

Building a Power BI report - From A to Z

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1. Create data model

Prepare

- make sure you are not duplicating an existing report
- collect report requirements
- request/get access to workspace
- download Power BI Desktop from Microsoft Store via Start menu and configure settings

Get data

- add data sources/tables (decide data storage mode)
- if data is on premise, you will need a gateway after publishing
- create database views if possible (corporate BI)
- decide if you will use custom or automatic date table

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



2. Create reports & dashboards

Create reports

- separate report from dataset
- add logo/branding/theme
- add title/header/footer
- add visualizations
- add filters and slicers
- add bookmarks if necessary
- add mobile layout

Configure row-level security (optional)

- add security roles/filters

Publish reports

- publish the report to workspace

Configure settings

- re-enter data source credentials
- map gateway if data is on-premise
- add role members (optional)
- configure Q&A
- configure endorsement and discovery

Schedule refresh

- go to settings and add refresh schedule

Create dashboards

- pin visuals to dashboard

Create and publish apps (optional)

- add navigation
- publish app

Sanity check

- make a final check



3. Collaborate & share

Share

- configure permissions and update app (optional)
- share workspace/dataset/report
- ensure good communication and support

Make subscriptions and alerts

- subscribe to report/dashboard
- add and manage alerts

Feedback

- collect feedback and plan improvements

Monitor

- monitor performance