

Client Prerequisites

Quorum Network Resources Ltd

Power BI

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Table of Contents

[1. Overview 3](#_Toc127522378)

[1.1. Introduction 3](#_Toc127522379)

[3. Power BI 3](#_Toc127522380)

[3.1. Assign Power BI Pro License for the ADD org account 3](#_Toc127522381)

[3.2. Added as a Power BI Administrator 3](#_Toc127522382)

[3.3. Added as a power bi capacity administrator 4](#_Toc127522383)

[3.4. Create the appropriate aad groups and assign members 4](#_Toc127522384)

[3.5. Provide the Power BI Service Tenant ID 4](#_Toc127522385)

# Overview

## Introduction

This document contains an exhaustive list of requirements we may need before we start working within a client environment to provide power BI administration and project work.

AAD Organisational Account

We require an AAD organisational account created for each member of Quorum that will be working within the clients environment.

Example: firstname.lastname@domain.com

# Power BI

## Assign Power BI Pro License for the ADD org account

We require a Power BI Pro licence for each Quorum member working within the clients’ Power BI tenant.

This will allow the account to:

* Publish reports from Power BI Desktop to the Power BI service.
* Create datasets from dataflows using Power BI desktop then publish them to the Power BI service.
* Create thin reports using Power BI desktop then publish them to the Power BI service.
* Demonstrate the use of 3rd party tools.

## Added as a Fabric Administrator

We require Fabric administrator role to be assigned to the domain account created.

How to – assign Fabric Admin role to an AAD account in your tenant - <https://docs.microsoft.com/en-us/power-bi/admin/service-admin-role>

This will allow them to:

Access the Fabric Admin portal – Tenant Settings

Access Workspaces - Fabric Admin portal – Workspaces

Run Power Shell scripts to call Restful APIs to monitor Power BI Service -

* What workspaces are in the tenant.
* What users have access to workspaces.
* What reports are in workspaces.
* What datasets are in the workspaces.
* Activity – how often reports are viewed, data is extracted etc.

Create the following AAD groups:

OrgName\_PowerBI\_Admin\_Security – Azure Active Directory **Security** Group.

In this group will be the accounts which have overall administrative control of the Power BI.

## Added as a Fabric capacity administrator

We require Fabric capacity administrator privileges for each Quorum member in a Power BI capacity administrator role. This can be done via the Azure Portal.

This will allow them to:

* Report on capacity usage.
* Set up capacity notifications.
* Manage capacity permissions (who can add workspaces with premium capacity).
* Manage capacity workloads.
* Install the following App - aka. ms/capacityUsageReport

## Create the appropriate aad groups and assign members

Our best practices require the appropriate AAD groups to be created to provide permissions to the workspaces in the Power BI tenant.

**Workspaces review**

Do they have any naming conventions? - Yes / No

Are Dataflows, Datasets and Reports in different workspaces? Yes / No

Are groups assigned to workspace roles? Yes / No

Workspaces should be separated to contain different entities, e.g. Dataflows, Datasets, Reports and Dashboards.

AAD groups are assigned to the workspace roles.

## Provide the Power BI Service Tenant ID

Please provide us with the Power BI service tenant ID.

To do this, open the URL app.powerbi.com using an internet browser and sign in using an AAD account.

Once signed into the Power BI Service for your company, go to the top right-hand side, and click with the left-hand mouse button on the "?" (see step 1).

Graphical user interface, text, application, chat or text message

Description automatically generated

From the menu that appears, click once with the left-hand mouse button on the menu item 'About Power BI.

Graphical user interface, text, application

Description automatically generated

This will open the window seen below; click once with the left-hand mouse button on the value 'Tenant URL'. The last step is to click on the copy button.

Graphical user interface, text, application

Description automatically generated

Please email the value sent the value from the Tenant Url, which should look something like this.

<https://app.powerbi.com/home?ctid=43ad7b98-e7ac-4315-9137-5e0a60zxh7f1>

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