

Building a Power BI solution that encourages self-serve report development

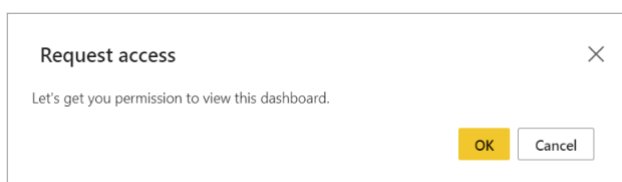
We spend a lot of time writing about developing organisational Governance and Best Practices. It is one thing to set up a successful community of Governance and install and deploy Power BI; it's a completely different thing to get report writers to actually use it. Ultimately, people are in control of their own choices, but there are ways to present Power BI and a dataset that encourages use. The information shared in this article intertwines the need for Governance and Best Practices with what really encourages users to dive into a self-serve Power BI solution. The goal of this article is to provide some ideas for Power BI developers to ensure their hard work does not go unnoticed nor unused.

The key items that seem to discourage use of a Self-Serve system:

- Lack of access or painful process
- Unable to recognise or find data
- Unknown where to begin
- Dataset has errors
- Dataset is stagnant or is limited

All of the above issues should be addressed at the beginning of the Data Needs Assessment and re-assessed throughout your organisations' data journey. As experienced implementers, we are always publishing articles about Governance and Best Practices not because we provide the services but because we have experienced highly successful implementations when these are indeed addressed.

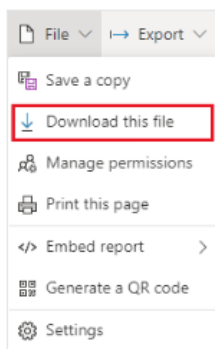
To prevent users facing a lack of access or painful process, it is important to refine the process users are required to employ to gain access. This should be part of the Governance and Best Practices from the beginning. Nothing frustrates a user more than being bounced from IT service desk to IT service desk looking for who's in charge of approving access, granting it and applying the license. It literally kills the enthusiasm of users when they are unable to access Power BI and their data. Direct users to the correct method for getting Power BI Desktop installed on their machine in accordance with your organisation's preferences. Leverage the in-built access request pathways within Power BI Service to keep the process intuitive to the user.



Ensure roles are used for granting access to Power BI and data sources so more than one individual can be notified when a user is requesting access. Refine estimates for the number of licenses required for your organisation so you stay ahead of demand. If you are purchasing your Power BI licenses from a 3rd party, ensure they will not be part of the delays in the process -- perhaps an SLA should be in place.

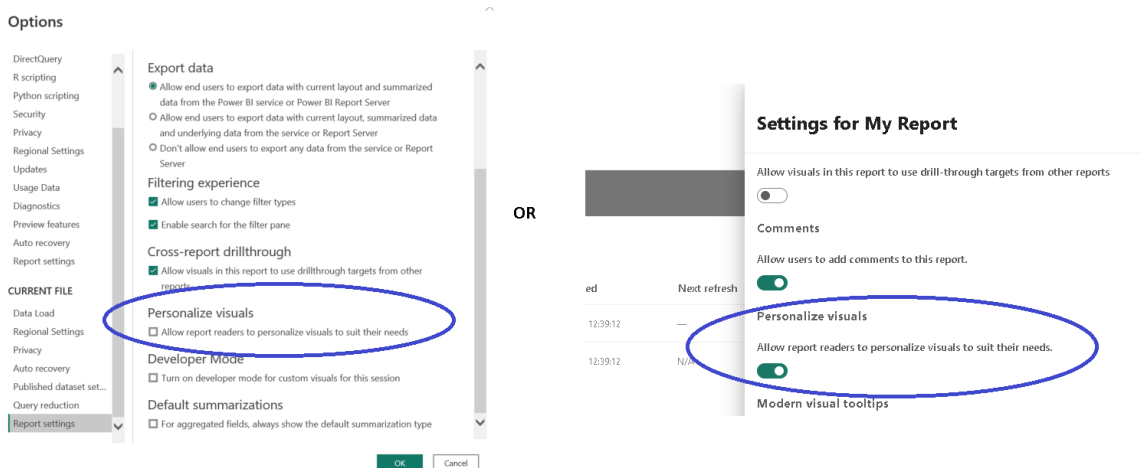
The solution for helping users recognise and find data in Power BI begins at the early stages of implementing a Self-Service solution. This is closely related to the Dataset development. It is critical to communicate with users and understand how the users work with the data, how they understand it and the labels they give to groups of data. Early in the development phases, a common tool for communicating with users is a Data Dictionary. The Data Dictionary should be a "living" document that is maintained for life. There are many ways to implement, so I will focus on the content the Data Dictionary should hold. The Data Dictionary should solidify the information that is necessary for the bulk of users, any calculations that need to be made and the labels for all fields. Then the organisation of folders, renaming fields (in compliance with the Data Dictionary) and creation of measures (based on the calculations agreed in the Data Dictionary) comes easily. Within that same document the fields that are readily available should be marked for a Phase 1 release with subsequent data marked for later phases, depending on complexity of obtaining them. Leveraging a document such as the Data Dictionary makes creating a centralised dataset more simple. Obtaining organisation agreement on what data is intended to represent is a large portion of the battle. It is time consuming and often frustrating, but many a successful deployment has taken the time to get this step right. Be careful the IT team does not develop a centralised dataset without input from the users that will consume the data. This is a collaborative effort so take the time to explain to users if the logic they have in mind is not possible in the model. Focus on why the data is needed and many ideas for surfacing the data will be available. Having a centralised dataset that the organisation agrees upon not only encourages self-serve reporting but has the added benefit of truly being the "one source of truth".

When presented with a Self-Service Power BI solution, some users will not intuitively know how to begin. One way to "whet their appetite" so-to-speak, is to publish basic reports to get them started. The basic reports should present data utilising the guidelines set forth in your organisations' Governance and Best Practices. Ensure the basic reports demonstrate the use of design principles, logos, themes, visualisation tips, standard footers, etc. Users will automatically emulate what they see and find to be a good presentation. By having basic reports available -- and available to be downloaded, users can then modify a copy of the basic report and enhance it to their own liking.

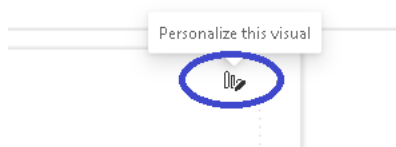


In addition to building the initial basic reports, there are ways to leverage in-built presentation tools in Power BI service as well. Changes made while presenting the report in the service layer do not

change the core PBIX file but change the user's VIEW of the file. Enabling the Personalize option in published visuals, either in Power BI Desktop Options or in Power BI Service Report Settings allow users to modify something slightly or completely change the presentation of the report -- all within the safe boundaries of Power BI service.

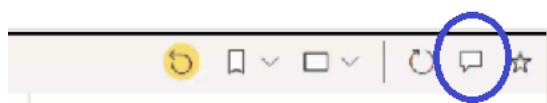


Within your organisations Governance community, offer courses on how to perform these **Personalize** tasks to modify the appearance of reports within Power BI Service. It is a great stepping-stone into report development without the burden of learning the depths of Power BI report development.



Building a centralised dataset is not an instant, one-off occurrence. It comes about by repeated cycles of feedback, development, update, and deployment. Do not release a Dataset until it holds a reasonable amount of data and be sure each field and measure is validated. In the beginning, users will not be adept at exporting and adding their own information into their own dataset, so it is advantageous to wait until much of the organisation's data is represented. The more available data there is to offer, the better the buy-in from users. Further to validating the fields, ensure no errors are occurring in the dataset's tables and measures prior to publication. It is discouraging to open a dataset for the first time to see errors.

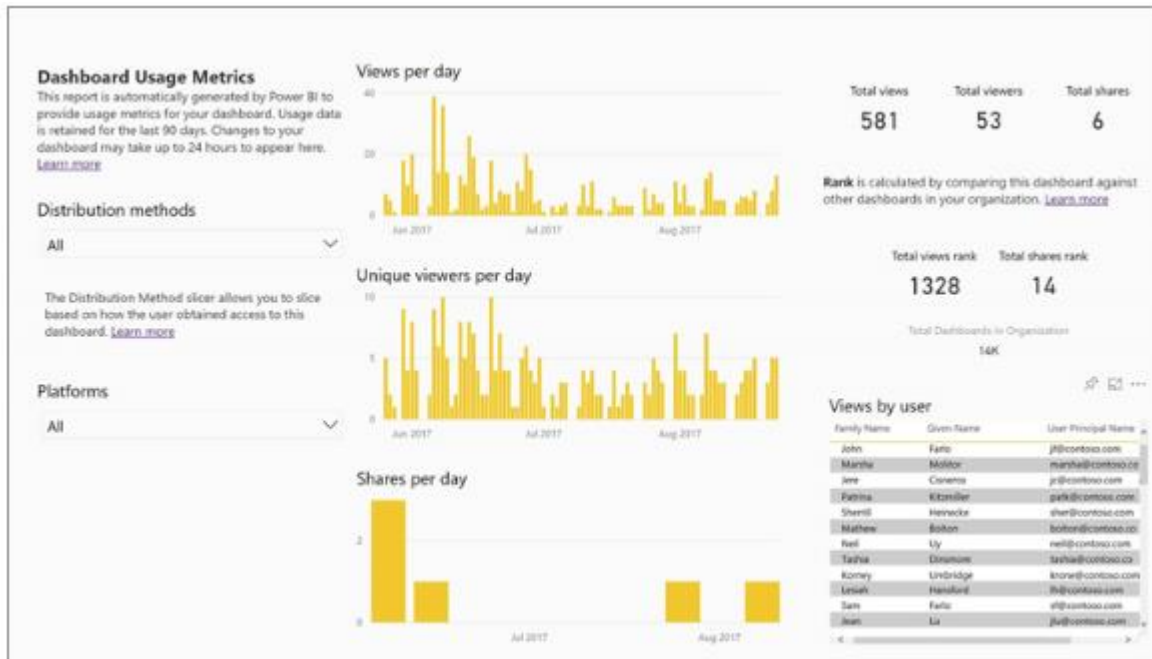
Finally, a good Power BI Dataset for self-serve report development is always improving. Be sure to keep the feedback lanes open by leveraging the in-built Comment feature in Power BI.



Ensure this Comment feature is clearly explained and advertised within your organisational Governance and Best Practices community. Allow users to report the questions they cannot answer and formulate a plan to improve the dataset. A good way to improve the dataset is to collect

feedback from users who are often combining the data from the mature/stable dataset with other data sources they access.

Also, monitor and analyse the usage data in-built into Power BI to understand which reports get the most traffic and prompt users to explain why they use it.



Above all else, prioritise enhancement of the dataset. Do not let it stagnate. The dataset is an investment into keeping the data of the organisation relevant. Organisations evolve. The dataset should also. Plan in regular releases of Dataset enhancements driven by user inquiry and feedback.

If your business needs help with building a Power BI solution that encourages self-serve report development, contact a Fujitsu Data & AI specialist now.

Contact

Fujitsu Data & AI
 +61 3 9924 3000