



Manage Datasets in Power BI

Learning Objectives

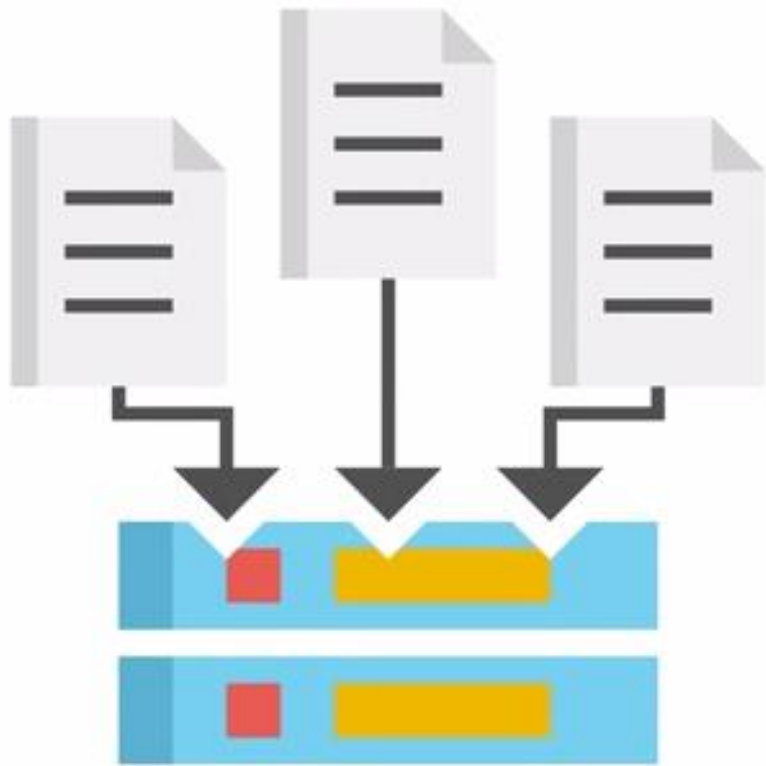
By the end of this lesson, you will be able to:

- 🕒 Understand datasets and parameters
- 🕒 Create dynamic reports with parameters
- 🕒 Configure row-level security group membership
- 🕒 Promote or certify Power BI datasets



Datasets and Parameters

Datasets and Parameters



- Datasets are published in workspaces.
- Sharing datasets boosts the productivity of report authors.
- Management of datasets involves the implementation of parameters within datasets.

Dynamic Reports with Parameters

Dynamic Reports with Parameters

Data in dynamic reports can be changed by a developer according to user specifications.

Manage Parameters

ABC SalesPerson

New

Name

SalesPerson

Description

Required

Type

Text

Suggested Values

Any value

Current Value

279



	ABC SalesOrderNumber	123 SalesOrderID	123 SalesPersonID	OrderDate
1	SO43659	43659	279	31/05/2011 00:00:00
2	SO43660	43660	279	31/05/2011 00:00:00
3	SO43681	43681	279	31/05/2011 00:00:00
4	SO43684	43684	279	31/05/2011 00:00:00
5	SO43685	43685	279	31/05/2011 00:00:00
6	SO43694	43694	279	31/05/2011 00:00:00
7	SO43695	43695	279	31/05/2011 00:00:00
8	SO43696	43696	279	31/05/2011 00:00:00

Dynamic Reports with Individual Values



Steps to create dynamic reports with individual values:

- First, write an SQL query and use the **get data** feature in Power BI Desktop to connect to the database.
- Second, create a parameter and adjust the SQL query in it.

Dynamic Reports with Multiple Values

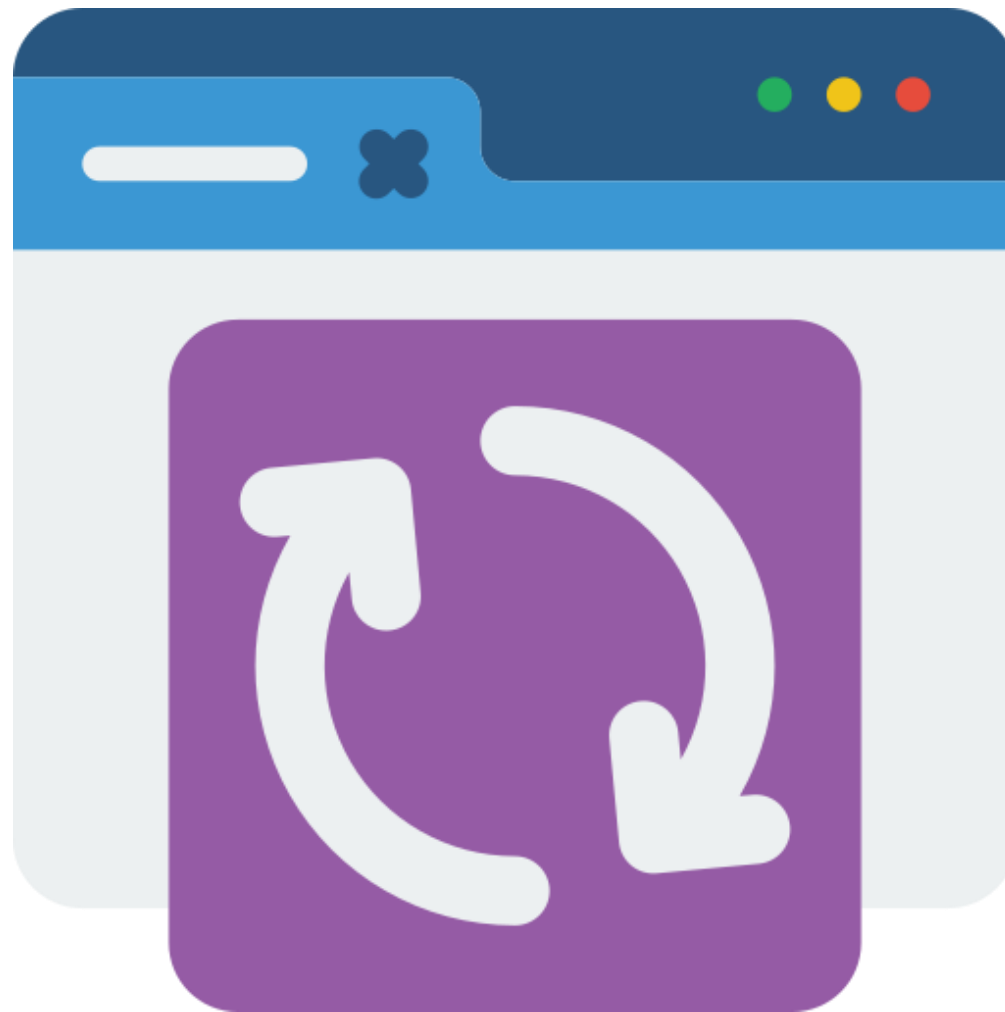
Dynamic reports with multiple values at a time can be created using an Excel worksheet that has a table comprising one column with a list of values.



Dataset Scheduled Refresh

Dataset Scheduled Refresh

The scheduled refresh feature in Power BI service allows you to define the frequency and time slots to refresh a particular dataset.



Set Up a Refresh Schedule

▲ Scheduled refresh

Keep your data up to date

☒ On

Refresh frequency

Time zone

Time

[Add another time](#)

☒ Send refresh failure notifications to the dataset owner

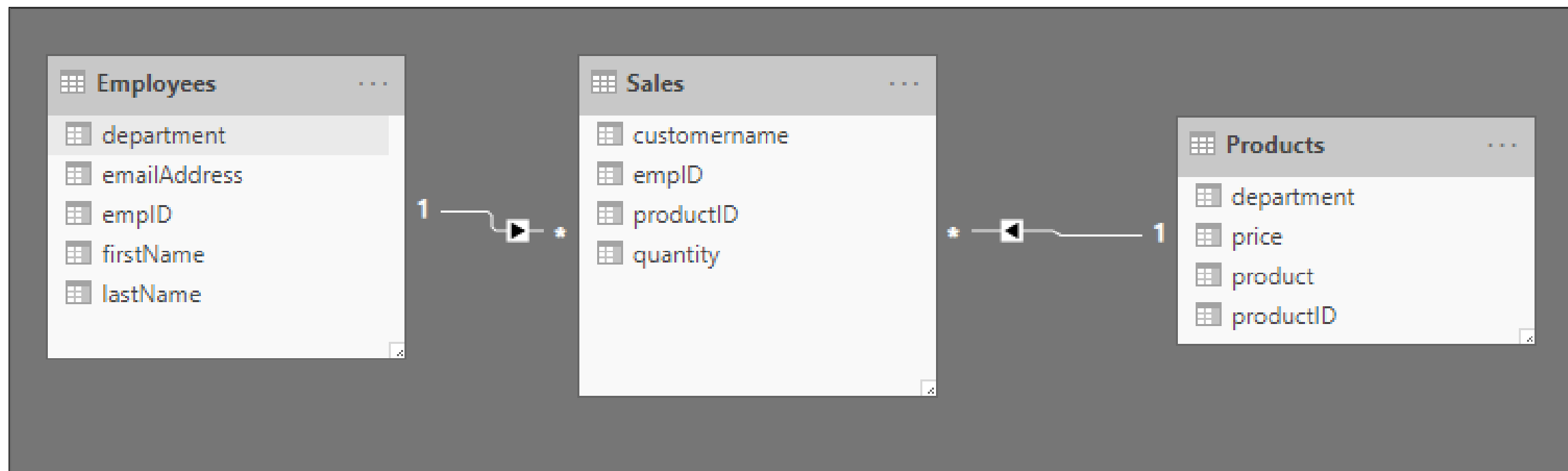
Email these users when the refresh fails

- To set up a refresh schedule for a dataset, select **datasets** in **dataflows** page.
- In addition to the scheduled refresh, you can refresh a dataset at any time by performing an on-demand refresh.
- You can also check the refresh status and history at any time.

Configure Row-level Security Group Membership

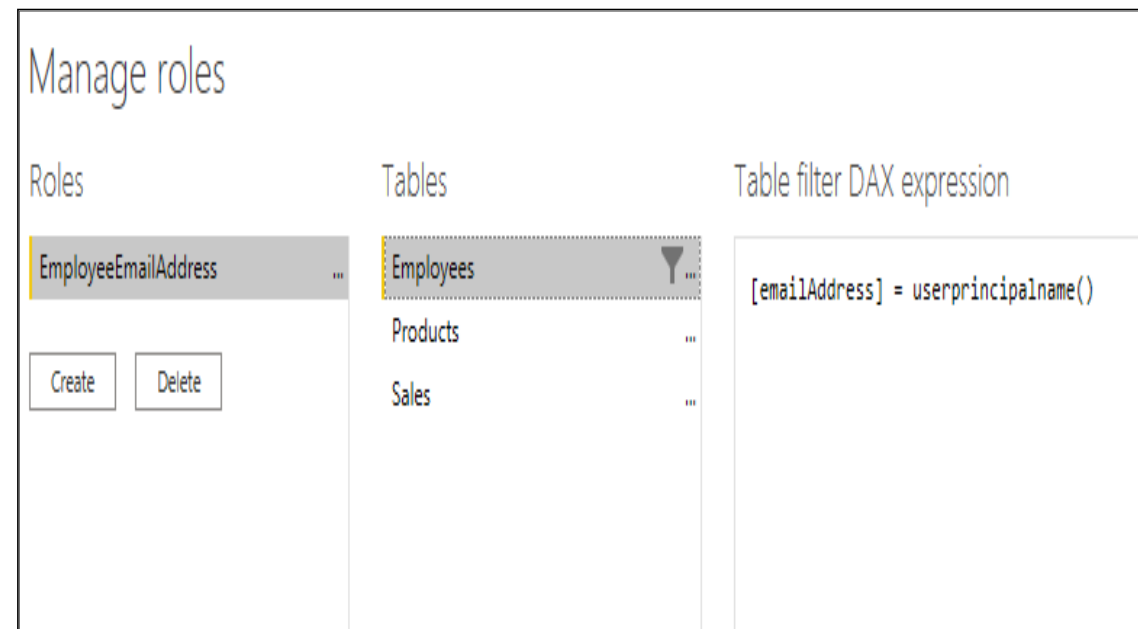
Row-level Security

Row-level security (RLS) uses a DAX filter as the core logic mechanism in Power BI to ensure that the records are accessed by the appropriate person.



Row-level Security

There are two ways to implement row-level security in Power BI:



Static

Uses a fixed value in the DAX filter

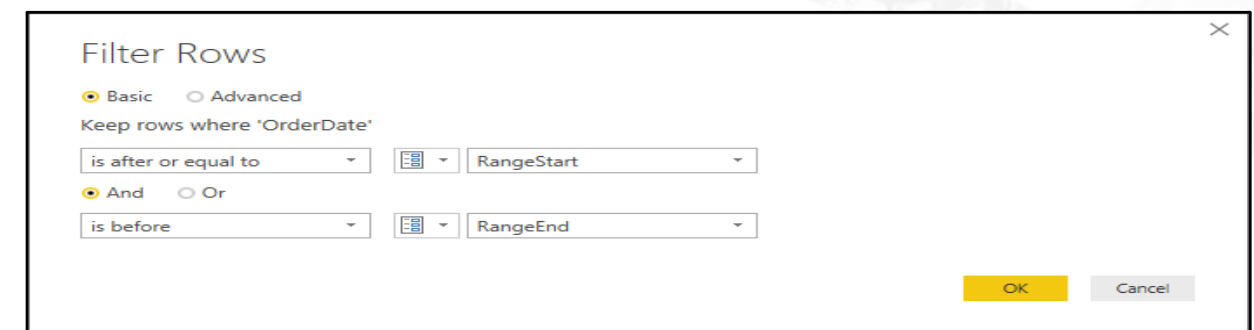
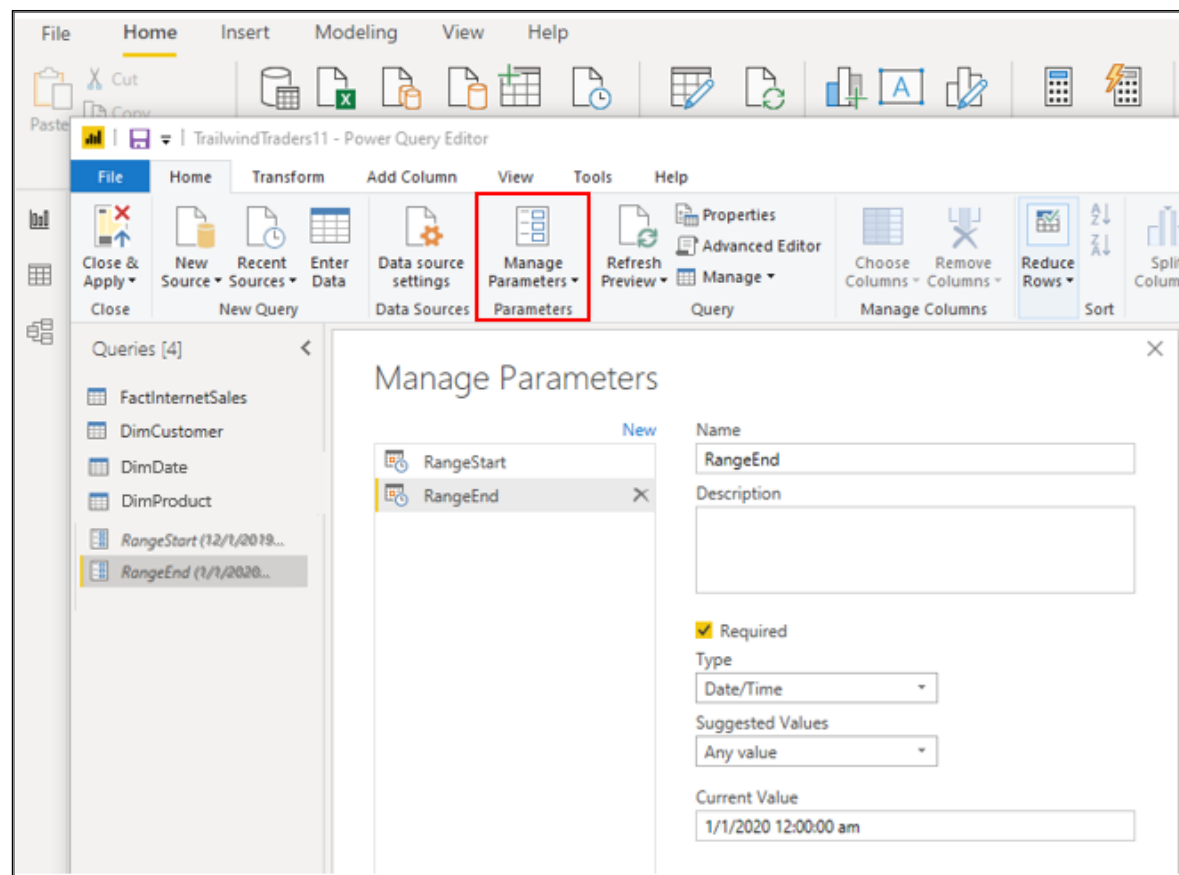
Dynamic

Uses a dynamic value in the DAX filter

Incremental Data Refresh Settings

Incremental Data Refresh

Incremental refresh feature in Power BI allows you to refresh large datasets quickly without having to reload the historical data each time.



Incremental Data Refresh Settings



Defining an incremental refresh policy involves the following steps:

- **Define filter parameters:** Filter datasets by date and time parameters using **RangeStart** and **RangeEnd**.
- **Apply the filter:** Apply filter to new parameters on the applicable column.
- **Define the policy:** Once the data is filtered, define the incremental refresh policy for the data table that sets up the refresh process.
- **Publish to PBI service:** After the incremental refresh policy is defined in Power BI Desktop, publish the report to the Power BI service.

Promote or Certify Power BI Datasets

Promote a Dataset

The dataset can be promoted only by workspace members with WRITE permissions when they are ready for widespread usage.

Endorsement

Help your colleagues find, learn about, and connect to your dataset.

☐ Default

This dataset can be searched for and used by others.

☒ Promoted

Promote this dataset with a badge to show it's ready to be used by others.

☐ Certified

Request certification from experts in your org to get a badge that shows it's recommended for use by others. [Learn more](#)

Description

Describe the contents of this dataset.

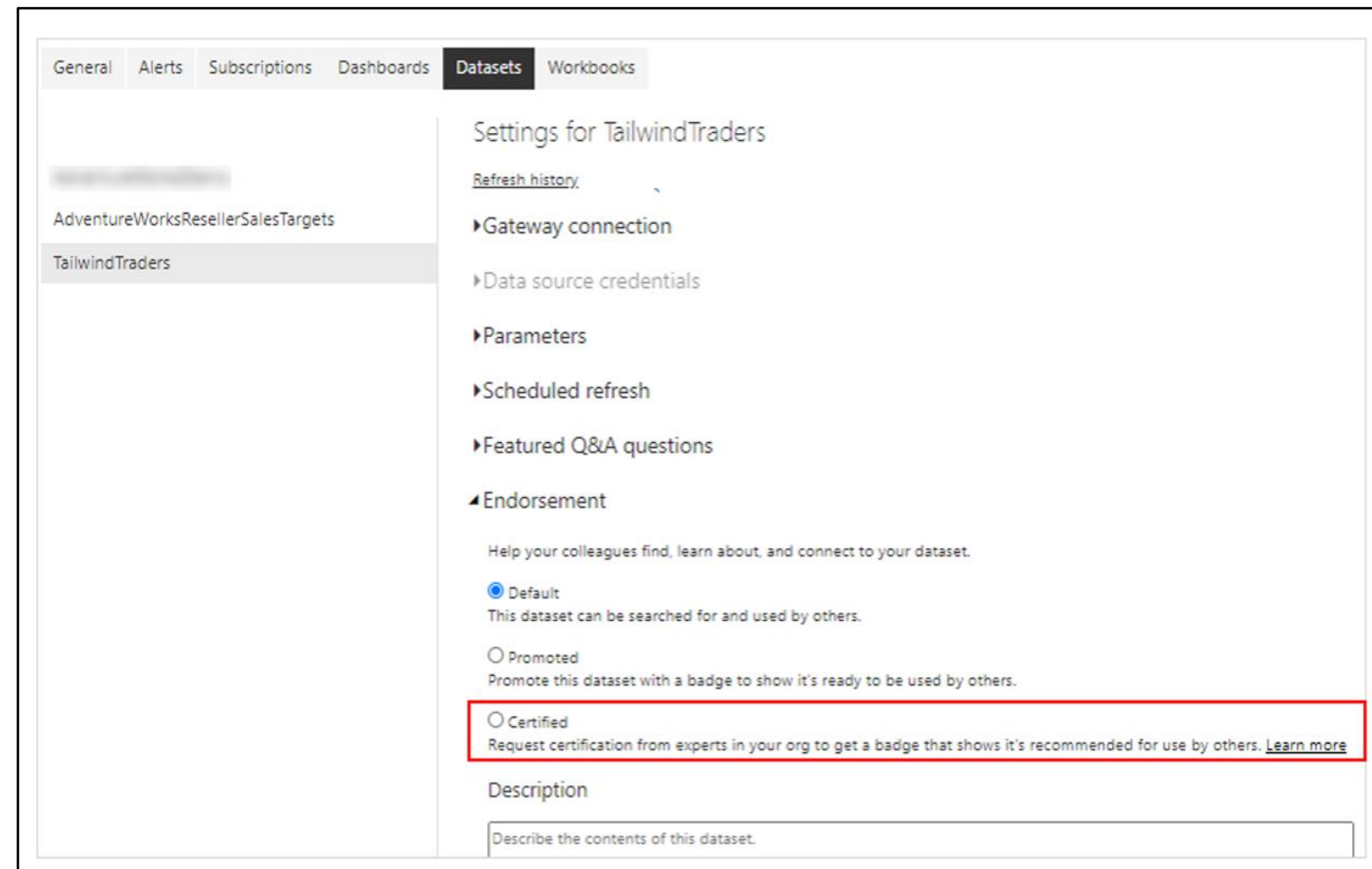
500 characters left

Apply

Discard

Certify a Dataset

Certification is a highly selective process to keep datasets used across the organization reliable and authoritative.



General Alerts Subscriptions Dashboards **Datasets** Workbooks

AdventureWorksResellerSalesTargets
TailwindTraders

Settings for TailwindTraders

[Refresh history](#)

- ▶ Gateway connection
- ▶ Data source credentials
- ▶ Parameters
- ▶ Scheduled refresh
- ▶ Featured Q&A questions
- ▲ Endorsement

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Description

Key Takeaways

- Dynamic reports with multiple values at a time can be created using an Excel worksheet.
- Certification is a highly selective process to keep datasets used across the organization reliable and authoritative.
- Incremental refresh feature in Power BI allows you to refresh large datasets.
- Row-level security (RLS) uses a DAX filter as the core logic mechanism in Power BI.





Knowledge Check

Knowledge Check

1

Which of the following feature defines the frequency and time slots to refresh a particular dataset?

- A. Incremental refresh
- B. Scheduled refresh
- C. Row-level security
- D. Dynamic reports



Knowledge Check

1

Which of the following feature defines the frequency and time slots to refresh a particular dataset?

- A. Incremental refresh
- B. Scheduled refresh
- C. Row-level security
- D. Dynamic reports



The correct answer is **B**

Scheduled refresh defines the frequency and time slots to refresh a particular dataset.

**Knowledge
Check**
2

Which of the following process helps to keep datasets used across the organization reliable and authoritative?

- A. Promotion
- B. Dynamic reports
- C. Certification
- D. Row-level security



**Knowledge
Check**
2

Which of the following process helps to keep datasets used across the organization reliable and authoritative?

- A. Promotion
- B. Dynamic reports
- C. Certification
- D. Row-level security



The correct answer is **C**

Certification helps to keep reliable and authoritative datasets are used across the organization.

**Knowledge
Check**
3

Which of the following process ensures that the records are accessed by the appropriate person?

- A. Promotion
- B. Dynamic reports
- C. Certification
- D. Row-level security



**Knowledge
Check**
3

Which of the following process ensures that the records are accessed by the appropriate person?

- A. Promotion
- B. Dynamic reports
- C. Certification
- D. Row-level security



The correct answer is **D**

Row-level security ensures that the records are accessed by the appropriate person.