BI Apps

How to Create a Power BI App

- Apps are created from a Power BI workspace (not My Workspace).

- You need to be a Power BI Pro or Premium Per User (PPU) license holder to publish an app.

- Steps to create an App:
  1. Develop reports and dashboards within a Power BI workspace.
  2. Click Create App from the workspace.
  3. Configure Navigation, Permissions, and Branding.
  4. Publish the app and share the link with users.

Power BI Apps

How to Create a Power BI App

- You can organize both reports and dashboards within sections, making it easier for users to navigate.

- Apps can include multiple content tabs, weblinks, links to other reports, helping users access related reports in a structured way.

- You can customize the app with a logo, colors, and descriptions to match corporate branding.

Power BI Apps

Access & Permissions

- Users: Apps are shared via direct assignments or security groups.
- Permissions:
  - View-only (default).
  - Users cannot modify or save changes to the app but can export data if allowed.
  - Admins can grant dataset access for deeper analysis in Excel or Power BI Desktop.
- License Requirements:
  - Power BI Pro users can access shared apps.
  - Power BI Premium allows free users to access apps hosted in a Premium workspace.

Power BI Apps

Updating & Managing an App

- Updates to the app do <u>not</u> affect users until changes are republished.

- You can add new reports or dashboards without impacting existing ones.

- Users do not need to be re-invited after updates; they always see the latest version.

Power BI Apps

App Deployment in Large Organizations

•Multiple Workspaces, One App: You can publish an app that includes reports from different workspaces.

•App Audiences: Different sections of the app can be shown to different user groups, ensuring relevant content distribution.

•Cross-Tenant Sharing: Power BI Apps cannot be shared outside the organization unless using Azure B2B guest accounts.

Power BI Apps

Limitations of Power BI Apps

- No Real-Time Auto-Updates – Users must refresh or reopen the app to see new changes.
  No Direct Report Editing – Users can only interact with reports but cannot edit them.

- Dataset Access Control – Users don't automatically get access to the underlying dataset unless explicitly granted.

- Embed in SharePoint – For more visibility and easy access, embed your reports in your department SharePoint page.

Power BI Apps

Alternatives to Power BI Apps

• Sharing Reports Individually – If you have only one report, direct sharing might be simpler.

• Power BI Service Workspaces – For collaborative editing, workspaces might be a better option.

• Embedding Power BI in SharePoint or Teams – If users frequently work in Microsoft Teams, embedding reports might be preferable.

Power BI Apps

A Few Best Practices for Power BI Apps

- Use Security Groups instead of adding users one by one.

- Keep navigation simple to ensure users can easily find reports.

- Regularly update content to keep reports relevant.

- Communicate changes when updating the app so users are aware of new features or reports.

Power BI Dashboards

Dashboards vs Reports?

Dashboards are <u>single-page canvases</u> that aggregate visuals from multiple reports and datasets.

Reports are <u>multi-page</u> and come from a single dataset.

Dashboards provide a high-level overview, while reports offer deeper, interactive analysis.

Power BI Dashboards

Key Components of Dashboards

- Tiles: Individual visual elements pinned from reports, datasets, or Excel files.
- Live Tiles: Dynamic, real-time visuals pinned directly from reports.
- KPIs & Cards: Simple metric displays showing key business figures.
- Custom Web Content: Tiles can embed web pages, videos, and images.
- Q&A (Natural Language Queries): Allows users to ask questions in plain English to generate insights.
- Alerts – Alerts on metrics can be emailed if a threshold is met or not met.

Power BI Dashboards

Real-Time Data & Refreshing

- Dashboards can support real-time streaming data tiles from IT or external sources.
- Data refresh depends on dataset configuration, scheduled or automatic refreshes.
- DirectQuery and Live Connection visuals update dynamically.

Power BI Dashboards

Sharing & Collaboration

- Share with users within your organization in Workspace

- Publish your Dashboards to include with a Power BI App for controlled distribution.

- Embed in SharePoint, Teams, or Websites using Power BI Web embedding.

- Create Alerts for threshold-based monitoring on specific metrics.

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📅 09/25/2024 | 10:00 - 18:00 (CDT)

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🌐 English (United...
🌐 Training

Registration and details ↪

Dashboard in a Day - OmniData Insights - United States

📅 09/26/2024 | 08:00 - 16:00 (CDT)

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🌐 Training

Registration and details ↪

Dashboard in a Day - PragmaticWorks - United States

📅 09/27/2024 | 08:00 - 16:00 (CDT)

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🌐 English (United...
🌐 Training

Registration and details ↪

Dashboard in a Day - smart BI - United States

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Beginner | Data Analyst | Business Analyst | Business User | Functional Consultant | Power BI

Learn about Power BI, the building blocks and flow of Power BI, and how to create compelling, interactive reports.

This module helps prepare you for Exam PL-200: Microsoft Power Platform Functional Consultant.

Learning objectives

In this module, you'll learn:

- How Power BI services and applications work together.
- Explore how Power BI can make your business more efficient.
- How to create compelling visuals and reports.

[Start >] ⊕ Add

Prerequisites
None

This module is part of these learning paths
Create and use analytics reports with Power BI
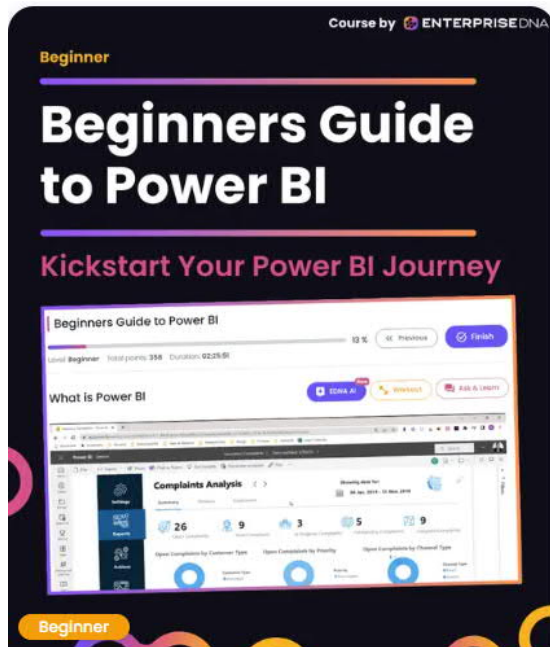Get started with Microsoft data analytics
Get started with Power BI

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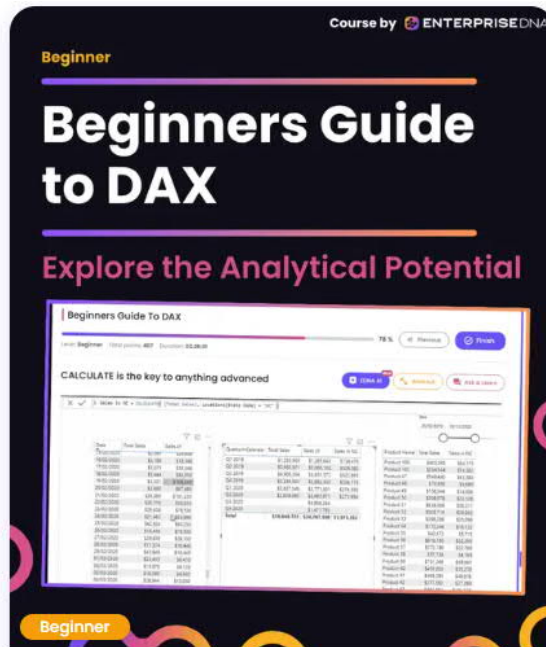
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