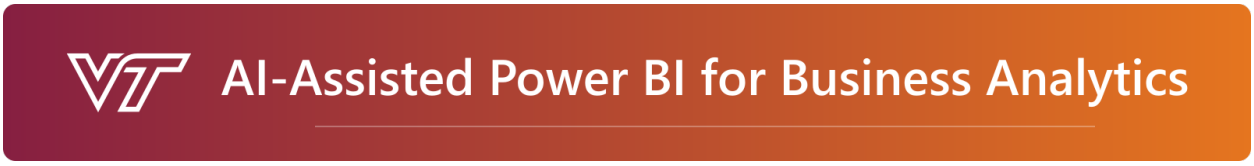

Figure 1: AI-Assisted Power BI for Business Analytics

Lab 6: Deploy Your Solution

Module 6: Sharing, Collaboration & Governance

Duration: 35 minutes **Dataset**: Any (use your Module 5 dashboard or earlier work) **Deliverable**: Published app screenshot + governance reflection

Learning Objectives

By the end of this lab, you will be able to:

- Publish reports to workspaces for collaboration
- Create Power BI apps for curated distribution
- Understand Row-Level Security concepts (demonstration)
- Recognize governance considerations for enterprise deployment

Before You Begin

Required Reading

1. **EnterpriseGovernance BRD** - View BRD

What You'll Need

- A completed report from a previous lab (ideally Lab 5)
- Power BI Service account with workspace access
- Understanding of your target audience (who will consume this?)

Key Concepts

Concept	What It Means
Workspace	Collaboration space for building content
App	Packaged, curated experience for consumers
Sharing	Direct access to individual reports
Row-Level Security	Controls what data users can see

```
%%{init: {'theme':'base', 'themeVariables': {'primaryColor': '#e8f4fd', 'secondaryColor': '#e8f6ea', 't
flowchart LR
    subgraph Build[" Build"]
        A[ Semantic Model/]
        B[ Reports/]
    end

    subgraph Workspace[" Workspace"]
        C["Admin / Member / Contributor"]
    end
```

```
subgraph Distribute[" Distribute"]
    D[ App/]
    E[ Direct Share/]
end

subgraph Consume[" Consumers"]
    F[" Mobile"]
    G[" Desktop"]
    H[" Web"]
end

A --> Workspace
B --> Workspace
Workspace --> D
Workspace --> E
D --> F & G & H
E --> F & G & H

style Build fill:#f0f7ff,stroke:#c7d8ed
style Workspace fill:#fff3bf,stroke:#ffd43b
style Distribute fill:#edf6ee,stroke:#c2dbc8
style Consume fill:#f8f9fa,stroke:#dee2e6
```

Power BI content flows from build → workspace → distribution → consumption.

Lab Instructions

Part 1: Organize Your Workspace (5 minutes)

A well-organized workspace makes collaboration and governance easier.

Step 1: Review Your Course Workspace

1. Navigate to app.powerbi.com
2. Open the course workspace
3. Look at the content list - note the different item types:
    - Reports (visualizations)
    - Semantic models (data)
    - Dataflows (if any)

Step 2: Understand Workspace Roles

Role	Can Do	Typical User
Admin	Everything + manage membership	IT, BI Team Lead
Member	Create, edit, publish	Analysts, Developers
Contributor	Edit existing content	Collaborators
Viewer	View only	Consumers

Step 3: Identify Your Report Locate the report you'll package into an app: - Option A: Your Lab 5 M365Marketing Executive Dashboard - Option B: Your Lab 2 CloudRevenue Report - Option C: Any completed report from the course

Note the report name: _____

Part 2: Create a Power BI App (15 minutes)

Apps provide a polished, curated experience for report consumers.

Step 1: Start the App Creation

1. In your workspace, click **Create app** (top right)
2. You'll enter the App creation wizard

Step 2: Configure App Settings (Setup Tab) Fill in the app details:

Field	What to Enter
App name	`[YourName] Marketing Insights`
Description	Marketing campaign performance dashboard with executive summary and drill-through details
Support site	Leave blank or use course support URL
App logo	Optional: Upload a simple icon
App theme color	Choose a professional color

Step 3: Add Content (Content Tab) Select what to include in your app:

1. Check the box next to your report(s)
2. You can include multiple reports if you have them
3. **Set the default page**: Choose your executive summary page
4. **Navigation**: Decide if consumers can see report pages or just the pages you specify

Step 4: Configure Audience (Audience Tab) This controls who can access the app:

1. **For this lab**: Keep it within the course workspace
2. In real deployments, you would:
   - Add specific users or groups
   - Enable/disable install permission
   - Control sharing rights

Step 5: Publish the App

1. Click **Publish app**
2. Wait for confirmation
3. Copy the app link for sharing

Screenshot #1: Capture your published app in the Apps area

Part 3: Test the Consumer Experience (5 minutes)

Now experience your app as a consumer would.

Step 1: Open the App

1. In the left navigation, click **Apps**
2. Find your newly created app
3. Click to open it

Step 2: Navigate as a Consumer

- Can you find the information you need?
- Is the navigation clear?
- Does the default page make sense?

Step 3: Test Copilot in the App (if available) If your workspace has app-scoped Copilot enabled:

1. Look for the Copilot icon in the app
2. Try asking: "What are the key insights from this report?"
3. Note: App Copilot can provide "verified answers" based on curated content

Step 4: Share the App Link

1. Click **Share** or copy the app link
2. Note: In a real scenario, you'd share this with stakeholders

Screenshot #2: Capture the consumer view of your app

Part 4: Row-Level Security Demonstration (5 minutes)

Row-Level Security (RLS) controls what data different users can see. This is an instructor-led demonstration.

What is RLS?

Without RLS	With RLS
All users see all data	Each user sees only their data
Sales manager sees all regions	Sales manager sees only their region
Security risk	Data governance

Demo Scenario The instructor will demonstrate:

1. **Define roles in the semantic model**
   - Create a role: "North America Sales"
   - Add filter: `[Region] = "North America"`
2. **Assign users to roles**
   - Map AD groups or users to roles
   - Users automatically see filtered data
3. **Test as different users**
   - "View as" feature to verify RLS works

Your Observation Notes

- What data was visible before RLS? _____
- What data was visible after RLS? _____
- How might this apply to your future work? _____

Part 5: Governance Reflection (5 minutes)

Enterprise deployment requires governance planning.

Governance Questions to Consider Think about deploying your marketing dashboard enterprise-wide:

1. **Access Control**
   - Who should see this data?
   - Who should NOT see specific data?

- How do you handle executives vs. individual contributors?

2. **Data Refresh**
   - How often should data update?
   - What happens if refresh fails?
   - Who is notified of issues?
3. **Content Lifecycle**
   - Who owns this report?
   - How do you handle report updates?
   - What about deprecated reports?
4. **AI Governance**
   - Should Copilot be enabled for all users?
   - How do you ensure AI answers are accurate?
   - What training do users need?

Enterprise Scenario

> *"Your marketing dashboard was so successful that leadership wants to roll it out to 500 marketing employees across 12 countries. Some data is region-specific and confidential. What considerations would you raise?"*

Your response (3-5 bullet points):

- _____
- _____
- _____
- _____
- _____

Lab Deliverable

Submit: Screenshot + governance reflection document

Deliverable 1: App Screenshot

- Screenshot of your published app in the Apps area
- Screenshot of the consumer view (app open)

Deliverable 2: Governance Reflection (1 page)

Answer these questions:

1. Describe your app deployment - What content did you include? - Who is your target audience? - What was your navigation strategy?

2. RLS Application - Based on the demonstration, describe a scenario where RLS would be necessary for your marketing dashboard - What roles would you create? - What data would each role see?

3. Enterprise Governance - List 3 governance considerations for rolling out this dashboard to a large organization - For each consideration, describe how you would address it

4. AI Governance - What concerns would you raise about enabling Copilot for 500 users? - How would you ensure AI responses are trustworthy?

Submission Format

- **File Name**: `Lab6_Governance_[YourName].docx` or `.pdf`
- **Length**: 1 page
- **Include**: 2 screenshots (app list + consumer view)

- **Submit via**: Canvas → Assignments → Lab 6

Completion Checklist

Before submitting, confirm you have:

- ☐ Reviewed workspace organization
- ☐ Created Power BI app with your report
- ☐ Configured app settings (name, description, content)
- ☐ Published the app
- ☐ Tested consumer experience
- ☐ Observed RLS demonstration
- ☐ Completed governance reflection
- ☐ Captured screenshots
- ☐ Submitted via Canvas

Key Takeaways

1. **Workspaces for collaboration**: Where teams build together
2. **Apps for distribution**: Curated, polished experiences for consumers
3. **RLS protects data**: Users only see what they're authorized to see
4. **Governance enables scale**: Clear policies prevent chaos as adoption grows
5. **AI needs governance too**: Copilot requires thoughtful deployment

Deployment Decision Framework

When to Use Each Sharing Method

Method	Best For	Considerations
Direct Share	One-off, individual access	Hard to manage at scale
Workspace Access	Collaboration teams	Users see all content
App	Broad distribution	Curated experience, easier to manage
Embed	External/custom apps	Requires development

Workspace vs. App Mental Model

```
%%{init: {'theme':'base', 'themeVariables': {'primaryColor': '#e8f4fd', 'secondaryColor': '#e8f6ea', 't
flowchart LR
    subgraph WORK["WORKSPACE (Building)"]
        W1[Reports - drafts]
        W2[Semantic models]
        W3[Dev/Test content]
        W4[Collaboration]
    end

    subgraph APP["APP (Showroom)"]
        A1[Curated reports]
        A2[Polished views]
        A3[Consumer-ready]
        A4[Read-only]
    end

    WORK -->|publish| APP
```

```
W5[Analysts work here]
A5[Users consume here]

style WORK fill:#f0f7ff,stroke:#c7d8ed
style APP fill:#f8f9fa,stroke:#d0d7de
style W5 fill:#f0f7ff,stroke:#c7d8ed
style A5 fill:#f0f7ff,stroke:#c7d8ed
```

Row-Level Security Quick Reference

Creating RLS (in Power BI Desktop)

1. **Modeling → Manage Roles**
2. Create a role (e.g., "North America")
3. Add DAX filter: `[Region] = "North America"`
4. Test with "View as Role"
5. Publish to Service
6. Assign users in Security settings

Dynamic RLS (Advanced)

Instead of hard-coding regions, use:

```
[Region] = USERPRINCIPALNAME()
```

Or with a security table:

```
[Region] IN VALUES(SecurityTable[AllowedRegion])
```

This automatically filters based on logged-in user.

Preparation for Capstone

- Review all lab deliverables
- Start thinking about your capstone project:
  - What business problem will you address?
  - What data will you use?
  - Who is your target audience?
- Form your team (3-4 students)

"The best analytics solution is one that actually gets used. Governance and deployment are not afterthoughts - they're essential to impact."