

3. User types

As mentioned earlier, the use of Power BI encompasses various roles determined by user capabilities and access levels. This chapter explores the specifics of these roles, playing a pivotal role in efficient data management and utilization.

At SOLVAY Power BI users are categorized into two distinct types:



Every role within the Power BI ecosystem comes with distinct responsibilities and access rights, specifically designed to address the varied requirements of the team members and align with the organization's overarching data strategy. A comprehensive understanding of these roles is crucial to ensuring that the team members have the necessary tools and permissions for effective task performance.

In the following sections, each role will be detailed, highlighting their functions, and outlining the scenarios where they prove to be most advantageous.

3.1. Report Viewers

In the Power BI ecosystem at SOLVAY, Report Viewer serve as end-users with the main responsibility of consuming and engaging with shared reports and dashboards. Their primary function is to leverage the insights provided, helping them in their work or decision-making processes. Can filter and drill down into reports to conduct more in-depth analyses, however, they lack the authority to modify the underlying data or alter the structure of reports. This role is specifically designed for team members who need to stay well-informed about metrics and trends relevant to their work areas, without the necessity for advanced data manipulation capabilities.

Report Viewers primarily **consume reports through Power BI Service and Power BI Mobile**, focusing solely on consumption rather than report development. The necessity for installing the Power BI Desktop application is absent, as this role centers on viewing and analyzing shared content on these platforms. These interfaces are designed for convenient access and interaction, offering a tailored experience.

Report Viewers need Premium license to access to shared content is contingent upon the reports being hosted in a **Premium Workspace**.

3.2. Content Creators

To qualify as **Content Creator**, is recommended to undergo a training and demonstrate a commitment to adhering to organization rules and data governance standards. This rigorous process ensures that **Premium per user (PPU) Licenses** are awarded only to individuals with the requisite technical expertise and a strong dedication to maintaining best practices in data management.

PPU License holders gain access to advanced capabilities, including the ability to:

- Manage and leverage Premium features such as paginated reports and larger dataset support.
- Collaborate on highly scalable datasets with enhanced performance for complex analytics.

By acquiring a **PPU License**, you can take full advantage of Power BI's advanced functionalities, foster cross-departmental collaboration, and drive data-driven decision-making across the organization.

3.3. Report Viewers vs Content Creators

The different roles have different permissions to work within Power BI Desktop, Service and Mobile.

	PowerBI Desktop	PowerBI Service	PowerBI Mobile
Content Creator	Can utilize all PBI Desktop features, but also has the permission to publish into other workspaces.	Provide all the features of Power BI PPU, including sharing and collaborating within shared workspaces.	Provide all advanced analytics and data visualization capabilities, enabling users to create, share, and collaborate.

Report Viewer	-	Can view and interact with reports with shared workspaces.	You can view and interact with reports in your personal workspace via PowerBI mobile
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Both roles require a license to access Power BI, but they differ in their purpose and functionality:

Actions expected as	Report Viewers	Content Creators
Access Reports/Dashboards	Yes	Yes
Interact with Reports	Yes	Yes
Create Reports	No	Yes
Create Datasets	No	Yes
Create Dashboards	No	Yes
Create & Edit Workspaces	No	Yes
Create and Share Apps	No	Yes
View Shared Content	Yes	Yes
Data Modeling (e.g., relationships)	No	Yes
Publish to Power BI Service	No	Yes
Export to Excel/PDF/PowerPoint	Yes (depending on permissions)	Yes
Share Reports/Dashboards	No	Yes
Set Row-Level Security (RLS)	No	Yes
Schedule Data Refresh	No	Yes (with appropriate permissions)
Use Power Query Editor	No	Yes
Publish Apps to Workspaces	No	Yes

3.4. Role types and main differences

Furthermore, this document will incorporate highlights and insights to clarify the distinct roles within Power BI at SOLVAY. This includes outlining the additional capabilities and responsibilities associated with a Premium License.

The goal is to provide a clear and comprehensive understanding of what each role accounts for, helping the team members navigate their roles and responsibilities effectively within the Power BI ecosystem.

General - Power BI Desktop	With Free License	With Premium License
General		
Licenses Type	Free	PPU
Request to add Workspace to Premium	-	X
Power BI Desktop		
Installation of Power BI Desktop.	X	X
Create Reports: Can create and design reports.	X	X
Create Bookmarks: To quickly navigate through different views of the report, when published on Power BI Service.	X	X
Publish Reports: Can publish reports to the Power BI Service.	My workspace	All workspaces (with right permissions)

POWER BI Service (1/3)	With Free License	With Premium License
Basic Interactions		
View Reports and Dashboards: Can access and view published reports and dashboards.	My workspace	All workspaces (with right permissions)
Interact with Reports: Use filters, and slicers, explore data in detail with drill-down and drill-through.	My workspace	All workspaces (with right permissions)
Edit Reports and Dashboards: Can create new reports and edit existing ones in workspaces.	My workspace	All workspaces (with right permissions)
Comments and Collaboration		
Add Comments: Post comments on reports (visual or page) and dashboards for collaborative communication.	-	X
View Comments: Read comments added by others for insights and discussions.	-	X
Bookmarks		
Use Bookmarks: If the report creator has set up bookmarks, viewers can use these to quickly navigate through different views of the report.	My workspace	All workspaces (with right permissions)
Personal Bookmarks: Create personal bookmarks to save a specific view of the report for later reference.	My workspace	All workspaces (with right permissions)
Alerts and Notifications		
Receive Alerts and Notifications: Receive alerts based on data changes post-refresh.	-	X
Set Alerts: Depending on permissions, set data-driven alerts.	-	X

POWER BI Service (2/3)	With Free License	With Premium License
Subscriptions		
Subscribe and Receive Updates: Set up subscriptions to receive regular email updates with snapshots of reports or dashboards, subject to permissions.	-	X
Subscribe Others: Create a subscription that includes others.	-	X
Reports and Dashboard - Exporting and Sharing		
Export Data: Depending on permissions, can export data from visuals in reports to Excel or CSV formats.	My workspace	All workspaces (with right permissions)
Print Reports: Print report pages directly from the Power BI Service.	My workspace	All workspaces (with right permissions)
Share and Collaborate: Share reports with other users.	-	X
Refresh		
Manual Dataset Refresh: Depending on permissions, can trigger manual dataset refreshes.	My workspace	All workspaces (with right permissions)
Scheduled Refreshes: Depending on permissions, can schedule refreshes for datasets.	-	X

POWER BI Service (3/3)	With Free License	With Premium License
Workspace		

Workspace Access: Can access reports in the workspace.	My workspace	All workspaces (with right permissions)
Create and Manage Workspaces: Can create new workspaces and manage workspace settings, including adding and removing members with a Premium License.	-	X
Share and Collaborate: Share content within and across workspaces and collaborate with others with a Premium License.	-	X
Workspace		
Workspace Access	My workspace	All workspaces (with right permissions)
Create and Manage Workspaces: Can create new workspaces and manage workspace settings, including adding and removing members.	-	X
Share and Collaborate: Share content within and across workspaces and collaborate with others.	-	X
Apps		
Access and Consume Apps: Access and view content - Reports and Dashboards - in apps that have been shared with them.	-	X
Create and Publish Apps: Can create, publish, and update apps, including adding reports, dashboards, and datasets.	-	X
Share and Collaborate: Manage workspace settings, including permissions and updates.	-	X
Others		
Includes advanced features, which are part of the advanced capabilities provided by license.	-	X

POWER BI Mobile	With Free License	With Premium License
Basic Interactions		
Optimized Mobile Viewing: Access and view reports optimized for mobile devices.	My workspace	All workspaces (with right permissions)
Touch-Optimized Viewing: Interact with reports and dashboards optimized for touch interfaces on mobile devices.	My workspace	All workspaces (with right permissions)
Offline Access		
View Offline: Access certain reports and dashboards in offline mode.	-	X
Reports based on Direct Query or live connection are not cached and are not available offline.	-	X
Can access the full report, but not filter, cross-filter, sort, or use slicers on it.	-	X
Comments and Collaboration		
View and Add Comments: Mobile users can view and add comments on reports (visual or page) and dashboards.	-	X
Annotate and Share Snapshots: On mobile, viewers can take a snapshot of a report, annotate it, and share it through email or other apps.	-	X
Alerts and Notifications		
Alerts and Notifications: Receive alerts based on data changes post-refresh.	-	X
Refresh and Sharing		
Manual Dataset Refresh: Trigger manual dataset refreshes, depending on permissions.	My workspace	All workspaces (with right permissions)