Power BI reports

Planon Software Suite

Version: L105

Planon
Building Connections

© 1997 - 2024 Planon. All rights reserved.
Planon and the Planon logo are registered trademarks of Planon Software Development B.V. or its affiliates. All other product and company names mentioned herein are trademarks or registered trademarks of their respective companies. Planon Software Development B.V., its affiliates and/or licensors own the copyright to all Planon software and its associated data files and user manuals.

Although every effort has been made to ensure this document and the Planon software are accurate, complete and up to date at the time of writing, Planon Software Development B.V. does not accept liability for the consequences of any misinterpretations, errors or omissions.

A customer is authorized to use the Planon software and its associated data files and user manuals within the terms and conditions of the license agreement between customer and the respective legal Planon entity as soon as the respective Planon entity has received due payment for the software license.

Planon Software Development B.V. strictly prohibits the copying of its software, data files, user manuals and training material. However, customers are authorized to make a back-up copy of the original CD-ROMs supplied, which can then be used in the event of data loss or corruption.

No part of this document may be reproduced in any form for any purpose (including photocopying, copying onto microfilm, or storing in any medium by electronic means) without the prior written permission of Planon Software Development B.V. No copies of this document may be published, distributed, or made available to third parties, whether by paper, electronic or other means without Planon Software Development B.V.'s prior written permission.

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

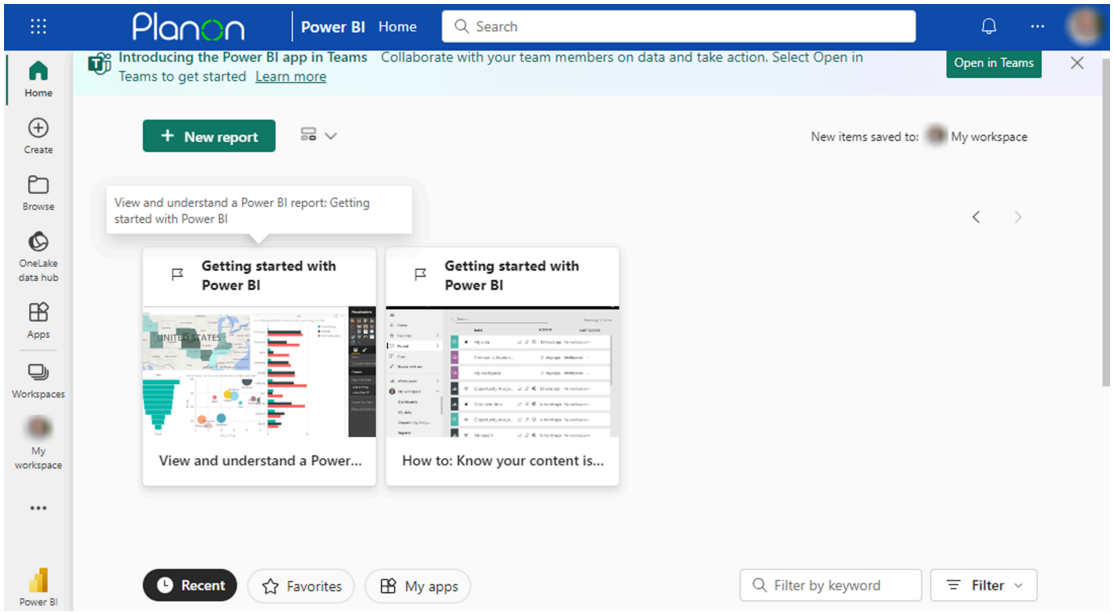
Table of Contents

Supporting Power BI reports (via an app).....5
Installing a Power BI report app..... 6
Power BI settings..... 6
Power BI reports.....7
Publishing the Power BI report..... 9
Uninstalling a Power BI report app..... 10
Updating a Power BI report app..... 10
Index.....11

Supporting Power BI reports (via an app)

Customers can expand business intelligence reporting capabilities, as the Planon platform now supports apps containing Microsoft Power BI dashboards.

By installing Power BI reports that are made available via apps, customers can plug in additional reporting functionality and benefit from preconfigured Power BI dashboards.



Requirements

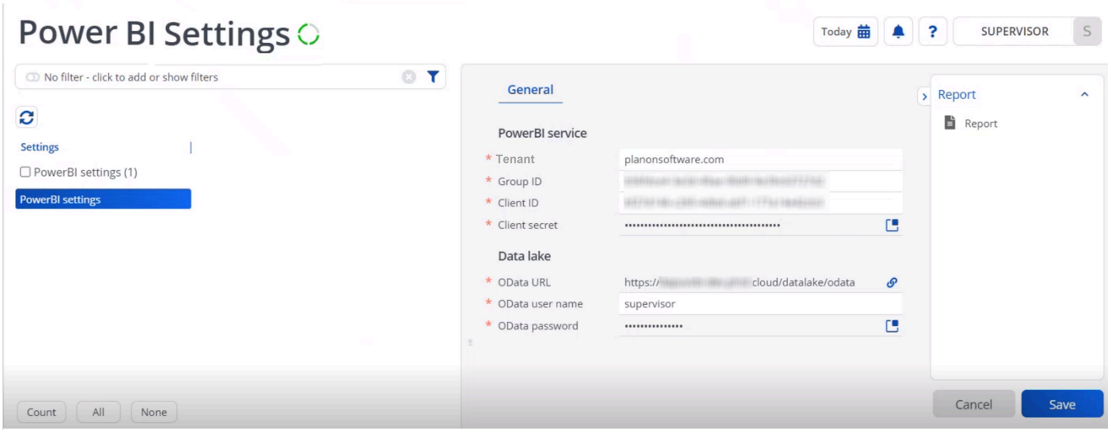
- As a precondition for the Power BI reports to work, you need to have Connect for Analytics.
- In the navigation panel, add:
  - **Power BI reports** - this TSI will contain the reports that can be published to Power BI workspace.
  - **Power BI settings** - this TSI contains all settings to connect the report to the customer's data lake and to publish the report to the Power BI workspace.
- In **File locations** > **Settings for secure documents**, make sure to add *pbix* as an allowed file type.

Installing a Power BI report app

Installing a Power Bi report app follows the default procedure for installing apps (Platform apps).

Power BI settings

In **Power BI settings** you can specify a number of settings for connecting to your Power BI workspace and data lake.



Power BI service

To be able to publish the Power BI report to the Power BI workspace, you must enter the Power BI credentials.

Field	Description
Tenant	Enter the name of the Tenant that is used to connect to the Power BI workspace.
Group ID	Specify the Power BI workspace system (UUID) where the pbix file should be uploaded.
Client ID	Identify the Planon application in connecting to the Power BI workspace (UUID).

Field	Description
Client secret	Store the ‘password’ used in connecting the Planon application to the Power BI workspace.

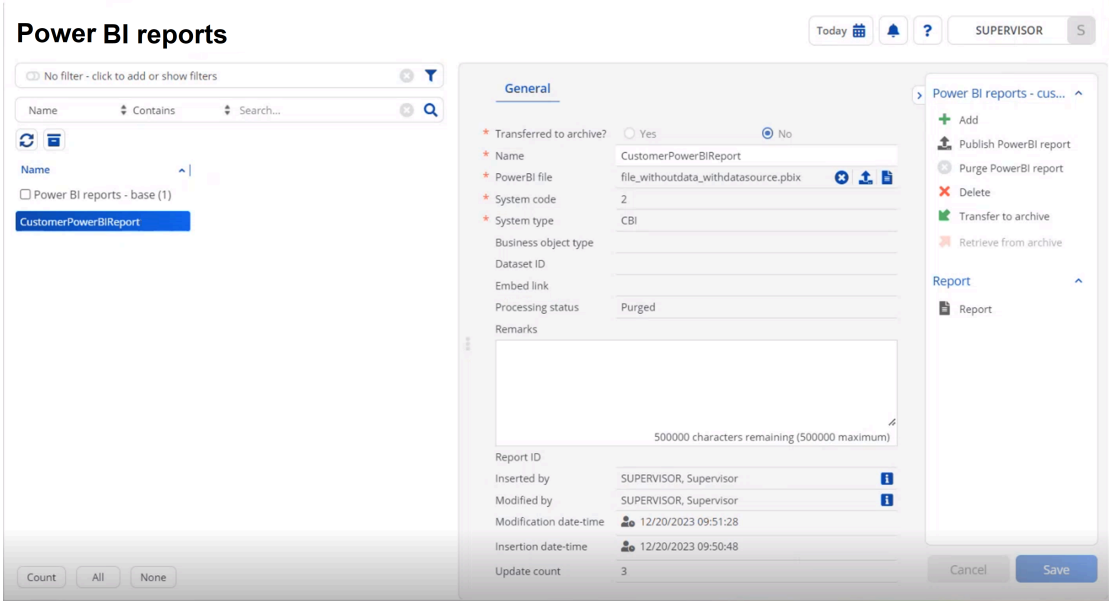
Data lake

Once the report is published to Power BI and the refresh schedule is implemented, the credentials specified here will be used to pull the data from the **Connect for Analytics**' data lake.

Field	Description
OData URL	Specify the URL of the Power BI report data source (data lake).
OData user name	Specify the Planon account name that will be used to connect to the data lake.
OData password	Specify the password of the same Planon account.

When saving these settings, implicitly the connection is validated and you can continue. If not, an error will be shown.

Power BI reports



In **Power BI reports**, you can create two types of reports:

- Customer Power BI reports

  This is any self-created report that is directly added or registered here. These reports can be maintained here and published to the Power BI workspace.

  For this type of report, no validations have been implemented. This type of file added here can contain data and a data source and you can also download the file here.

- Planon Power BI reports

  This is a report that is made available via a Platform app.

Field descriptions

Field	Description
Power BI file	Specify the secure document containing the pbix file. This field is only visible for the CustomerPowerBIReport system type.
App	Reference to the app from which the report originates. This field is only available for the PlanonPowerBIReport system type.

Field	Description
Embed link	Link that can be used to embed the report (for example on an intranet page).
Report ID	Uniquely identifies the report in the Power BI Workspace.
Dataset ID	Uniquely identifies the report's dataset in the Power BI Workspace.
Processing status	Indicates the status of the purge & publishing process (background action).
Refresh schedule	Specify on which weekday(s) to refresh the report in the Power BI workspace.
Refresh start time	The initial refresh time for the report on a given day. Only whole or half hours are permitted. Use the format: HH:00 or HH:30 (e.g., "08:00, 09:30, 13:00"). Ensure that the time is specified in the UTC time zone.
Refresh interval (hours)	The frequency, measured in hours, at which the report should be refreshed within a day. Note that Power BI permits a maximum of 8 refreshes per day.

Publishing the Power BI report

If users would want to see the report in their Power BI workspace, they must publish it.

Procedure

1. To synchronize the latest Planon data, go to **Connect for Analytics**, click **Export to data lake**

This action will take some time.

Once the initial export is completed, the Planon application continues to synchronize with **Connect for Analytics**.

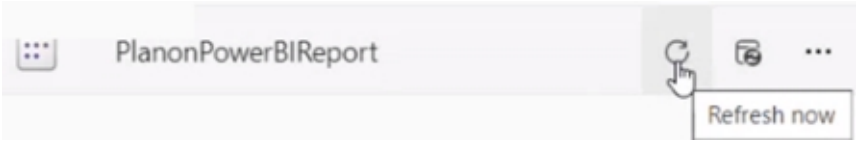
2. Go to **Power BI reports** and click **Publish Power BI report**.

This action makes the report available to the Power BI workspace specified in Power BI settings. (The data source and credentials are populated from the Power BI settings).

The **Processing status** is set to *Published*.

When opening the report for the first time, it will be empty and needs to be refreshed (manually) before being able to display actual data.

3. Select your Power BI semantic model and click **Refresh now**



If you now open your report, the report will contain Planon data.

Uninstalling a Power BI report app

Complete the steps described in Uninstalling apps to delete the appropriate app from the AppCenter.

When doing this, the following components will be deleted:

- Related Power BI report business objects
- Related *pbix* file (secure documents)
- Corresponding report in the Power BI workspace

  If deleting the report in the Power BI workspace fails, the report is disregarded. Consequently, the Power BI report business object is deleted, but the report within the Power BI workspace remains.

Updating a Power BI report app

If a customer has a license for the app, it will automatically be downloaded and installed.

Because the app includes configuration, it will need to be configured after installation.

If a newer version of the app is installed, only the secure document is updated with a new *pbix* file (report name remains unchanged). The new *pbix* report needs to be published to the Power BI workspace whereby you can select to keep or replace the existing report.

Index

E

Export to data lake 9

P

Power BI report
  Publish 9
Power BI report app
  Install 6
  Uninstall 10
  Update 10
Power BI reports
  Requirements 5
  TSI 7
  via apps 5
Power BI settings
  TSI 6

R

Refresh now 9