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# “Implementing a Dynamic Power BI Distribution Strategy”

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- Business Intelligence & Analytics Lead at Stoneridge Software
- 9+ years of experience in data analytics and various types of reporting. 5+ years of experience in the Microsoft stack (Dynamics 365 Application , Azure, and Power Platform)
- Specialization in Power BI
- Bachelor of Science Degree in Accounting from The Pennsylvania State University (WE ARE!)
- Love spending time with my family, chilling at the beach, and experiencing new culture and new food

# OUTLINE

1. Lack of Strategy
2. Distribution Functions
3. Demonstration

1. How do I maximize visibility into key company Power BI reports?
2. How do I ensure a single source of truth in my Power BI reports?
3. How do I co-develop Power BI solutions with other developers?
4. How do I know when to create a Power BI app vs keeping the report in a workspace?
5. How do I know if I should publish a report to My Personal Workspace vs Workspace?
6. How do I manage access and security in Power BI most effectively?
7. How do I organize my Power BI content in workspaces?
8. How do I minimize loss of valuable content during employee turnover?

# Lack of Strategy!

# Main Idea:

Power BI is the best business intelligence tool in the market and has great functionality for dynamically distributing content, but you MUST LEARN best practices to use it most effectively.

WE WANT YOU TO LEARN



POWER BI BEST PRACTICES

# Defining Distribution Functions

1. *My Workspace* - is a personal workspace for a Power BI user to work with personal content. Only the user and an admin have access to “My workspace”. You can share individual content from your personal workspace.
2. *Workspace* – is used to collaborate and share content with colleagues. You can add team members to your workspaces and collaborate on content development.
3. *App* – is a collection of dashboards and reports built to deliver content to the Power BI consumers in your organization. Apps are interactive, but consumers can't edit them.
4. *Share* – is a button that allows you to give others access to individual content in Power BI service.

# My Workspace

1. Best used for personal development, proof of concept, learning, temporary analysis, and testing
2. Biggest benefit: allows lots of freedom and flexibility for personal development
3. No license is needed
4. Reports can be “shared” with other individuals using the Share function (pro license needed)
5. Critical company content should not be stored in personal workspaces
6. Personal workspaces can be accessed for 90 days by an admin once an employee leaves

*Analogy: “Home Playroom”*



*Key Word: **Personal***

# Workspace

1. Best used for collaboration and small distribution
  - Primary Purpose: Group content and collaborate in development
  - Secondary Purpose: Distribute content to smaller teams
2. Best way to create workspaces is to identify the needed app and then create the workspace for it
3. Allows for delineation of security (more on following slide)
4. Allows for delineation of development responsibilities
5. There is no hierarchical folder structure in the workspace, so the content needs to be narrow in scope. Use short but descriptive names for workspaces.
  - Subject Area/Purpose – Sales / Finance / Inventory
  - Department/Team – Accounting / Marketing / Operations
  - Project – Title / Internal / External
  - Environment – Dev / Prod
  - Types of Content - Datasets / Dataflows / Reporting
6. Minimize the number of people who can edit content in a workspace

Analogy: “Park Playground”



Key Word: **Collaboration**

# Power BI Workspace Roles

Capability	Admin	Member	Contributor	Viewer
Update and delete the workspace.	X			
Add/remove people, including other admins.	X			
Allow Contributors to update the app for the workspace	X			
Add members or others with lower permissions.	X	X		
Publish, unpublish, and change permissions for an app	X	X		
Update an app.	X	X		
Share an item or share an app.	X	X		
Allow others to reshare items.	X	X		
Feature apps on colleagues' Home	X	X		
Manage dataset permissions.	X	X		
Feature dashboards and reports on colleagues' Home	X	X	X	
Create, edit, and delete content, such as reports, in the workspace.	X	X	X	
Publish reports to the workspace, delete content.	X	X	X	
Create a report in another workspace based on a dataset in this workspace.	X	X	X	
Copy a report.	X	X	X	
Create goals based on a dataset in the workspace.	X	X	X	
Schedule data refreshes via the on-premises gateway.	X	X	X	
Modify gateway connection settings.	X	X	X	
View and interact with an item.	X	X	X	X
Read data stored in workspace dataflows	X	X	X	X

# App

1. Best used for combining content and distributing to a broad group of users
2. Published apps are always read-only for the users
3. Published apps can be downloaded by the users (based on permissions)
4. Permissions can be set for specific individuals or groups
- ⚠ 5. Changes made on reports do not automatically change the app but rather need to be re-published (this allows for more control and versioning)
- ⚠ 6. Changes made to the dataset do automatically update the data in the app

*Analogy: “Movie Theatre”*



*Key Word: **Distribution***

# “Share” Button

1. Best used for granting read-only access to individual reports and dashboards
2. Best used for sharing informal content with a small group of participants who work closely with one another
3. The “Share” button is the button that tends to be overused
4. As a rule of thumb, use workspace or app permissions to distribute content before reverting to using the “Share” button
5. Useful:
  - To allow access to one piece of content
  - To limit access to other things in the workspace
  - To limit access to other things in the app
6. When a report or dashboard is shared, all changes that are made to the report will be seen by the recipients right away

Analogy: “Personal Library”



Key Word: **Individual Content**

# Main Idea:

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POWER BI BEST PRACTICES

# DEMONSTRATION



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