

Your Power BI Success Starts With Governance



Why Governance Matters

- Prevents data chaos and report confusion
- Ensures data is trustworthy and reliable
- Scales your BI environment effectively
- Reduces security risks and errors
- Saves time and money in the long run



Workspace Standards

- **Classify workspaces by purpose: Dev, Test, Prod**
- **Assign dedicated owners for each workspace**
- **Establish clear publishing and promotion processes**
- **Use descriptions to state the workspace's purpose**
- **Implement a consistent archiving policy for old content**



Security Best Practices

- Apply the principle of least privilege access
- Use Microsoft 365 Groups for easier user management
- Build security into your data model with RLS
- Regularly audit and review user permissions
- Document security protocols for all workspace roles



Naming Conventions

- Create a simple, logical naming structure
- Include project or department name as a prefix
- Indicate the object type (e.g., Report, Dataset)
- Add a version or environment suffix if needed
- Avoid spaces and special characters; use underscores



Dataset Management

- Promote a single source of truth for metrics
- Encourage reusability to reduce redundancy
- Document refresh schedules and data sources
- Set performance benchmarks and monitor them
- Establish certification and endorsement processes



Ownership & Responsibilities

- Define clear roles for developers and admins
- Assign a business owner for every report
- Create a process for handling access requests
- Designate a team to oversee governance standards
- Ensure there is a plan for employee turnover



Documentation is Key

- **Maintain a central inventory of all reports**
- **Document the purpose of each dataset and report**
- **Keep a record of all data sources used**
- **Make your naming conventions document easy to find**
- **Use a wiki or SharePoint site for easy access**



Start Simple & Iterate

- **Begin with a pilot group or project**
- **Focus on the most critical standards first**
- **Train your team on the new guidelines**
- **Gather feedback and be ready to adapt**
- **Communicate the benefits to drive adoption**



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