

Manage workspaces in Power BI service

1. Introduction

<https://learn.microsoft.com/en-us/training/modules/manage-workspaces-power-bi-service/1-introduction>

Introduction

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Imagine you're part of a growing analytics team in your organization. You spent weeks building a detailed sales performance report in Power BI Desktop, filled with interactive visuals and valuable insights. Now, your leadership team wants to have access to this report, and your colleagues from different departments need to collaborate on the data. However, sharing a static Power BI (.pbix) file through email isn't a scalable solution — it creates version control issues, risks data inconsistency, and makes collaboration difficult.

Additionally, some stakeholders only need to see high-level trends, while others need the ability to drill down into the raw data. The IT team wants to ensure that sensitive financial data remains secure, while executives need a streamlined way to access reports without navigating complex folders or multiple files.

This is where the Power BI service comes in. By publishing your report to the Power BI service, you can create a centralized, web-based environment where users can securely view, interact with, and collaborate on reports. With workspaces, dashboards, and apps, you can control access levels, ensure everyone sees the most up-to-date data, and streamline report distribution across your organization.

By the end of this module, you'll have the skills to effectively publish and share your Power BI reports using the Power BI service. This enables you to collaborate seamlessly with your colleagues, ensuring that everyone has access to the latest insights and data models, regardless of their location or device.

2. Understand Power BI service

Understand Power BI service

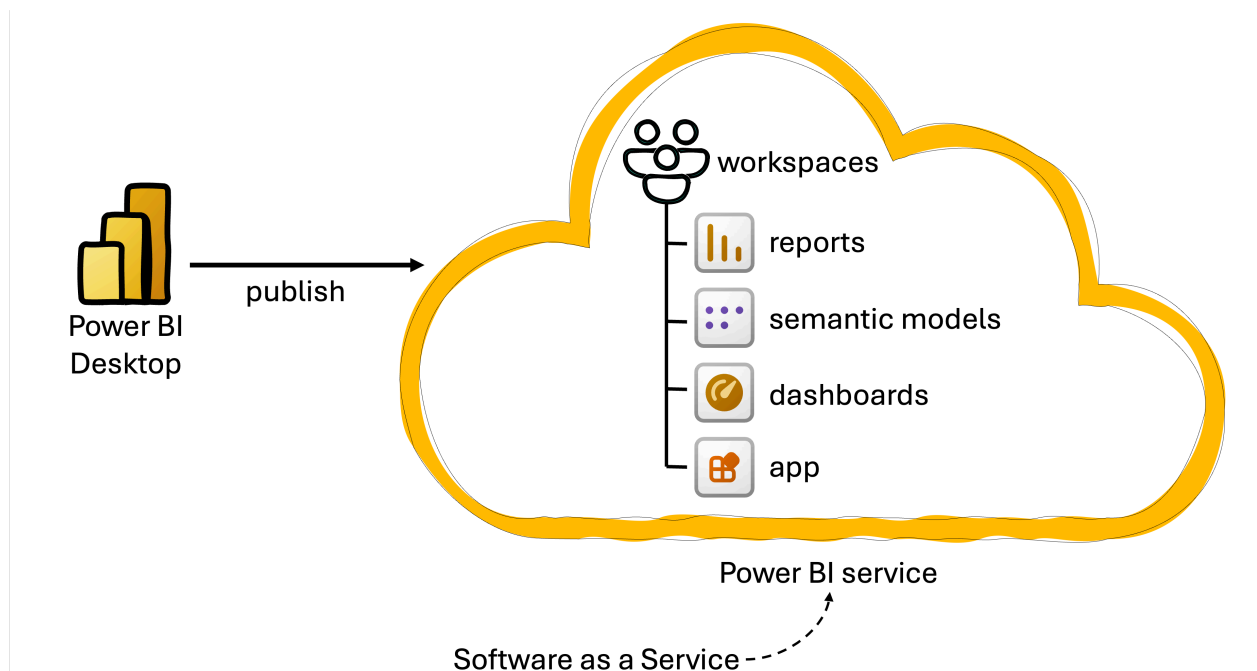
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You've likely had the chance to load and transform data from numerous sources, build visuals, create measures, and even publish a report or two to Microsoft Power BI. The next step on your data analysis journey is to share these reports with a wider audience in your organization. This is where the Power BI service comes into play.

What is the Power BI service?

In a typical Power BI workflow, you begin by building a report in Power BI Desktop, then publishing it to the Power BI service. It's the Software as a Service (SaaS) part of Power BI and can be accessed through a web browser (<https://app.powerbi.com>). The Power BI service lets you consume and interact with reports, as well as individual visual elements found in those reports, right from your browser.

The Power BI service is composed of many building blocks, including workspaces, reports, semantic models, dashboards, and apps. Each of these components play a unique role in the Power BI ecosystem.



Workspaces

Workspaces are spaces for your Power BI content. They allow you to organize and manage your reports, semantic models, and dashboards. Workspaces can be created for different teams or projects within your organization, enabling collaboration and sharing of Power BI content.

Depending on the license mode, workspaces offer different levels of sharing, performance, and advanced features such as AI capabilities and higher refresh rates.

Reports

Once a report designer publishes a report to a Power BI workspace, the report becomes available to other users in that workspace. Users can then view it in their browser and interact with the visuals, and create their own reports based on the same semantic model.

A report has one or more pages, each containing one or more visuals. Presenting data as visuals makes it easier to grasp the meaning of what you're seeing. And, the visuals aren't static. You interact with the visuals and filters as you dig into the data to discover insights and find answers.

Semantic models

Power BI semantic models represent a source of data that's ready for reporting and visualization. When publishing a report from Power BI Desktop, the semantic model is included in the report. The semantic model is a collection of tables, relationships, and measures that define how data is structured and how it can be used in reports.

If you have access to a Power BI semantic model, you can create new reports based on that model. It's a great way to reuse existing content and save time. Semantic models can be promoted or even certified in order to help users find the right data for their reports. The **Browse** experience in the Power BI service is a great place to find semantic models that are available to you, regardless of where they're located.

Dashboards

Dashboards and reports in Power BI might look similar, but they have key differences. Dashboards are single-page visual summaries that can pull data from multiple reports and models, while reports can have multiple pages and use only one semantic model. Reports offer more interactive features like filtering, drilling down, and viewing data tables, while dashboards focus on quick insights. Both allow subscriptions, favorites, and natural language queries, but only dashboards support alerts on certain tiles.

Dashboards are exclusive to the Power BI service and aren't available in Power BI Desktop. You can create a dashboard by pinning a visual from a report, which is called a *tile*. A dashboard can contain tiles from multiple reports, and it can be shared with other users in the Power BI service. Due to its single-page limitation, an effective dashboard includes only the key highlights of the story. For more detailed information, readers can refer to the associated reports.

Apps

Apps are an easy way for designers to share related content, like dashboards, semantic models, and reports, all in one place. It's easier to find content in the Power BI service when it's organized together as an app. After you install an app, you don't have to remember the names of several dashboards or reports because they're all together in one app.

For the app designer, it gives them control over the content included in the app and who can access it. They do not need to share each item individually or depend on the workspace access list. Apps are a great way to share content with a larger audience, such as an entire department or organization. You can even target multiple audiences in the same app.

Additionally, it gives app designers control over when updated content will be released as a new app version.

3. Understand workspaces

<https://learn.microsoft.com/en-us/training/modules/manage-workspaces-power-bi-service/3-understand-workspaces>

Understand workspaces

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A **Power BI workspace** is a collaborative environment within Power BI service where users can create, manage, and share reports, dashboards, and datasets. It acts as a container for Power BI content, allowing teams to work together on analytics projects.

Types of Workspaces

There are two types of workspaces: **My Workspace**, which is private to an individual user, and **Shared workspaces**, which can be accessed by multiple users with assigned roles. Workspaces allow you to organize your content, apply role-based access control, and create Power BI apps.

Create a workspace

When you create a workspace, you have to choose a unique name for it. You can also enter an optional description to help others understand the purpose of the workspace. A workspace image can be uploaded as a .png or .jpg file. The name, description, and icon are important for identifying

the workspace and its content. The Contact list allows you to identify the people who are responsible for the workspace.

Create a workspace



Name *

Fabrikam Operations

✓ This name is available

Description

Insights from daily activities, supply chain, logistics, and production.

Domain ⓘ

Assign to a domain (optional)



[Learn more about workspace settings](#)

Workspace image



↑ Upload

↶ Reset

Advanced ^

Contact list * ⓘ



admin (Owner) ×

Apply

Cancel

Choose a license mode for your workspace

You also have to choose a license mode for the workspace. The license mode determines how the content in the workspace can be shared and consumed.

A **Power BI Pro** license allows users to create workspaces and share content, but all users who access the workspace must also have a Pro license. It's suitable for small to medium teams needing

collaboration within Power BI service. However, it doesn't support advanced features like larger model sizes or AI capabilities.

A **Premium Per User (PPU)** license provides all Pro features plus advanced capabilities such as more scheduled refreshes per day, AI-powered features, and larger semantic model sizes. Unlike Pro, PPU workspaces can only be accessed by other PPU-licensed users, making it less flexible for broad sharing. It's ideal for individuals or teams needing Premium features without committing to full Fabric Capacity.

A **Fabric Capacity** license provides enterprise-grade performance and scalability by allocating dedicated cloud resources (a capacity). This option supports all advanced features, including real-time streaming, larger semantic models, and enhanced AI capabilities. Users can create dataflows, pipelines, data warehouses, and other Fabric content.

Create a workspace



License mode ⓘ

☒ **Pro**

Select Pro to use basic Power BI features and collaborate on reports, dashboards, and scorecards. To access a Pro workspace, users need Pro per-user licenses. [Learn more](#)

☐ **Trial**

Select the free trial per-user license to try all the new features and experiences in Microsoft Fabric for 60 days. A Microsoft Fabric trial license allows users to create Microsoft Fabric items and collaborate with others in a Microsoft Fabric trial capacity. Explore new capabilities in Power BI, Data Factory, Data Engineering, and Real-Time Intelligence, among others. [Learn more](#)

☐ **Premium per-user**

Select Premium per-user to collaborate using Power BI Premium features, including paginated reports, dataflows, and datamarts. To collaborate and share content in a Premium per-user workspace, users need Premium per-user licenses. [Learn more](#)

☐ **Premium capacity**

Select premium capacity if the workspace will be hosted in a premium capacity. When you share, collaborate on, and distribute Power BI and Microsoft Fabric content, users in the viewer role can access this content without needing a Pro or Premium per-user license. [Learn more](#)

☐ **Embedded**

Select embedded if the workspace will be hosted in an Azure embedded capacity. ISVs and developers use Power BI Embedded to embed visuals and analytics in their applications. [Learn more](#)

☐ **Fabric capacity**

Select Fabric capacity if the workspace will be hosted in a Microsoft Fabric capacity. With Fabric capacities, users can create Microsoft Fabric items and collaborate with others using Fabric features and experiences. Explore new capabilities in Power BI, Data Factory, Data Engineering, and Real-Time Intelligence, among others. [Learn more](#)

Apply

Cancel

Once a workspace has been created, the diamond icon  identifies Fabric workspaces. Premium Per User workspaces are identified by this diamond icon .

Note

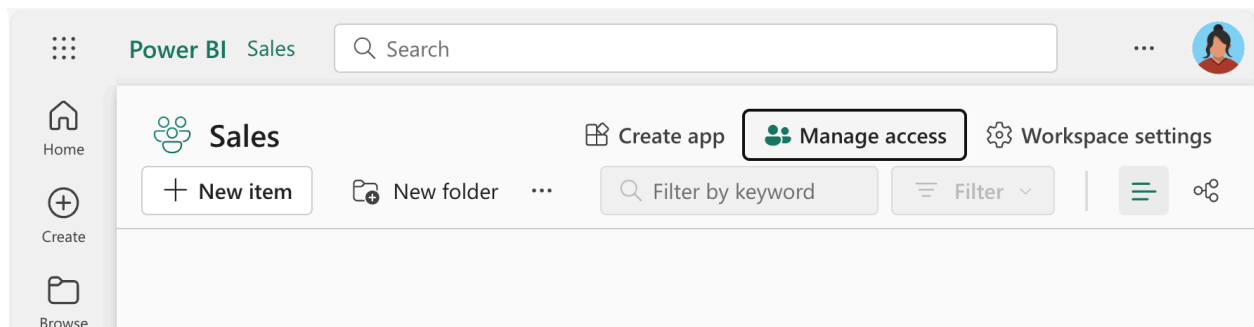
In this learn module, we won't cover Fabric topics. For more information about Fabric, see [Microsoft Fabric concepts and licenses](#).

Grant access to a workspace

Roles let you manage who can do what in a workspace, so teams can collaborate. Workspaces allow you to assign roles to individuals, and also to user groups such as security groups, Microsoft 365 groups, and distribution lists.

- **Viewers** has read-only access, allowing them to view and interact with reports and dashboards without making changes.
- **Contributors** can create, edit, and delete content but lacks control over app publishing, sharing, and workspace settings.
- **Members** can manage content, publish and update apps, share items, and modify data settings but can't delete the workspace or manage Admin roles.
- **Admins** have full control, including managing workspace settings, updating or deleting the workspace, adding or removing users, and controlling app publishing.

Select the **Manage access** option to add people or groups to the workspace. You can also remove people or groups from the workspace.



4. Publish to Power BI service

<https://learn.microsoft.com/en-us/training/modules/manage-workspaces-power-bi-service/4-explore-publishing-process>

Publish to Power BI service

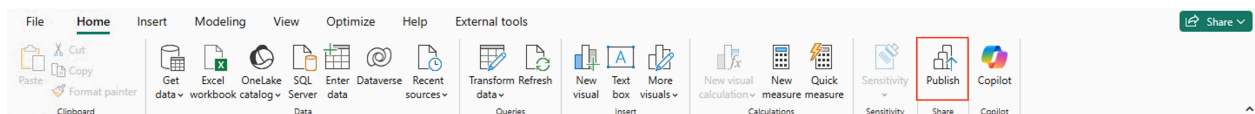
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Imagine you have created a report in the Power BI Desktop and now you want to share it to your colleagues. Sending the .pbix file via email isn't the best option, as the file might be too large, and it can be difficult to keep track of the latest version. Also, your colleagues might not have the same version of Power BI Desktop installed, which could lead to compatibility issues.

Instead, you can publish the report to the Power BI service, where your colleagues can access it online. This process is called publishing.

Publish from Power BI Desktop

In Power BI Desktop, choose **File > Publish > Publish to Power BI** or select **Publish** on the **Home** ribbon.



If you aren't signed in yet with your Microsoft Entra ID (work or school account), you're prompted to do so. After signing in, you'll see a dialog box that allows you to select the workspace where you want to publish the report.

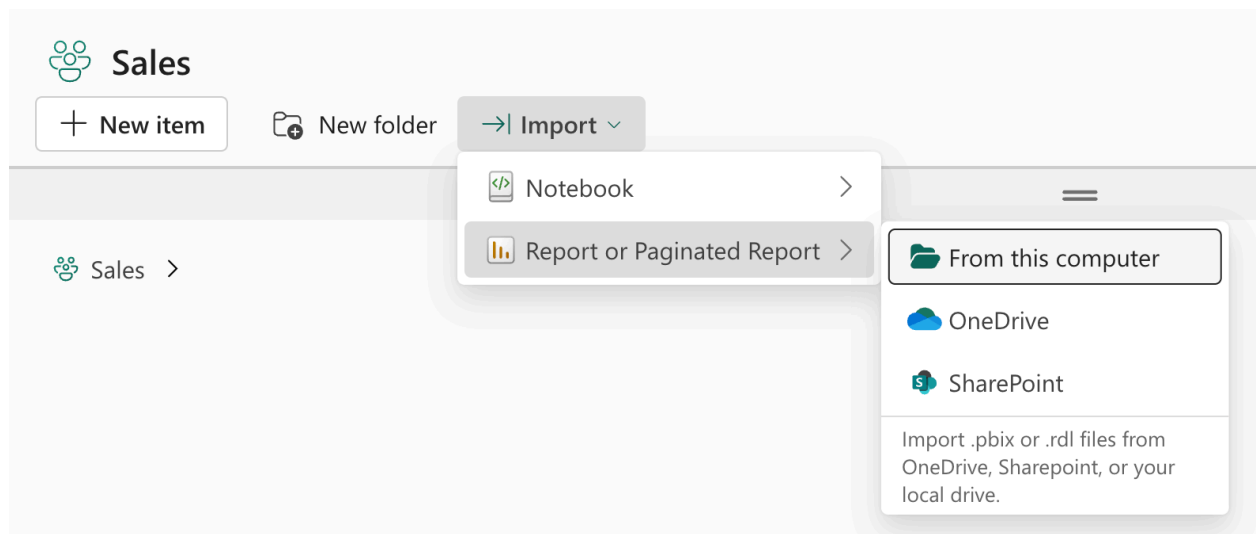
When publishing is complete, you receive a link to your report. You can also find the report in the Power BI service by navigating to the workspace you selected during the publish process.

Notice the semantic model is also published with the report. This means that the data model, including tables, relationships, and measures, is now available in the Power BI service. You can use this semantic model to create new reports or dashboards based on the same data.

When you make a change to a report in Power BI Desktop and then republish it, a message shows you how many workspaces, reports, and dashboards are potentially impacted by the change. Power BI then asks you to confirm that you want to replace the currently published semantic model with the one you modified.

Upload a Power BI report

There's another way to add a report to a workspace. You can upload a Power BI report (.pbix file) directly to the workspace. This is useful if you have a report that was created in Power BI Desktop and you want to add it to the workspace without publishing it from Power BI Desktop. The following image shows the menu options.

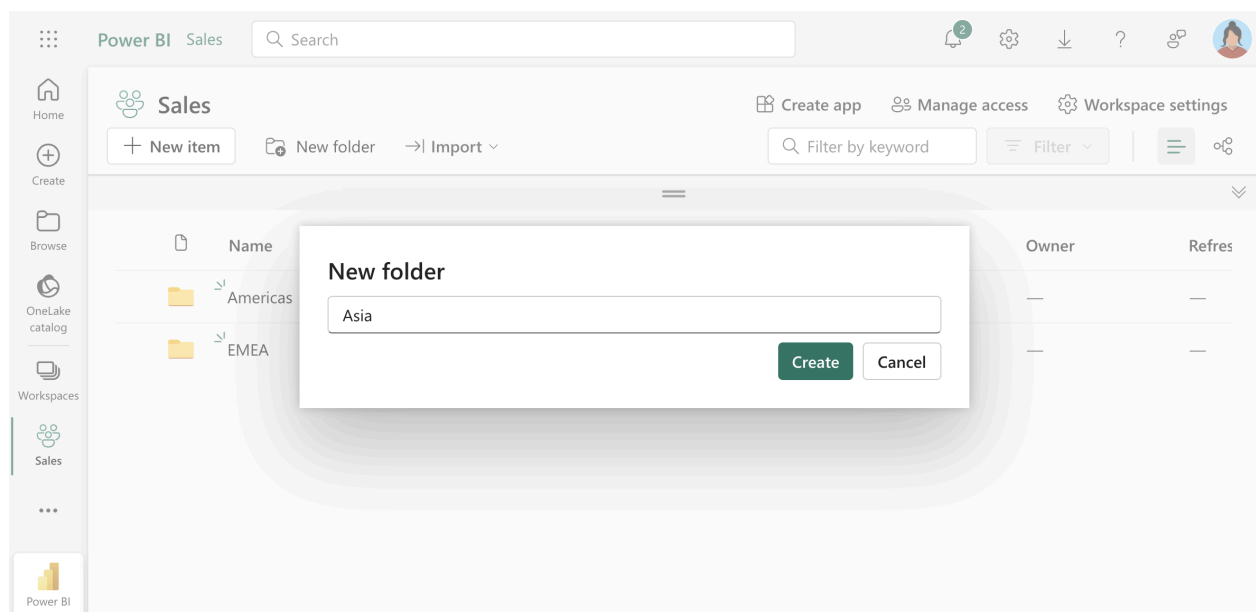


You can use the dropdown menu to connect to files stored in OneDrive for work or school or any SharePoint site to which you have access, or you can upload them from your computer through the Browse menu option.

If you use the OneDrive for work or school or SharePoint option, the Power BI service creates a connection to the file and as you make changes to the file in SharePoint, Power BI can automatically sync those changes approximately each hour.

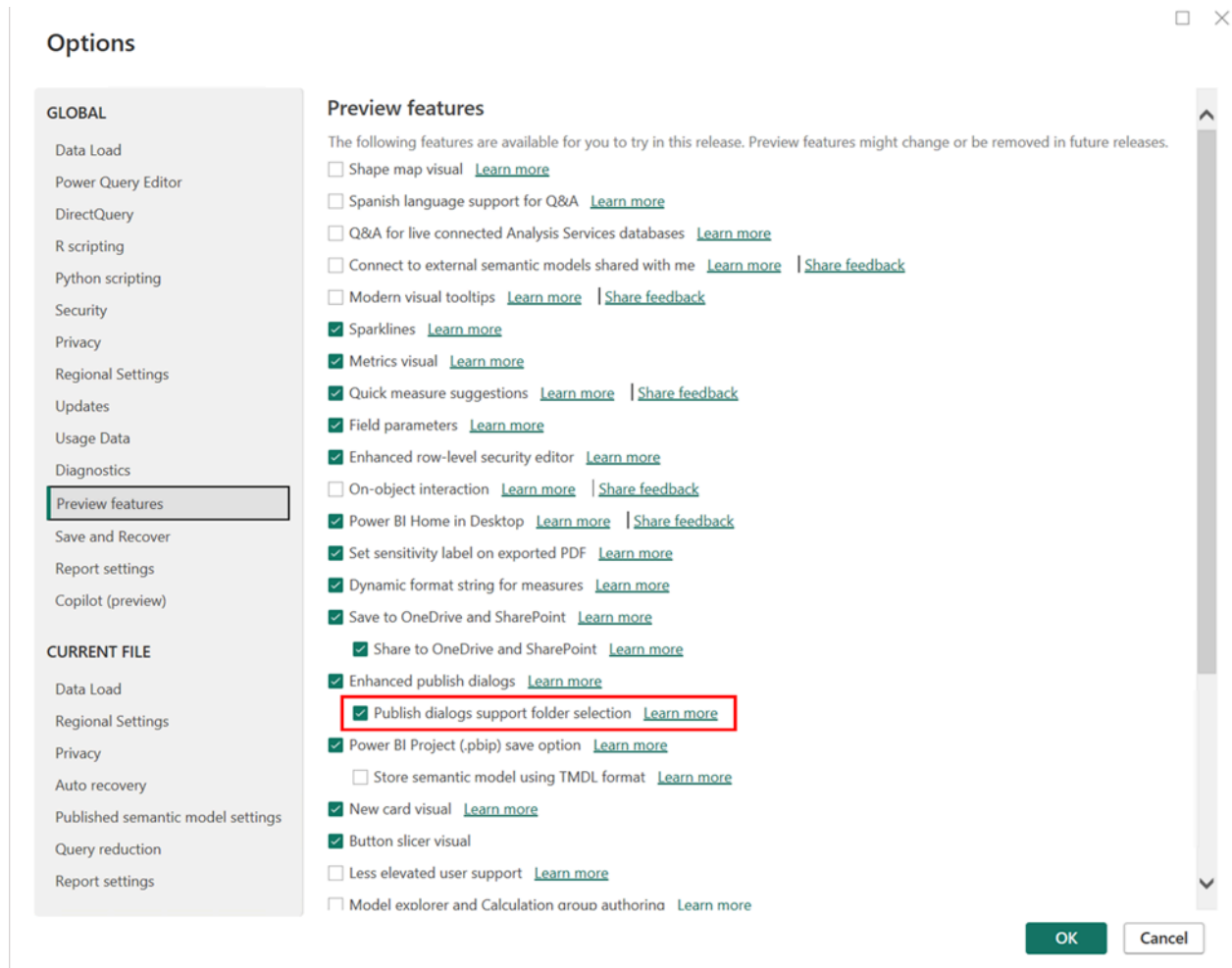
Organize items in folders (preview)

Folders are organizational units inside a workspace that enable users to efficiently organize and manage artifacts in the workspace. Select **New folder** and assign it a name.



You can create nested subfolders in a folder in the same way, up to 10 levels deep. You can also move a single or multiple items to folders and subfolders.

To publish reports from Power BI Desktop to specific folders in the service, make sure that the **Publish dialogs support folder selection** setting is enabled in the **Preview features** tab in the options menu.



5. Check your knowledge

<https://learn.microsoft.com/en-us/training/modules/manage-workspaces-power-bi-service/5-knowledge-check>

Check your knowledge

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6. Summary

Summary

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In this module, you learned about the **Power BI service** and how it enables seamless sharing and collaboration on reports, dashboards, and semantic models. You explored key components such as **workspaces**, where users organize and manage Power BI content, and **apps**, which provide a streamlined way to share multiple reports and dashboards with larger audiences.

Additionally, you learned how to **publish reports** from Power BI Desktop, manage **role-based access** to workspaces, and utilize **dashboards** for high-level insights.

Learn more

For more information about the topics discussed in this module, see:

- [Power BI service per-user and capacity-based licenses](#)
- [Workspaces in Power BI](#)
- [Roles in workspaces in Power BI](#)
- [Create folders in workspaces](#)