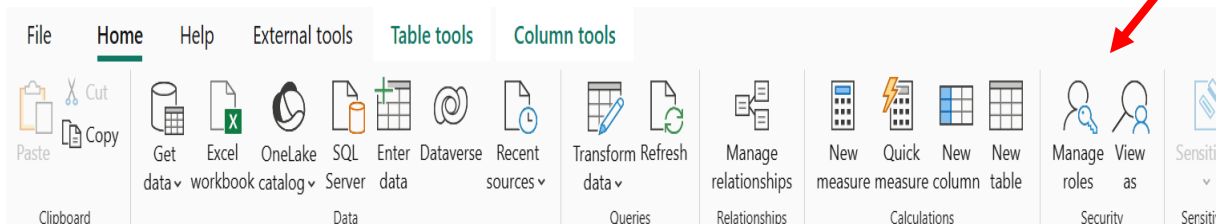


# Manage Roles in Power BI



# Manage Roles

Open the "Model" view in Power BI Desktop and in the "Modeling" tab, select "Manage Roles"



The screenshot shows the Power BI Desktop ribbon with the 'Modeling' tab selected. The 'Manage roles' button is highlighted with a red arrow. The ribbon includes sections for Clipboard, Data, Queries, Relationships, Calculations, and Security. The 'Manage roles' button is located in the Security section, next to the 'View as' button.

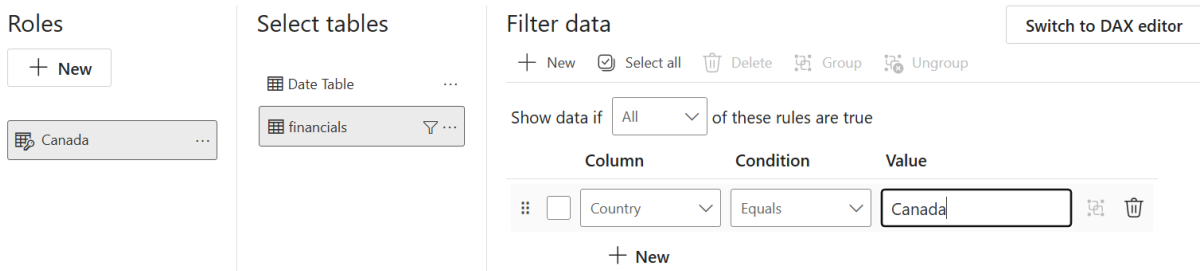
Segment	Country	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales	Discounts	Sales
Government	Germany	Carretera	None	1513	3	350	529550	0	529550
Government	Germany	Paseo	None	1006	10	350	352100	0	352100
Government	Canada	Paseo	None	1725	10	350	603750	0	603750
Government	Germany	Paseo	None	1513	10	350	529550	0	529550
Government	Germany	Velo	None	1006	120	350	352100	0	352100
Government	France	VTT	None	1527	250	350	534450	0	534450
Government	France	Amarilla	None	2750	260	350	962500	0	962500
Government	Mexico	Carretera	Low	1210	3	350	423500	4235	419265

# Crate a New Role

Create a new role with an intuitive name. Define filters to restrict data access

## Manage security roles

Create new security roles and use filters to define row-level data restrictions.



The interface is divided into three main sections: Roles, Select tables, and Filter data.

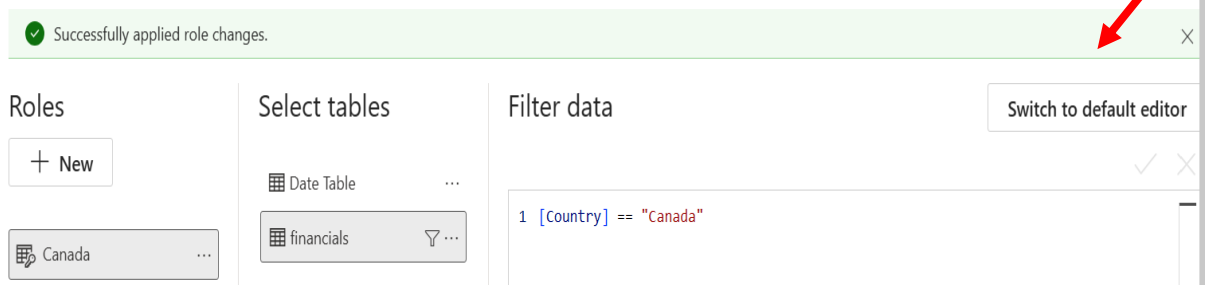
- Roles:** Contains a '+ New' button and a role named 'Canada'.
- Select tables:** Contains a 'Date Table' and a 'financials' table with a filter icon.
- Filter data:** Contains a '+ New' button, 'Select all', 'Delete', 'Group', and 'Ungroup' options. Below these, it says 'Show data if All of these rules are true'. A table shows a filter rule: 'Country' equals 'Canada'. A '+ New' button is at the bottom.

A red arrow points to the 'Switch to DAX editor' button in the top right corner.

When you click „Switch to DAX editor” you can define roles using Dax

## Manage security roles

Create new security roles and use filters to define row-level data restrictions.



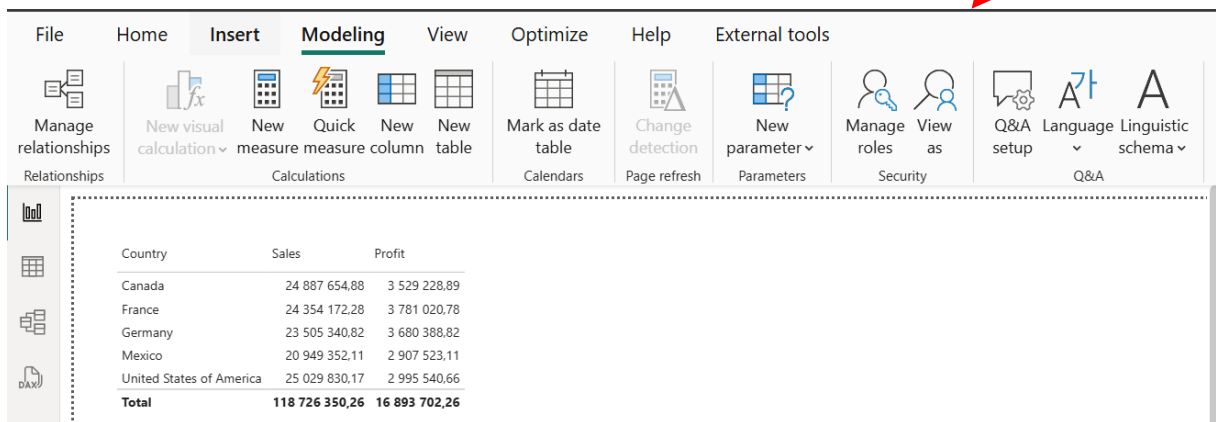
The interface is divided into three main sections: Roles, Select tables, and Filter data.

- Roles:** Contains a '+ New' button and a role named 'Canada'.
- Select tables:** Contains a 'Date Table' and a 'financials' table with a filter icon.
- Filter data:** Contains a 'Switch to default editor' button. Below it, a DAX expression is shown: '1 [Country] == "Canada"'. A red arrow points to the 'Switch to default editor' button.

A green notification bar at the top says 'Successfully applied role changes.' with a close button (X).

# View as role

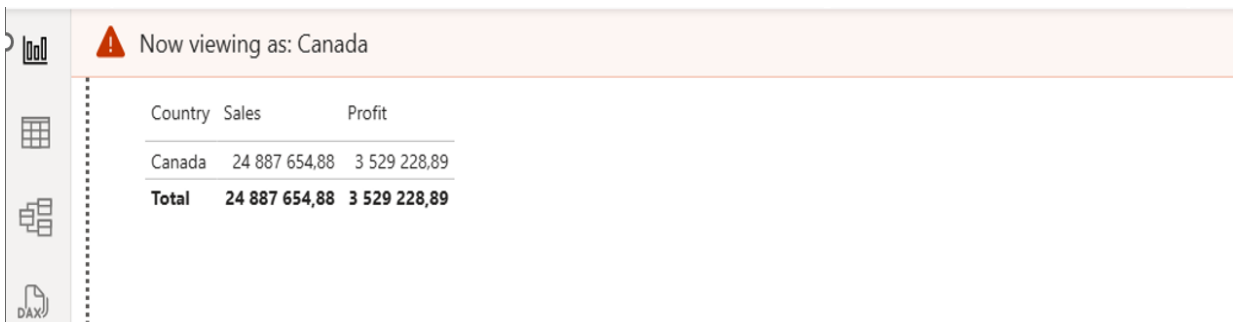
Test your role using "View as roles"  
Below is the full pre-test report.



The screenshot shows the Power BI ribbon with the 'Modeling' tab selected. The 'Security' group contains the 'View as' button, which is highlighted with a red arrow. Below the ribbon, a table displays sales and profit data for various countries.

Country	Sales	Profit
Canada	24 887 654,88	3 529 228,89
France	24 354 172,28	3 781 020,78
Germany	23 505 340,82	3 680 388,82
Mexico	20 949 352,11	2 907 523,11
United States of America	25 029 830,17	2 995 540,66
<b>Total</b>	<b>118 726 350,26</b>	<b>16 893 702,26</b>

The same report page after applying role: Country Canada.

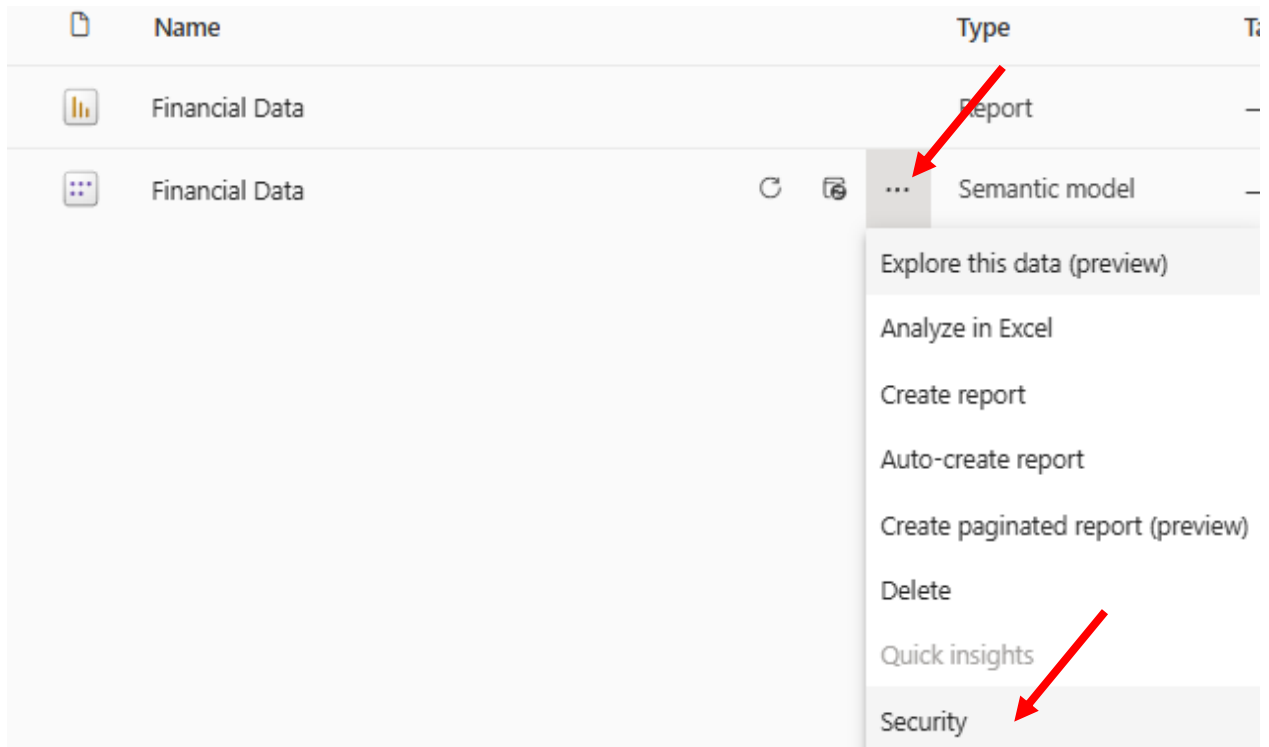


The screenshot shows the same report page after applying the 'Canada' role. A message at the top indicates 'Now viewing as: Canada'. The table below shows only the data for Canada.

Country	Sales	Profit
Canada	24 887 654,88	3 529 228,89
<b>Total</b>	<b>24 887 654,88</b>	<b>3 529 228,89</b>

# Managing Security in Power BI Service

Go to the "Datasets" section in your workspace. Click the ellipsis (:) next to your dataset and select "Security"



# Managing Security in Power BI Service

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Add people or groups to role

## Row-Level Security

- Canada (0)
- France (0)
- Germany (0)
- Mexico (0)

## Members (0)

People or groups who belong to this role

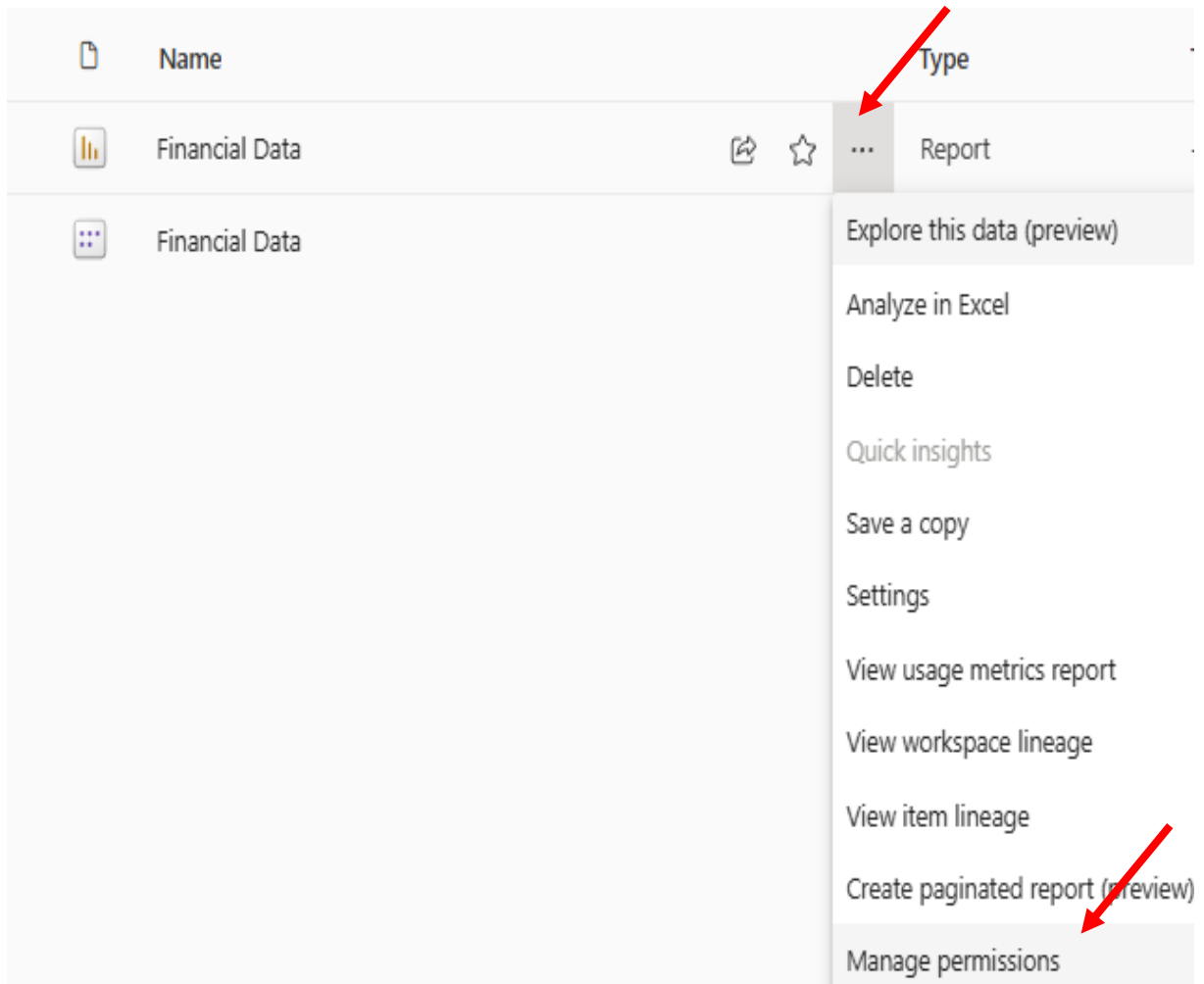
Enter email addresses

Add




# Managing Permissions in Power BI Service

Go to the „Report" section in your workspace. Click the ellipsis (:) next to your report and select „Manage permissions"






# Managing Permissions in Power BI Service

Add people or groups to report

 Financial Data


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Related content

-  Dashboards
-  Workbooks
-  Semantic models

+ Add link

Links Direct access Pending Shared views Access via related items



## Grant people access



🔍 Enter a name or email address

- ☒ Allow recipients to share this report
- ☒ Allow recipients to build content with the data associated with this report
- ☒ Send an email notification

Add a message (optional)

Grant access

Cancel