

1. Create data model

### **Prepare**

- · make sure you are not duplicating an existing report
- · collect report requirements
- · create database views in dbt/Databricks (optional)
- · request/get access to workspace
- · download and install Power BI Desktop from Company Portal (Firmaportal) via Start menu

#### Get data

- · consider using Gjensidige template
- add data sources/tables (decide data storage mode)
- · decide if you will use custom or automatic date table
- · save PBIX file regularly in SharePoint

# **Transform &** shape data

- transform data
- · keep only needed data
- · remove unnecessary columns
- · filter only required rows
- · rename tables and columns if necessary
- · check and adjust data types

#### Model data

- · create relationships
- · create hierarchies
- · mark date table
- · add variables/parameters (optional)
- · add calculation groups/items (optional)
- display folders
- · create (explicit) measures

- · hide irrelevant tables and columns
- · check and adjust summarize by
- · check and adjust sort by another column · apply formats/signs
- · configure incremental refresh (optional) • add empty tables for measures or create • run Best Practice Analyzer in Tabular
  - Editor (optional)

# 2. Create report & dashboard

## **Create reports**

- · separate report from dataset
- · add logo/branding/theme
- · add title/header/footer
- · add visualizations incl. (conditional) formatting/sorting
- · add filters and slicers
- add buttons and bookmarks if necessary (opt)
- · add mobile layout

# **Configure row-level** security

· add security roles/filters (optional)

# **Publish reports**

· publish the report to workspace

### **Configure settings**

- · add semantic model description
- · update parameters
- · configure gateway connections
- · re-enter data source credentials
- · schedule refresh
- add endorsement (optional)
- · customize request access message
- · add role members if using RLS (optional)
- · configure other relevant settings...

#### Schedule refresh

· if you did not schedule refresh in semantic model settings, schedule refresh outside Power BI service (optional)

#### Create dashboards

· pin visuals to dashboard (optional)

# **Create and publish** apps

- add short and descriptive name. description and contacts
- add content/navigation
- · add audience/permissions
- · customize request access message
- · publish app

# Sanity check

· make a final check



#### **Share**

- add audiences/permissions and update app (recommended) or use other sharing options
- · share a link to app with end users
- · ensure good documentation, communication and support

# Make subscriptions and alerts

· subscribe to report/dashboard (optional) · add and manage alerts (optional)

#### **Feedback**

· collect feedback and plan improvements

#### **Monitor**

- · monitor performance
- · monitor usage