MICROSOFT POWER-BI SERVICE

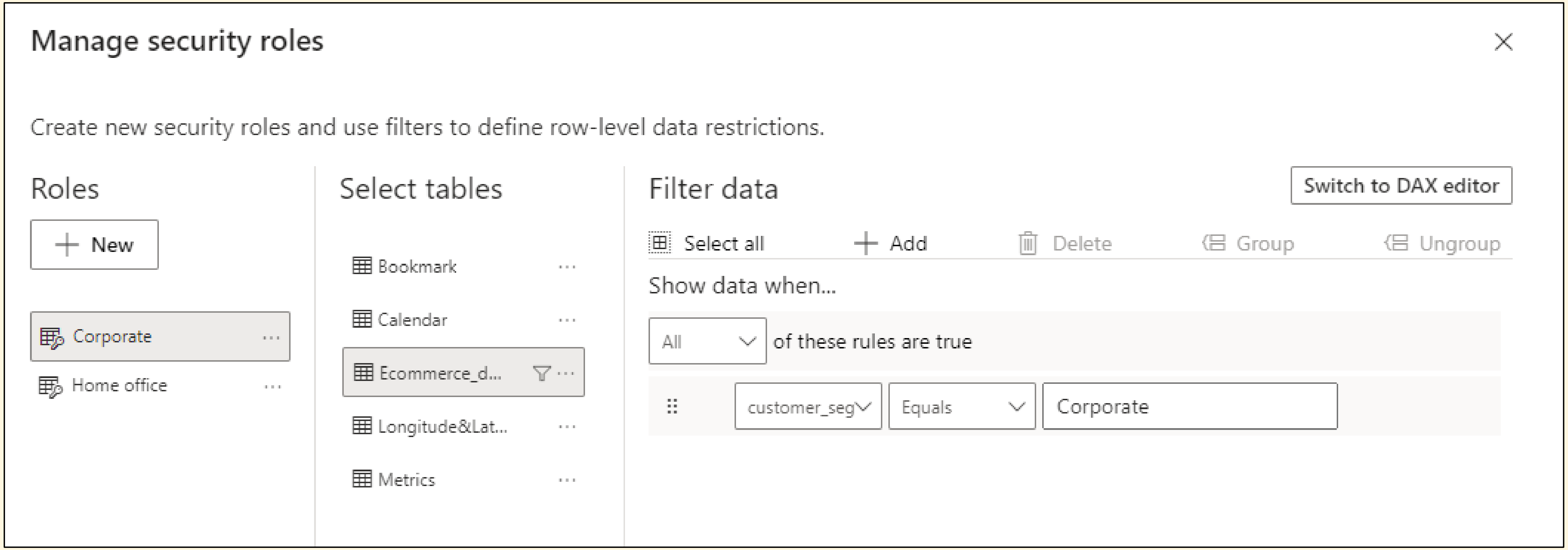
PART II

- MAYURI .D.

ROW LEVEL SECURITY (RLS)

- Row-level security (RLS) with Power BI can be used to restrict data access for given users.
- Filters restrict data access at the row level, and you can define filters within roles. In the Power BI service, users with access to a workspace have access to semantic models in that workspace.
- RLS only restricts data access for users with Viewer permissions. It doesn't apply to Admins, Members, or Contributors.
- You can configure RLS for data models imported into Power BI with Power BI. You can also configure RLS on semantic models that are using DirectQuery, such as SQL Server.
- For Analysis Services or Azure Analysis Services lives connections, you configure row-level security in the model, not in Power BI.
- The security option doesn't show up for live connection semantic models

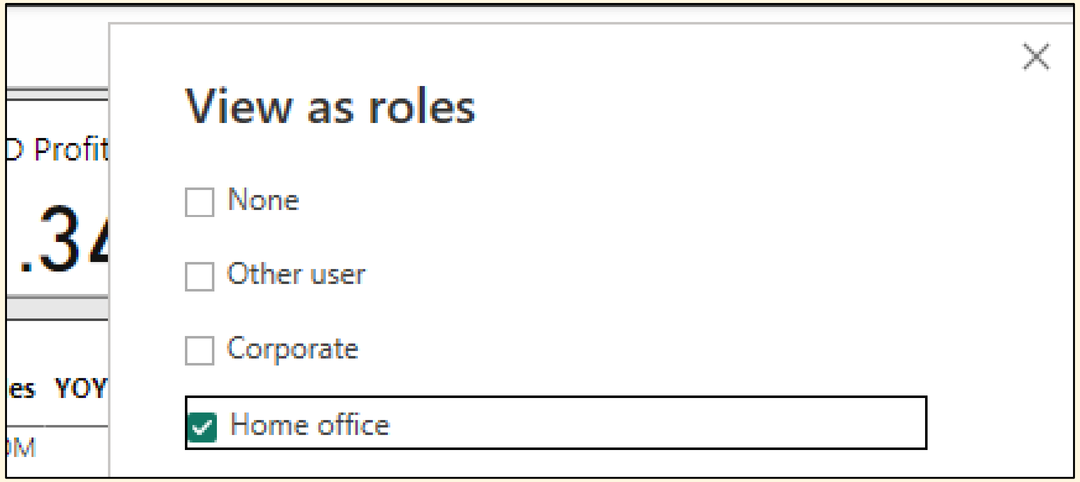
- In Power-BI Desktop select Manage Roles under Modelling tab.
- Select New under Roles and provide a name for the role
- Select the table to which you want to apply a filter rule.
- In filter data, define rules that incorporate to the Role



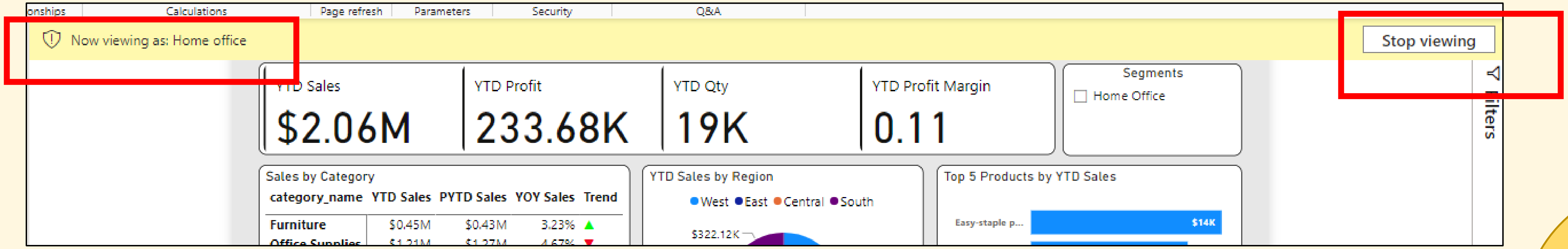
- Click save.
- Again repeat same above process to add new role

After you've created your roles, test the results of the roles within Power BI Desktop

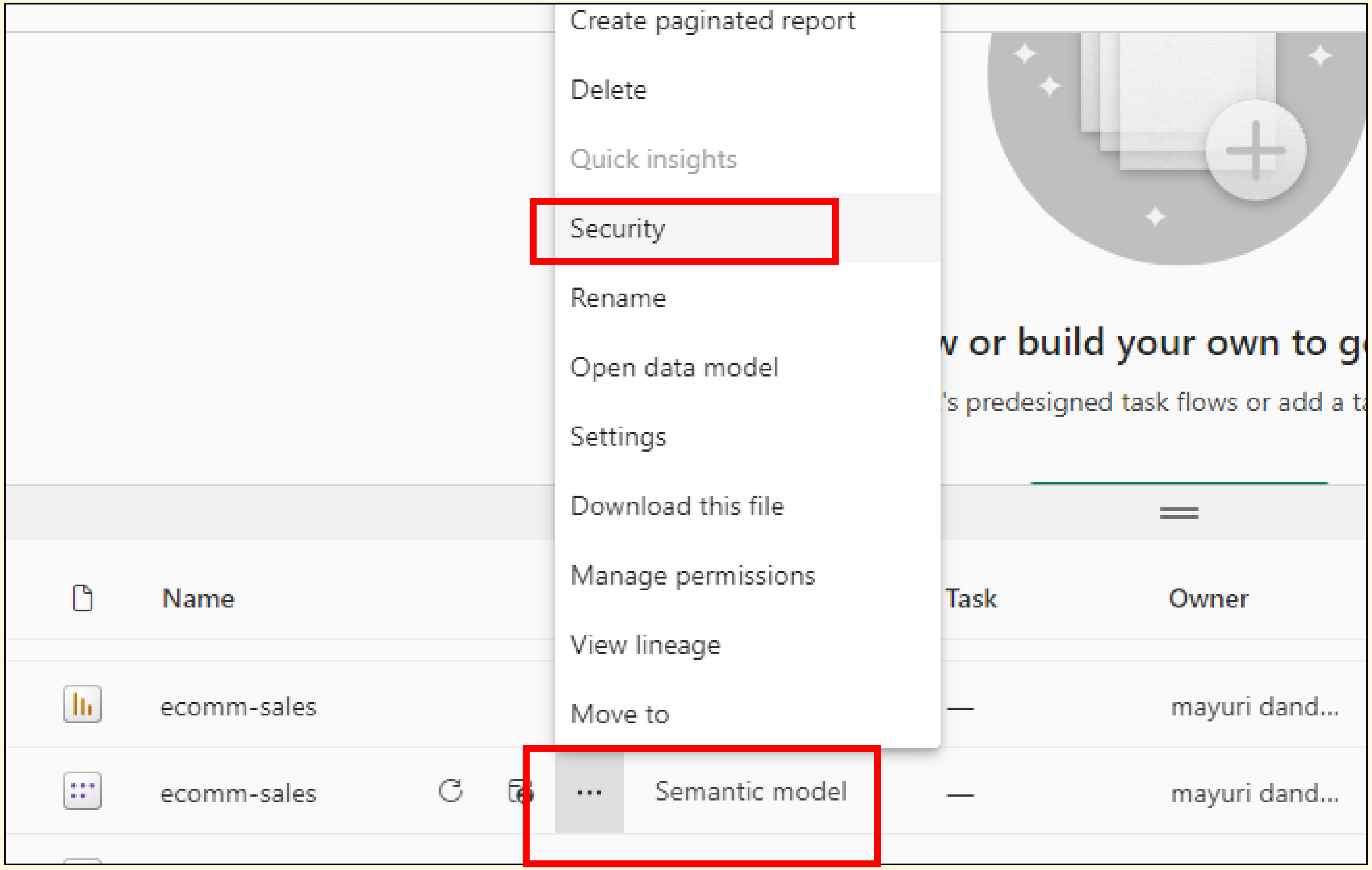
- From the Modeling tab, select View As.
- Select a role you created. Then choose OK to apply that role.



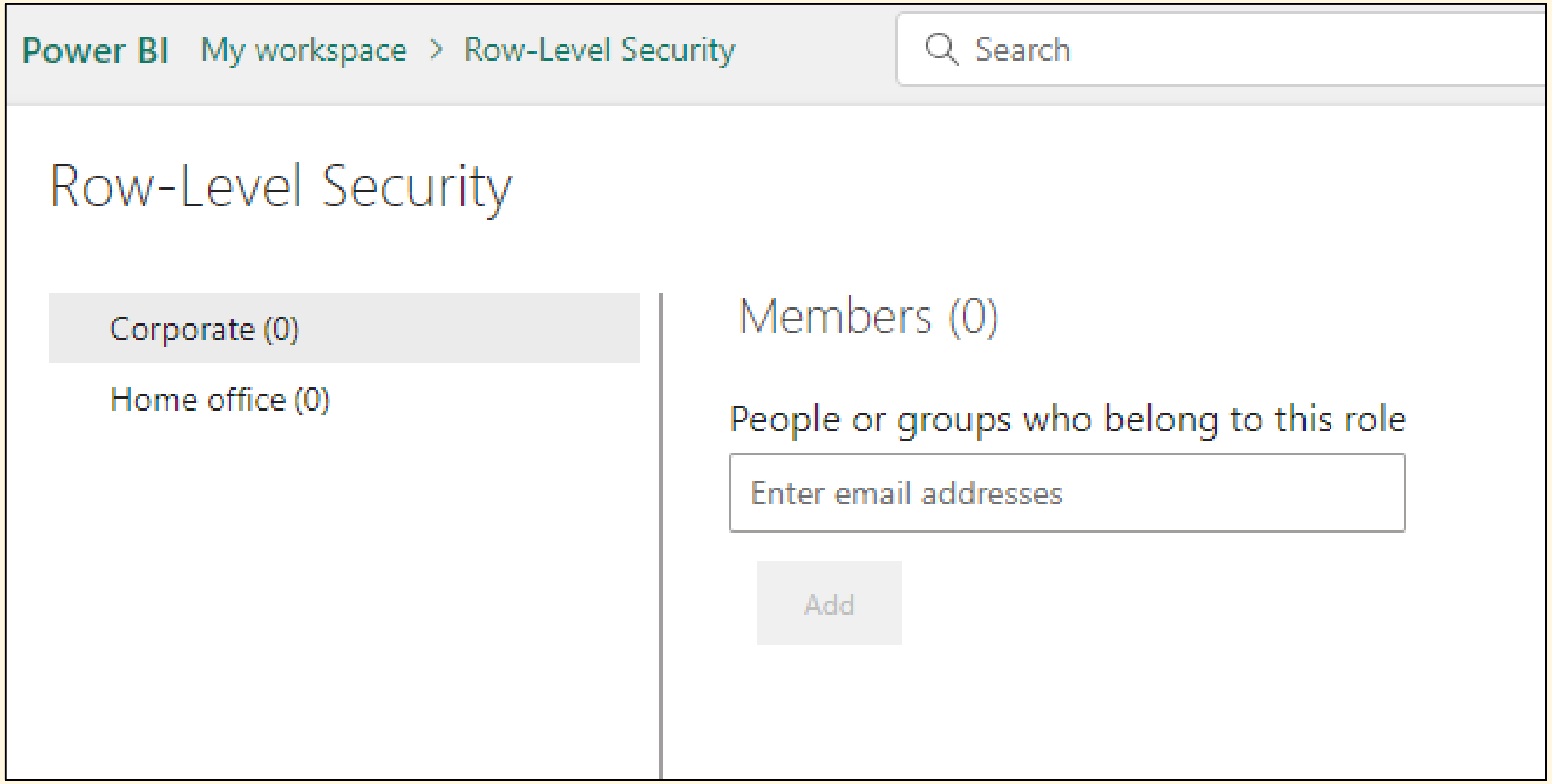
- You will see screen like below with yellow strip showing the role name.
- Click stop viewing and check for next role.



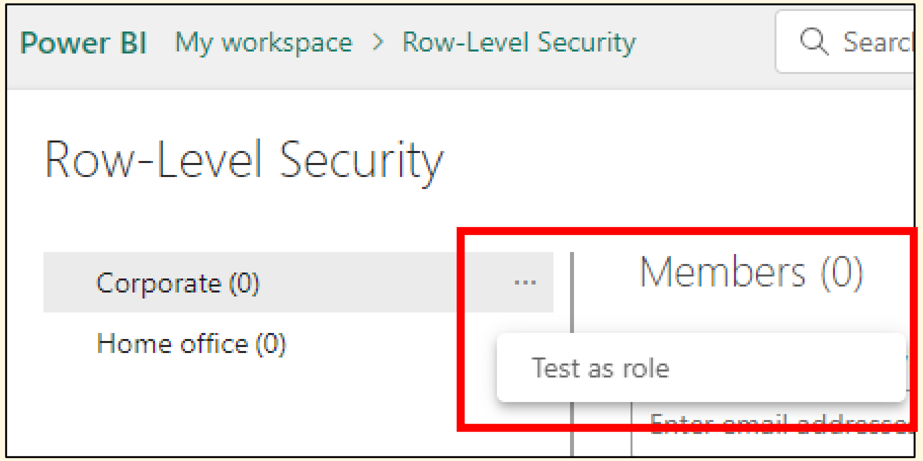
- After creating roles in Power-BI Desktop, publish your report to Power-BI Service.
- In Power-BI Service, go to my workspace where all reports are stored.
- For each report you will find 2 types--- report and semantic model.
- Find semantic model (not report) alongside the report name.
- click on 3 dots and select security.



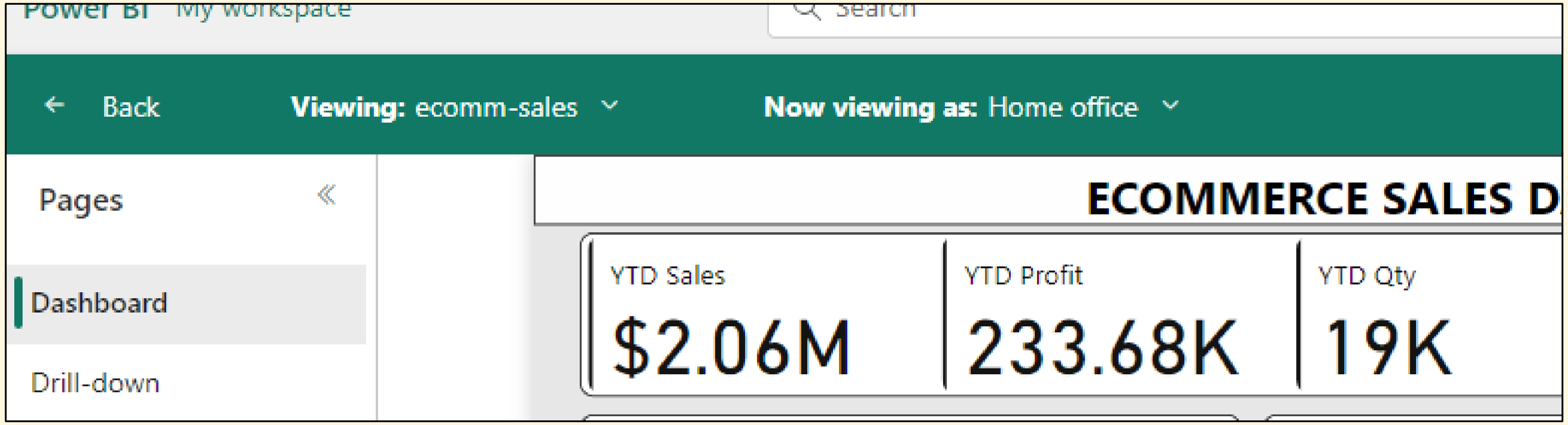
- You will find the roles which were created in Power-BI Desktop.
- Select each role and provide email address of respected persons to whom the role is being assign and click save. You can add multiple email addresses to one role by clicking on Add



- If you want to test the roles before giving them access of respected role
- Click on 3 dots next to role name and select test as role.



- A report with green stripe as shown below appears showing the role names
- Also check other roles from drop-down arrow and click back to go back .



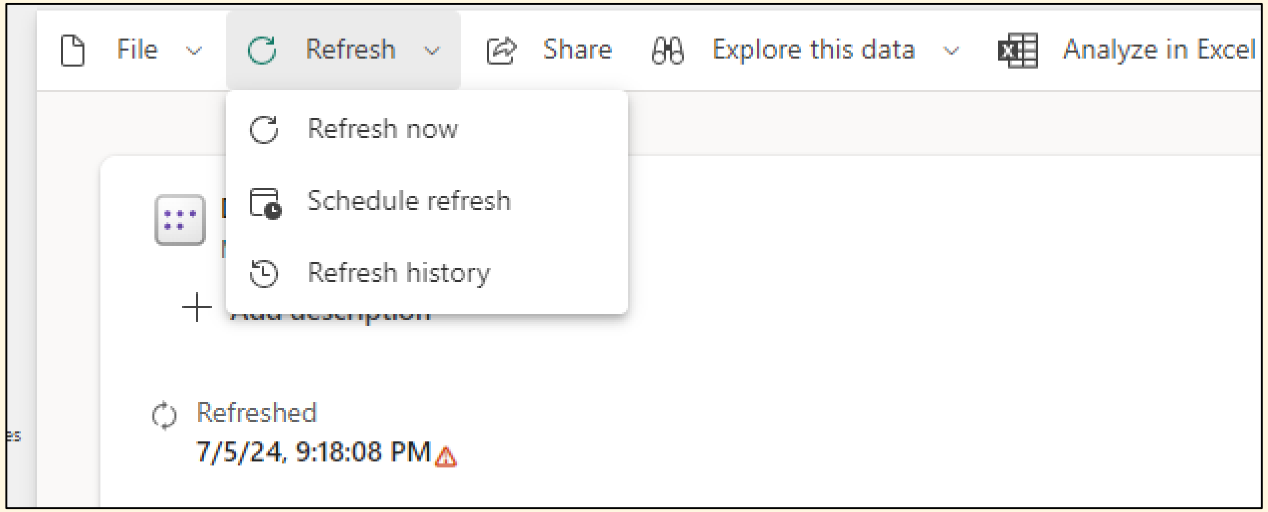
SCHEDULE REFRESH

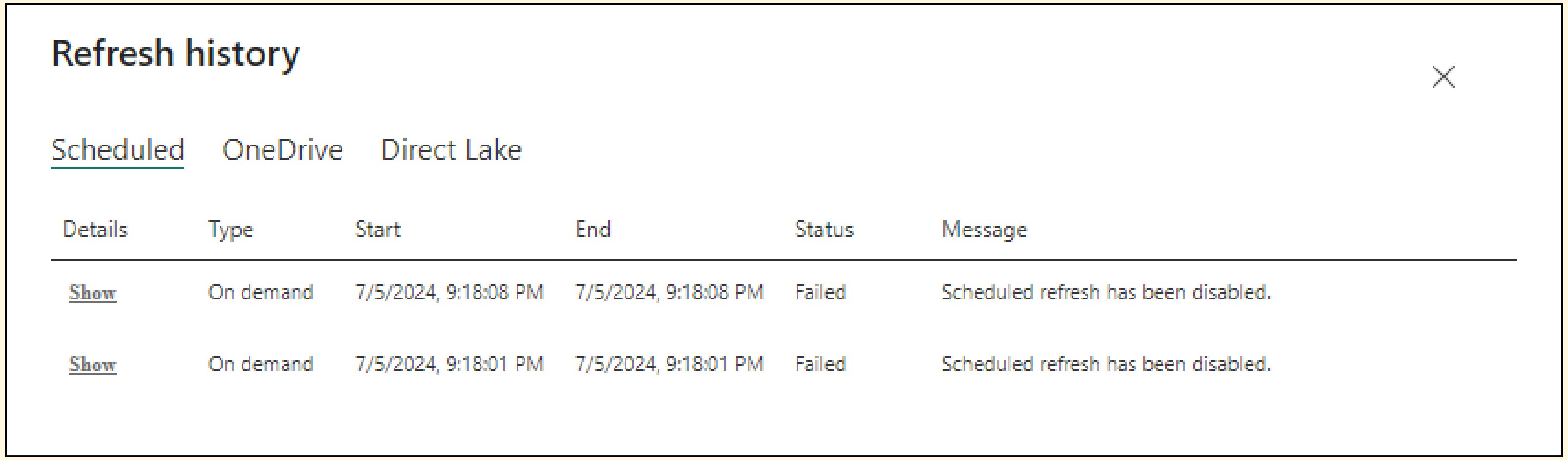
- Power BI enables you to go from data to insight to action quickly, yet you must make sure the data in your Power BI reports and dashboards is recent. Knowing how to refresh the data is often critical in delivering accurate results.

- If you save your file on a local drive or a drive in your organization, you might need an on-premises gateway to be able to refresh the semantic model in Power BI. The computer that stores the file must be running during the refresh. You can also reimport your file, or use Publish from Excel or Power BI Desktop, but those processes aren’t automated.

- The on-premises data gateway acts as a bridge to provide quick and secure data transfer between on-premises data (data that isn't in the cloud) and several Microsoft cloud services. These cloud services include Power BI, PowerApps, Power Automate, Azure Analysis Services, and Azure Logic Apps. By using a gateway, organizations can keep databases and other data sources on their on-premises networks, yet securely use that on-premises data in cloud services.

My workspace → open semantic model of your report →refresh → refresh now →refresh history
It will show refresh as failed as there is no connection created to your source data and current data.



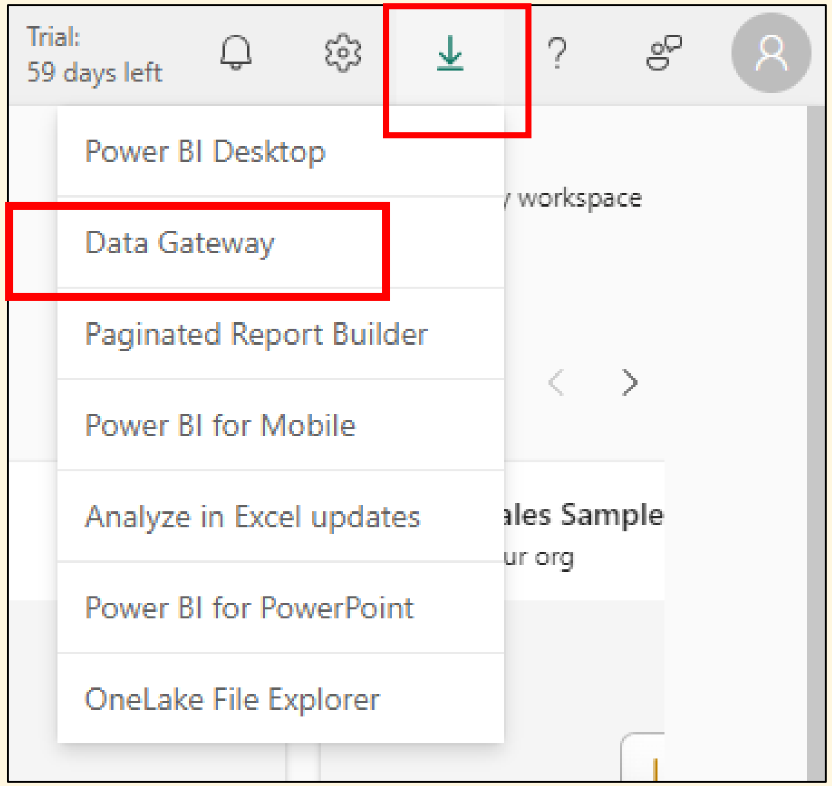


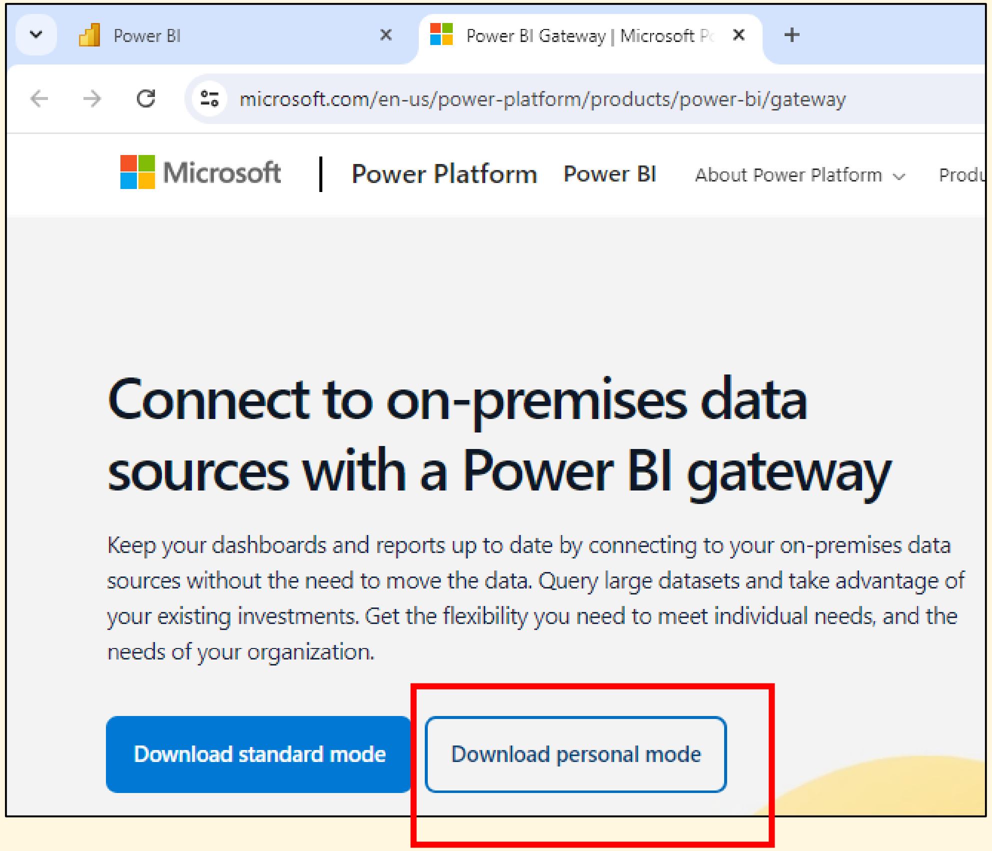
Refresh history

Scheduled OneDrive Direct Lake

Details	Type	Start	End	Status	Message
Show	On demand	7/5/2024, 9:18:08 PM	7/5/2024, 9:18:08 PM	Failed	Scheduled refresh has been disabled.
Show	On demand	7/5/2024, 9:18:01 PM	7/5/2024, 9:18:01 PM	Failed	Scheduled refresh has been disabled.

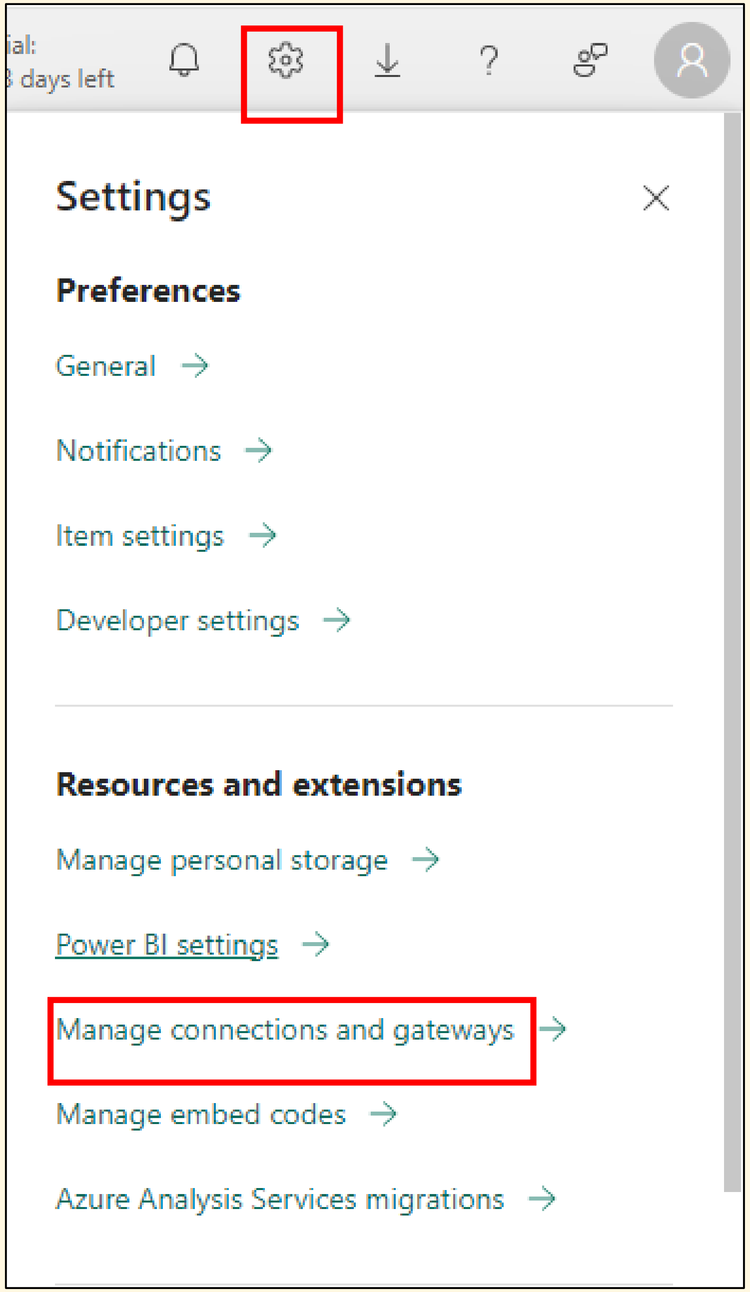
For this we need to create connection by using on-premise data gateway
Top right → download icon → Data Gateway
Official site opens → select download personal mode → after download completes start the installation process while providing email credentials





Check whether gateway is online

Settings → manage connections and gateways → on-premise data gateway → top right there is toggle on/off, turn it off and above it there is filter select All from filter → personal mode gateway will be visible → click on status, it will display as online



Edit credentials so that data source file gets connected with gateway.

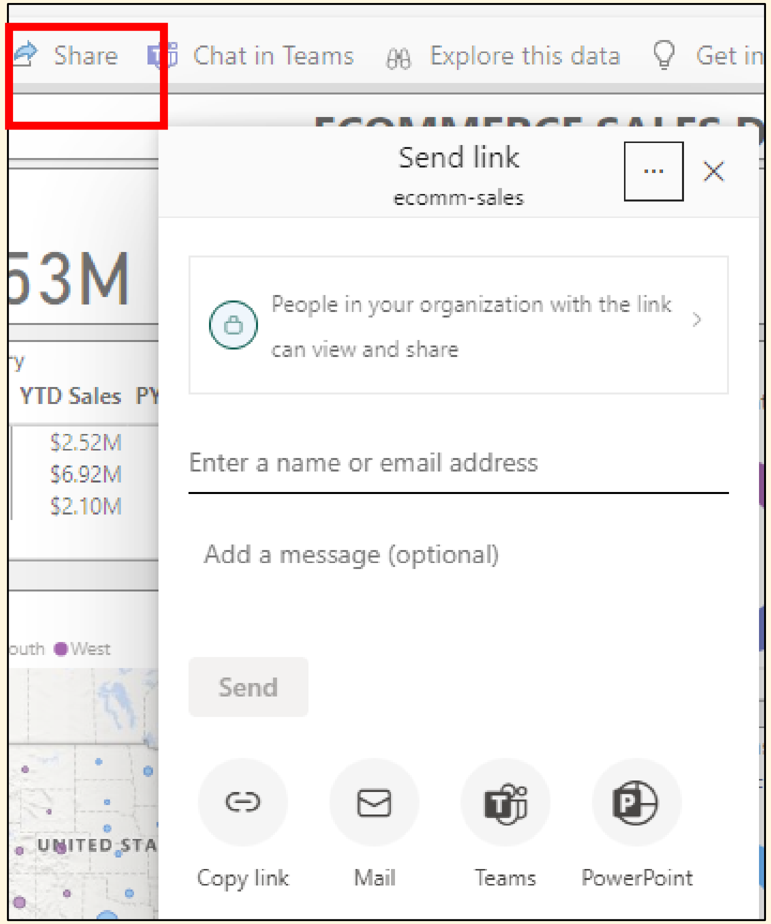
My workspace → semantic model 3 dots →settings → data source credentials → edit credentials
Go back to semantic model and refresh it and check refresh history it must be successful.

Now you can set schedule refresh

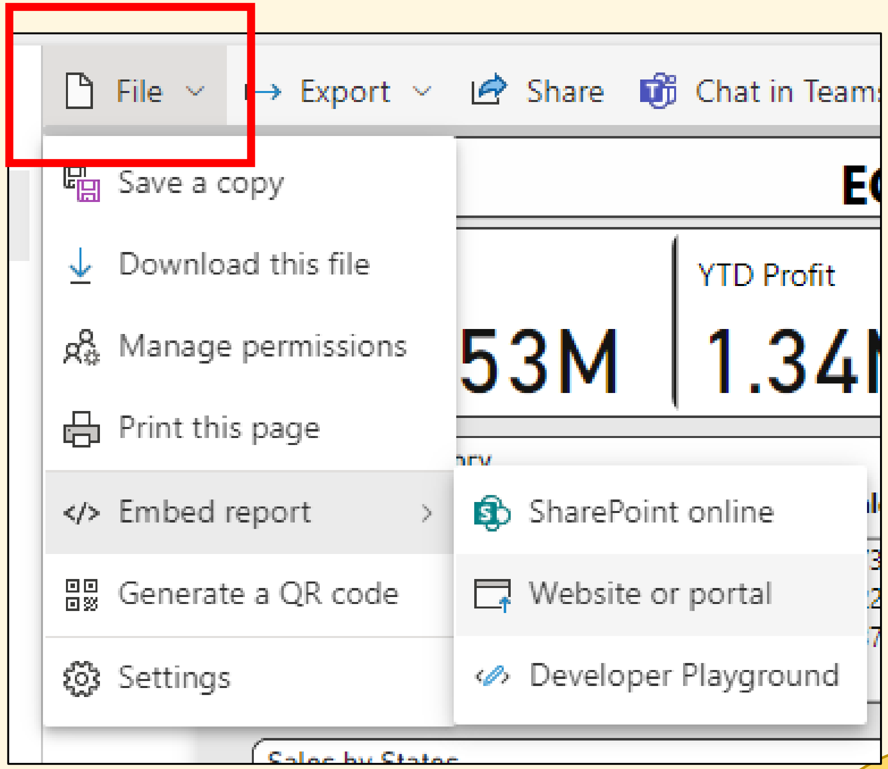
Go to semantic model settings → refresh → turn schedule on, select time zone, time (can set 2/3 timing in a day)→ apply

SHARING REPORT

- Click on share → enter name or email



- Click on file → embed report → website or portal



THANK YOU

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