



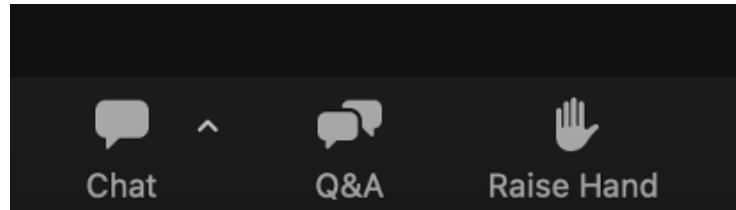
SENTURUS

Power BI Administration & Data Governance: Keys to a Successful Rollout

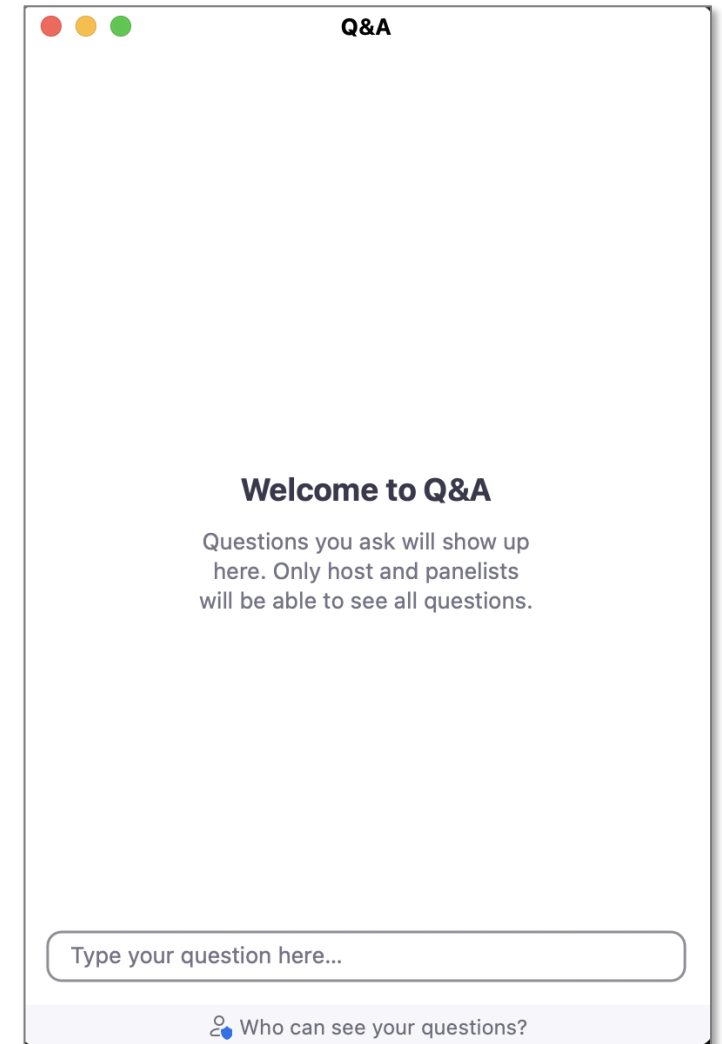


Questions?

Click Q&A at the bottom
of your screen

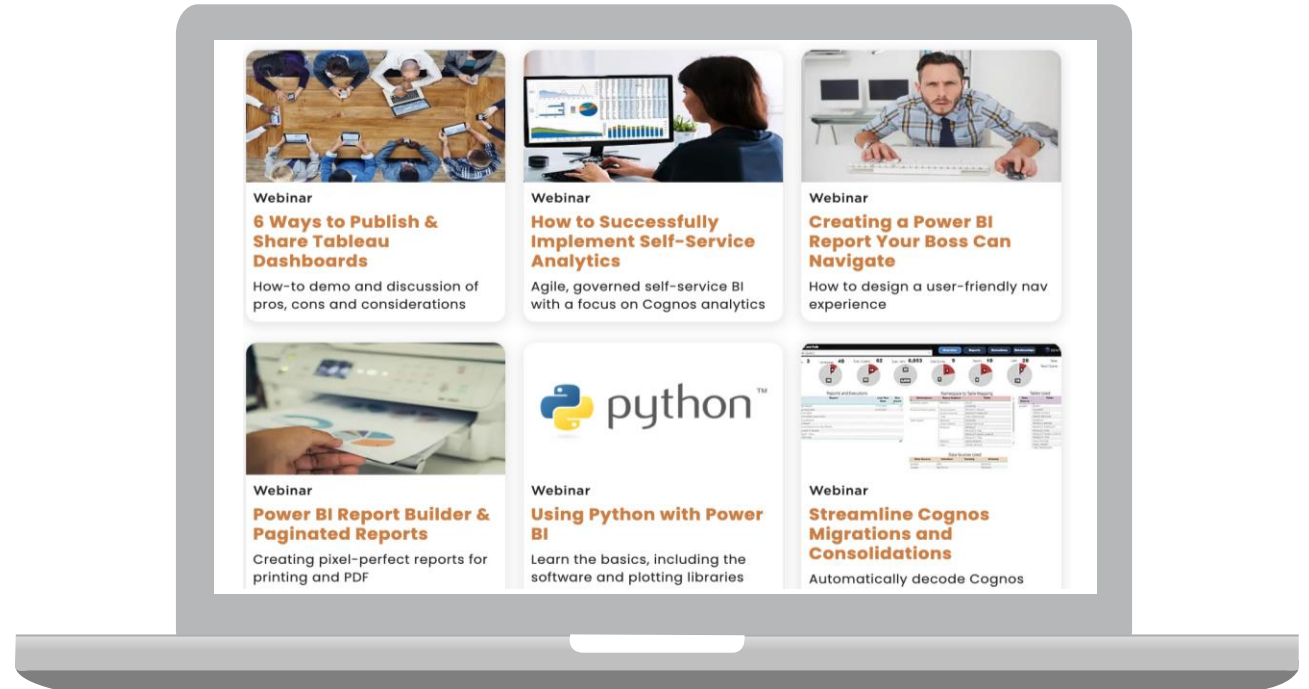


Submit questions
in this section



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Visit the Knowledge Center on the Senturus website to download this presentation and explore other assets.



senturus.com/resources

Agenda

Introductions

Role delegation

Workspace administration

Data governance

Content administration

Internal / external sharing

Senturus overview and additional resources

Q&A

Introductions



Todd Schuman

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Architect
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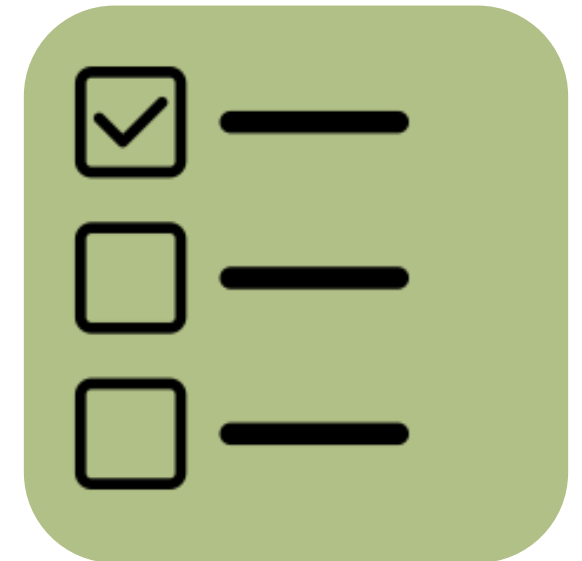
Steve Reed-Pittman

Director, Enterprise Architecture
and Engineering
Senturus, Inc.

Poll

How confident are you that your company has properly secured governance across your Power BI environment?

- Very secure
- Moderately secure
- Fairly insecure
- Completely insecure



A green rounded rectangle containing three radio button options for the poll. The first option is selected, indicated by a checkmark inside the box. The other two options are unselected, indicated by empty boxes. Each option is followed by a horizontal line.

<input checked="" type="checkbox"/>	—
<input type="checkbox"/>	—
<input type="checkbox"/>	—

Licensing resources



[Different Power BI and Fabric capacities](#)



[Different Power BI user licenses](#)



[Fabric licensing](#)



[Power BI premium features](#)



[Fabric pricing](#)



[Power BI pricing](#)

Administrator types

Microsoft 365 – global administrator

- Create users/security groups
- Assign licenses
- Full control over Power Platform and Power BI

Power Platform admin

- Dynamics 365, PowerApps, Microsoft Flow
- Full control over Power BI

Fabric administrator

- Previously known as Power BI Administrator
- Power BI Desktop
- SAAS – Power BI service
- Power BI mobile apps
- Setup tenant(s)
- No access to Power Platform/Office 365

* Being updated as Fabric continues to roll out



Setup admins using O365

[Account](#) [Devices](#) [Licenses and Apps](#) [Mail](#) [OneDrive](#)

Username
2112019newtest@themeasuredproduct.com
[Manage username](#)

Groups
Game Marketing Org
Gaming Insights Support Team
[Manage groups](#)

Roles
No administrator access
[Manage roles](#)

Roles and administrators | All roles ...

Senturus, Inc. - Azure Active Directory

[+ New custom role](#) [Delete custom role](#) [Download](#)

All roles

Get just-in-time access to a role when you need it using PIM

<input type="checkbox"/>	External ID User Flow Attribute Administrator
<input type="checkbox"/>	External Identity Provider Administrator
<input checked="" type="checkbox"/>	Fabric Administrator
<input checked="" type="checkbox"/>	Global Administrator
<input type="checkbox"/>	Global Reader
<input type="checkbox"/>	Global Secure Access Administrator
<input type="checkbox"/>	Groups Administrator
<input type="checkbox"/>	Helpdesk Administrator
<input type="checkbox"/>	Hybrid Identity Administrator
<input type="checkbox"/>	Identity Governance Administrator
<input type="checkbox"/>	Insights Administrator
<input type="checkbox"/>	Intune Administrator
<input type="checkbox"/>	Kaizala Administrator
<input type="checkbox"/>	Knowledge Administrator
<input type="checkbox"/>	License Administrator
<input type="checkbox"/>	Lifecycle Workflows Administrator
<input type="checkbox"/>	Microsoft Hardware Warranty Administrator
<input type="checkbox"/>	Network Administrator
<input type="checkbox"/>	Office Apps Administrator
<input type="checkbox"/>	Password Administrator
<input type="checkbox"/>	Permissions Management Administrator
<input checked="" type="checkbox"/>	Power Platform Administrator



Separation of user roles

- Best practice: use groups vs. individual users
- Setup admin groups
 - Define global admin group
 - Define Power Platform admin group
 - Define Fabric admin group
- Setup user type groups
 - Workspace admin
 - Data stewards
 - Testers
 - Developers
 - Consumers (by business function)

Privileged identity management

Add assignments ...

Privileged Identity Management | Privileged access groups (Preview)

Membership Setting

Assignment type ⓘ

☒ Eligible

☐ Active

Maximum allowed eligible duration is 1 year(s).

Assignment starts *

10/13/2021 2:22:56 PM

Assignment ends *

10/13/2022 2:22:56 PM

- Time-based and approval-based role activation
- Reduce risk for excessive, unnecessary or misused access to import resources
 - Start/end date
 - Allow users to request temp role access

Activate - Member ✕

Privileged Identity Management | Privileged access groups (Preview)

Roles Activate Status

☐ Custom activation start time

Duration (hours) ⓘ

8

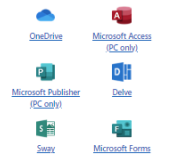
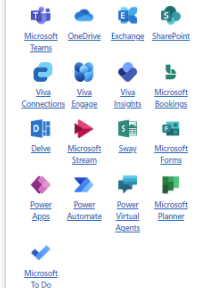
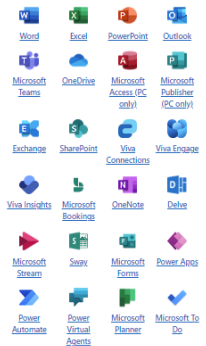
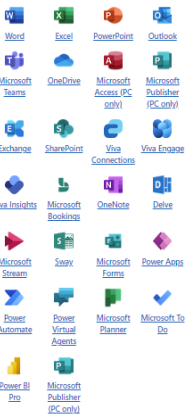
*Reason (max 500 characters) ⓘ

Privileged identity management

Included in Microsoft 365 E5

- Include Power BI Pro
- Includes Azure AD Premium P2 (renamed Microsoft Entra ID P2)

Azure AD (renamed to Microsoft Entra)

Microsoft 365 Apps for enterprise	Office 365 E1	Office 365 E3	Office 365 E5
The enterprise edition of the Microsoft 365 apps plus cloud-based file storage and sharing. Business email not included. ¹	Business services such as email, file storage and sharing, Office on the web, meetings, and IM, and more. Microsoft 365 apps not included. ¹	All the features included in Microsoft 365 Apps for enterprise and Office 365 E1, plus some security and compliance capabilities. ²	All the features included in Office 365 E3, plus some advanced security and compliance, analytics, and voice capabilities. ³
\$12.00 user/month (Annual subscription—auto-renews) ²	\$10.00 user/month (Annual subscription—auto-renews) ²	\$23.00 user/month (Annual subscription—auto-renews) ²	\$38.00 user/month (Annual subscription—auto-renews) ²
Buy now	Buy now	Buy now	Buy now
Try for free >	Try for free >	Try for free >	Try for free >
See trial terms¹	See trial terms¹	See trial terms¹	See trial terms¹
Learn more >	Learn more >	Learn more >	Learn more >
<ul style="list-style-type: none">✓ Microsoft 365 on the web with create and edit rights for online versions of core Microsoft 365 apps✓ Install apps on up to five PCs, five tablets, and five mobile devices✓ 1 TB of OneDrive cloud storage✓ Anytime phone and web support	<ul style="list-style-type: none">✓ Microsoft 365 on the web with create and edit rights for online versions of core Microsoft 365 apps✓ Email, file storage and sharing, meetings, and instant messaging✓ 1 TB of OneDrive cloud storage✓ Audio conferencing for up to 1,000 attendees✓ Anytime phone and web support	<p>Everything in Office 365 E1, plus:</p> <ul style="list-style-type: none">✓ Install Microsoft 365 Apps on up to five PCs or Macs, five tablets, and five mobile devices per user✓ Message encryption✓ Rights management✓ Data loss prevention for email and files	<p>Everything in Office 365 E3, plus:</p> <ul style="list-style-type: none">✓ Advanced security and compliance capabilities✓ Call control and PBX capabilities in the cloud✓ Scalable business analytics with Power BI
<p>Apps and services included</p> 	<p>Apps and services included</p> 	<p>Apps and services included</p> 	<p>Apps and services included</p> 

Workspace administration





Workspaces

Dashboards

Reports

XLS workbooks

Datasets

Data flows



My Workspace

- Visible to only you
- Other users can not access/collaborate
- Pro users can move/publish to a shared Workspace that they have been given **contributor** access to

Workspace proliferation

#1 Issue - Need to avoid

- Duplicates/conflicting Information
- Might seem OK now, quickly gets out of hand
- Settings/best practices to prevent this from occurring



Workspace settings

Admin portal

Tenant settings

Usage metrics
Users
Premium Per User
Audit logs
Domains (preview) **New**
Capacity settings
Refresh summary
Embed Codes
Organizational visuals
Azure connections
Workspaces
Custom branding
Protection metrics
Featured content

Help and support settings

- ▷ Publish "Get Help" information
Disabled for the entire organization
- ▷ Receive email notifications for service outages or incidents
Disabled for the entire organization
- ▷ Users can try Microsoft Fabric paid features
Enabled for the entire organization
- ▷ Show a custom message before publishing reports
Disabled for the entire organization

Workspace settings

- ▷ Create workspaces (new workspace experience)
Enabled for the entire organization
Users in the organization can create app workspaces to collaborate on dashboards, reports, and other content. Even if this setting is disabled, an upgraded workspace will be created when a template app is installed.

☒ Enabled

ⓘ The permission to create workspaces in the new workspaces experience preview is currently controlled by the permission to create groups in Office 365. By clicking Apply, the values below will control which users can create workspaces in the new workspaces experience preview. [Learn More.](#)

Apply to:

- ☒ The entire organization
- ☐ Specific security groups
- ☐ Except specific security groups

Workspace access/permissions



- Always use groups vs. users
- Define Workspace user type access (admin, member, contributor, viewer)
- Viewer = consumer/manager type
 - Will allow user to get see Workspace/app
 - View content, data sets hidden
 - Unable to edit or publish
- Contributor = developers/content creators
 - Full control over content - create/edit/delete (can delete datasets)
 - Unable to share or publish workspace
- Member
 - Publish, share and create apps
 - Create other members, contributors, viewers (unable to create admins)
- Admin
 - Full control
 - Add and create other admins

Deployment pipelines

Prerequisites

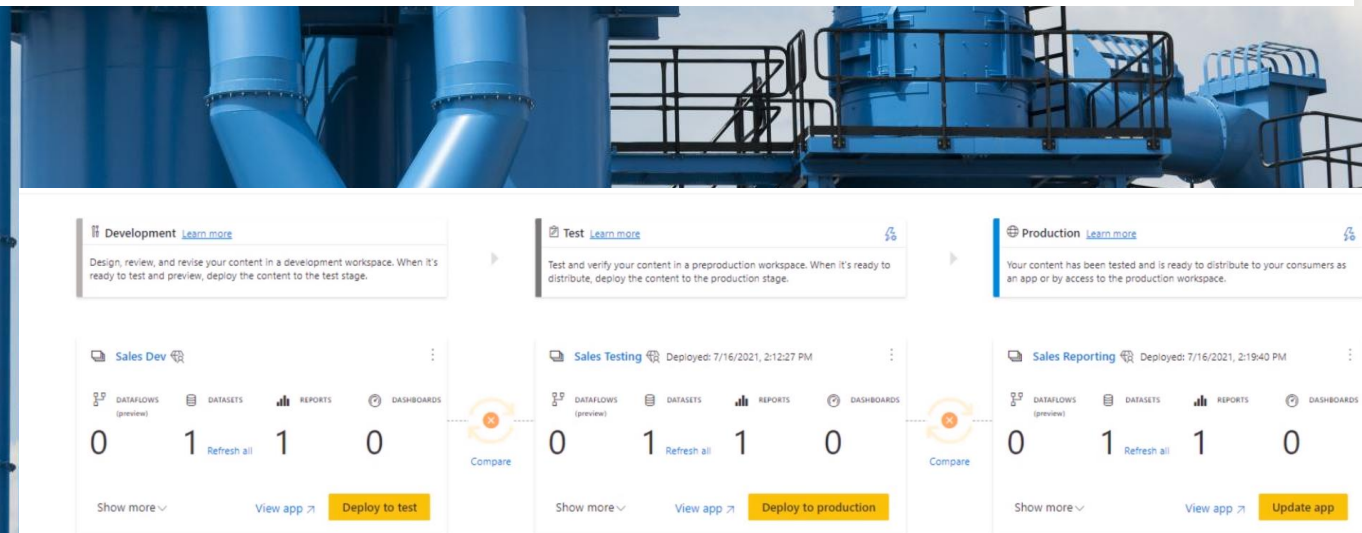
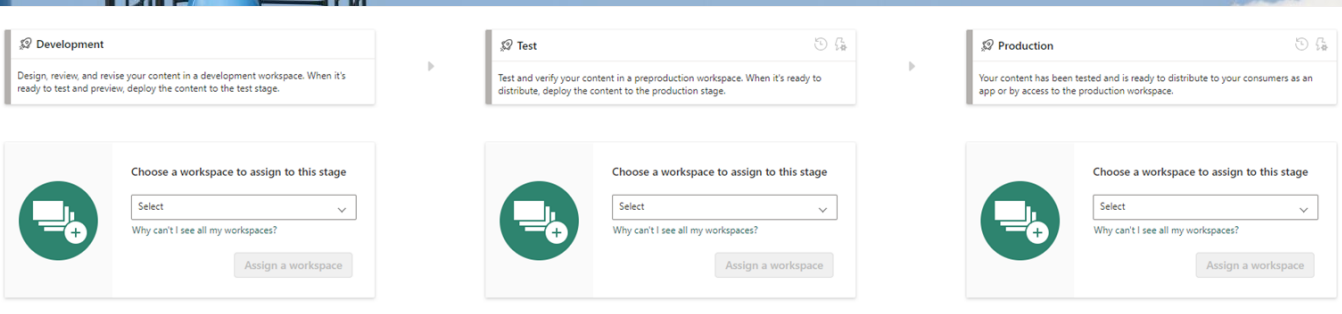
- Pro license
- Workspace admin
- Dedicated capacity (PPU or premium/embedded)

Define data source parameters DEV, QA, PROD

- Server name, database name, schema, etc.
- Set specific connections for workspace

Move all or individual objects Define Workspace groups for each

- Developer group for dev, test team for test, etc.





Data governance

Self service

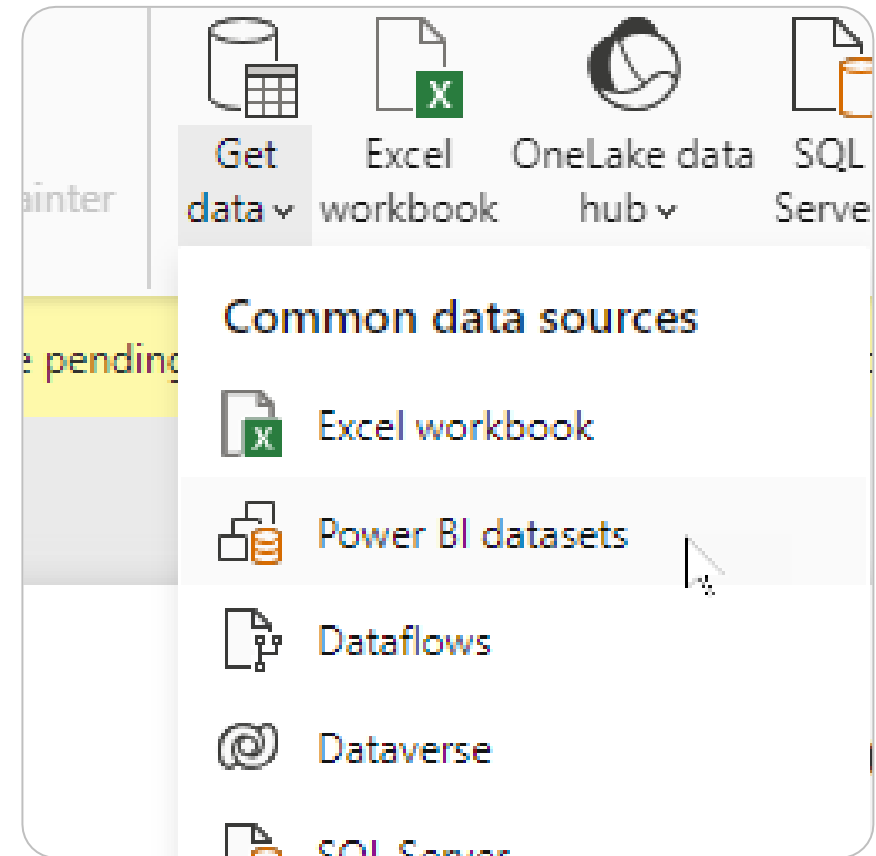
“Self-service business intelligence (BI) offers the potential to eliminate the bottleneck that currently hinders communication between IT professionals and business users. However, it's important to acknowledge that if data is provided to a diverse group of data consumers without the implementation of appropriate safeguards, it could lead to a state of data chaos.” – ChatGPT

- Single version of “the truth”
- Endorsements
- What to do with local Excel?
- Centralized datasets and data flows



Single version of the truth

- Dedicated datasets Workspace
- Share across workspaces
 - Eliminate having multiple copies of the same dataset
 - Users connect directly to published Power BI datasets
 - Avoid new connections if existing datasets already provide data and are **certified**
- Schedule refreshes



Endorsements

- Promoted
 - Can only be done by owner
- Certified
 - Should be restricted
 - Add security group i.e., Power BI Certifiers to allow certification
- Datasets with certified status show at the top of the list, followed by Promoted

4 Certification
Enabled for a subset of the organization

Choose whether people in your org or specific security groups can certify items (like apps, reports, or datamarts) as trusted sources for the wider organization.

Note: When a user certifies an item, their contact details will be visible along with the certification badge.

☒ Enabled

Specify URL for documentation page

Enter URL

Apply to:

☐ The entire organization

☒ Specific security groups



☒ PowerBICertifiers

☐ Except specific security groups

Delegate setting to other admins

☐ Domain admins can enable/disable

Apply Cancel

	Certified Signifies the content is trustworthy
	Promoted Amplifies that the content is available

Excel

- Early adoption usually requires reliance on existing Excel
- Upload Excel workbooks into Power BI service
- Enable “Analyze in Excel”
 - Users can work in Excel Online
 - Centralize Excel Workbooks
- Restrict Export to XLS/CSV
 - Static data, no longer in sync

Data flows

Centralize Power Query/M transformations in Power BI service

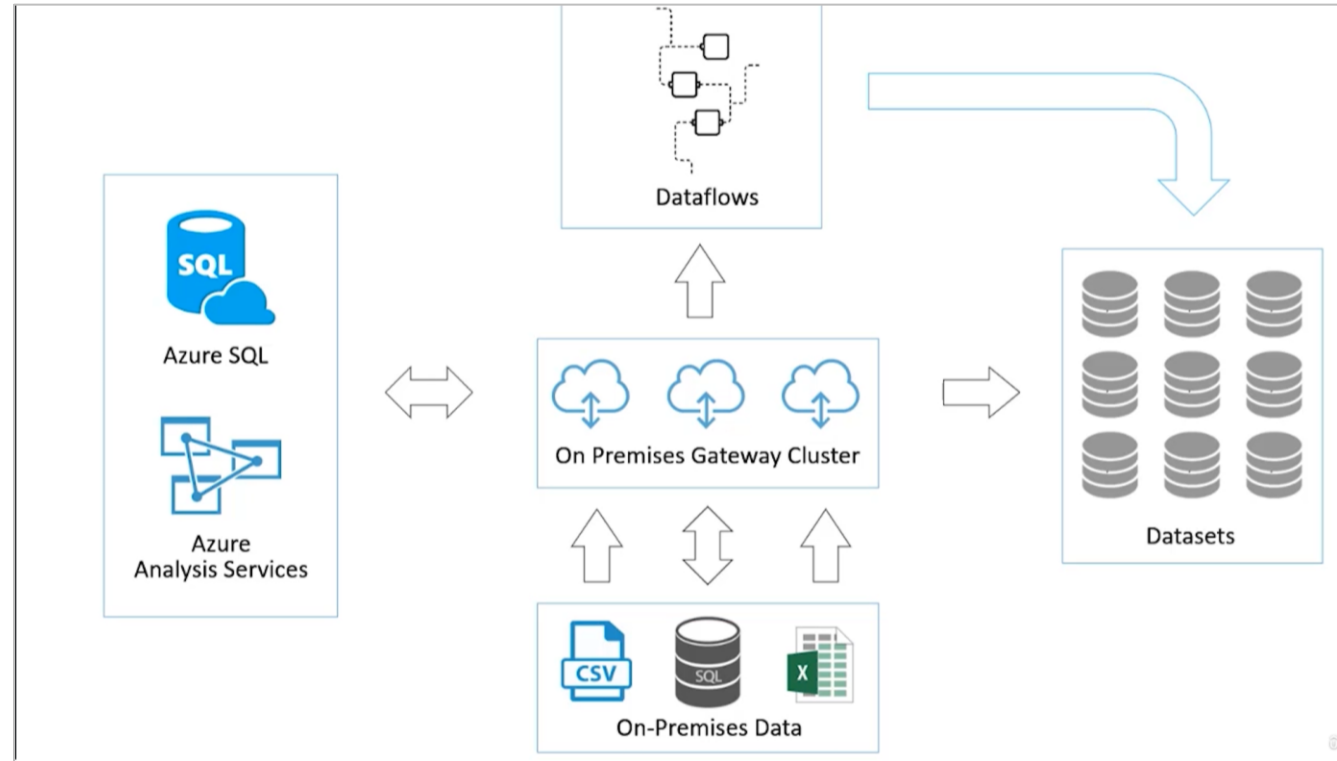
- Power Query transformations in desktop do not get published

Additional layer of security

- Prevent direct access to DB

Better control of refresh granularity

- Refresh the data that is updated, ignore data that is not

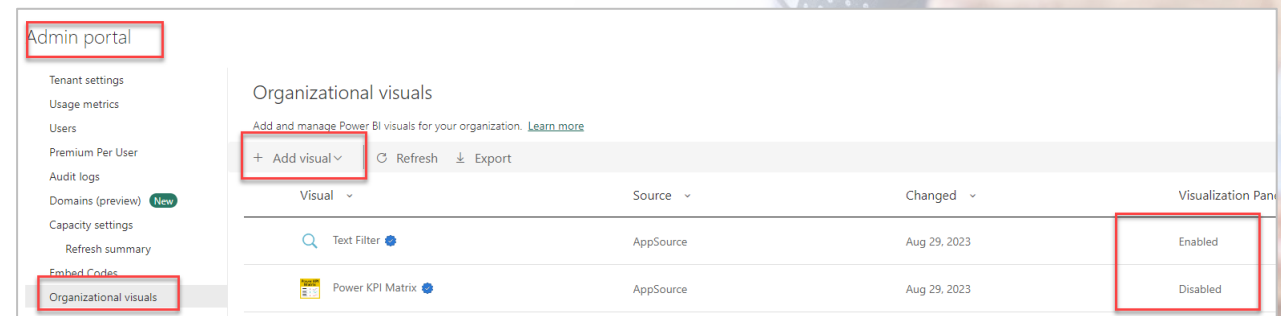
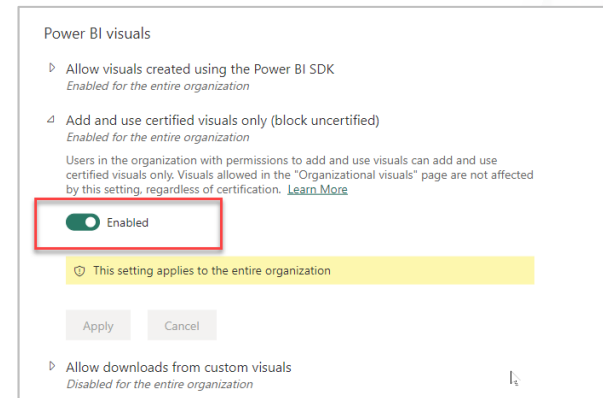




Content administration

Custom visualizations

- Free/paid
- Block uncertified visuals
- Power BI Certified (blue starburst)
 - AppSource
 - No external calls
- Explicitly add visuals in admin portal
 - Default to disabled
 - Need to enable
 - Can be disabled if needed



Row-level security



Power BI Desktop

Manage roles



Hard code security groups

Group name: North sales reps
Filter: region = North
Assign to North sales rep group



Dynamic RLS

Security table
Email address = username()



“View as” to test



Publish to Workspace

Publishing apps

- Workspaces for development
 - Contributors/members
- Apps for consumers
 - Viewers
 - Designed to present content
- Global app settings
 - Install app automatically
 - Eliminate need to find and add
 - Allow users to make a copy of report
 - Keep unchecked
- Create audience
 - Map to user group
 - Limit multi page report views

Advanced settings ^

Navigation pane

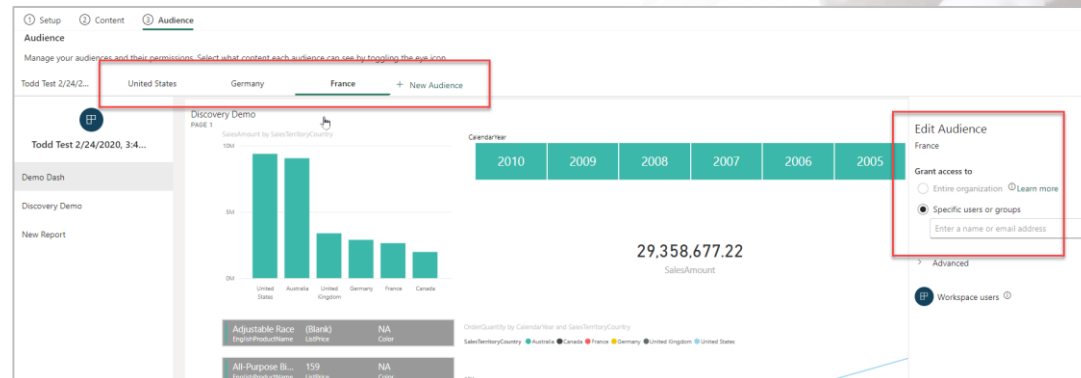
☒ Expand navigation pane by default

☐ Collapse navigation pane by default

Global app settings

☒ Install this app automatically.

☐ Allow users to make a copy of the reports in this app.





Internal/external sharing

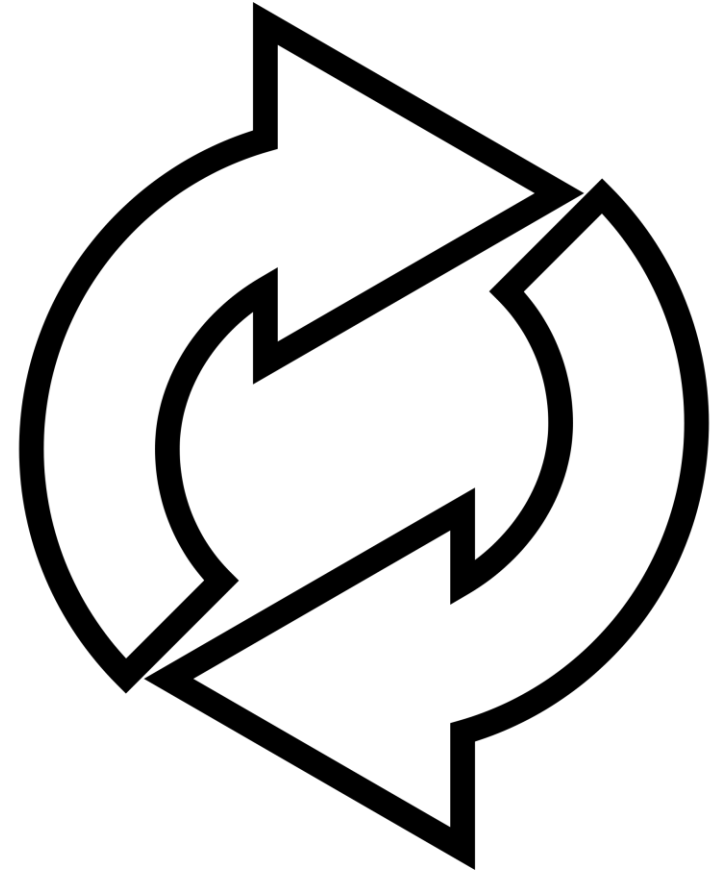
Settings to Prevent Duplication

- Publish to web
- Embed codes
- Export to PDF, HTML, images
- Allow guest users/B2B
- Guest share and collab
- Copy and paste visuals
- Print reports/dashboard



Ongoing Administration

- Audit Usage
- Engaging users for usability feedback.
- Setting criteria for dashboard and report accuracy testing.
- Iterative improvements based on findings.



Additional resources

Unbiased product reviews



Technical tips



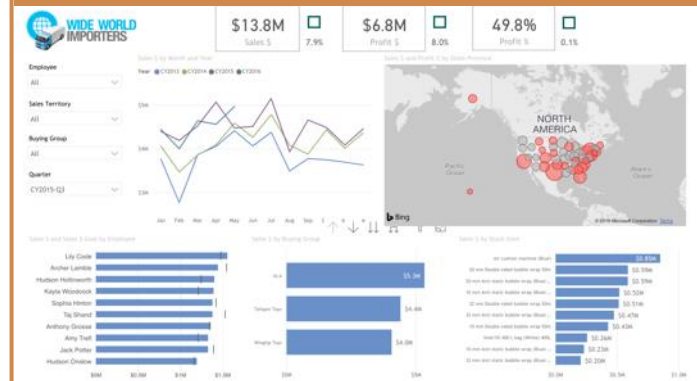
Insider viewpoints



More on this subject



Product demos



Upcoming events



Upcoming events

Microsoft Fabric & You!

Thursday, October 12, 11am PT (2pm ET)

Chat with Pat: Publishing and Using the Power BI Service

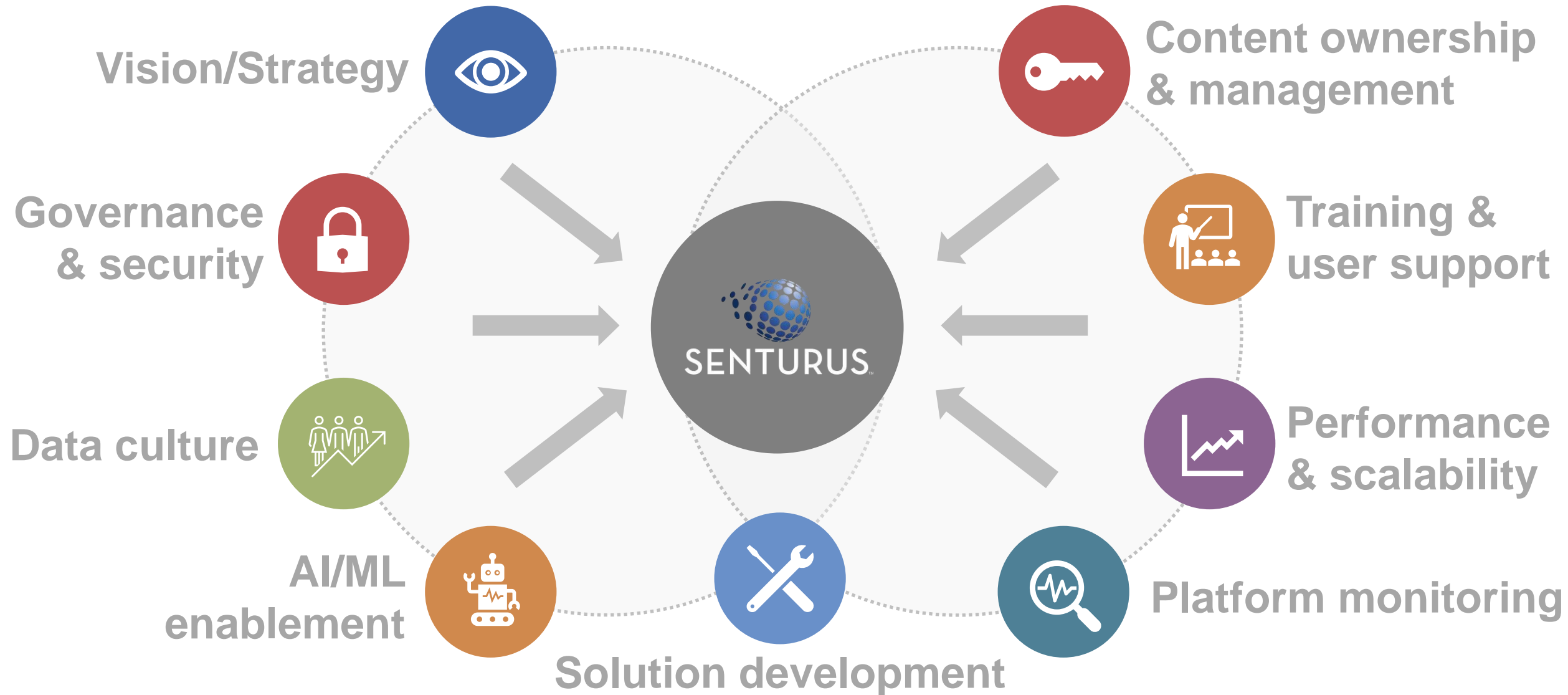
Wednesday, October 18, 11am PT (2pm ET)

Chat with Pat: Cognos 12

Wednesday, November 15, 11am PT (2pm ET)

Register at senturus.com/events

Modern BI: accelerated & accessible



A long, strong history of success

22+ years

1400+ clients

3000+ projects

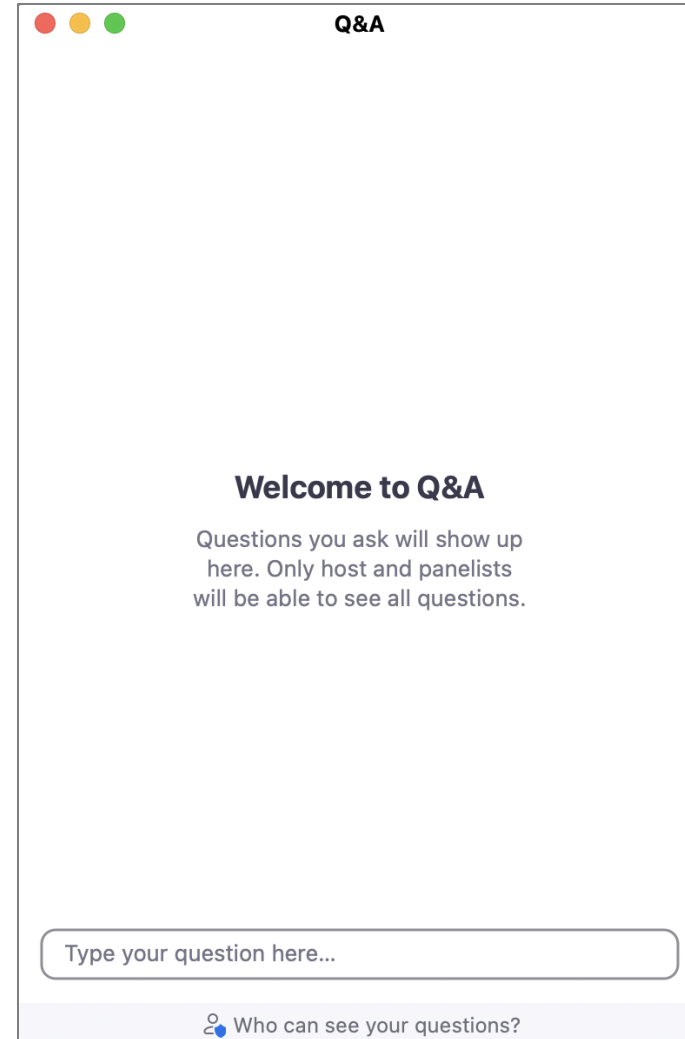


Q & A

If your question or issue is broader than what we are able to answer today, contact us at:

info@senturus.com

and we will set up a free consultation.



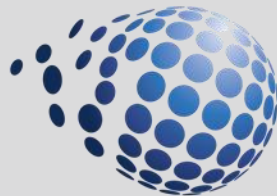
The image shows a screenshot of a web application window titled "Q&A". The window has a standard macOS-style title bar with red, yellow, and green window control buttons. The main content area is white and contains the following text:

Welcome to Q&A

Questions you ask will show up here. Only host and panelists will be able to see all questions.

At the bottom of the window, there is a light blue footer bar. It contains a text input field with the placeholder text "Type your question here..." and a small icon of a person with a speech bubble, followed by the text "Who can see your questions?".

Thank You



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