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## 1. Create and configure a workspace

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## [2](https://learn.microsoft.com/en-us/training/modules/publish-share-power-bi/1-introduction-content-packs 2). Configure and update a workspace app

If you want to configure an app , you should have a pro license .

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## 3. Publish, import, or update items in a workspace

### 3.1 Publish report with power bi desktop

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### 3.2 Import with workspace

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### 3.3 Update item in workspace:

You can simply click on edit in the report.

## 4.Create dashboards

A close-up of a text

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A screenshot of a white screen

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A screenshot of a computer

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After pinning your visuals, you can resize and move the visuals to suit your needs.

A screenshot of a graph

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## 5.Choose a distribution method

There are 3 ways of sharing power bi report:

1. Workspace roles
2. Item level sharing
3. Power bi Apps

### 5.1 Workspace roles

Power BI Service provides four distinct workspace roles: Viewer, Contributor, Member, and Admin. These roles determine the level of access and permissions a user has within a workspace. It's important to note that workspace roles operate on an all-or-nothing basis, meaning that users with access to a workspace can view or interact with all the reports, dashboards, and semantic models within it. You cannot selectively exclude specific items from being shared when using this approach.

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### 5.2 Item level sharing

Item-level sharing in Power BI Service provides a more granular approach to sharing content compared to workspace roles. While workspace roles grant access to all items within a workspace, item-level sharing allows you to share specific reports or dashboards with selected individuals or groups. This method is particularly useful when you want to maintain tighter control over who can access sensitive or restricted content.

When you share a report or dashboard, recipients can view and interact with the content but cannot edit it. Additionally, they gain access to the underlying semantic model unless Row-Level Security (RLS) is applied. RLS ensures that users only see the data they are authorized to view, adding an extra layer of security for sensitive datasets.

Item-level sharing also offers flexibility in how you share content. You can share via links or directly grant access to specific individuals or groups. Sharing links can be configured to allow access to "People in your organization," "People with existing access," or "Specific people." Each option provides varying levels of control, enabling you to tailor access based on your organization's needs.

One of the key advantages of item-level sharing is that it overcomes the "all-or-nothing" limitation of workspace roles. For example, you can share a single report with external partners without exposing other workspace content. However, it's important to manage permissions carefully to ensure that only authorized users can access the shared content.

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### 5.3 Power Bi Apps

Power BI Apps provide a streamlined way to share collections of dashboards, reports, and other content with a larger audience without requiring them to be part of your workspace or sharing individual items separately. This approach is particularly useful for organizations that need to distribute curated content to specific groups or even the entire organization while maintaining control over access and updates.

One of the key advantages of Power BI Apps is the ability to package multiple pieces of content into a single, cohesive experience. This eliminates the need to manage permissions for individual items, simplifying the process for both content creators and consumers. Users can access the app through a direct link, the Apps marketplace or AppSource, or even have it automatically installed in their Power BI accounts if configured by an admin. This flexibility ensures that the right content reaches the right audience efficiently.

Another significant benefit of using Power BI Apps is the control it provides when updating content. The workspace acts as a staging area where changes can be made and tested without immediately affecting the published app. Once the updates are ready, the app can be republished, ensuring that users only see the finalized version. This capability is invaluable for maintaining consistency and avoiding disruptions, especially in scenarios where reports and dashboards are frequently updated.

It's important to note that each workspace can only have one app, and the content included in the app must originate from that workspace. This limitation ensures that the app remains tightly coupled with its source workspace, simplifying management and ensuring consistency across shared content.

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Source : <https://learn.microsoft.com/en-us/training/modules/choose-content-distribution-method/2-understand-sharing-models>

## 6.Configure subscriptions and data alerts

### 6.1 Data alerts

Configuring data alerts is a simple process to complete for a dashboard in Power BI. Data alerts can notify you or a user that a specific data point is above, below, or at a specific threshold that you can set.

These alerts are features that are only available on Power BI service and they're available on such report elements such as **KPI visuals, gauges, and cards**.

After you have uploaded your reports to Power BI service and have pinned your chosen visuals to a dashboard, select the ellipsis (**...**) in the corner of the tile you want to set an alert for and then select **Manage Alerts**.

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A screenshot of a graph

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6.2 Configure subscriptions :

In **Power BI**, a **subscription** allows users to **receive reports or dashboards via email** on a scheduled basis. It helps keep stakeholders informed without requiring them to open Power BI manually.

You go to the content that you want to subscribe.

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## 7.Promote or certify Power BI content

Ensuring the quality and security of your organization's data is critical. Power BI provides tools to help you manage and protect your content effectively. Let's explore two essential practices for maintaining trustworthy and secure Power BI content. The first one is about endorsing your content, which helps users identify high-quality data. The second practice involves applying sensitivity labels to protect sensitive information.

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You can do that also for the dataset:

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## 8.Identify when a gateway is required

A Power BI Gateway is a bridge that connects on-premises data sources to Power BI, Power Automate, Power Apps, and other Microsoft cloud services.

On-premises data sources are those that aren't stored in the cloud. It enables secure data transfer between on-premises systems and Microsoft cloud services without moving the data to the cloud.

A cloud computing diagram with orange and blue icons

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## 9.Configure a semantic model scheduled refresh

The **Scheduled refresh** feature in Power BI allows you to define the frequency and time slots to refresh a particular dataset. Scheduling the refresh of your data will save you time because you don't have to manually refresh the data. It also ensures that users can access the most up-to-date data.

In this example, you are creating a report but then realize that the version of the employee data that you're using isn't the most up to date. You check the refresh status and notice that it was last refreshed some time ago, and no refresh is scheduled to take place.

You have 2 ways to perform refresh: Scheduling refresh or Manual refresh.

### 9.1 Scheduling refresh

#### 9.1.1 Simple refresh

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#### 9.2.2 Incremental refresh

The **Incremental refresh** feature in Power BI is a popular feature because it allows you to refresh large semantic models quickly and as often as you need, without having to reload historical data each time.

Traditionally, complex code was required for running incremental refreshes, but you can now define a refresh policy within Power BI Desktop. The refresh policy is applied when you publish to Power BI service, which then does the work of managing partitions for optimized data loads, resulting in the following benefits:

9.2 On demande refresh

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9.3 Check the refresh status :

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## 10.Assign workspace roles

* Set user roles (Admin, Member, Contributor, Viewer) in Power BI workspaces to control access and permissions.

## 11.Configure item-level access

* Grant or restrict access to individual Power BI items (reports, dashboards, datasets).

## 12.Configure access to semantic models

* Manage who can connect to and query datasets (semantic models) to ensure proper data usage.

## 13.Implement row-level security roles

* Define roles that filter data based on the user's identity, so each user only sees relevant data.

## 14.Configure row-level security group membership

* Assign users or security groups to RLS roles for efficient and scalable access control.

## 15.Apply sensitivity labels

* Use Microsoft Information Protection labels to classify and protect sensitive data within Power BI.