Power BI Governance

Assessment

infoavan

Content

1. Context

Whether a company has been using Power BI for some time or is just starting out, there can be many questions regarding organization, sharing, process standardization, governance, and licensing. Power BI offers a variety of features that allow companies to govern its elements according to their specific structures and needs.

2. Challenge

Adapting Power BI governance to a company's requirements demands close collaboration between Infoavan and the client. The main challenge is to understand the client's needs, leverage Power BI's functionalities, and guide clients through necessary changes to enhance their governance practices.

3. Scope and Goal

The project's objective is to evaluate the current state of Power BI governance and recommend best practices for governance, process standardization, and report dissemination. This includes focusing on organizational and departmental reports crucial to the corporate reporting process.

4. Activities

Kick-off Session

Objective: Introduce the project team, objectives, agenda, requirements, and work methodology.

Participants:

- **Client:** Product Owner, Key Users, IT
- **Infoavan:** BI Consultant

Duration: 1 hour

Initial Analysis

Steps:

1. **Documentation:** Send a questionnaire to evaluate current governance, process standardization, and report dissemination. The client has 1 week to respond.
2. **Discovery Session:** A 3-hour session to delve deeper into the questionnaire responses and identify key areas for improvement.

Participants:

- **Client:** Product Owner, Key Users, IT
- **Infoavan:** BI Consultant

Workshops

Five theoretical and practical sessions over 2 weeks, covering:

1. **Governance and Licensing:**
   - Roles and responsibilities of a Power BI Administrator.
   - Organizational structures in work areas.
   - Governance strategies and role responsibilities.
   - Comparison and application of Power BI licensing types.

   Duration: 2.5 hours

2. **Visual Standardization:**
   - Streamlining, standardizing, and simplifying corporate backgrounds and themes.
   - Use of PBIT report templates and parameterized reports for visual standardization.
   - Best practices for agile, understandable, and standardizable report design.

   Duration: 3 hours

3. **Corporate Datasets:**
   - Best practices for creating datasets, including data obtaining, transforming, and modeling.
   - Dataset governance configurations and permission levels.
   - Use of datasets across different work areas and promotion and certification functionalities.
   - Introduction to Power BI Dataflows.

   Duration: 3 hours

4. **Disseminating and Publishing Reports:**
   - Sharing and configuring reports within and outside the organization.
   - Work Areas configurations and roles.
   - Differences and use cases for Reports, Dashboards, and Power BI Apps.
   - Application of Row Level Security (dynamic and static).
   - External sharing options for Reports or Dashboards.

   Duration: 2 sessions of 2 hours each

Participants:

- **Client:** Product Owner, Key Users, IT
- **Infoavan:** BI Consultant

5. Report and Roadmap

Deliverables:

- A summary report of workshop functionalities and personalized recommendations.
- A clear, easy-to-understand roadmap outlining priorities, responsibilities, and objectives.
- A closing meeting to present the report, roadmap, and initiate the follow-up period.

Participants:

- **Client:** Product Owner, Key Users, IT
- **Infoavan:** BI Consultant

6. Client Responsibilities

- Complete the initial assessment.
- Provide necessary information for workshops.
- Participate in sessions.

7. Deliverables

- Project kick-off presentation.
- Workshop recordings and presentations.
- Summary report and conclusions.
- Action plan (Roadmap).

Total Duration: 4 weeks