Power BI

Workspaces

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# Document Control

## Version History

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| --- | --- | --- | --- | --- |
| ***Version #*** | **Date** | **Reason for release** | | **Name** |
| V1 | 15/04/2022 | | First Draft | Robert French |
| V2 | 04/12/2024 | | Updates changes to the naming convention | Robert French |
| v2.1 | 03/03/2025 | | Change Datasets to Semantic Model | Robert French |

# Workspaces

## Overview

Workspaces are containers that can hold several different entity types. At the time of writing, this document then can contain.

* Reports
* Paginated reports
* Scorecards
* Dashboards
* Semantic Model
* Dataflows
* Streaming datasets

# Workspace planning

When planning workspaces, it is worth considering some questions

1. What content will be in the workspace?
2. Who is consuming the content that is view/using the reports?
3. Who is managing the content in the workspace?
4. How will the content be deployed to the end-users?

## Content of the workspace

Consider what kind of information is going to be in this workspace. Is it for a department, such as Finance, Logistics, Sales, Administration? Or for a subject, such as Products, City Site, Country Site etc. These can be used as the names of workspaces.

## Who is consuming the content

Is the audience internal or external to the organisation? The nature of data consumed is what security is required for the exposed data. What methods are best for delivering the content to the end-user? What type of license will be required to access the content?

## Who is managing the content in the workspace?

Some topics to consider is best to separate the items such as dataflows and Semantic Model into a separate workspace. They had a different workspace for the reports. Will a centralised team manage the content? Or is a self-service scenario being considered? Which manager or department is responsible for the content? Is there any particular security requirements? For example, the data is sensitive, for example, customers' details, HR information, and financial data. Who is responsible, or is there a process in place to permit access to workspaces containing sensitive data?

## How will the content be deployed to the end-users?

What method will be used to get the content to the end-user? Using an app to distribute the reports to the end-users. Or allowing users access to individual pieces that are stored in a workspace. Are Azure DevOps pipelines going to be used to pass the content from development to UAT (User Acceptance Testing) and finally to production? Where is the data going to be stored geographically? What implications does that have for legislation and other legal compliance?

# Naming conventions

## Best practice

Recommended not to use the following words in the name of a workspace - ‘Power BI’, ‘workspace’. Both of these are implied by the use of the workspace.

Avoid the use of a backslash ‘/’ in the workspace name Azure Data Lake Storage Gen 2 autogenerates folder names for Dataflows in the background. This character is used to separate folders.

The name of the workspace should reflect the content of the workspace; for example

•Sales

•Sales Client

•Finance General

•Finance Analytic

•Marketing

Note that it is not possible to have subfolders underneath a workspace. So, consider using subject or departmental names and subject matter to help define workspace names.

If using multiple workspaces for different parts of development, then this could be appended to the end of the workspace name, for example

•Sales [Dev]

•Sales [UAT]

•Sales

•Finance General [Dev]

•Finance General [UAT]

•Finance General

•Sales -Dataflow's [Dev]

•Sales [UAT]

•Sales

•Finance General [Dev]

•Finance General [UAT]

•Finance General

•Finance Month End

•Finance Reconciliation [UAT] [R]

•Sales Analytics

•Marketing [Public]

Note that any workspace without the suffix [Dev] or [UAT] will be the Production workspace

Suggestions for Workspace suffixes

[Test] - Testing content used for testing purposes

[Dev] - Development content is being actively developed

[Public] - Content is shared publicly, e.g. published to the web

[Team] - Content is managed by a team of people

[R] - Restricted content, the data in the workspace is sensitive

## Workspace Naming - Tips / hints / suggestions

The prefix will allow sorting and searching, giving some consideration to help people find the workspaces they want.

Use images – it is possible to assign an i[mage (jpg or png).](https://community.powerbi.com/t5/Service/Power-BI-App-content-packs-Icon-sizing-and-future/m-p/171104) Adding an image to the workspace might make it easier to find the workspaces.

# Workspace content management

## Read-only workspaces for reports

To set up a set of workspaces to contain all the required entities to extract data from a Datasource and pass the data to a report. Configure the workspaces so that only one group has permission to edit the entities. Also, grant read-only permissions to a single workspace to one group.

----------------------------------------------------------------------------------------------------------------

In this example, there are three workspaces.

* A Quorum Journey – this workspace will contain reports and associated entities.
* A Quorum Journey [SM] – this workspace will only contain **Semantic Models**
* A Quorum Journey [DF] - this workspace will only contain **Data Flow’s**
* A Quorum Journey [DE] – this workspace will only contain **Data Engineering** entities

How to access the workspaces

Go to <https://app.powerbi.com/> and log in.

Go to the left-hand side and click on the workspaces icon (see 1 in the screenshot below)

This will list all the workspaces your account has access to.

Graphical user interface, text, application

Description automatically generated

Workspace - A Quorum Journey [DF] - Roles

Graphical user interface, application

Description automatically generated

Workspace - A Quorum Journey [DS] - Roles

Graphical user interface

Description automatically generated

Workspace - A Quorum Journey - Roles

Graphical user interface, application

Description automatically generated

As can be seen from the screenshots above, the only workspace with a ‘viewer’ role is assigned to a group. The ‘A Quorum Journey’ workspace only contains reports/dashboards. This will ensure that any user in the group ‘All Quorum Users’ can view entities in that workspace. However, users in that group **cannot see** the workspaces ‘A Quorum Journey [DF]’ and ‘A Quorum Journey [DS]’.

The report ‘A\_Quorum\_Journey\_Stage2’ is configured to use the dataset ‘Quorum\_Strava\_Dataset\_OnlyStage2’ as the data source. Dataset ‘Quorum\_Strava\_Dataset\_OnlyStage2’ the data source is configured as the dataflow ‘Stage2.’

**A Quorum Journey [DF]**

**Quorum\_Strava\_Dataset\_OnlyStage2**

**A Quorum Journey [DS]**

A\_Quorum\_Journey\_Stage2

**A Quorum Journey**



Stage2



#### Configure dataset

From the menu on the left-hand side of the window, select ‘Semantic Model’ see one on the screenshot below. Next, find the dataset you wish to work with; in the example, the dataset is ‘Quorum\_Strava\_Dataset\_OnlyStage2’. Click on the dataset, and three dots will appear to see item 2 on the screenshot below. From the menu that appears, click on ‘Manage permissions’

Graphical user interface, application, website

Description automatically generated

The ‘Manage permissions’ screen is shown below; the first step is to click on the ‘Add user’ button below.

Graphical user interface, text, application

Description automatically generated

Once the ‘Add user’ screen appears, select the group which want to add permissions to the DataSet. In the example below, one group is being added is ‘All Quorum Users’. Note all the three tick boxes are unselected; in this example, we do not want to grant these permissions. Once all the user groups have been selected, click on ‘Grant Access.’

Graphical user interface, text, application, email

Description automatically generated

Once the user has been added, that group will be granted ‘Direct access’, which is read (only) permission. In the screenshot below, the group ‘All Quorum Users’ has been added and granted ‘Read’ permissions.

Graphical user interface, text, application

Description automatically generated

This setting allows the group ‘All Quorum Users’ to read-only access to the dataset in the workspace ‘A Quorum Journey [DS]’. Note that the group ‘All Quorum Users’ has no permissions on ‘A Quorum Journey [DS]’. It only has Read permissions on the DataSet ‘Quorum\_Strava\_Dataset\_OnlyStage2’, which is the data source of the report ‘A\_Quorum\_Journey\_Stage2’.

### Final result

The group ‘All Quorum Users’ has viewer (read-only) access to the workspace ‘A Quorum Journey’ and the entities in that workspace. So the group can view and interact with the reports in that workspace, the group cannot edit anything in that workspace.

The data source (dataset - Quorum\_Strava\_Dataset\_OnlyStage2’) is not visible to the group ‘All Quorum Users’. Nor does the group have permission to use the dataset to build reports from that dataset.

# License Mode

There are four distinct types of license modes that can be used with Workspaces.

* Pro
* Premium per user (PPU)
* Embedded (EM-SKU)
* Per Capacity (A SKU or P-SKU)

When creating the workspace, depending on the available license, you should be able to select one of the above options. A new workspace is being created in the screenshot below called ‘Example Workspace’. Near the bottom of the workspace is the ‘License mode’. This will determine the type of license used for the workspace, determining what features and users can access the workspace. The type of license chosen in the screenshot is ‘Premium Per User’. Note the types of licences available to the workspace will be determined by the user creating the license and the type of capacity available to the tenant organisation.

Graphical user interface, application

Description automatically generated

## Change the license type of an existing workspace

Once a workspace has been created, it is still possible to change the licensing mode associated with that workspace. To carry out that task, then go to ‘Settings’, then click on the ‘Premium’ tab (yes I also wonder why it’s called that as well)

Graphical user interface, application

Description automatically generated

# Listing all workspaces in an organization

In the admin portal menu there is a section titled ‘Workspaces’. If you click on this section it will list all the workspaces in the tenant. Please note the settings seen here are only available to the an account which has been assigned to the Power BI administrators role.

Graphical user interface, application

Description automatically generated

When click on the ‘Workspaces’ link then the list of workspaces in the tenant similar to the one shown below will appear. As the mouse moves over each row to select a workspace, then to right hand side of the name three ellipse will appear. When click once with left hand mouse button the ellipse then a menu will appear.

Graphical user interface, text, application

Description automatically generated

The pop out menu has four items.

**Details** – the window that appears will show the ID of the workspace, workspace name, workspace description. There will also be a list of entities in the workspace e.g. Dashboards, Reports, Semantic Model, Dataflows etc.

Graphical user interface, application, table

Description automatically generated

**Access** – This view will show all the accounts / groups, this is the same dialogue box that is accessed from the workspace. From here you can see which users / groups have been assigned to which roles. It is possible to assign users / groups to roles from this dialogue box for the workspace that has been selected.

**Edit** – this will open a dialogue box which will allow editing of the Workspace and description.

Graphical user interface, text, application

Description automatically generated

**Capacity** – If a workspace is part of a capacity then it will be shown here. In the screenshot below the workspace is not part of a capacity. If there are capacities avialable then the workspace can be assigned to the capacity from the this dialgoue box.

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

Description automatically generated

# Workspace Roles

## Access to workspaces

Each individual user account can be allocated one of three different licence types

* Free
* Pro
* Premium Per User (PPU)

If a user account only has a Free licence then they can only access “My workspace”. This workspace is intend only for that user account. Whilst it is possible to share content with other users this should be **strongly discouraged**. Note that any content in the “My workspace” will be deleted when the user account is removed.

When the workspace is created and is **not allocated** to a premium per capacity. Then it can be create using Pro licence or a Premium Per User licence. If the workspace is created and assigned a Pro licence then only user accounts with a Pro or PPU licence can access the

|  |  |  |  |
| --- | --- | --- | --- |
|  | **User Licence Type** | | |
| **Type of Workspace** | **Free** | **Pro** | **PPU** |
| **My workspace** | Checkmark with solid fill | Checkmark with solid fill | Checkmark with solid fill |
| **Pro** | Close with solid fill | Checkmark with solid fill | Checkmark with solid fill |
| **PPU** | Close with solid fill | Close with solid fill | Checkmark with solid fill |

# Workspace configuration

## Best practice

When creating workspaces, then consider separating each entity into separate workspaces. For example

Quorum Journey [DF] – this workspace will contain all the data flow’s

Quorum Journey [DS] – this workspace will contain all the dataset’s

Quorum Journey – this workspace will contain all the reports, and dashboards

Note that the last workspace does not have a suffix as this will only contain reports. Then the workspaces/ entities can be configured so that this is the only workspace that report viewers can only view that single workspace.

If using separate workspace for entity type, this also allows separation of responsibilities for each entity. So it is would be possible to grant access to only user group to administer dataflows. Yet another group could be granted admin privileges on the workspace containing the Semantic Model.

THANK YOU

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