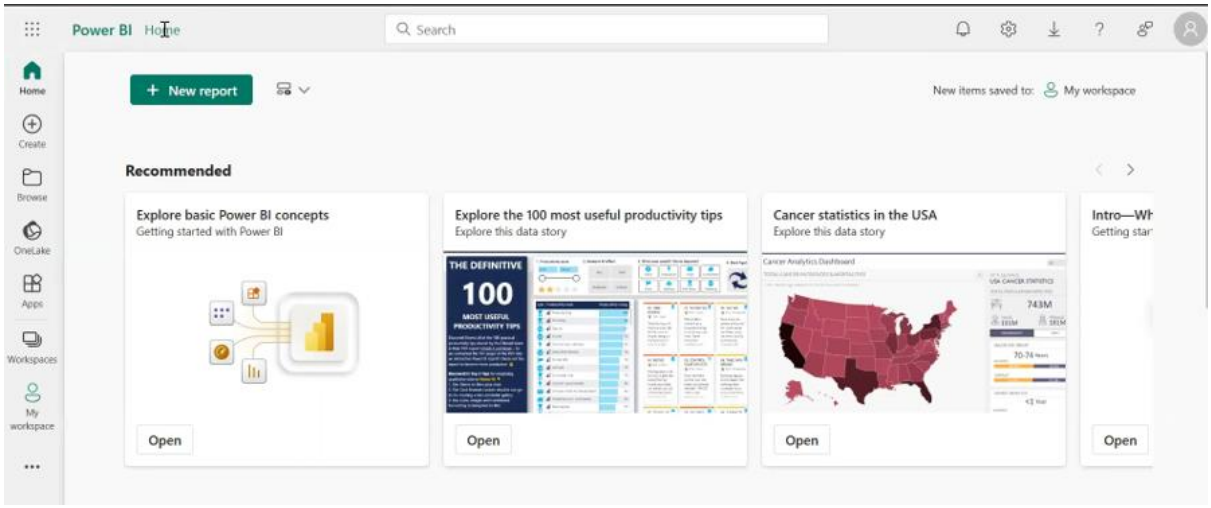
Power BI Services

PBI services is cloud-based services, which is hosted version of PBI component in Azure Cloud.

Using Power BI:

- Share and Distribute Reports
- Data Refresh and Scheduling
- Role-Based Access and Security
- Collaboration and Versioning
- Dashboards and Alerts
- Integration with Other Tools



To publish we use workspaces

Each Project will have a dedicated WorkSpace

Upon comleting development activities on Power BI Desktop > Select first page of the report Save the report and the click on publish

Publish > Enter Credentials > Select Workspace you want to us

Go to Workspaces:

It will show two files

- Report: Report created
- Semantic Model: Holds Source Datasets

You can Save a copy, Download the report, Export to web, Sharepoint, manage permissions, generate QR code, Export, share, set alerts, Explore data, Edit

If you want to change the navigation tabs (Report Pages) to same view as PBI Desktop:

Settings > Display Report Pages as tabs along the bottom of the report

Power BI Services

Schedule Reports:

Using PBI Gateways we can schedule reports to show updated info

Go to Semantic Layer of the report

Semantic Model > Settings > Gateways

Gateways act as bridge between PBI service semantic model datasets & source datasets

Type of Gateways:

On-Premises (Personal Mode) – Up to 8 refreshes per day

On-Premisses – Up to 48 refreshes per day

On-Premises: All developer within the same company and domain will be able to use,

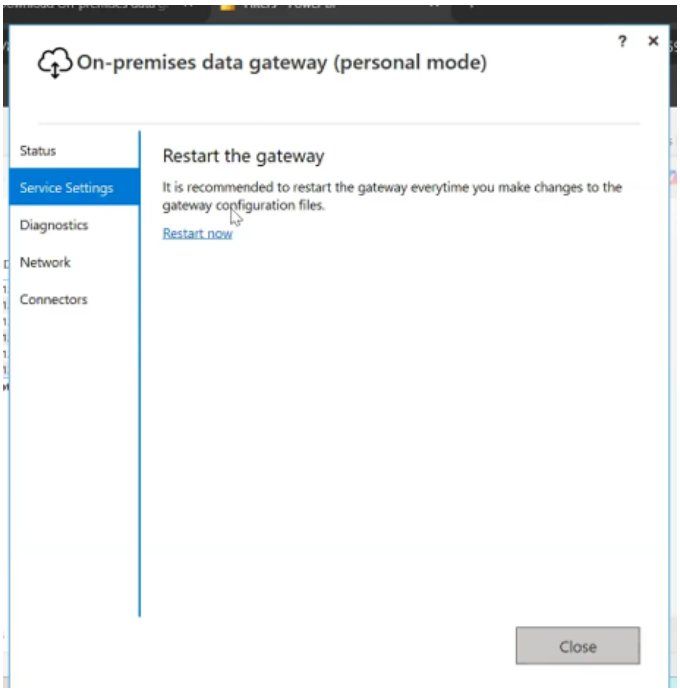
Max 48 refreshes per day

On-Premises (Personal Mode): Personal mode is only restricted to the developer installed / configured, 8 Refreshes per day

Gateways > Download and Configure

Download & Install Power BI Onprem Data Gateway Personal Mode
Should be installed as per company's requirement (Server)

Login > Enter your email



Power BI Services

Refresh:

To Schedule the reports > Go to the report > Datasets (Semantic Mode) > settings >

Semantic model > Gateway & Cloud Connections (Select Gateway, ensure its running)>

Data Source Credentials check the status of all the reports > Refresh > Time Zone > Refresh Frequency > Time > Send Notification to user

Add Users to the workspace:

Select the workspace > manage access > Add users by entering email and assign required permissions

User Permissions:

ADMIN: Complete Access

Contributor: Publish, Add reports, Add users, Control Permissions

Member: Can access all the reports

Viewer: Can access all the reports

Note: If we need to enable RLS the permission level has to be Viewer

RLS Row Level Security:

User Access Control can be done using RLS Row Level Security

RLS > Find the column based on which we can apply filter condition >

Create roles in PBI Desktop > Table Filter DAX expression to filter the data >

Test the access based on the roles > Publish into PBI services >

Login to PBI Services > Semantic Model more Option > Security > you can find list of roles created > select a role and enter the users Email_ID and save

Note: To Create RLS we need to use Power BI Desktop, DAX Expressions & PBI Services

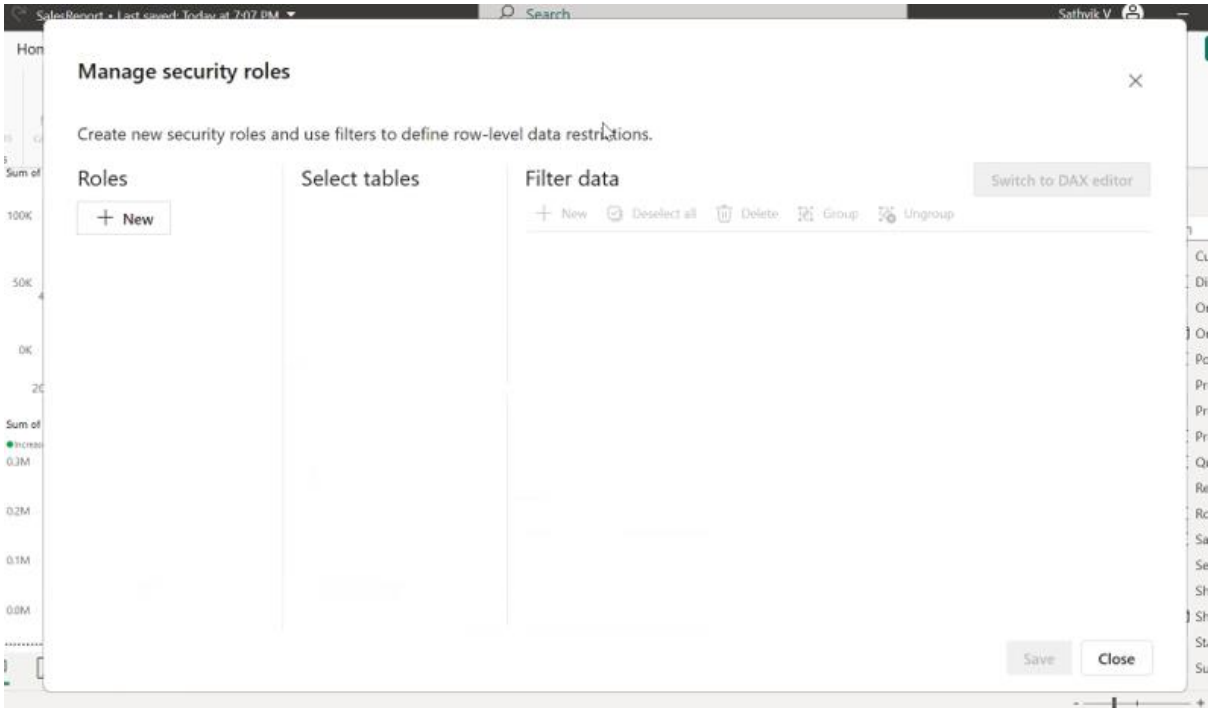
Example:

Power BI Desktop > Go to the report >

Identify the column that we need to use to assign RLS, if there is no column identify and utilize grouping option that can be used to manage permissions

Modeling > Manage Roles >

Power BI Services



Create New > One Rule per one requirement (Region) > one rule can contain n numbers of users

Name the Rule (Follow Naming Convention) >

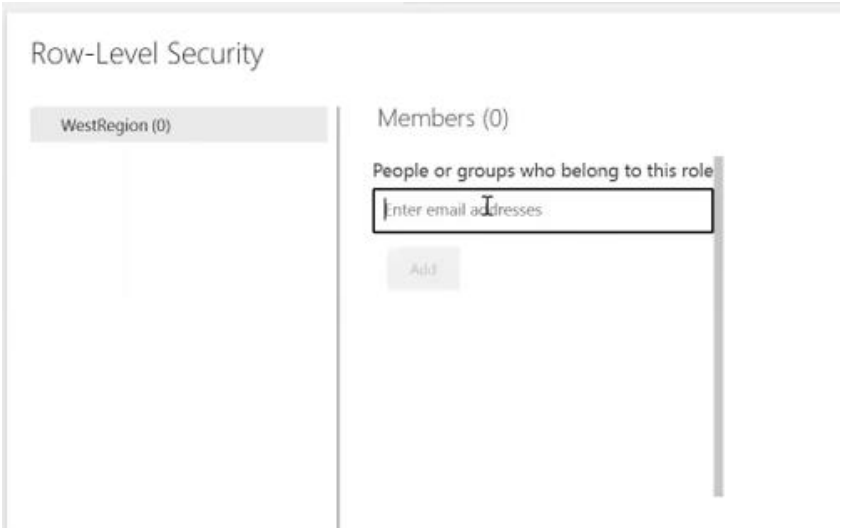
Switch to DAX editor > enter the formula > Orders[Region] = “West”, Save and close

Upon creating test the role to ensure its as per the need

View As > Select the Role > it should show filtered data

Publish the report to the required WorkSpaces > Semantice Model > Security > Row Level Security >

List of roles created on PBI Desktop > Select the required role > Members > Add users using Email_ID > Save (Ensure Users added here should be added to workspace with viewer permission)



Power BI Services

Dashboard:

Create new Dashboard

Go to the report > Select the visual > Pin to the dashboard > Pin

Go to the dashboard and review