



Deploy and manage Power BI service items

aka.ms/PL300-7

Agenda

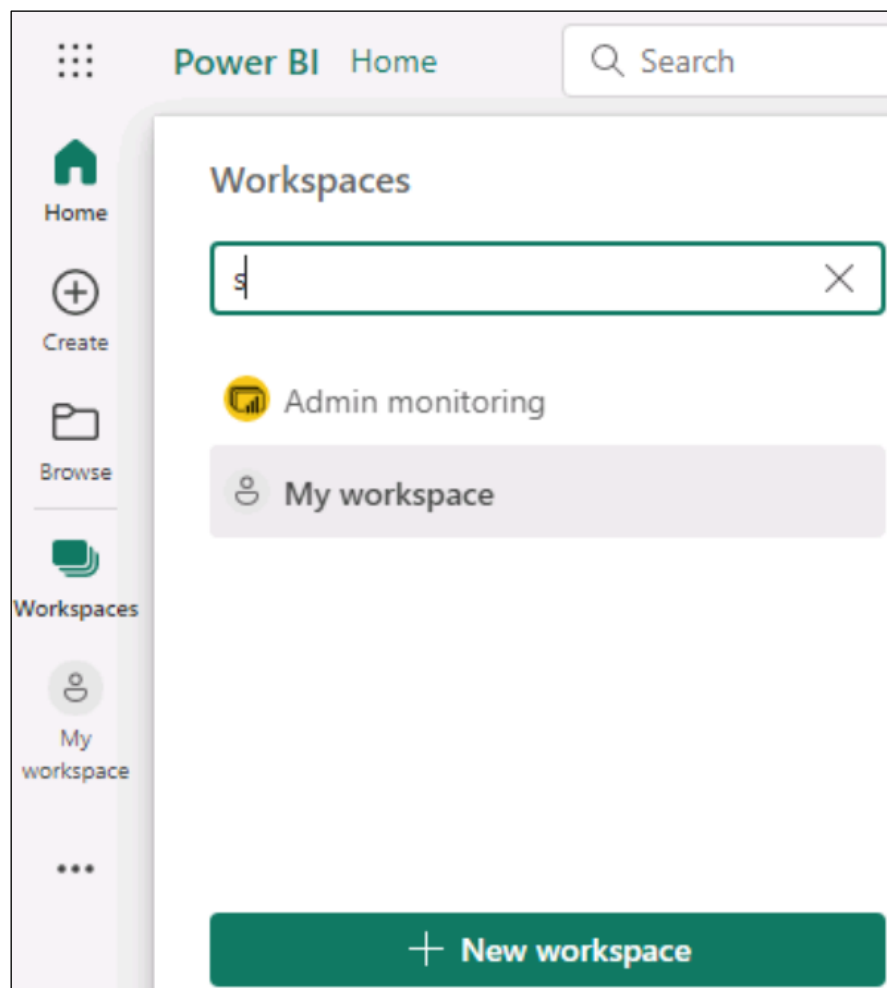


- Power BI workspaces
- Distribute and manage content
- Dashboards in Power BI service
- Row-Level Security overview

Create and manage workspaces



Create Power BI workspaces



Create a workspace

Name *

Available

Description

Domain (preview) ⓘ

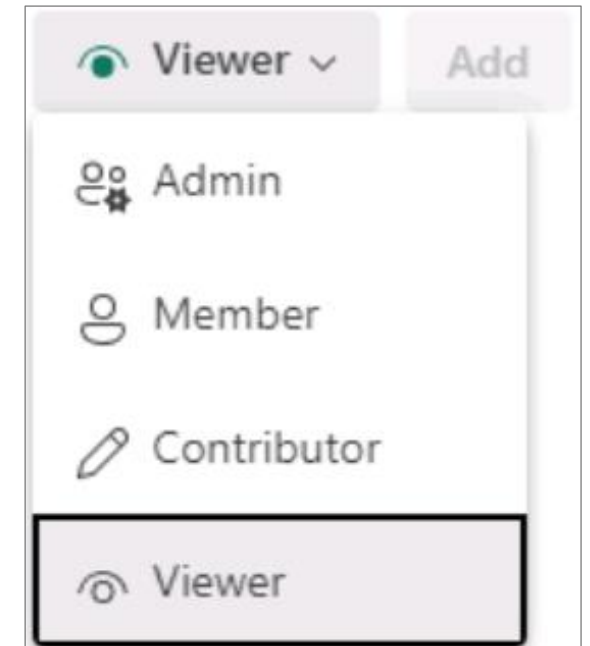
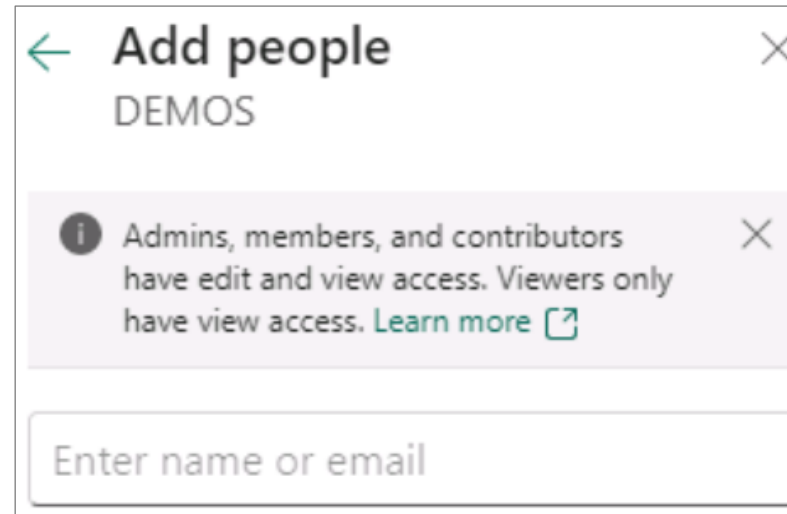
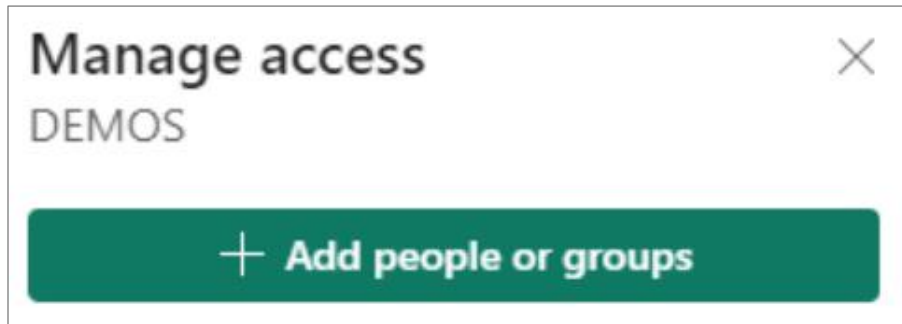
[Learn more about workspace settings](#)

Workspace image

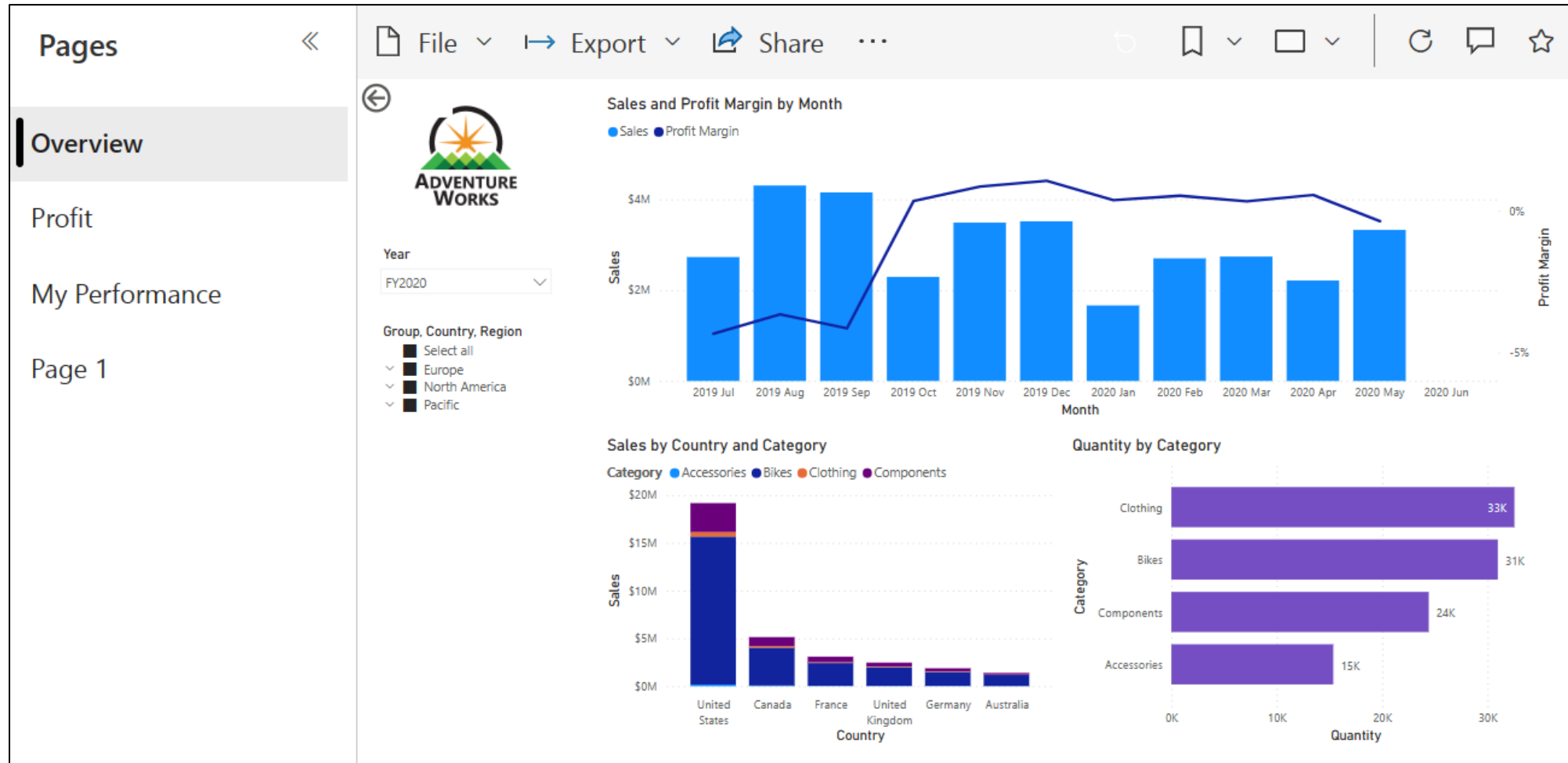
Advanced ▼

Assign workspace roles

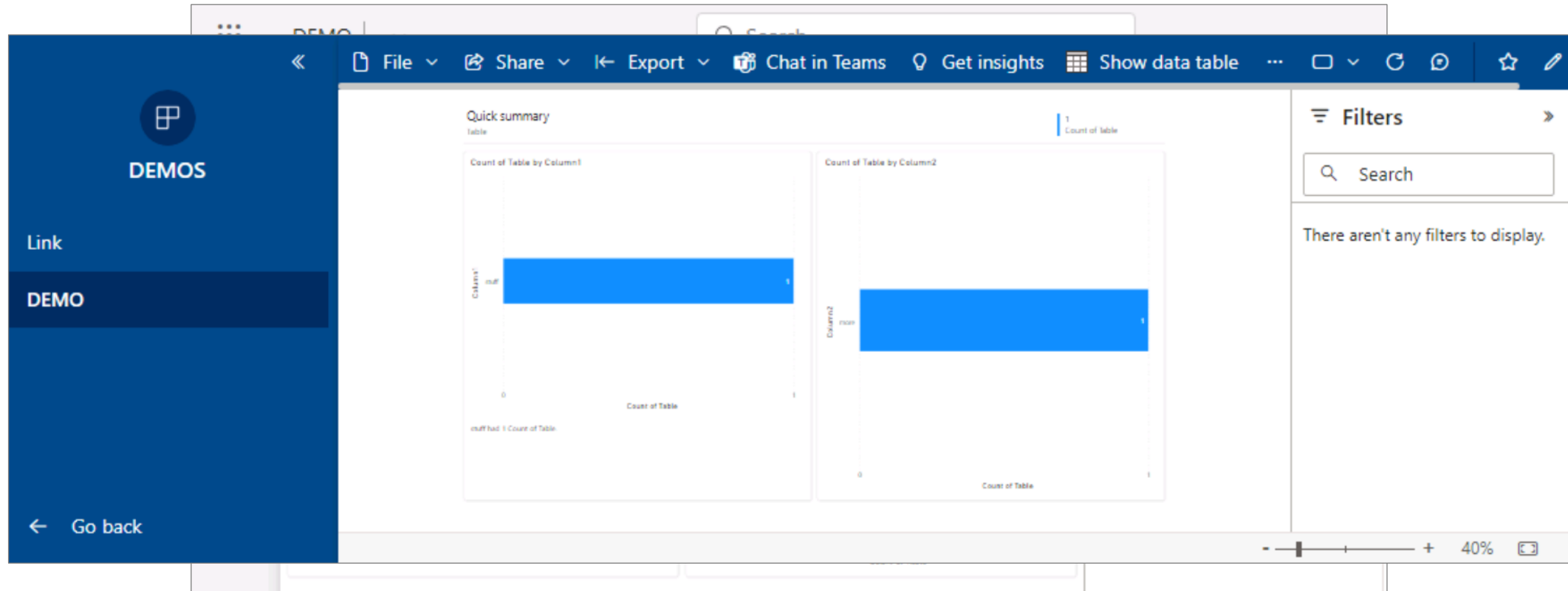
Use workspaces for collaboration with other developers, not content sharing.



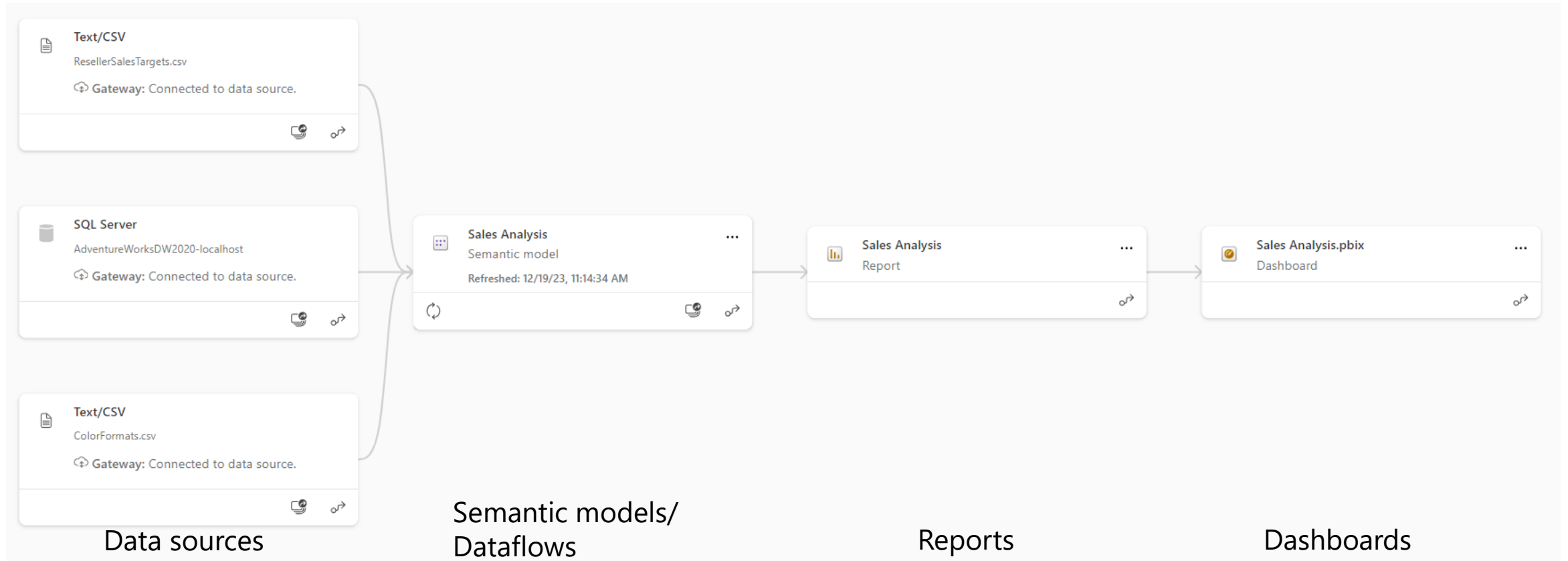
Publish reports to a workspace



Explore different workspace items

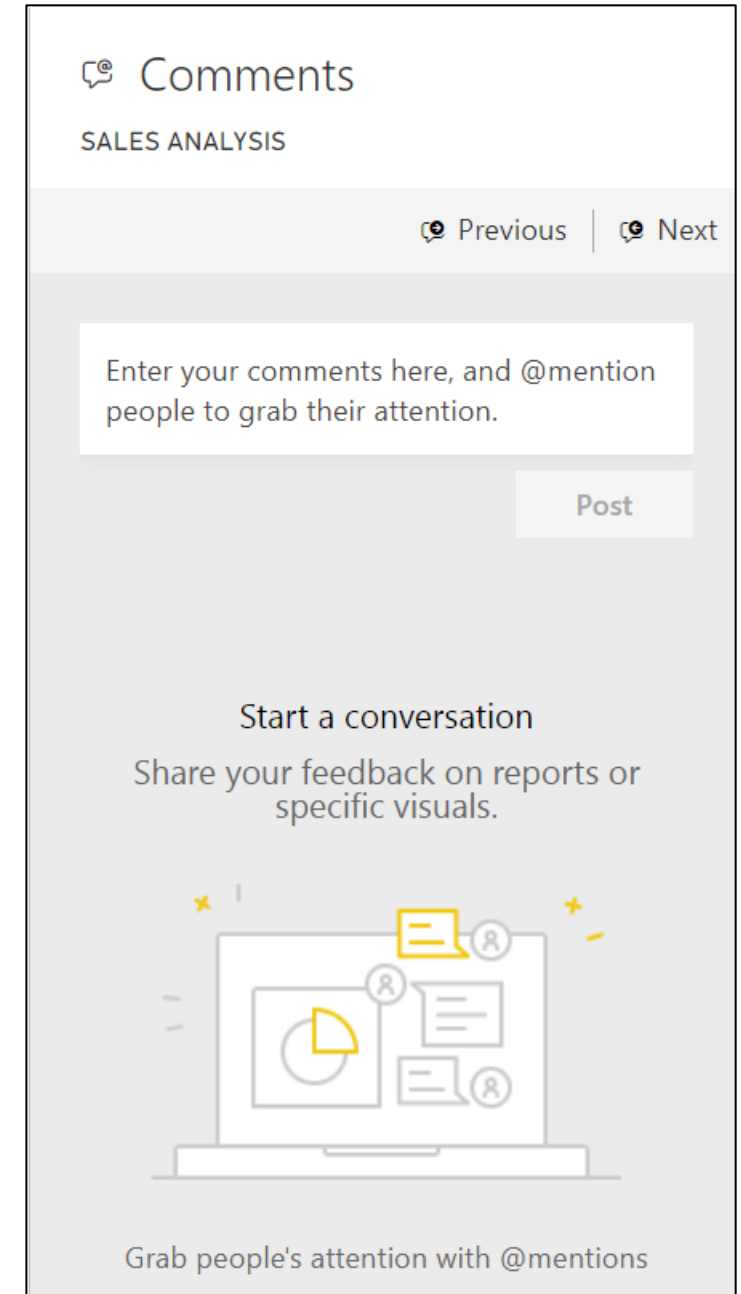


Identify relationships between items with Lineage view



Provide feedback in report comments

- Comment pane
- Tag specific people
- Comment on specific visuals



Distribute and manage content



Configure apps for distribution

The image shows a screenshot of the 'Create app' dialog in Microsoft Dynamics 365. The dialog has a tabbed interface with 'Setup', 'Content', and 'Audience' tabs. The 'Setup' tab is active, showing fields for 'App name' (filled with 'DEMOS'), 'Description' (with a placeholder 'Enter a summary'), 'App logo' (with an 'Upload' button and a 'Delete' icon), and 'App theme color' (a blue color picker). A 'Contact Information' sub-dialog is open over the main dialog, containing radio buttons for 'Show app publisher' (selected), 'Show items contacts from the workspace', and 'Show specific individuals or groups', followed by a search input 'Enter a name or email address'. Below this are 'Global App Settings' with checkboxes for 'Install this app automatically.', 'Hide app navigation pane.', and 'Allow users to make a copy of the reports in this app.'. The 'Support site' section has a text input 'Share where your users can find help'. The background shows a 'Success' message for 'DEMOS' and a 'Workspace users' list.

① Setup ② Content ③ Audience

Create app

Audience

Manage

Success

DEMOS

Give people

<https://app>

Build your app

App name *

DEMOS

Description *

Enter a summary

Describe your app.

App logo

Upload

Delete

App theme color

Contact Information

☒ Show app publisher

☐ Show items contacts from the workspace

☐ Show specific individuals or groups

Enter a name or email address

Global App Settings

☐ Install this app automatically.

☐ Hide app navigation pane.

☐ Allow users to make a copy of the reports in this app.

Support site

Share where your users can find help

to app

Close

Workspace users

Keep data up to date

On-demand or scheduled refresh

- 8 times per day for shared
- Up to 48 times per day with Premium

Automatically pauses after

- 5 consecutive failures
- 2 months of inactivity

⌵ Scheduled refresh

Keep your data up to date

Configure a data refresh schedule to import data from the data source into the dataset.

On

Refresh frequency

Daily

Time zone

(UTC-08:00) Pacific Time (US and Cana

Time

[Add another time](#)

Send refresh failure notifications to

Semantic model owner

These contacts:

Enter email addresses

Apply

Discard

Incremental refresh

- Works best with query folding
- DirectQuery requires Premium/PPU

How to enable:

- Define the filter parameters
- Use the parameters to apply a filter
- Define the incremental refresh policy

Incremental refresh and real-time data

Refresh large tables faster with incremental refresh. Plus, get the latest data in real time with DirectQuery (Premium only). [Learn more](#)

i These settings will apply when you publish the dataset to the Power BI service. Once you do that, you won't be able to download it back to Power BI Desktop. [Learn more](#)

1. Select table

Orders

2. Set import and refresh ranges

☒ Incrementally refresh this table

Archive data starting

5

Years

 before refresh date

Data imported from 1/1/2017 to 11/17/2022 (inclusive)

Incrementally refresh data starting

3

Days

 before refresh date

Data will be incrementally refreshed from 11/18/2022 to 11/20/2022 (inclusive)

3. Choose optional settings

☐ Get the latest data in real time with DirectQuery (Premium only) [Learn more](#)

Selected table cannot be folded for DirectQuery.

☐ Only refresh complete days [Learn more](#)

☐ Detect data changes [Learn more](#)

4. Review and apply

Archived

Incremental Refresh

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Data protection report settings

- If and how users can export data.

Export data

Choose the type of data you allow your end users to export.

Summarized data and data with current layout

Summarized data and data with current layout

Summarized data, data with current layout and underlying data

None

- Set data sensitivity.

Sensitivity label *

Classify the sensitivity of this report content.

Non-Business

Non-Business

Public

General

Semantic model endorsement

Provide trusted semantic models and encourage reusability.

Endorsement and discovery

Help coworkers find your quality content by endorsing this semantic model and making it discoverable. [Learn more](#)

☒ None
This semantic model will appear in search results but isn't endorsed.

☐ Promoted
When you're ready to distribute the semantic model to your coworkers, promote it to let them know.

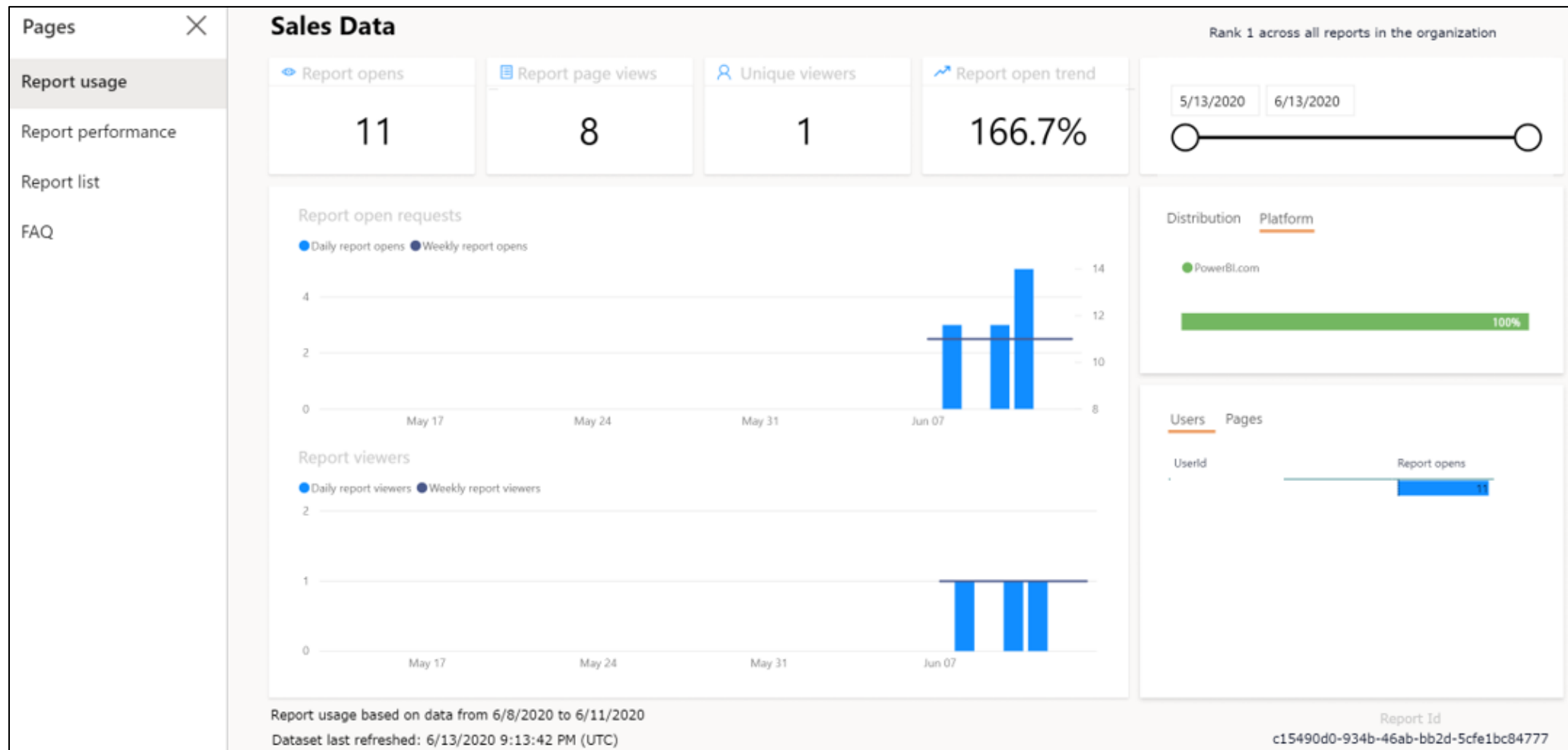
☐ Certified
Certify your semantic model to show coworkers that it's been reviewed and meets your org's certification criteria. [How do I get my semantic model certified?](#)

☐ Make discoverable
Allow users without access to this semantic model to discover it and request permissions to access the data [Learn more](#)

Apply

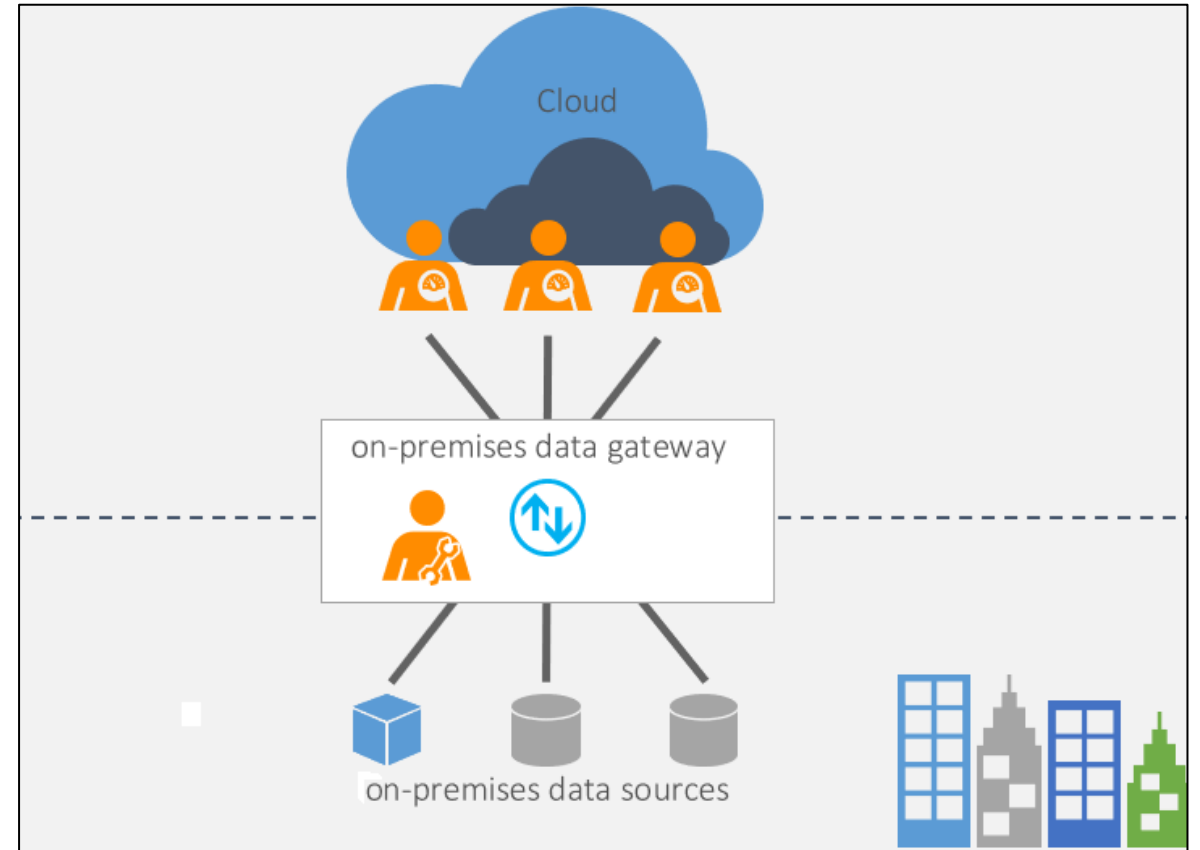
Discard

Leverage Usage Metrics report for insights




Connect to on-premises data sources

- Gateways allow Power BI to connect and refresh **on-prem data sources**.
- Organizational or personal gateways available.
- Require credentials to data source.



Power BI licensing overview

License	Shared workspace	Premium workspace 
Free	<ul style="list-style-type: none">• Access to their own content.• Cannot distribute any content.	<ul style="list-style-type: none">• Access workspace content.• Cannot distribute any content.
Pro	<ul style="list-style-type: none">• Access to all workspace content.• Distribute to other Pro users.	<ul style="list-style-type: none">• Access all workspace content.• Distribute content to all users.
Premium Per User (PPU)	<ul style="list-style-type: none">• Access to all workspace content.• Distribute to other PPU users.	<ul style="list-style-type: none">• Access all workspace content.• Distribute content to all users.

DEMO

Manage files and semantic models in Power BI service

Knowledge check: manage service items



Which one of the following options is the best description of a workspace?

- ☐ A feature in Power BI service that allows you to view reports only.
- ☒ A centralized location to store and collaborate on content.
- ☐ A feature that allows you to edit the data model and build reports.

Where are semantic model-scheduled refreshes configured?

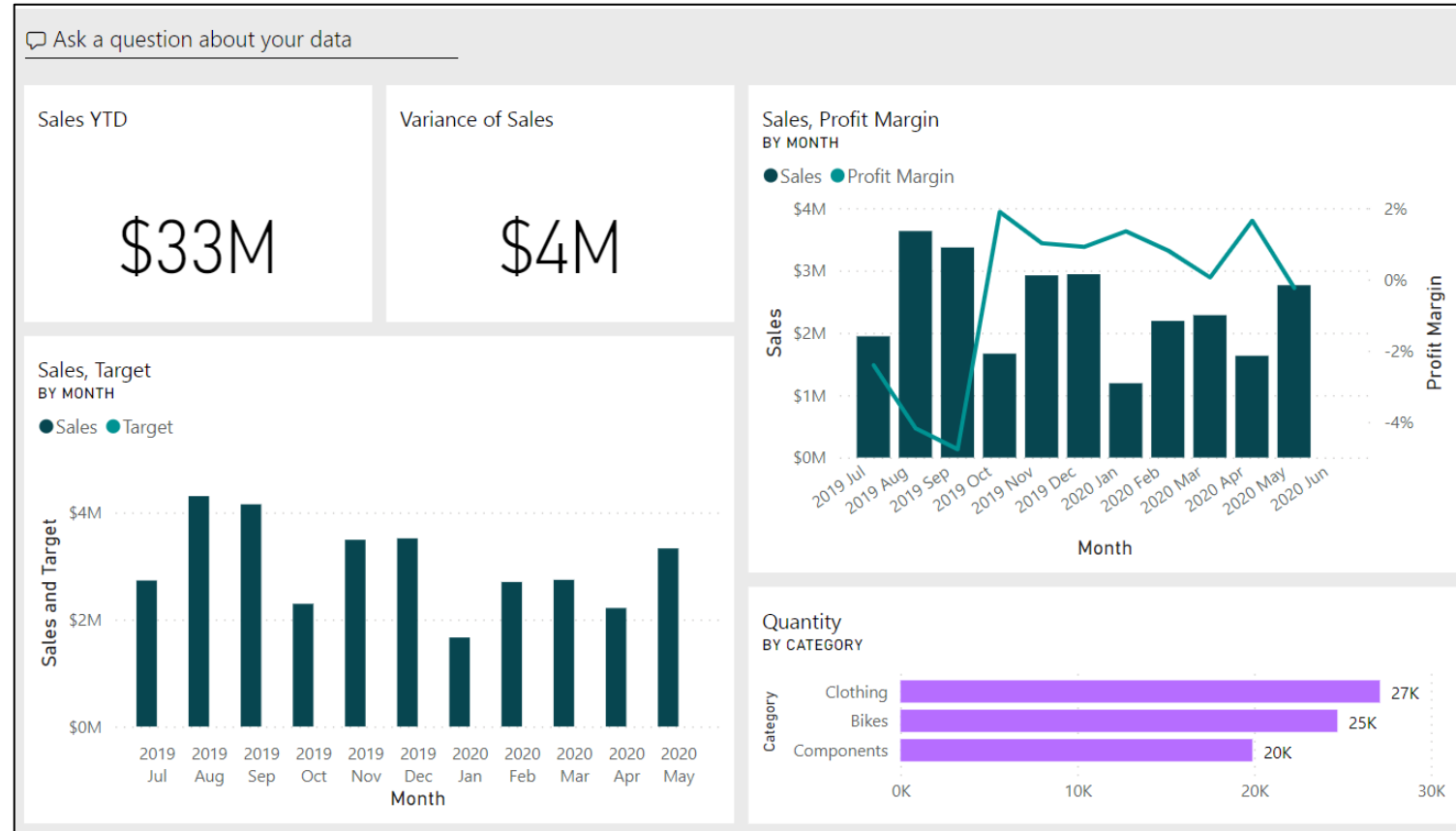
- ☒ Power BI service
- ☐ Power BI Desktop
- ☐ AppSource

Create and use dashboards



What is a Power BI dashboard?

- Single page
- Visuals pinned from reports
- Tiles are static
- Default Q&A feature
- Refreshes with semantic model
 - DirectQuery every 15 min



Pin visuals to a dashboard

- Specific visuals
- Entire pages (pin live)

Pin to dashboard

Select an existing dashboard or create a new one.

Where would you like to pin to?

☒ Existing dashboard

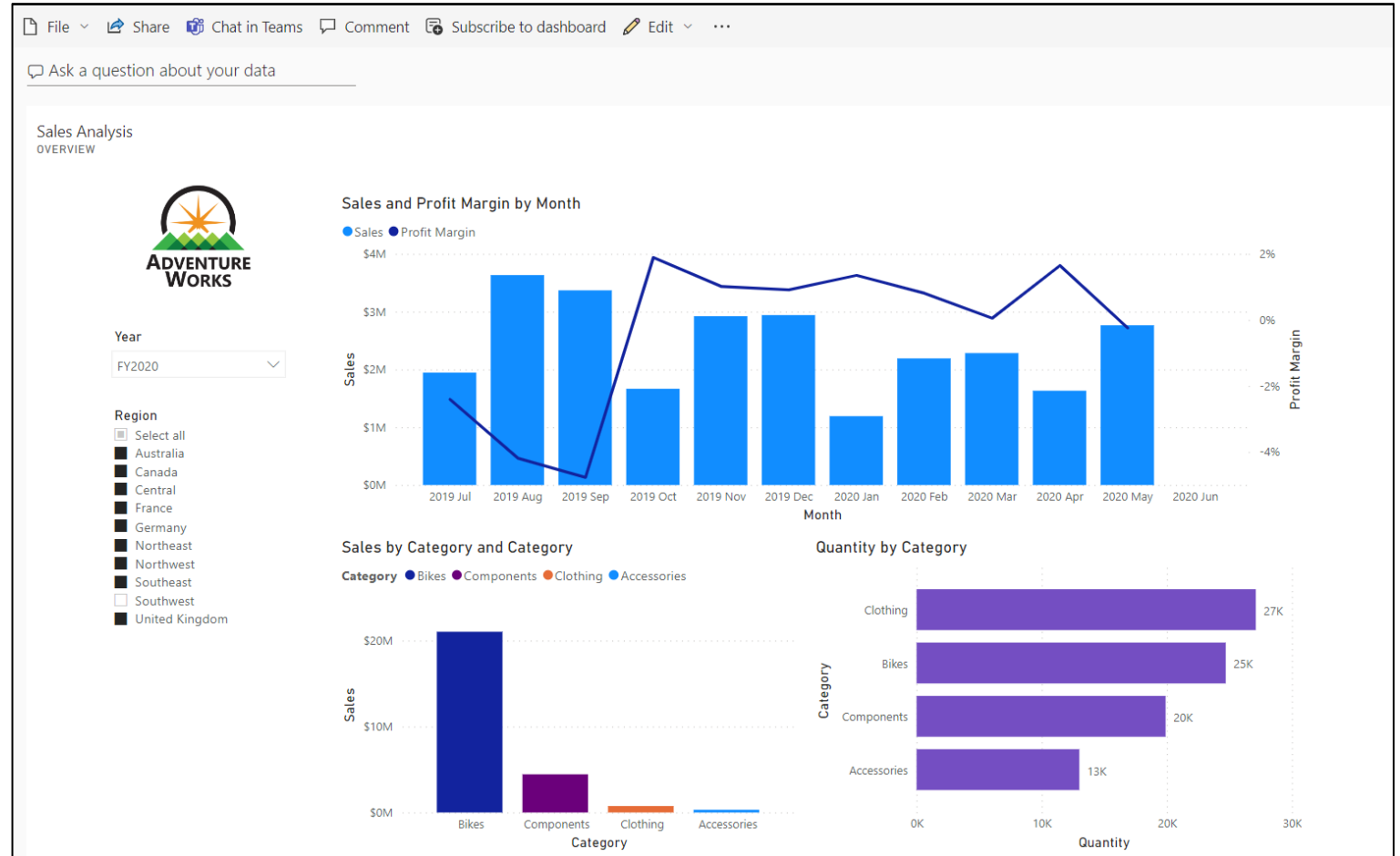
☐ New dashboard

Select existing dashboard

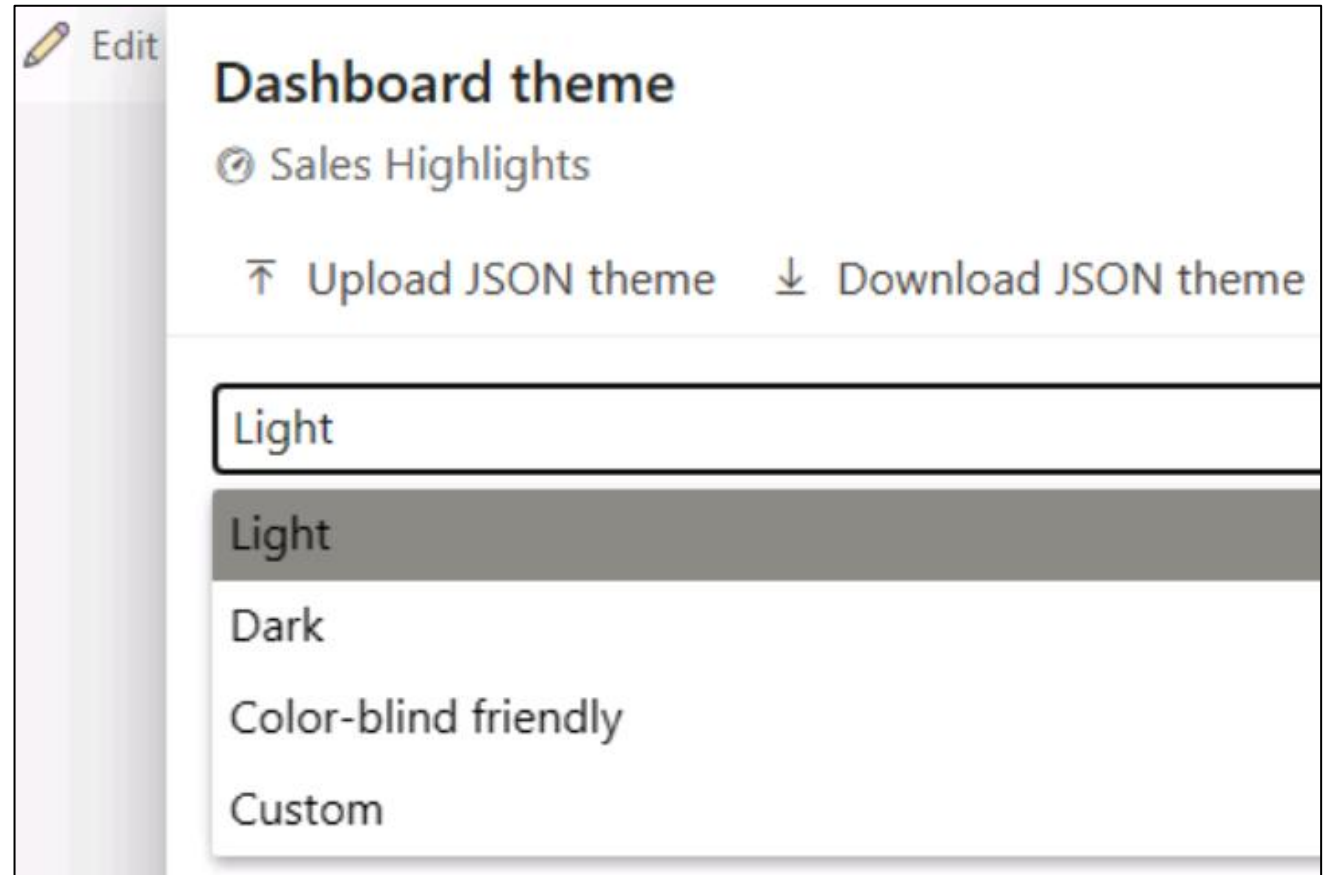
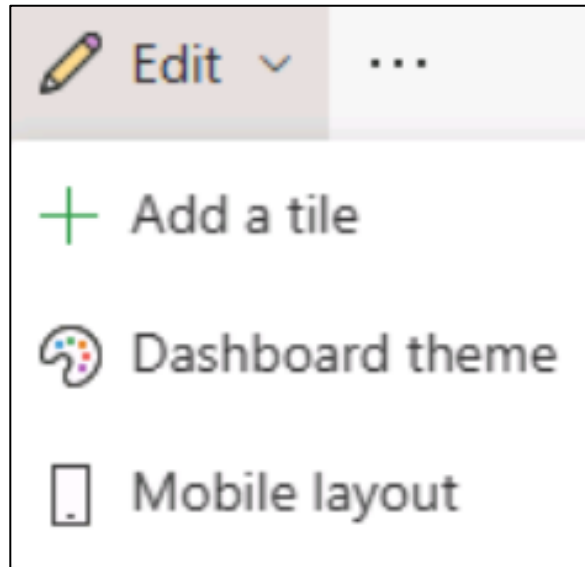
Sales Overview

Pin live page enables changes to reports to appear in the dashboard tile when the page is refreshed.

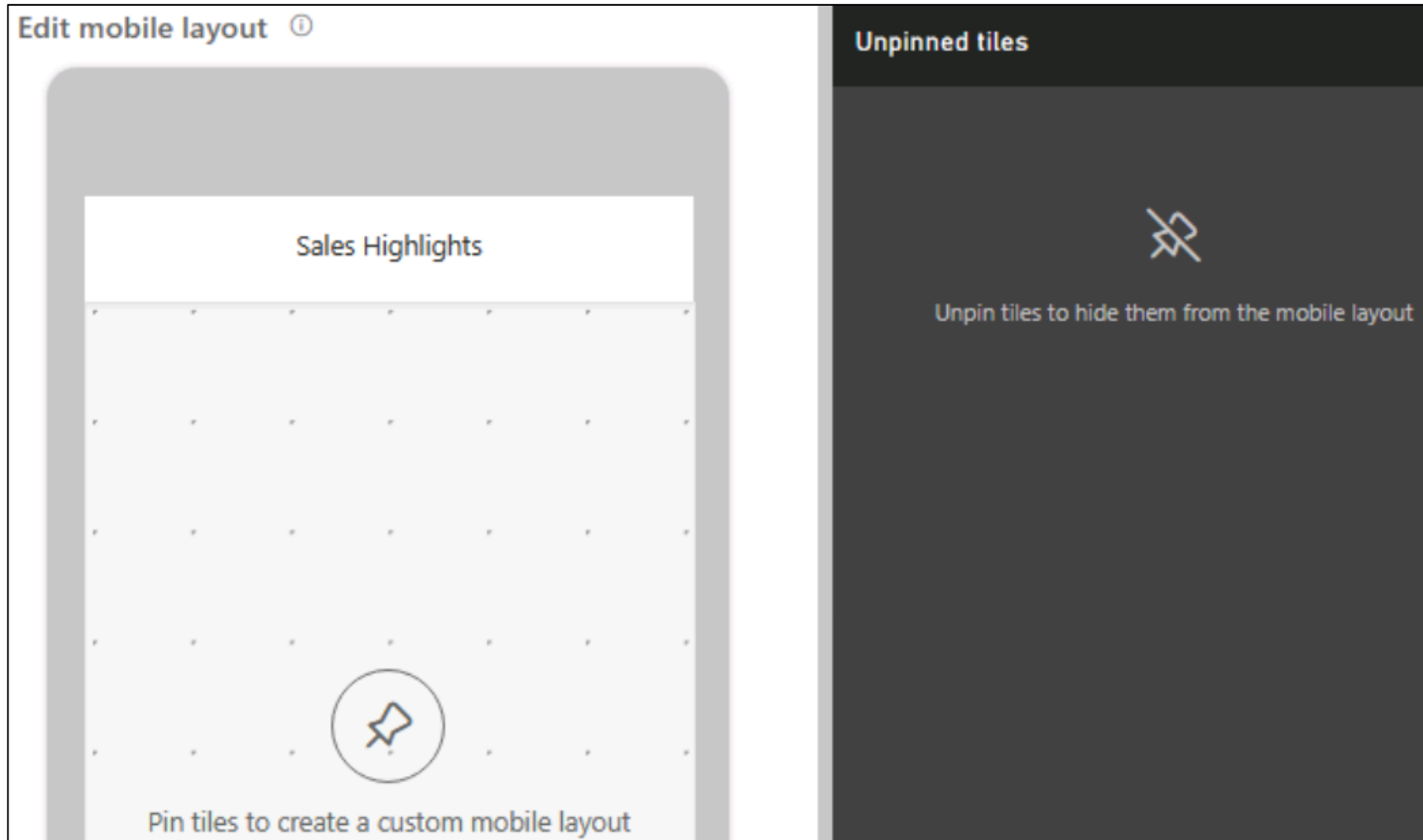
Pin live Cancel



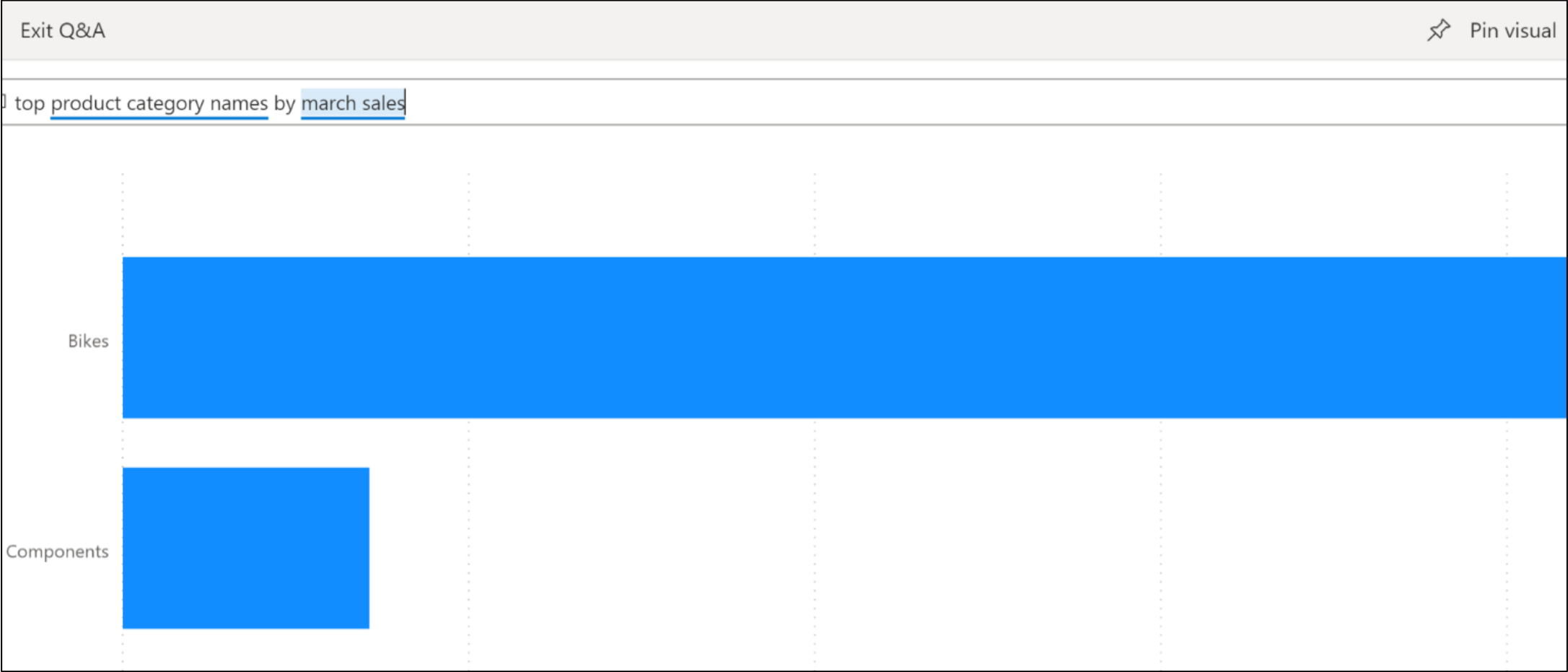
Enhance your dashboard with a theme



Design mobile layout for dashboards on the go



Use natural language to explore with Q&A



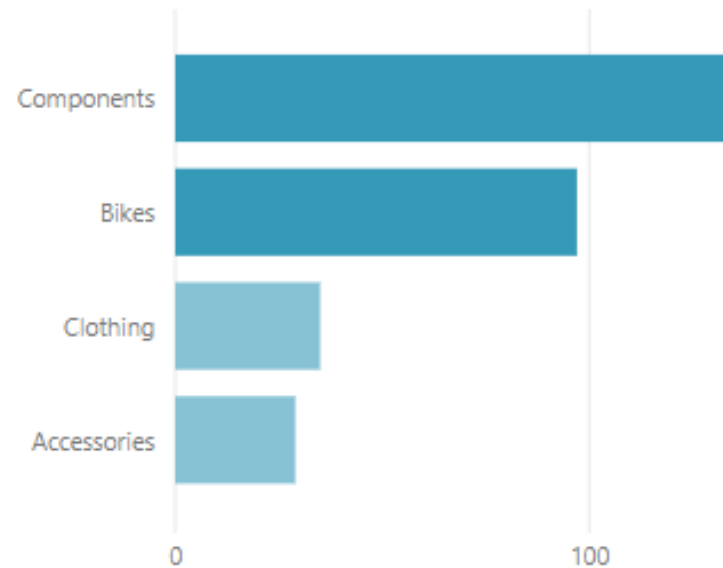
Discover more with Quick Insights

- Uses Machine Learning algorithms.
- Generate visual interactions.
- Find insights missed during development.

Quick Insights

A subset of your data was analyzed and the following insights were found. [Learn more](#)

Count of Product
BY CATEGORY NAME



'Components' and 'Bikes' have noticeably more Product.

Create Real-time dashboards

Stream data and update dashboards as soon as the data is logged.



DEMO

Create a dashboard in Power BI service

Lab: Create a Power BI dashboard (30 minutes)



[Create a dashboard | GitHub Exercise](#)

In this lab, you'll create the Sales Monitoring dashboard in the Power BI service using an existing report.

- Pin visuals to a dashboard
- Use Q&A to create dashboard tiles

Knowledge check: dashboards



What's the difference between a report and a dashboard?

- ☒ In reports, you can have multiple pages; in dashboards, you can have only one page.
- ☐ You can only build reports and dashboards in Power BI service.
- ☐ There's no difference between reports and dashboards.

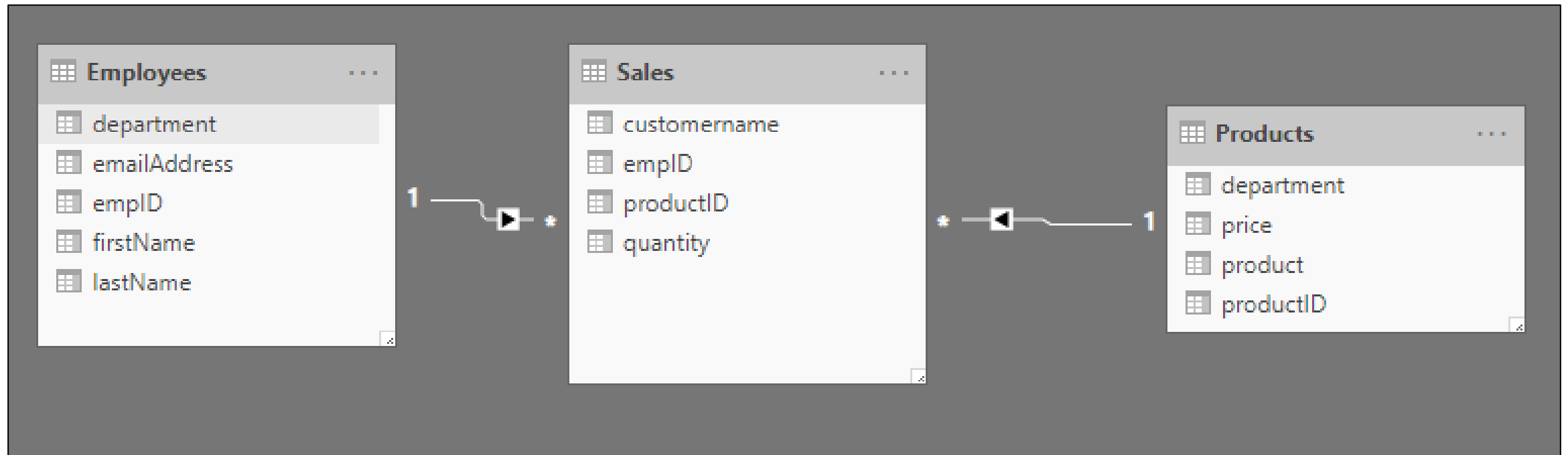
Where can you configure and set data alerts?

- ☒ Data alerts can be set only in Power BI service on specific visuals such as KPI cards, gauges, and cards.
- ☐ Data alerts can be set in both Power BI service and Power BI Desktop on any kind of visual.
- ☐ Data alerts can be set in Power BI service on any kind of visual.

Row-level security overview



Security overview in Power BI



Configure roles with Static method

Manage roles

Roles

- Automotive ...
- Clothing ...
- Game** ...
- Sports ...

CreateDelete

Tables

- Employees ...
- Sales** ...

Table filter DAX expression

[department] = "Game"

Filter the data that this role can see by entering a DAX filter expression that returns a True/False value. For example: [Entity ID] = "Value"

SaveCancel

Use a dynamic value with DAX filters

Manage roles

Roles

EmployeeEmailAddress ...

CreateDelete

Tables

Employees ...
Products ...
Sales ...

Table filter DAX expression

[emailAddress] = userprincipalname()

DEMO

Implement row-level security in Power BI

Lab: Enforce row-level security in Power BI (20 Minutes)



[Row-level security | GitHub Exercise](#)

In this lab, you'll enforce row-level security to ensure that a salesperson can only analyze sales data for their assigned region(s).

In this lab you learn how to:

- Enforce row-level security

Knowledge check: row-level security



Which function will tell you the username used in the Power BI service?

- ☒ USERPRINCIPALNAME()
- ☐ LOOKUPVALUE()
- ☐ USEROBJECTID()

Where can you test RLS by using different security roles?

- ☐ Power BI Desktop only
- ☐ Power BI service only
- ☒ Both Power BI Desktop and Power BI service

Recap

In this section, we covered:

Creation and management of workspaces in the Power BI service.

Management and distribution of content via apps.

Data refresh, protection, and endorsement.

Usage Metrics report for your content.

Licensing overview.

Creating compelling dashboards.

Implementation of row-level security.

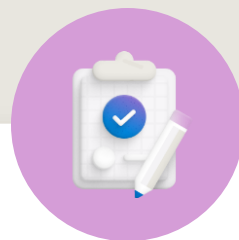
Thank you for attending this course

Quick reminders



Celebrate your new skills

- Redeem your achievement
- Share with us and your network



Let us know how we did

- Give us your feedback
- Survey will be sent via email



Become Microsoft Certified

- Explore additional resources to help prepare
- Schedule your exam

➔ Tag us social: [#AlwaysLearning](#)

What could be next in your learning journey?

[Use DAX in Power BI Desktop](#)

This learning path introduces Data Analysis Expressions (DAX) and provides you with foundational skills required to enhance data models with calculations. Module topics include:

- Using DAX iterator functions.
- Modifying DAX filter context.
- Using DAX time intelligence functions.

[DP-600: Microsoft Fabric Analytics Engineer](#)

The primary audience for this course is data professionals with experience in data modeling, extraction, and analytics.

DP-600 is designed for professionals who want to use Microsoft Fabric to create and deploy enterprise-scale data analytics solutions.

Thanks

Resources

[Create and manage workspaces](#)

[Manage semantic models in Power BI](#)

[Create a Power BI dashboard](#)

[Implement row-level security](#)