

# **Your Power BI Report is Ready. Now What?**



# Power BI Desktop

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- The application for building reports
- Where you design and create data models
- You develop all visuals and dashboards here
- Think of it as the 'authoring' tool
- It is a free Windows application
- You save your work as a .pbix file



# Power BI Service

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- The online platform for sharing
- Accessed via a web browser
- This is where you publish your reports
- Hosts and secures your data content
- Enables sharing and collaboration features
- Often referred to as 'the cloud'



# Publishing Your Report

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- Open your .pbix file in Desktop
- Click the 'Publish' button on the ribbon
- Select your destination workspace
- The service processes and uploads the data
- Your report is now live online
- Refresh schedules are managed in the service



# Understanding Workspaces

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- Workspaces are like shared folders
- They group related reports and dashboards
- My Workspace is for your personal use
- Create new workspaces for teams or projects
- Workspaces have roles: Admin, Member, Contributor, Viewer
- Apps package workspaces for broad distribution



# Sharing Reports Securely

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- Share with individuals directly via email
- Set permissions: View or Build access
- Recipients need a Power BI license
- Avoid attaching .pbix files in emails
- Use Microsoft Groups for easier management
- Always audit your sharing permissions regularly



# Exporting Data & Pages

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- Users can export summarized data to .CSV
- Export visuals to PDF, PowerPoint, or .png
- Admins can restrict export capabilities
- Exporting does not share the underlying dataset
- Be mindful of data security when exporting
- Use subscriptions to email report snapshots



# Embedding Reports

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- Embed securely in SharePoint Online
- Embed in public websites with publish to web
- Publish to web creates a public link
- Use the secure embed feature for internal sites
- Always validate embedding permissions
- Private embedding requires user authentication



# Best Practices Recap

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- Publish to the service, don't email files
- Use workspaces to organize content logically
- Share via apps for a clean user experience
- Grant the least privileged access needed
- Regularly review who has access to what
- Always consider data security first



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