POWER BI HOW-TO GUIDE

Connect to a Data Source File on OneDrive or SharePoint and Set Up Scheduled Refresh

Introduction

The purpose of this document is to help you understand how to:

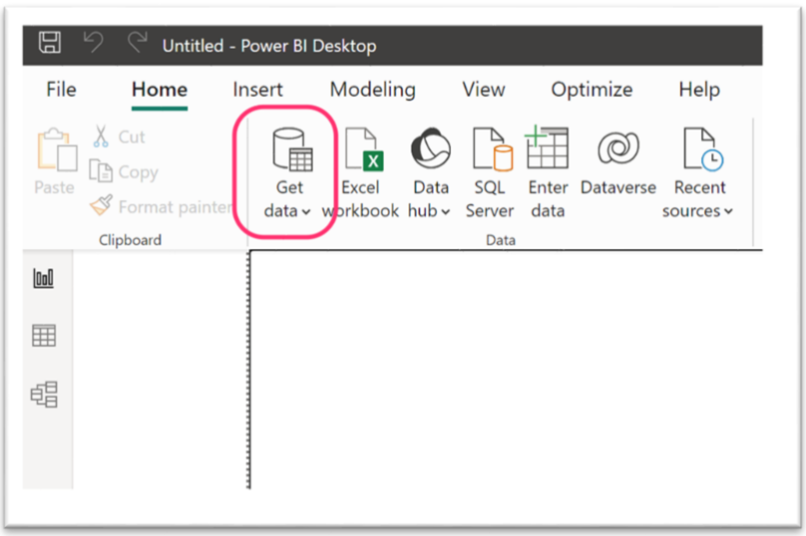
- Connect to a data source file on One Drive or SharePoint with Power BI Desktop
- Set up a scheduled refresh so that your data in Power BI is updated when the file is updated

Prerequisites:

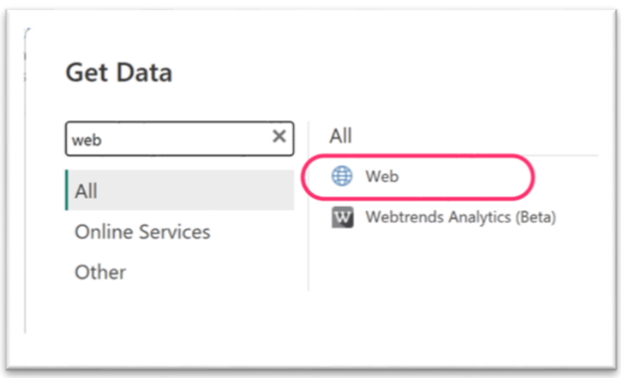
1. Power BI Pro License
2. A data file (XLS) stored on OneDrive that has been sharing-enabled
3. Power BI Desktop

First Steps

1. Open Power BI Desktop and click on Get Data.



2. In the **Get Data** search box, enter in 'web' and then select the Web connector and click on the **Connect** button. A box will open requesting a URL address (link to the source file). Proceed to the next section of this document to get that URL, depending on where your source file is hosted.

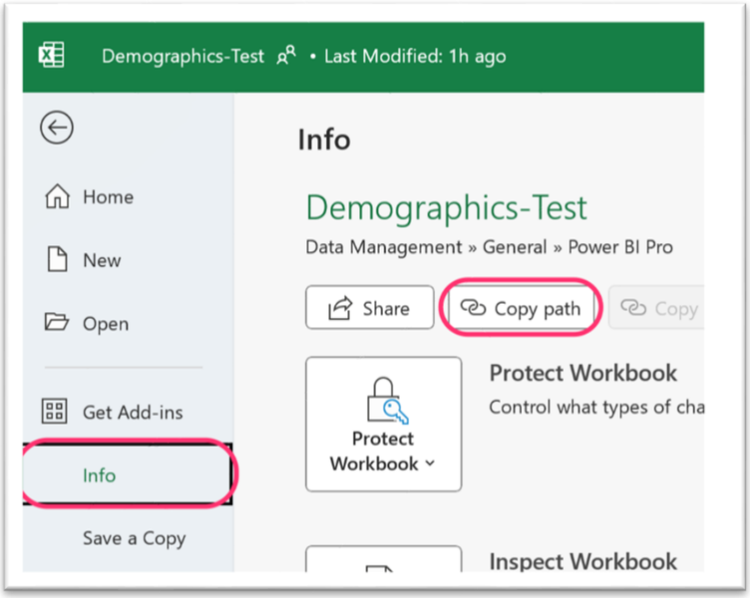


CONNECT TO A SOURCE FILE ON ONEDRIVE OR SHAREPOINT

To connect to your data source file, choose option 1 or option 2 below, depending on whether you would like to connect to a file on OneDrive or a file on SharePoint.

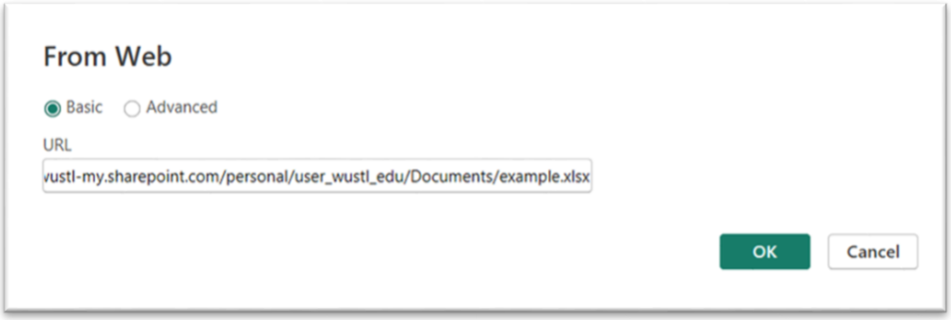
OPTION 1: Connect to a Source File on OneDrive:

1. Navigate to OneDrive and click the ellipses next to the .xls or .csv file you wish to use as the data source file. Click **Open > Open in App**. Once the file is open in the Excel desktop app, go to **File > Info** and click **Copy Path**.

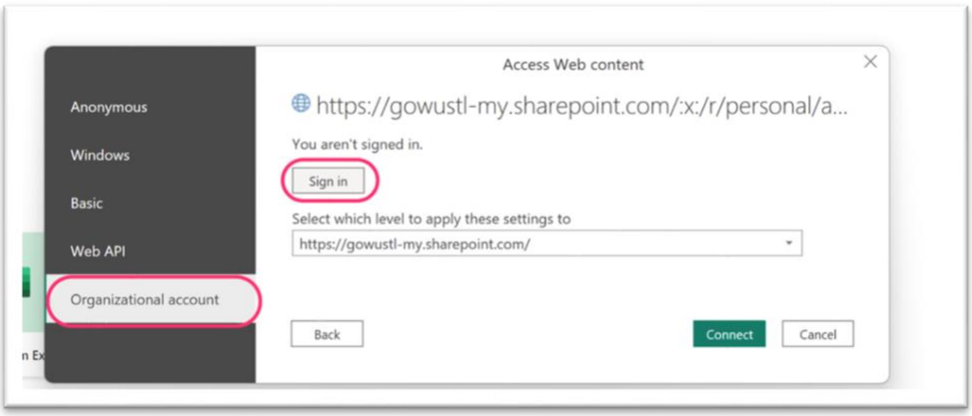


2. Paste the link into the URL line of the Web Connector window in Power BI. **<u>Important:</u> You will need to remove the end portion of the URL (select and delete) until the very end of the URL is ".xlsx" or ".csv".**

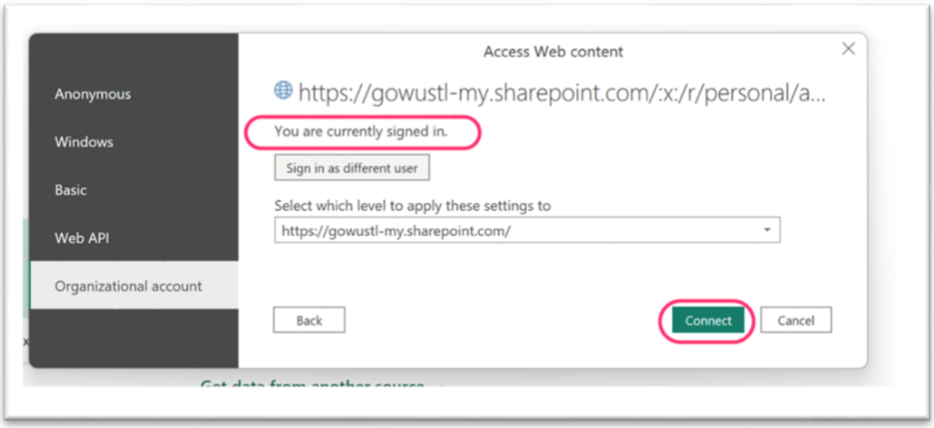
Once your URL ends in ".xlsx" or ".csv" you can click '**OK**' to load the source file.



NOTE: At this point, you may receive a dialog asking you to specify how Power BI should access web content. If you see this, select "Organizational Account" in the left pane and then click the **Sign In** button. Enter your WUSTL email address in the Microsoft login window that appears and, if prompted, complete the WUSTL Key sign-in. (if you were already signed in, you may skip this step)



3. Once signed in, the Access Web Content dialog will look like this. From here, just click the '**Connect**' button.



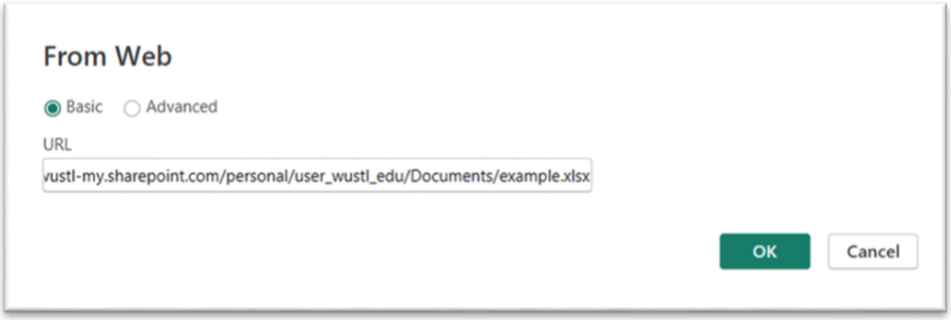
For connections to OneDrive source files, you may now proceed to the "Load Your Data" section. If you need to connect to a SharePoint source file, proceed to the 'Option 2' instructions below.

OPTION 2: Connect to a Source File on SharePoint:

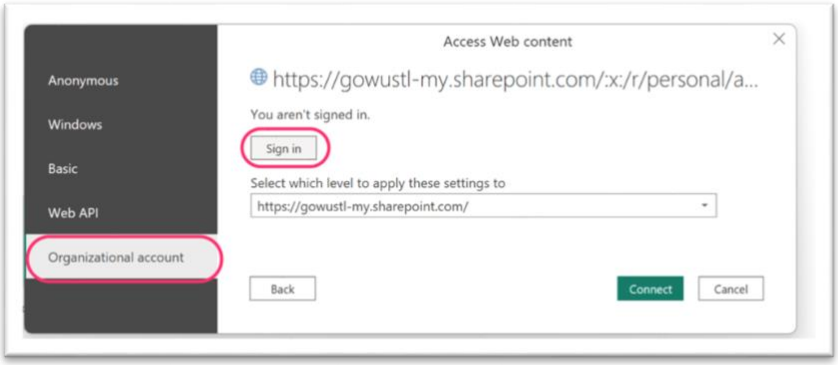
1. Navigate to SharePoint and click the ellipses next to the .xls or .csv file you wish to use as the data source file, then select ‘**Copy Link**’.

2. Paste the link into the URL line of the Web Connector window in Power BI. **<u>Important:</u> You will need to remove the end portion of the URL (select and delete) until the very end of the URL is “.xlsx” or “.csv”.**

Once your URL ends in “.xlsx” or “.csv” you can click ‘**OK**’ to load the source file.



NOTE: At this point, you may receive a dialog asking you to specify how Power BI should access web content. If you see this, select “Organizational Account” in the left pane and then click the **Sign In** button. Enter your WUSTL email address in the Microsoft login window that appears and, if prompted, complete the WUSTL Key sign-in. (if you were already signed in, you may skip this step)



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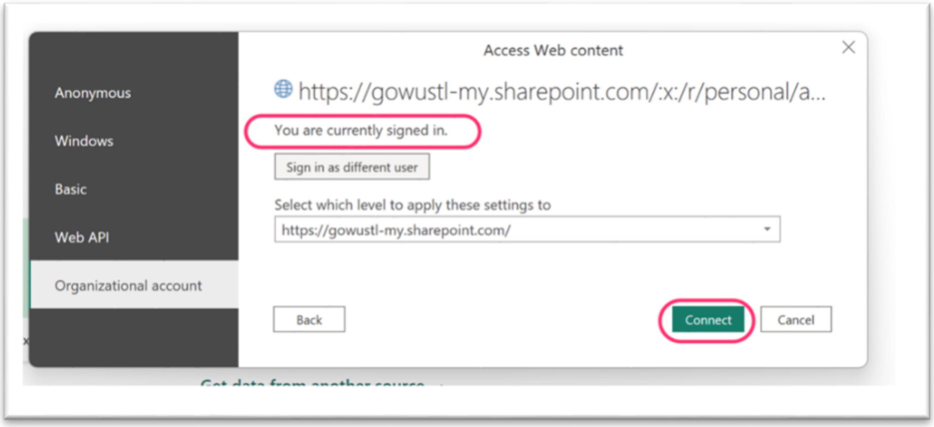
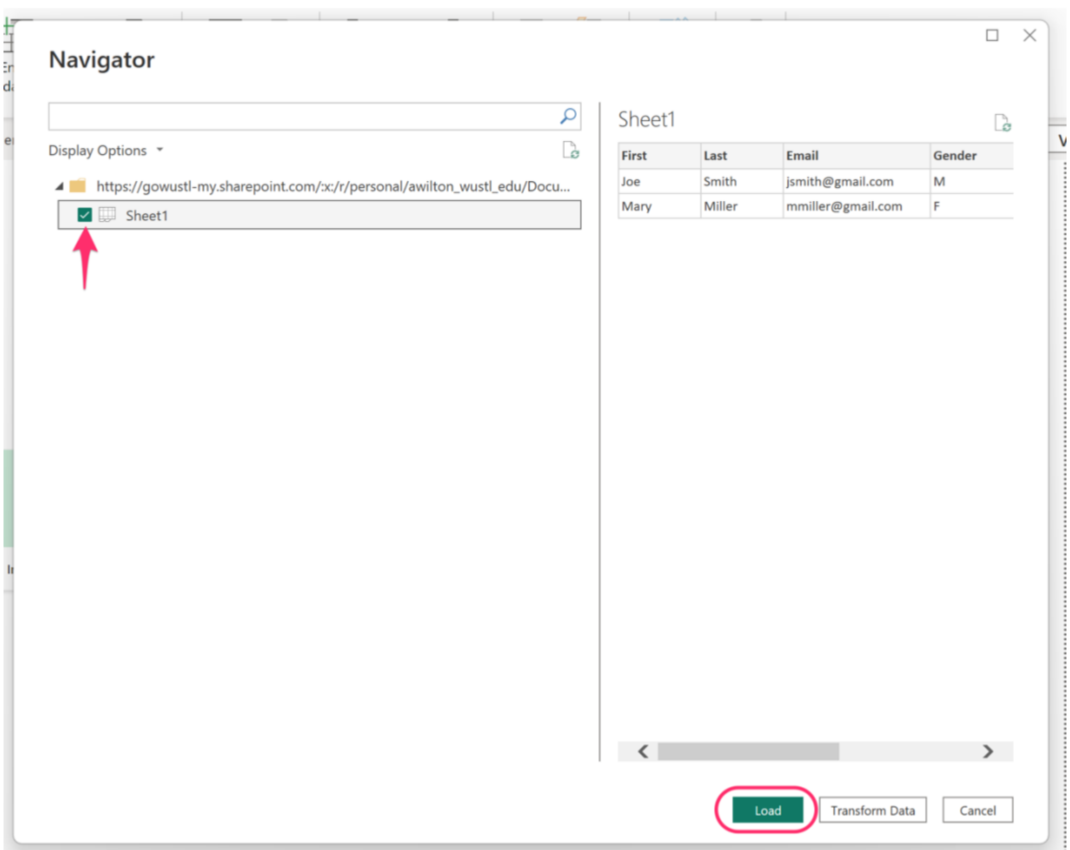
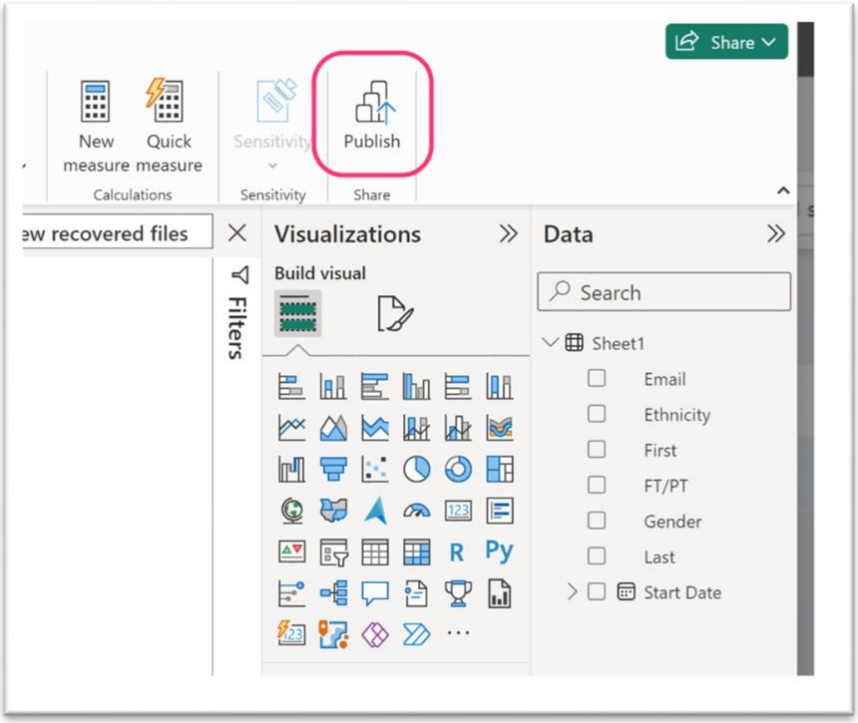


LOAD YOUR SOURCE DATA

1. You will see a Navigator dialog with your source file showing on the left side. Click the checkbox next to the sheet or sheets from the source file that you wish to load, then click the **Load** button.

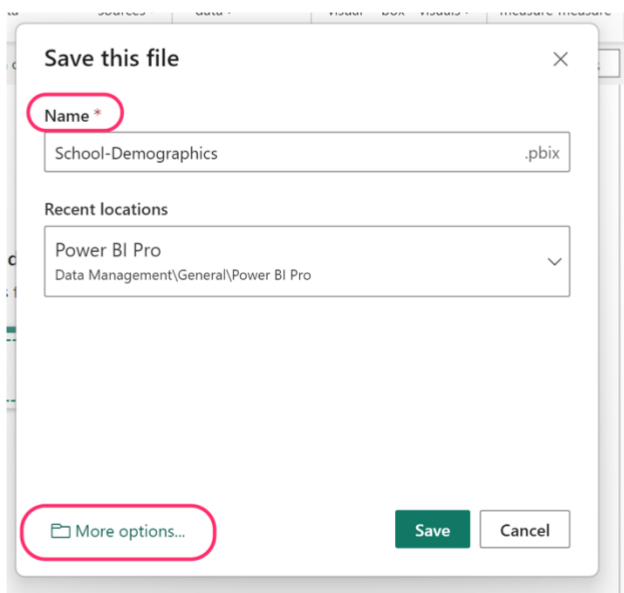


2. Once the data loads to Power BI Desktop, you will see your data fields in the Data pane on the right side. Click the **Publish** button in the top ribbon. (if asked to save your changes, click Save)

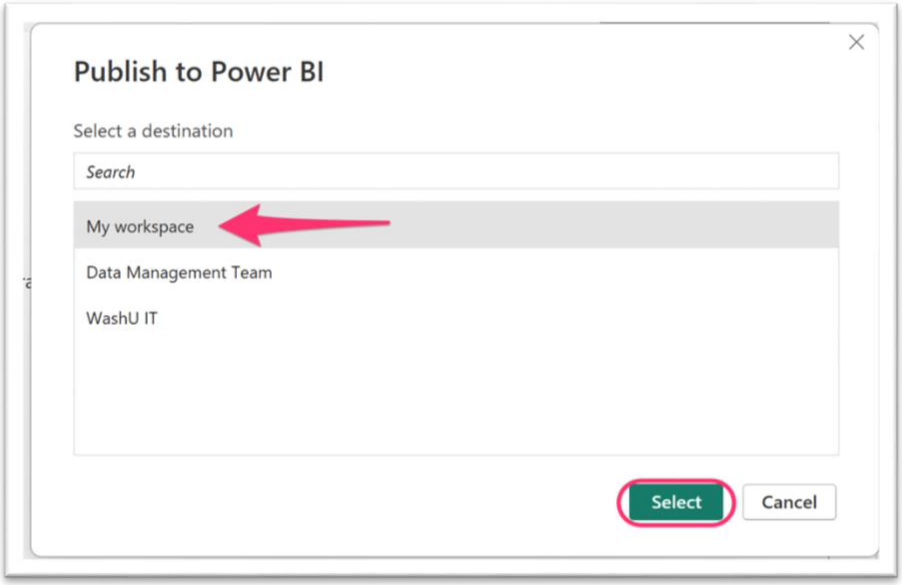


3. Now you will give your Power BI file (.pbix file) a name and select a location to save it to. This is essentially the file that will serve as the dataset for the dashboard(s) you create. At this point, you are saving that dataset file (.pbix file) to a local folder (or cloud folder).

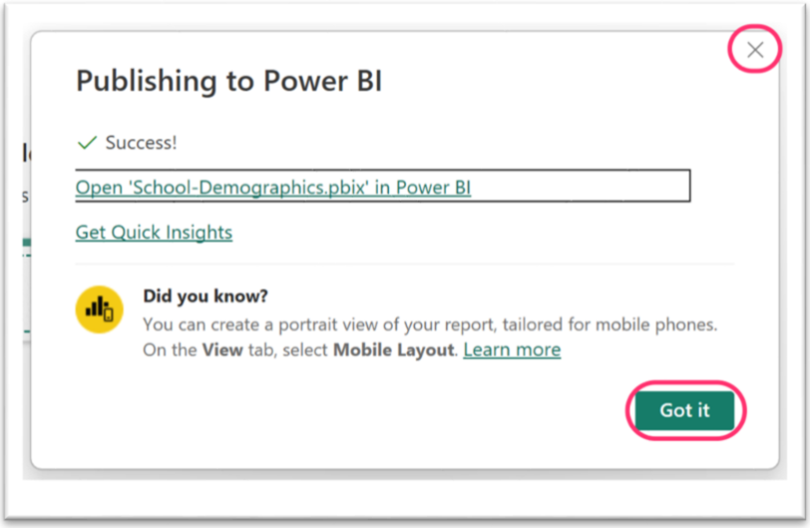
   If the ‘Recent locations’ folder is not populated or is not where you wish to save this file, click the ‘More Options’ link at the bottom of this dialog to select the desired folder in which to save your .pbix file.



4. Once the .pbix file is saved, you will be prompted to publish the project to the Power BI web service. You can choose to save it to 'My Workspace' (recommended), or to another Power BI web location to which you have access. When you've selected the destination, click the **Select** button.

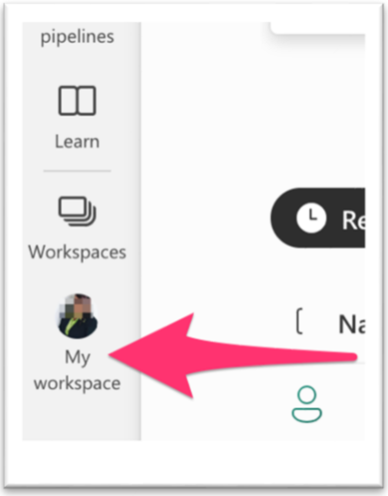


5. Your project will be published to the Power BI Workspace you chose, and you will see a Success message. From here, click the 'X' or the 'Got it' button to close this dialog. (note: if you click the "Open in Power BI link, your project will open in the web version of Power BI - this is an option if you have your dashboard built so you can view it/share it from a browser window; however, if you prefer to stay in the desktop version, click the 'X' or the 'Got it' button)

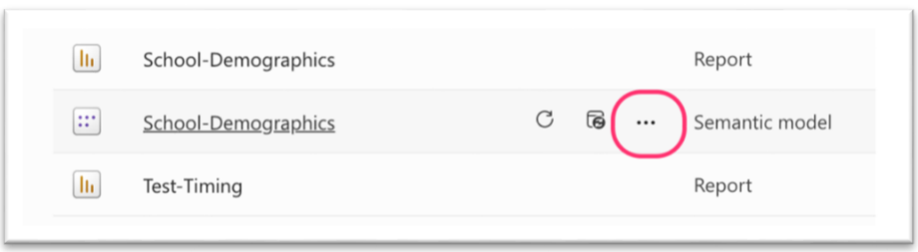


SET UP A SCHEDULED DATA REFRESH

1. To view your published project in the Power BI Workspace, open Power BI in a browser and click on the Workspace (left pane) where your report and data have been saved.

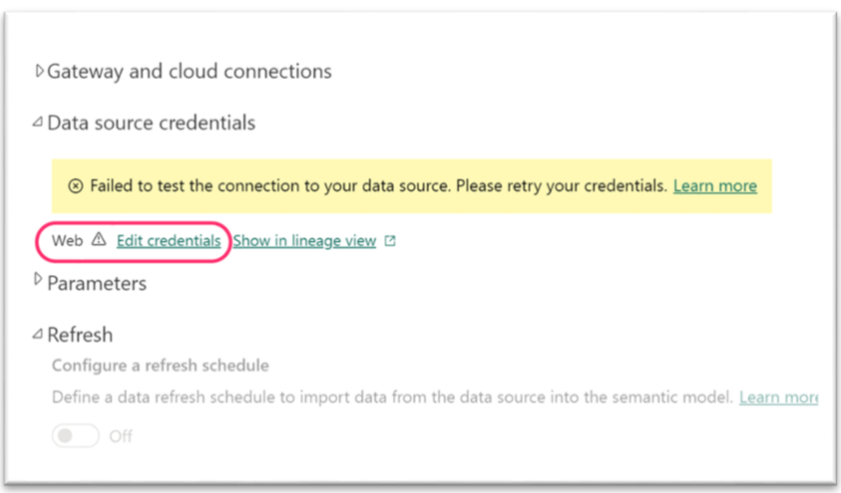


2. Your dataset will be listed as a "semantic model" in the workspace. Click on the ellipses next to the name of the dataset (not the report) and select **settings**.

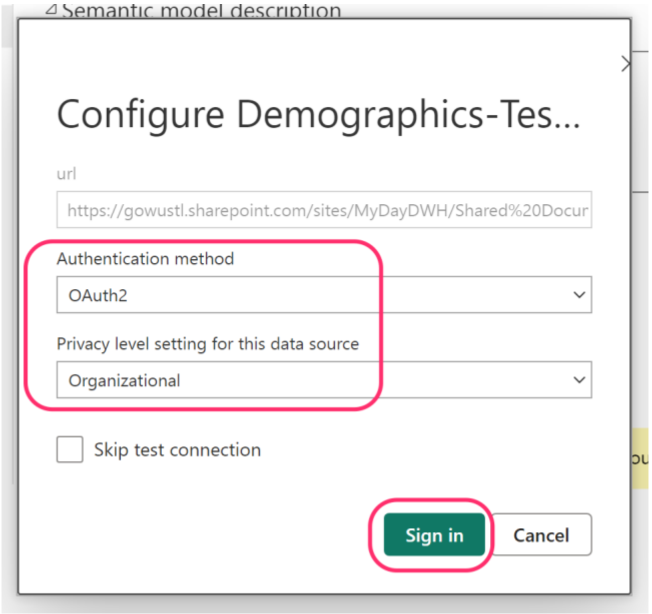


3. Scroll down to the **Refresh** option and expand that area using the arrow.

   a) If the Refresh area is grayed out, this likely means that the connection to your data source failed. You can remedy this by clicking the 'Edit credentials' link under the **Data Source Credentials** heading. (If the Refresh area is not grayed out, skip to Step 4)

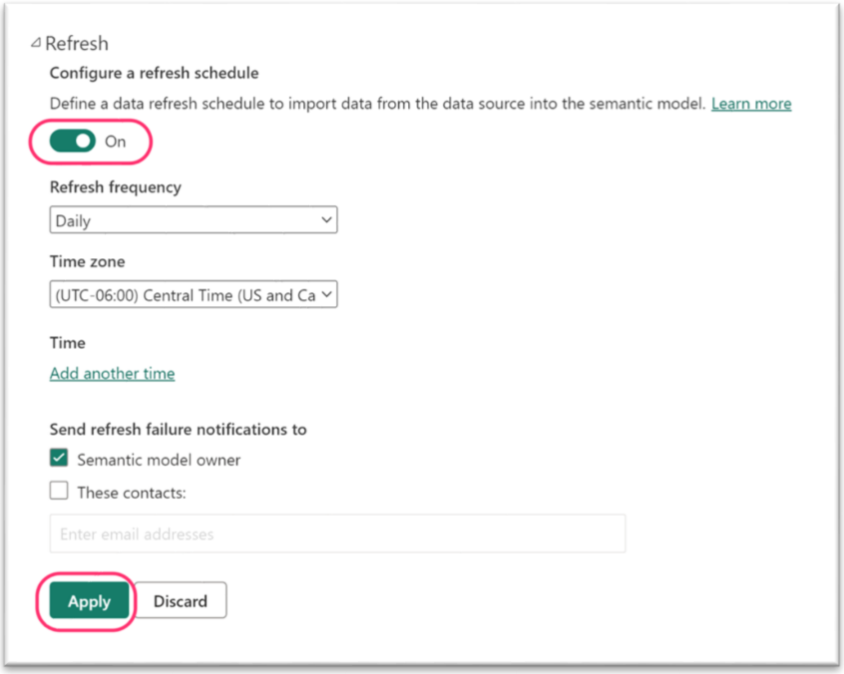


   b) After clicking 'Edit credentials', you will be presented with a dialog. Select "OAuth" from the Authentication Method menu and "Organizational" from the Privacy Level menu. Then click Sign In.



Select the Microsoft account with your wustl email address. You should see a success message "Web data source updated".

4. Back in the Refresh area, toggle the 'Configure a refresh schedule' option to **On** and set a frequency and time for the data to refresh. Check the Semantic model owner checkbox to have failure notifications sent to yourself, or enter a different contact using the 'These contacts' checkbox. Click **Apply**.



Now when the original source file is updated, the model and dashboard will be automatically updated based on the schedule chosen.