


Power BI | How to Series

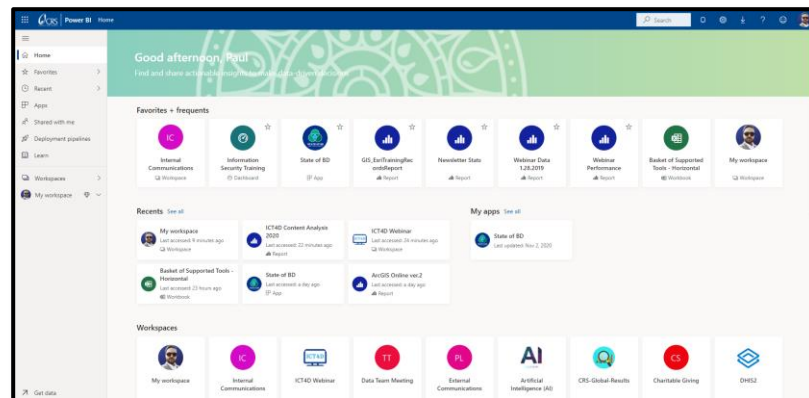
SHARING PUBLISHED POWER BI REPORTS AND DASHBOARDS WITH PARTNERS

Updated 11/20/2020

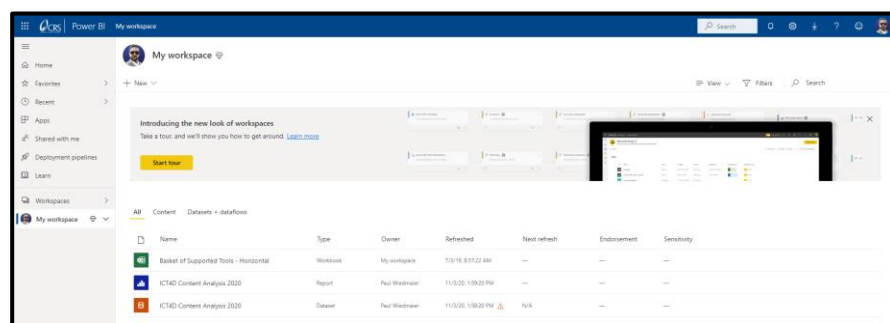
IMPORTANT:

- To be able to share, you need to have a **Power BI Pro** license.
- The people who consume the items that you share with them will either need their own Power BI Pro license or what you share will have to be shared under a Premium licensing environment.
 - The examples that I show below are from a Premium licensing environment. As you can see by the .
- We recommend taking this LinkedIn Learning course on [Sharing Data with Colleagues and Others](#) (Chapter 7).

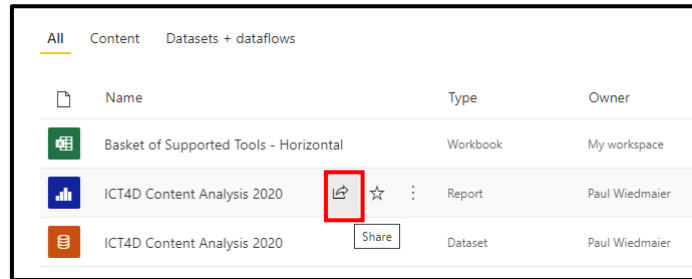
STEP 1) Navigate to Power BI Online through your CRS Microsoft Office 365 Account.



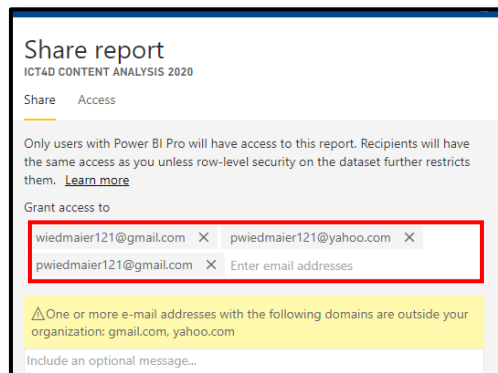
STEP 2) Navigate to the Workspace where a report or dashboard that you would like to share with a partner is. **NOTE:** You must be designated as the owner of the report or dashboard if you would like to share it.



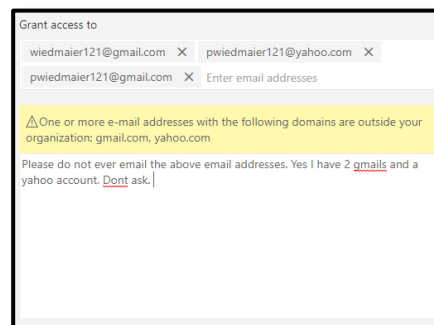
STEP 3) Hover your cursor over the report or dashboard and click the share icon.



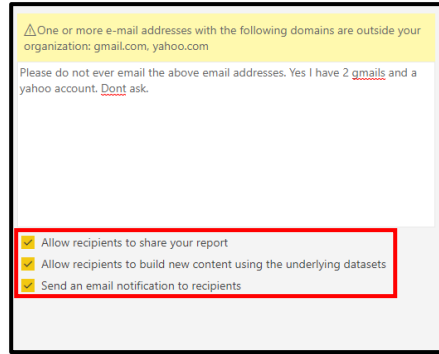
STEP 4) The Share report side pop-out menu will appear after you have clicked share. Type the email address(es) of the partner staff member(s) that you would like to share the report or dashboard with.



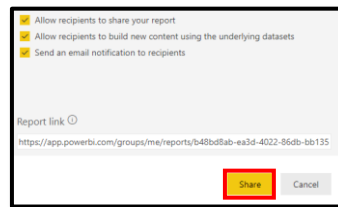
STEP 5) Enter an **optional** message for the partners to receive once you share the report with them.



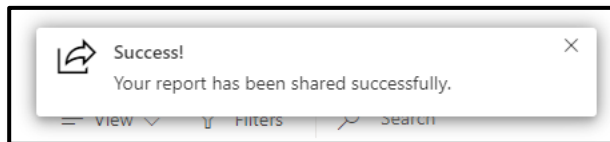
STEP 6) If you do not wish to allow recipients to share your report after you have shared it with them, uncheck the first box. If you do not want to allow recipients to build new content using your underlying datasets, uncheck the second box. **NOTE: All three boxes will be checked by default. You can revoke access to do those things later as well. WE STRONGLY RECOMMEND NOT ALLOWING EXTERNAL STAFF RESHARE REPORTS OR BUILD NEW CONTENT UNLESS IT IS NECESSARY.**



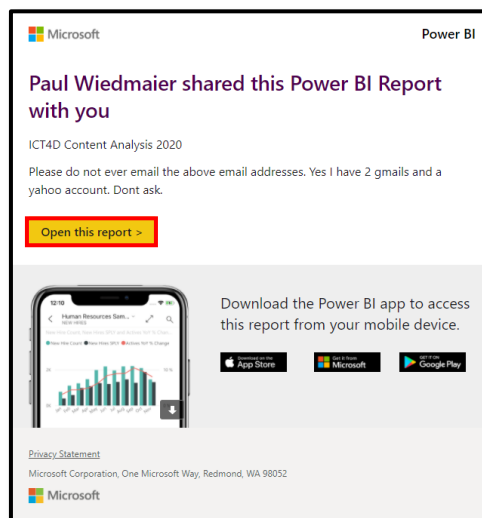
STEP 7) Click share.



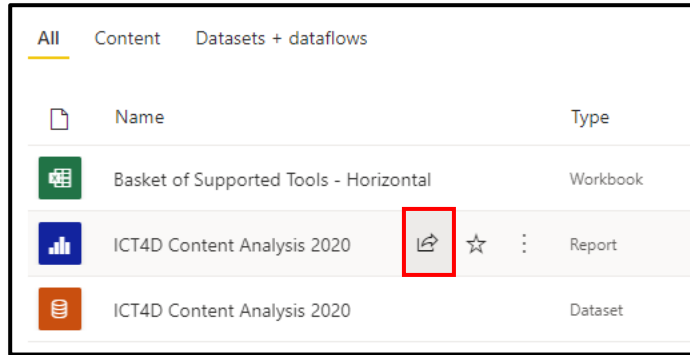
STEP 8) You will get a notification that looks like the below indicating that you have successfully shared the report or dashboard.



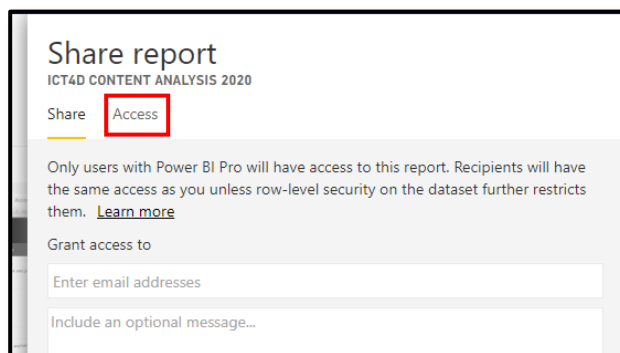
STEP 9) The partner staff that you shared the report or dashboard with will receive an email that looks like the below screenshot. They will need to click “Open this report >” and either sign in or create a Microsoft account.



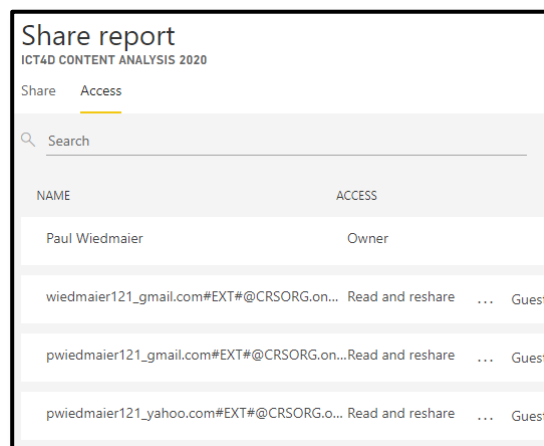
STEP 10) To view and/or revoke access to those you have shared a report or dashboard with, click the share button again.



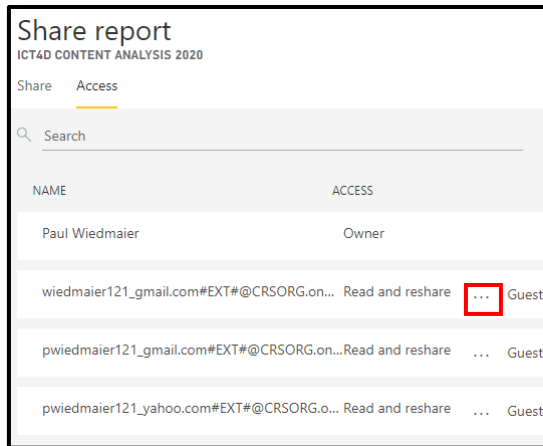
STEP 11) The Share report window will reappear to the right of the screen. Click “Access”.



STEP 12) The Access tab will tell you who you have granted access to and what type of access they have.



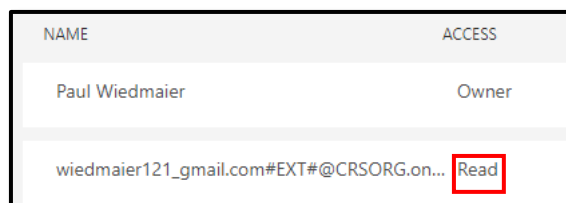
STEP 13) To edit or remove access from certain people, click the ellipsis (...) next to their current access level.



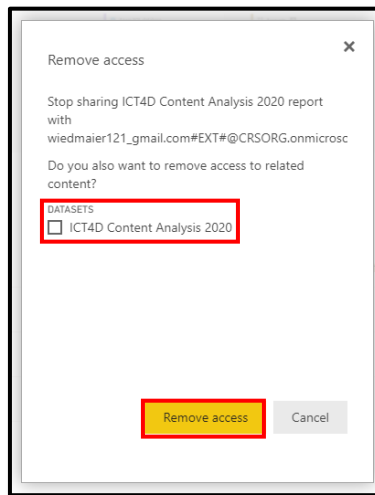
STEP 14) Once you click the ellipsis, a drop-down menu will appear. If you click “Read” it will grant them Read-only access. If you click “Read and Reshare” it will grant them access to Read and Reshare the report or dashboard you have sent them. If you click “Remove Access” they will no longer have access to the report.



STEP 15) For example, if you click Read, now under the access column, it will only say Read next to the email that you changed access for.



STEP 16) If you click “Remove access”, a pop-up window appears. If you want to also remove their access to the data set, check the box as seen below, then click Remove access.



STEP 17) You will know you have successfully removed the user's access when they no longer appear on the Access list to the right.

NAME	ACCESS
Paul Wiedmaier	Owner