Debabrata Palit
/debabrata-palit03

Publish & Share Your
Power BI Reports

TRANSFORM YOUR DATA INTO DECISIONS!

Debabrata Palit
in /debabrata-palit03

Publish Reports to Power BI Service

## Step 1: Open Your Completed Report

- Launch Power BI Desktop.
- Open the .pbix file that contains the report you want to publish.
- Ensure that the report visuals, data model, and transformations are complete and accurate.

💡 Always save your file before publishing to avoid losing any recent changes.

Step 2: Sign In to Power BI

- Click on "Sign in" at the top-right corner of Power BI Desktop.
- Enter your organizational Microsoft account (e.g., yourname@company.com).
- If you're not part of an organization or haven't been assigned a Power BI license, you won't be able to publish.

📝 Personal email addresses (like Gmail or Yahoo) typically won't work for publishing to the Power BI Service.
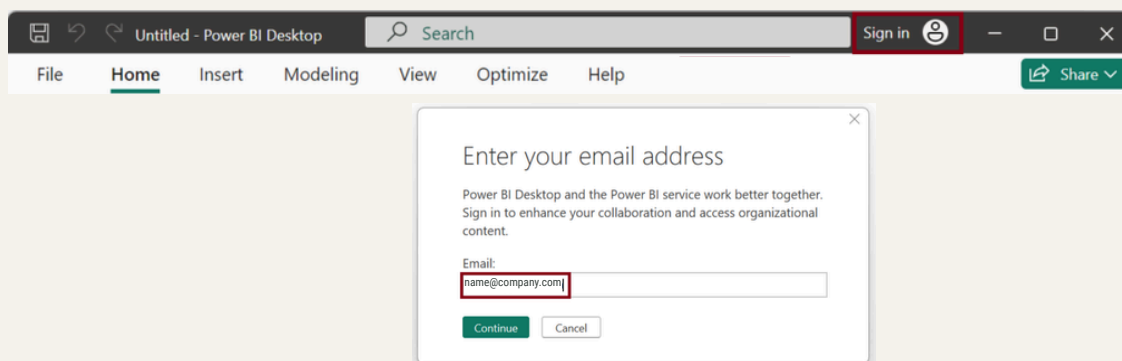
## Step 3: Click on the 'Publish' Button

- Go to the Home tab > Publish
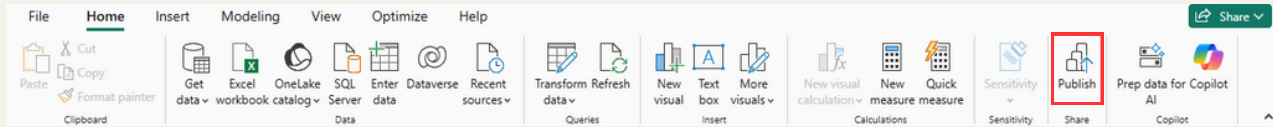
Step 4: Choose a Destination Workspace

- A dialog box will appear asking you to select a destination.
- You'll see a list of available **workspaces**:
  - **My Workspace:** your personal area in the Power BI Service.

  - **Shared Workspaces:** if you're part of any teams or collaborative projects.
- Select the appropriate workspace where you want the report to live.
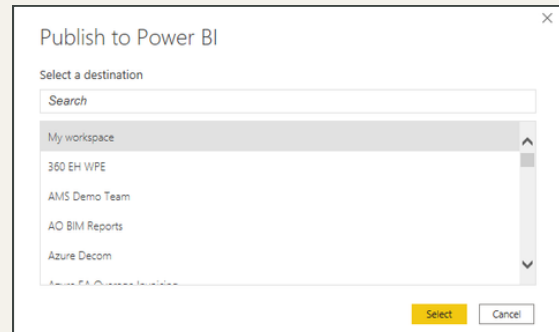
Step 5: Wait for the Upload to Complete

- Once you select the workspace, Power BI begins uploading the file.
- You'll see a progress bar showing "Publishing to Power BI…"
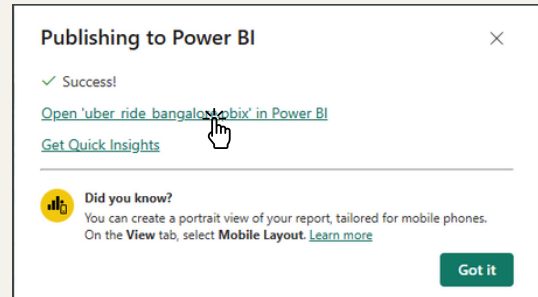- After a few seconds to minutes (depending on file size and internet speed), you'll receive a confirmation message.

Debabrata Palit
in /debabrata-palit03
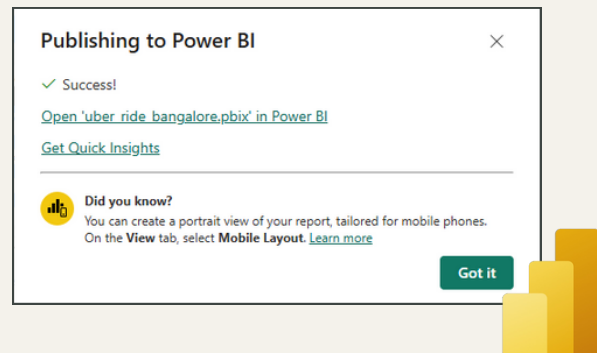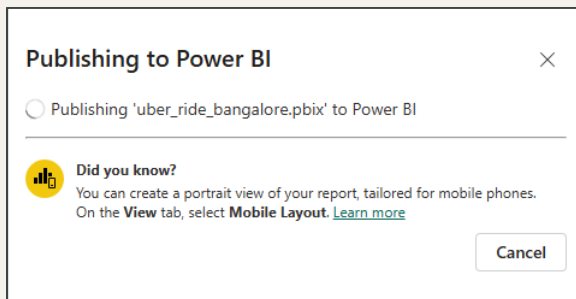
Step 6: Open the Report in Power BI Service

- Click the "Open 'Report Name' in Power BI" link in the confirmation dialog.
- Your web browser will launch and open the published report in the Power BI Service.
- You can now:
  - View and interact with the report online.
  - Share it with colleagues.
  - Set up scheduled refreshes (for supported data sources).
  - Manage permissions and access levels.

Publishing to Power BI ✕

✓ Success!

Open 'uber_ride_bangaloreobix' in Power BI

Get Quick Insights

Did you know?
You can create a portrait view of your report, tailored for mobile phones. On the **View** tab, select **Mobile Layout**. Learn more

Got it

Note:

- Once published, you can make updates by modifying your report in Power BI Desktop and re-publishing it. It will overwrite the existing version in the selected workspace.
- If you've connected your report to a local data source, consider configuring a gateway in Power BI Service for automatic data refresh.

Debabrata Palit
/debabrata-palit03

Share Reports & Dashboards

Share via Power BI Service

- Open Power BI Service at https://app.powerbi.com and go to the workspace where the report is published.
- Open the report or dashboard you want to share.
- Click the "Share" icon (usually at the top-right of the page).
- In the share dialog box, enter:
  - Email addresses or names of people you want to share it with (within or outside your organization).
  - You can also choose Microsoft 365 groups or security groups.
- Configure permissions:
  - ✅ Allow recipients to share this report
  - ✅ Allow recipients to build new content using the underlying dataset
- Add a message (optional), and click "Send" or "Copy link".

Note: Sharing outside your organization requires ***Azure B2B guest access*** and appropriate admin settings.

Debabrata Palit

in /debabrata-palit03

Share in Microsoft Teams from Power BI Service

- In Power BI Service, from the action bar, select the 'Share' button.
- In the Send link dialog, indicate the link recipient, and add an optional message.
- Select the Teams icon. You might be asked to sign in to Microsoft Teams.
- In the **Share to Microsoft Teams** dialog, verify the recipient and message, then select **Share** to send the link. The link is added to existing conversations or starts a new chat.

Debabrata Palit
🔗 /debabrata-palit03
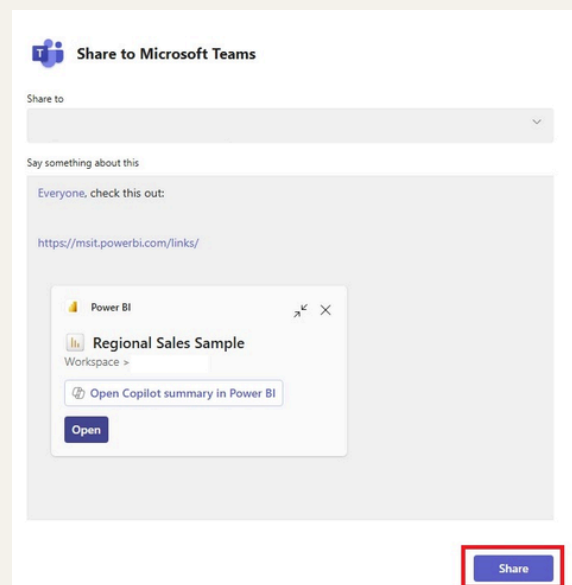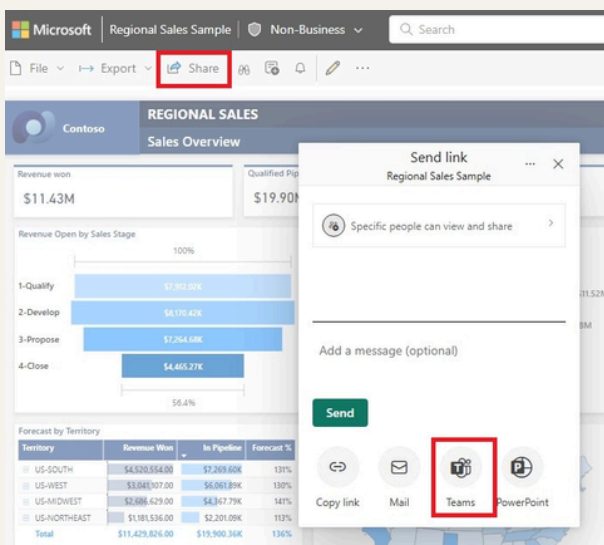
Embed in SharePoint Online

- Open a report in the Power BI service.
- On the File menu, select Embed report > SharePoint Online.
- Copy the report URL from the dialog box.
- Open the target page in SharePoint Online and select **Edit**. Or, in SharePoint Online, select Pages > + New > Site Page to create a new modern site page.
- Select the **+** in **New** dropdown menu. In the **Data analysis** section, select **Power BI** web part.
- Select **Add report** > Paste the previously copied report URL into the Power BI report link field. The report loads automatically.
- Select **Publish** to make the change visible to your SharePoint Online users.

Publish to Web

- Open a report in a workspace that you can edit, and select **File** > **Embed report** > **Publish to web (public)**.
- If your Power BI admin hasn't allowed you to create embed codes, you may need to contact them.
- Review the dialog content and select **Create embed code**.
- From "Embed in a Public Website" dialog box, select **Publish**.
- In the **Success** dialog, you see a preview of how the report will look. Select the **Size** and **Default page**.
- Then copy the link to send it in email, or copy the HTML to paste into a website. You can embed it in code such as an iFrame, or paste it directly into a web page or blog.
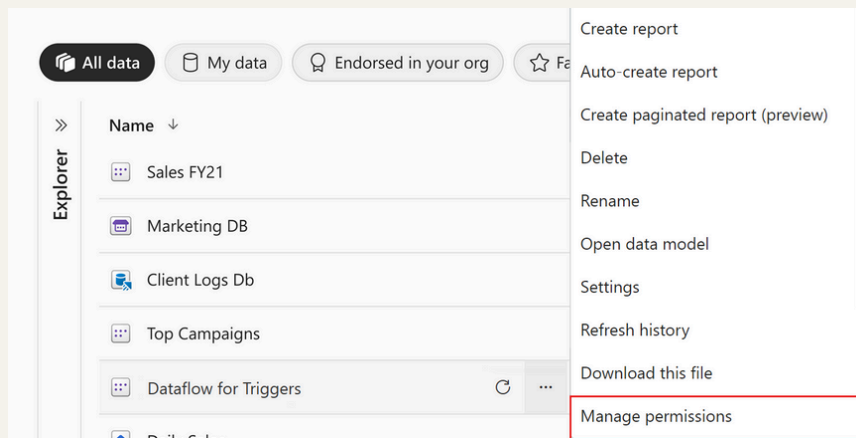- ⚠️ **Warning:** Never use "Publish to Web" for sensitive or private data!

Manage Access & Permissions

After sharing, you can control access and manage permissions:
1. Go to the dataset or report in Power BI Service.
2. Click on the "..." (more options) and select "Manage Permissions".

4. You'll see a list of users/groups who have access.

5. For each user, click the more options (…) menu to change or remove permissions.

Now, you can:
- View who has access.
- Grant/Revoke access.
- Change permissions (e.g., allow build or not).
- Remove share links.

Workspace Types

Workspaces are essential for organizing, managing, and distributing Power BI content.

There are two types of Workspaces:

My Workspace
- Personal sandbox for creating and testing your own reports.
- Ideal for private drafts or learning; not intended for team collaboration .

Shared Workspaces
- Two kinds:
  - **Classic workspaces:** tied to Microsoft 365 groups, include SharePoint/Teams integration.
  - **Modern workspaces:** flexible, role-based access, not tied to M365 groups - these are the current standard

Debabrata Palit

in /debabrata-palit03

Shared workspaces unite dashboards, datasets, and reports. You can assign roles:

Role	Permissions
Admin	Full control: manage content, members, settings
Member	Create/edit content; share, publish
Contributor	Design and edit content but can't change workspace settings
Viewer	Read-only access—can interact but not edit/share

THANK YOU!!!

STAY CONNECTED

SHARE
YOUR
THOUGHTS

SAVE
FOR
LATER

LIKE
THIS
POST