Lesson 19 — Publishing & Sharing

Power BI Desktop vs. Power BI Service

Desktop is the Windows authoring tool for data prep, modeling, and building reports. Service (PowerBI.com) is the cloud to publish, share, collaborate, schedule refresh, secure, and govern.

How to publish from Desktop to the Service

In Desktop: Home -> Publish (sign in) -> choose a workspace. Alternative: in the Service use Upload and select your .pbix.

What is a workspace and its types

A workspace is a container for content (reports, semantic models/datasets, dashboards, dataflows, etc.). Types: My workspace (personal) and collaborative workspaces (shared or Premium capacity). Roles: Admin, Member, Contributor, Viewer.

Workspace vs. App

Workspace = authoring and management area for creators. App = packaged, read-only, curated experience for consumers; it is published from a workspace.

Licenses and key limits (high level)

Free: personal use in My workspace; can view only if content is on Premium capacity. Pro: required to publish/share; consumers also need Pro unless content is on Premium. PPU: most Premium features per user; both author and consumer need PPU. Premium capacity (P1+): dedicated capacity, larger limits, up to 48 refreshes/day, enterprise features; allows free users to view content hosted there.

How to share with someone who does not have Pro

Host content on a Premium capacity and grant access (or publish an App from that Premium workspace). For offline distribution, export to PDF/PPT. Publish to web is public and not for private data.

What is a semantic model (dataset) and where it lives

The semantic model is the data model: tables, relationships, measures, RLS, etc. After publishing, it resides in the Service in the chosen workspace and can power multiple reports.

Scheduled refresh

Configure on the dataset in the Service: credentials/gateway (if on-prem), frequency/time windows, failure notifications. Pro: up to 8 refreshes/day. PPU/Premium: up to 48/day. Incremental refresh is supported when configured.

Dataset vs. Dataflow

Dataset: a ready semantic model used by reports. Dataflow: cloud Power Query in the Service for reusable ETL that multiple datasets can consume.

When to use a dataflow instead of only a dataset

When you want centralized, reusable transformations; standardize logic across teams; offload heavy prep; or enable upstream incremental patterns for many datasets.

Dashboards vs. Reports

Dashboard: single page of tiles in the Service; can combine visuals from multiple reports/sources; great for monitoring and real-time. Report: multi-page, interactive, usually built in Desktop from one semantic model.

How to pin a visual to a dashboard

In the Service, open the report -> on a visual click Pin -> choose dashboard (or use Pin live page to pin an entire page).

Mobile view and why it matters

A dedicated phone layout (portrait) so consumers have a clean mobile experience without changing the desktop layout.

What is a paginated report and when to use it

Pixel-perfect .RDL reports (Power BI Report Builder); best for invoices/statements, long tables, mass PDF export. Requires PPU or Premium to publish/use.

Export to PDF/PowerPoint in the Service

File -> Export -> PDF or PowerPoint (Current values), with permission to the report/dataset. Export has size/time limits.

What does Live connection in the Service mean

The report connects live to an existing semantic model (or SSAS via gateway) without importing data; calculations and security stay centralized.

RLS (Row-Level Security) in the Service

Define roles with DAX filters in Desktop or the Service. After publishing: Dataset -> Security -> assign users/groups to roles. Filters apply wherever that dataset is used.

How to test RLS online

Dataset -> Security -> Test as role (or use View as in Desktop) to see the report as a specific role/user.

What are Apps and how to publish one

Apps are curated packages of reports/dashboards from a single workspace with navigation and branding. In a workspace: Publish app -> choose content and target audiences -> publish and share the link. Update app to push changes.

Key enterprise benefits of the Service

Centralized access/control and governance, scalability with Premium, scheduled refresh and gateways, reusable dataflows and lineage/impact analysis, RLS and auditing/access management, deployment pipelines, alerts/metrics, mobile apps—reducing file sprawl and enabling a single source of truth.