Mastering Fabric: Workspace Governance and Organization

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– Danish Microsoft BI Community (MsBIP.dk)

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– Power BI Cruise, Power BI Next Step and Data Platform Next Step

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First things first

– A workspace serves as a dedicated area within the Fabric portal for **safeguarding** and **managing** content.

– These workspaces are tailored for the development and **collaboration** efforts. Strategic **planning of workspaces** is crucial for the success of any Fabric or Power BI deployment.

– Effective **governance** and **organization** of Fabric workspaces are essential.

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Agility

Control

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Practical checklist

- Monitoring workspaces

- Workspace audience

- Naming conventions for workspaces

- Creation process of workspaces

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Monitoring

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Monitoring workspaces

1. Programmatically **extract a tenant inventory** by using the metadata scanning APIs
   – Review all workspaces that currently exist
   – Audit if a Fabric administrator has obtained access to a user's personal workspace
   – Audit when a workspace has been created, changed or access has been changed
2. Use the very basic **Inventory Report** in **Admin Monitoring Workspace**

– **Document**
   – Intended purpose for the workspace (if it's not already mentioned in the workspace description).
   – Who approved the workspace – write it in the description.
   – Who's assigned as the workspace owner

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Audience

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Workspace audience

Enterprise

- For the whole organization
- Created and managed by IT or CoE.
- Large number of content consumers.

Team based

- Business-led self-service for organizational business unit, segment, team or department.
- Also known as Team or Departmental BI.
- Small number of authors.

Personal

- Every user has a personal Workspace.
- Consider creating "private" workspaces instead, if git integration is needed.
- Individual usage with lots of freedom and flexibility = Self-Service BI.

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Naming conventions

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Naming conventions

– Use short yet descriptive names
– **Prefixes** and/or use **domains**
  – By subject area/domain/content type
  – By team/department
  – By organizational business unit or segment
– Project as the main part
– Suffixes
  – Stages (environments)
  – Code, Data or Private

– Example:
```
[Organizational BU - ]<ProjectName>[ <Data Platform] -
{[Code] | [Data] | [Private]} {[dev] | [test] | [prod]}
```

– Document your standard!

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Creation process

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All (or most) can create

Limited set can create

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All (or most) can create

- Really agile and require tight monitoring
- Hard to ensure naming conventions

△ Create workspaces
Enabled for the entire organization

Users in the organization can create app workspaces to collaborate on dashboards, reports, and other content. Even if this setting is disabled, a workspace will be created when a template app is installed.

⬤ Enabled

Apply to:
◉ The entire organization
○ Specific security groups

Limited set can create

- Governance plan is in place
- Require process for requesting a new workspace

△ Create workspaces
Enabled for a subset of the organization

Users in the organization can create app workspaces to collaborate on dashboards, reports, and other content. Even if this setting is disabled, a workspace will be created when a template app is installed.

⬤ Enabled

Apply to:
○ The entire organization
◉ Specific security groups

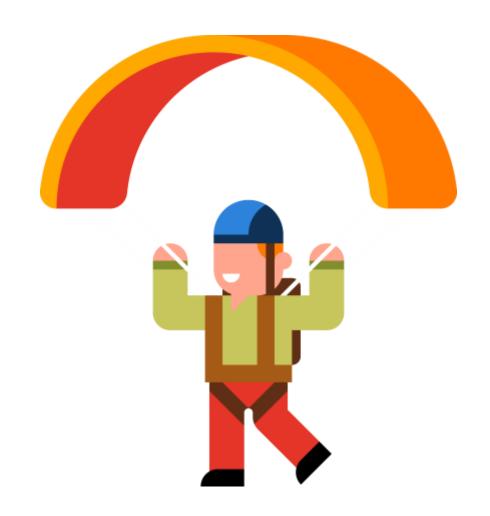S SEC-Fabric-CreateWorkspace ✕ | Enter security groups

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Request a workspace

Consider the information you'll need and how to capture the information, and who will process the request.

1. Email to service desk, who manually create the workspace
2. Create a form in Power Apps or use Microsoft Forms
   – Automatically create workspace with the API
   – With or without approval flow send to service desk

Link to the form should be easy to find in a centralized portal including documentation of the process.

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Resources and guidelines

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Resources and guidelines

– Tenant-level workspace planning

– https://learn.microsoft.com/en-us/power-bi/guidance/powerbi-implementation-planning-workspaces-tenant-level-planning

– Workspace-level workspace planning

– https://learn.microsoft.com/en-us/power-bi/guidance/powerbi-implementation-planning-workspaces-workspace-level-planning

– Govern workspaces

– https://learn.microsoft.com/en-us/power-bi/guidance/powerbi-implementation-planning-tenant-administration#govern-workspaces

– Workspace tenant settings

– https://learn.microsoft.com/en-us/fabric/admin/portal-workspace#create-workspaces

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Any Questions?

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Provide feedback

https://sqlb.it/?12560