Microsoft's Power BI Workspace:

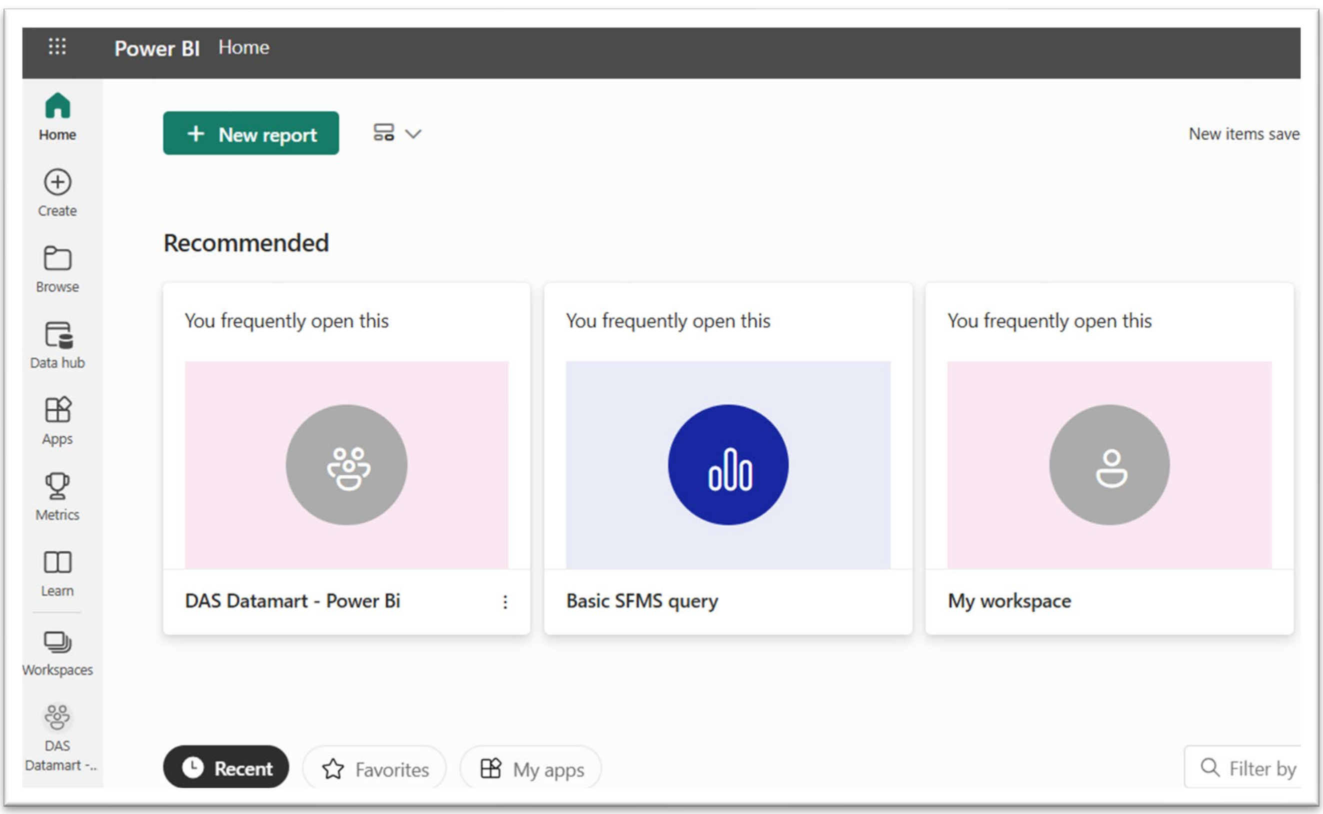
Background:
This document provides detailed information about using **Microsoft Workspace** with **Power BI Desktop**. The **Department of Administrative Services (DAS) Datamart team** will use Microsoft Workspace as a central hub for sharing **Power BI Desktop - Datamart Repository** files.

The **DAS Datamart Repository** contains frequently used query and report template files that are widely utilized by employees across the state.

To ensure better performance, the **DAS Tech Support team** recommends that users **download files to their local desktops** rather than working directly within the Workspace, due to limited online computing capacity.

If you are having issues with the Workspace, please contact: Datamart.Support@das.oregon.gov.

Workspace URL: https://app.powerbigov.us/home



How to apply for access to the DAS Datamart Workspace:

To request security access to the **DAS Datamart - Power BI - Workspace**, please contact the Datamart support team at Datamart.Support@das.oregon.gov.

The Datamart support admin team will add the user's email address to the Workspace and assign them an appropriate access level. Power BI workspaces support three roles: **Member**, **Contributor**, and **Viewer**.

Here's what each role allows:

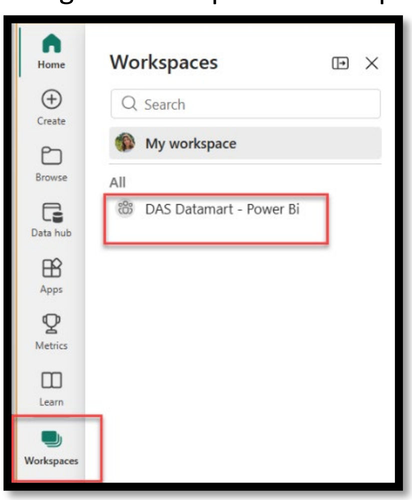
Role	Permissions
Viewer	Read-only access — can view and interact with dashboards and reports within the Workspace. Cannot edit content or add users.
Contributor	Can create, edit, delete, copy, download and publish content and reports in the Workspace; cannot add or remove users, and cannot change role permissions.
Member	Has all Contributor permissions, plus the ability to add users with lower roles (Viewer, Contributor), share content, and publish/unpublish Workspace Apps. Cannot remove users from the Workspace or assign someone to be an Admin unless permitted

Datamart support will, by default, assign new users to the **Contributor** role. This grants them several capabilities, the primary one being the ability to download files. While the Contributor role also allows editing, we ask that users *do not alter files directly on the Workspace site*. Instead, please download to your network drives, make any necessary changes, and use them as appropriate.

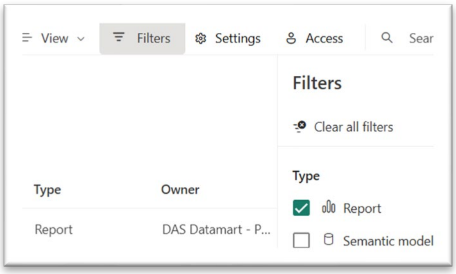
How to work with the Repository files on the DAS Datamart Workspace:

After you've been granted access to the **DAS Datamart Workspace**, follow these steps:

1. Open your internet browser and go to the Power BI home page: https://app.powerbigov.us/home
2. Click the **Workspaces** tab in the left navigation, then select **DAS Datamart – Power BI** from the list.
    - If you don't see the workspace listed, contact your agency's tech support—there may be a configuration or permission update needed on your end.

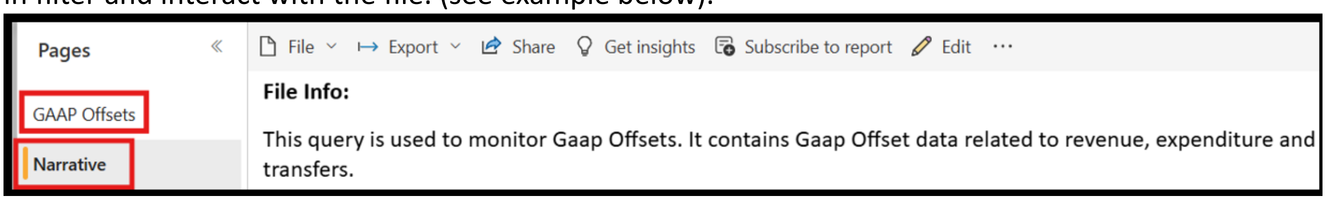


3. Once inside the workspace, you'll see the current Repository files available.
4. To make it easier to find the files you need, adjust the view using the **Filters** option:
    - Click on the filters drop-down menu.
    - Uncheck or hide types that are unnecessary (e.g. "Semantic model," "Other").
    - Next, select the **Report** option, so only report files are shown.

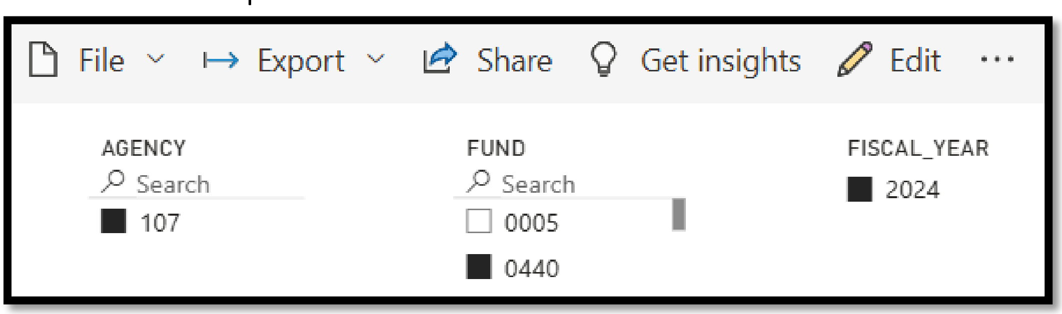


File View:
To view a file in full detail, click the file's name. There will be multiple tabs available on each file. The recommended initial info to review is the **Narrative tab**. This will provide an explanation of the file along with additional details on how the file should be used. It is of vital importance to understand how each file operates. After reviewing the narrative tab, you can open the **Report** tab or tabs within the **Pages** display. These tabs will display the extracted data and will reflect the state of the file at the time it was uploaded to the Workspace.

Note: Users should ***not*** refresh data on the service/website (per DAS tech support request). However, you can still interact with the original loaded data within the file. Start by clicking on a report tab that contains a built-in filter and interact with the file. (see example below).



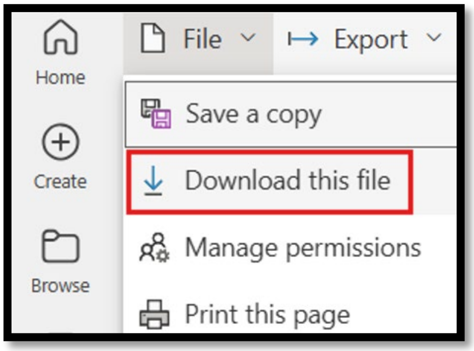
Built-in filters example:



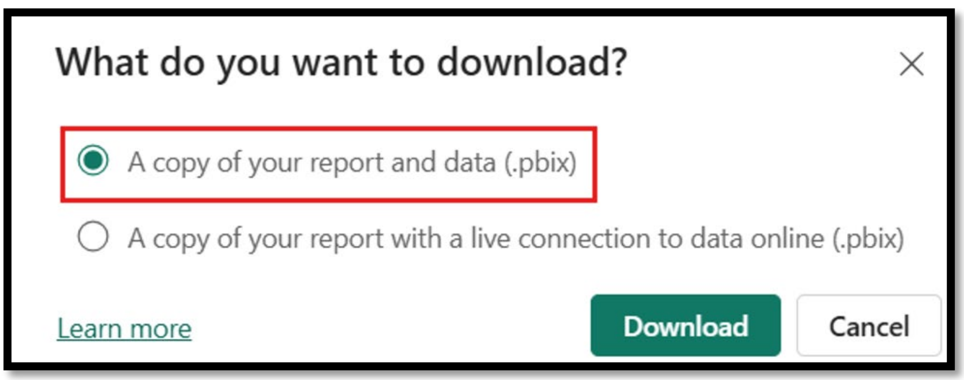
Download File:
Once you've chosen the file you want to download:
1. Click the file name to open it in **Report view**.
2. In the report section, go to the top menu bar and select **File → Download this file**.

Prerequisites & Limitations:

- You must have **Contributor** permissions in the workspace to see the “Download this file” option.
- The report must have been created using **Power BI Desktop** (or uploaded as a .pbix) or published from Desktop. Reports created entirely in the Power BI service may **not** allow download.
- Some reports might not be downloadable due to settings like **incremental refresh**, using large semantic models, or other restrictions.

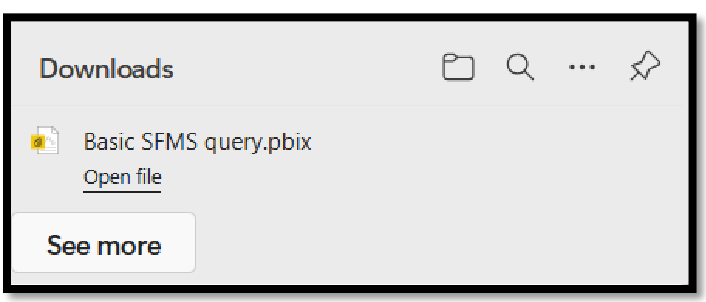


After selecting to download the file, a pop-up window will display, select the ‘**A copy of your report and data (.pbix)**’ option as shown below:



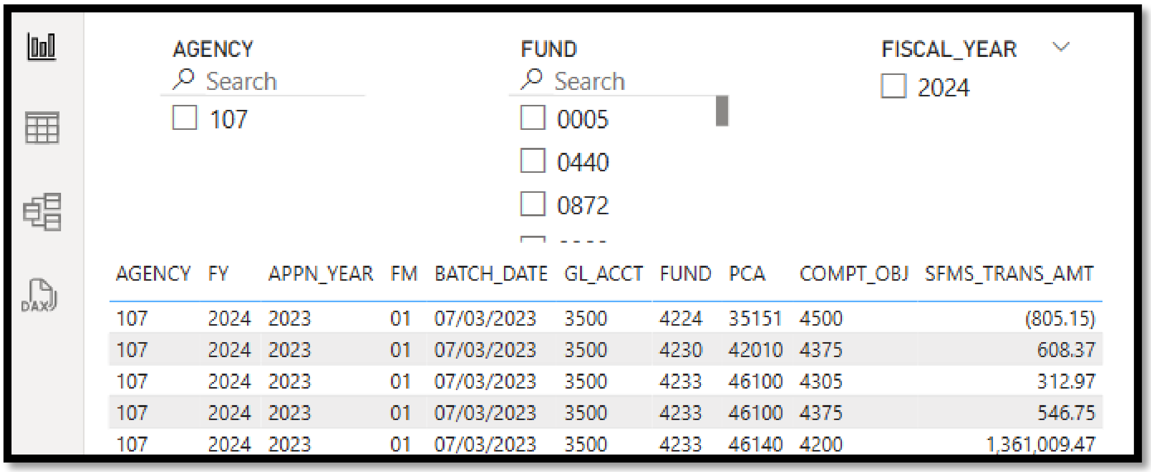
Once the file download is complete, open in Power BI Desktop.

Example: Microsoft Edge: Download view:



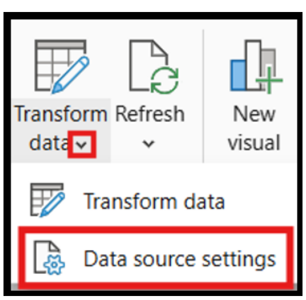
Note: Files are downloaded with all Power BI views present (Model, Table, and Report).

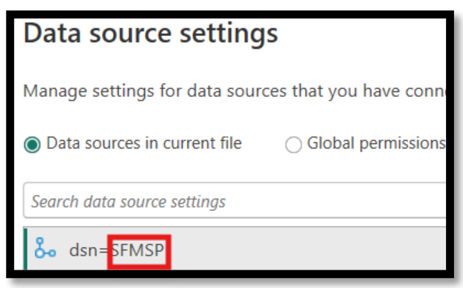
Example downloaded file: Report view:



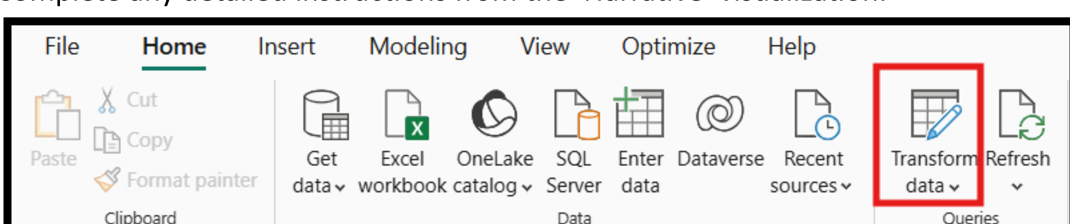
After Download:
Once the file download is complete, verify the files report **Narrative** and follow the instructions within.

1. Open the file in Power BI Desktop.
2. Click on the **Report View** tab. Find and read the **Narrative** visualization tab. This will help describe what the file is about and provide various instructions on how to update it.
3. Review the **Data source settings** included in the document and update as necessary.
   Users must ensure their security access to the repository file is current. You may need to update your Datamart RACF security credentials by editing permissions to obtain full access to the data.

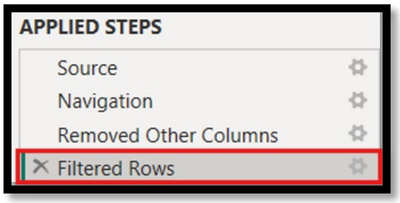


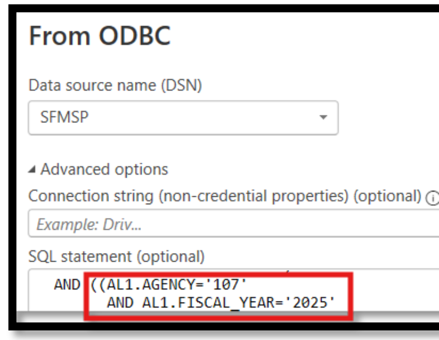


4. Move to the **Transform data** section by clicking the button on the menu ribbon.
   - Complete any detailed instructions from the 'Narrative' visualization.



5. Review the **Applied steps** section of each table to find the filtered data and chosen fields. Update as instructed or desired. The information could include basic, advanced or SQL filter options.

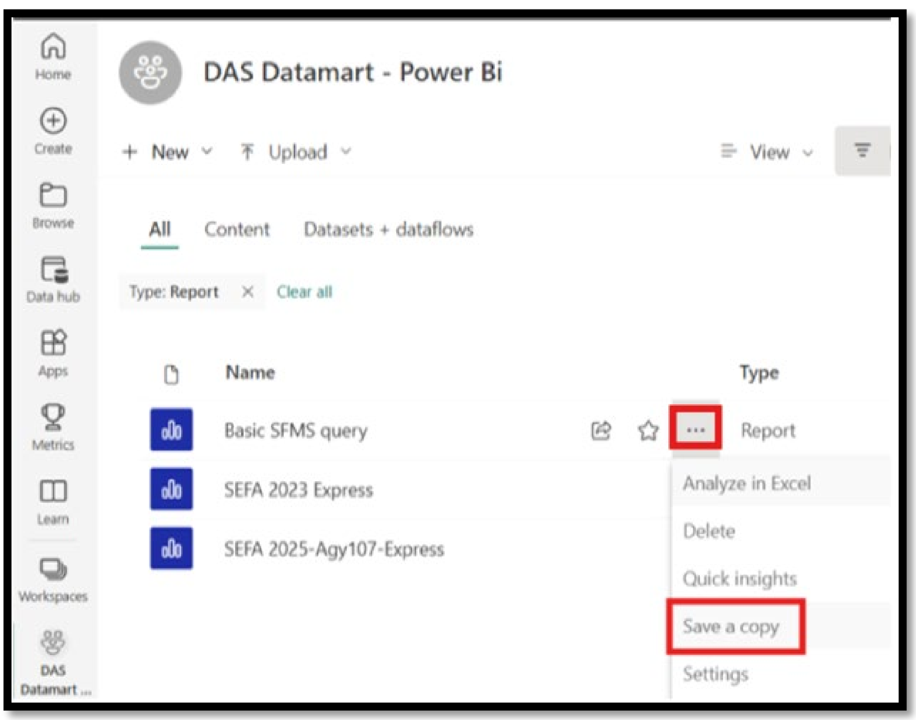




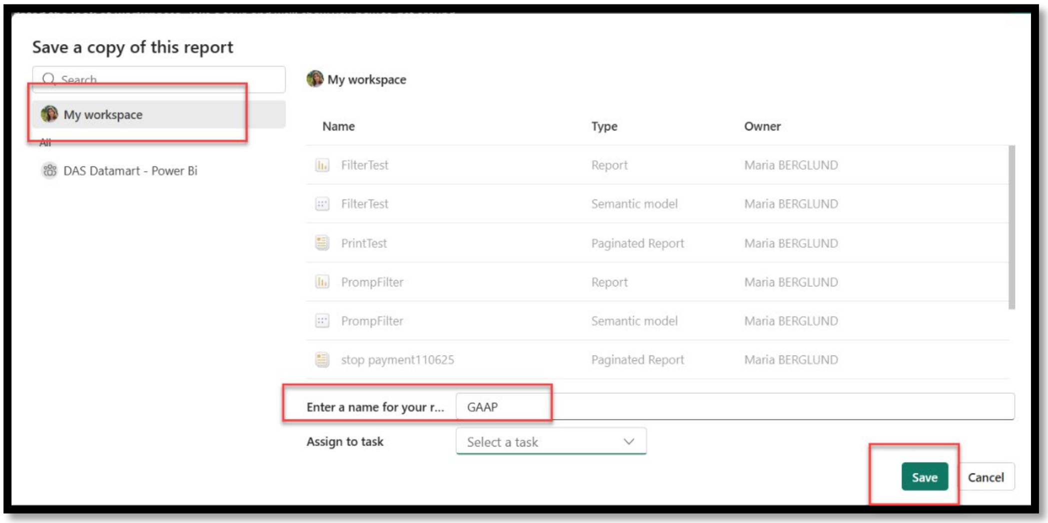
6. Once the review and updates are complete, **Close and Apply**.

Alternative Option: Save a Copy of a Report to Another Workspace

1. Find the report you want to copy in its current workspace and hover over its name.
   - Click the **ellipsis (…)** option menu that appears.



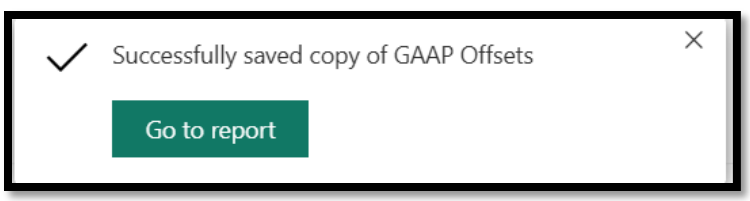
2. Select **“Save a copy”**. A dialog window titled *Save a copy of this report* will open.



- In the dialog, you can:
    1. Enter a **new name** for the report, and
    2. Choose a **destination workspace**
        1. Only workspaces where you are a member will appear.

3. **Optional**: Add a sensitivity label as desired. DAS Datamart data is level 2, which means it is public information.

4. Click **Save**. Power BI will create a copy of the report in the selected workspace. The copied report will still refer to the same semantic model as the original.



Agency: Workspace Creation:
If you would like to create your own agency Workspace, please contact your agency's tech support department. The Datamart team will only provide support for the internal DAS Datamart Workspace.

Why create an agency **Workspace**? This is useful when you need a controlled, collaborative environment for building, managing, and distributing analytics—especially in scenarios where multiple people or teams work together on shared content.

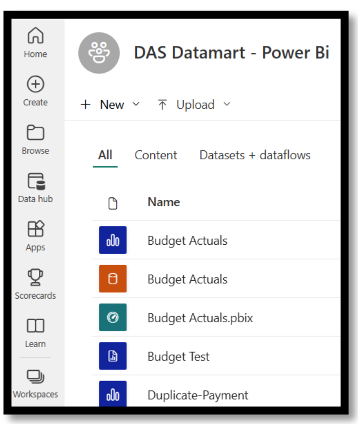
- A collaboration hub for sharing reports to specific users.
- The ability to schedule automatic file refreshes and keep data up to date.
- Role-based access control.

If your agency does not have a Workspace, have your agency technicians submit an **Ivanti ticket** to DAS EIS.

When a new agency Workspace environment is created, an administrator must be designated to manage and organize its users. Administrators can add a user to the Workspace via the instructions listed above.

Once the Workspace is ready, you can upload Power BI Desktop files.

A. **Publish a file** to Your Workspace.
   1. Use **Power BI Desktop** to create your query/report file.
   2. **Save** the file within your local network.
   3. Select **Publish** from the **Home** menu within Power BI Desktop.
      A. It will upload the **Semantic model** and **Report** separately within the Workspace.
   4. Go to your Power BI Workspace (https://app.powerbigov.us) to view the file.
      A. The file name with a **blue chart icon** represents the **report**.
      B. The file name with an **orange icon** represents the **semantic model**.



B. Setting up a Workspace file refresh: **Data Gateway** connection

   To enable automatic refresh for a file in your Power BI Workspace, you must first have a **Data Gateway** connection. The gateway allows Power BI to access and refresh your data sources; without it, your reports will not update and will remain static.

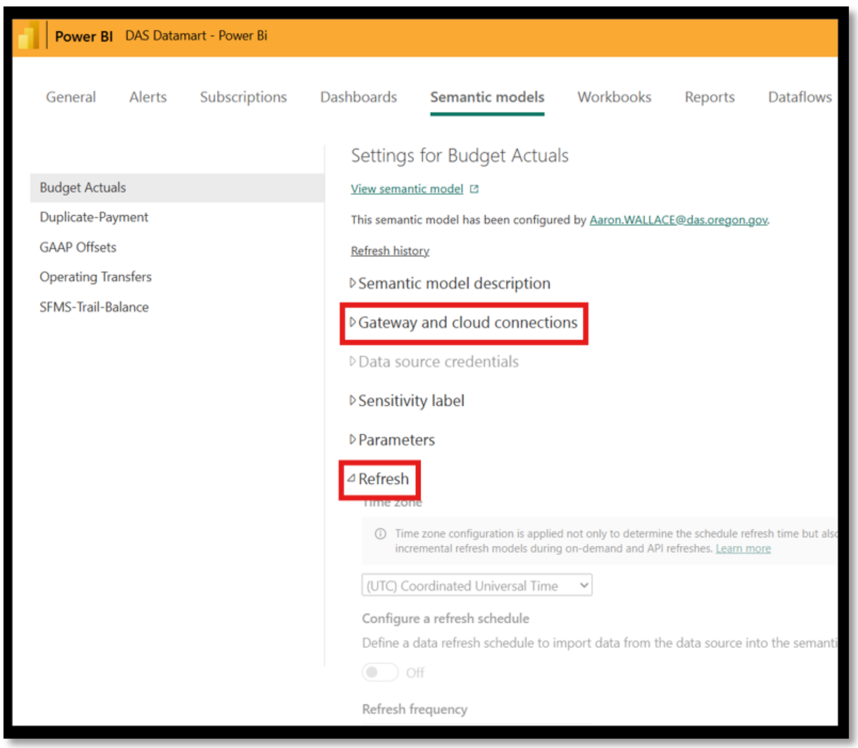
   If your agency does not currently have a Data Gateway, ask your agency technician to submit an Ivanti ticket to DAS EIS. Their team will provision a new Data Gateway server for your agency.

Agencies with a Gateway (Through February 2026): DAS, DELC, DEQ, DHS-OHA, DOC, DOR, DSL, EIS, HECC, ODE, ODOT, OLCC, OPRD, OSFM, OSP, OYA, & PERS.

Users must work with their agency's **Power Platform or Power BI administrator** to add the Datamart as a new source connection within the agency's Data Gateway.

After the connection is created, the report owner who published the report to the Workspace must ensure the **Power BI Administrator** adds them as a user to the ODBC (SFMSP) connection in the agency's Data Gateway.

Within the **site settings and semantic models** section, the configuration for the Gateway connection is set under the **Gateway and Cloud connections** area.

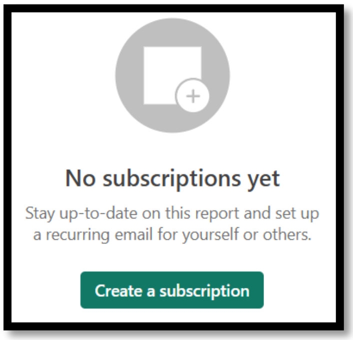


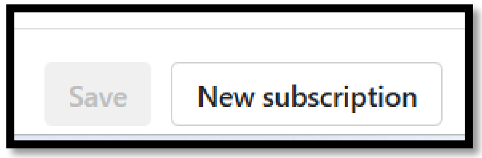
Once this setup is complete, the report owner can expand the **Refresh** settings and configure the refresh schedule. This determines when and how often the report pulls in new data.

C. **Schedule a file to Auto Run**

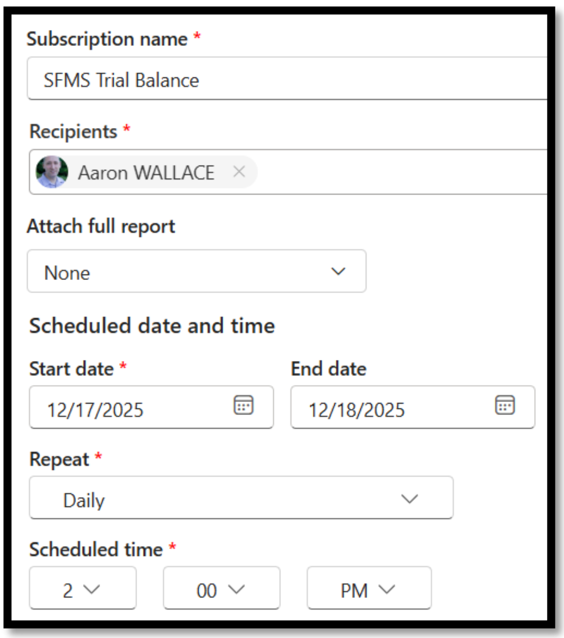
1. Click on the **Report** file name (blue chart icon) within the Workspace.
2. Select the **Subscribe to Report** option.

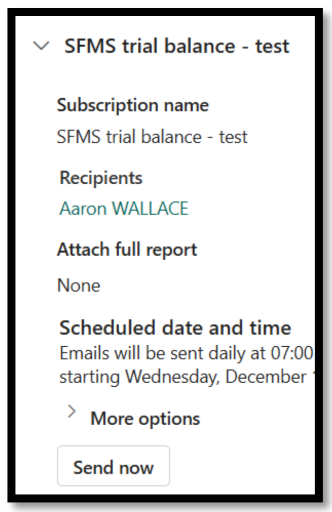
3. Select: **Create a Subscription** (only first time).
   A. Click **New Subscription** (after the first time)





4. Set the **Recipients**, **date range** and **time** for the auto-run schedule.





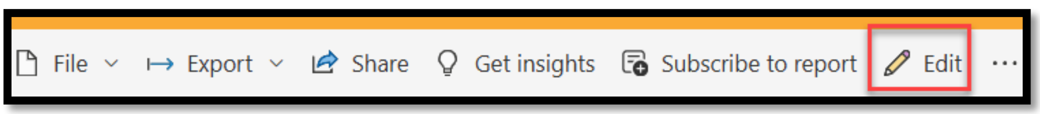
   A. Select **Frequency: Daily or Weekly**
   B. Select **Scheduled time** refresh.
   C. Click **Save.**

5. Once the report is created and saved.
   A. If desired, click **Send now** within the Subscriptions section to provide the data right away.
   B. **Edit** the subscription by clicking the pencil icon to the right of the subscription name.

D. **Share a Report**
1. Click on the **Report** file name (blue chart icon) within the Workspace.
2. Click **Share** from the toolbar.

3. Enter the **email addresses** of the recipients.
    - Optional: Add a message
4. Click **Send**.
    a. A link to the Report within the Workspace, will arrive in the user's inbox.
    b. The user must have access to the Workspace to view the link.

E. **Edit the Report**
1. Click on the **Report** file name (blue chart icon) within the Workspace.
2. Click **Edit** on the toolbar.



3. Once editing is complete, select the **File** drop-down and **Save**.
    a. Online editing features are **limited** and may be **slow**.
    b. It is recommended to edit files within the Power BI Desktop application, due to limited features.

F. **Export File:**
1. Click on the **Report** file name (blue chart icon) within the Workspace.
2. Select the **Export** drop-down and select **Analyze in Excel, PowerPoint** or **PDF**.
    a. If **Analyze in Excel** is selected:
        - A Pivot Table with the Data Model info will be exported into Excel.
    b. If **PowerPoint** is selected:
        - Displays each report page within the file as a page in PowerPoint.
        - It creates a one-page **snapshot** of all the reports.
    c. If **PDF** is selected:
        - Power BI creates a **static snapshot** of all the reports **at that moment**.
        - It doesn't convert multi-page reports into a multi-page PDF, it only exports the first page.
        - The PDF contains the **current data, filters,** and **slicers.**

Note: Each export option has its limitations. For the best functionality and flexibility, it's recommended to create the query directly in Excel.