# Power BI Report Publishing Checklist

**Query Editor:**

☐ Remove unused columns using the choose column button. Pay special attention to identifiable/GPA/exam score columns in DimStudent, Factmaster, and FactScores. Be sure the step to do shows as "Remove other columns"

**Report Settings:**

☐ Set to only export summarized data or disable export
☐ Set to use the modern filter pane
☐ Set to use modern visual headers

**Report Formatting:**

☐ Hide all fields
☐ For each visual, set visual header options to disable elements or the entire header from visuals as needed. Keep visual errors and warnings, drill down (as needed), and more options (to enable export as needed)
☐ For each page, visual, and the report, hide filters as necessary using the eyeball icon in the filters pane
☐ Disable visual-interactions (click a visual, then click the format tab) except where needed to prevent inadvertent filtering
☐ Set row-level security fields (if applicable)

**DAX:**

☐ Build in small-n checks to limit possible identification in DAX measures (only show if data field has >5 students, for example)
☐ Verify use of explicit DAX measures (measures you type in) in all results visuals. Do not use built-in implicit measures (measures that you click) such as count, max, etc.

**Power BI.com Service (after publishing, before sharing):**

☐ Set and test row-level security fields (if applicable)
☐ Ensure report uploaded to correct workspace
☐ Exclude report from App (if applicable)
☐ Test report functionality and data access. Share with another account and have them test it as well. Test all aspects outlined above—data export, field access, etc.
☐ Set refresh options for the dataset. Verify refresh works by manually refreshing
☐ Verify user emails when sharing. Choose to NOT notify users via email and disable the ability to reshare the report. Send users an email separately.