

PBI on Clientshare

On Clientshare, we have integrated with Microsoft's data visualisation tool, Power BI (PBI). It allows suppliers to share their key data with their customers in a professional, secure place. To upload your reports & dashboards to Clientshare, you must provide the necessary details and allow permission for them to be accessed via Clientshare. You also need to be an admin within your Clientshare account where you wish to add this information.

Please use the following instructions to gather the information required to connect your PBI platform with Clientshare.

Find your PBI account credentials

You need to have admin access to your Azure account which is connected to your PBI account. If you do not have admin access, please contact your head of IT. Please ensure that you have the correct PBI plan set up before gathering this information, because without the paid plan, you will not be able to embed your report within Clientshare. We recommend purchasing the 'Power BI Embedded' plan from your Azure Active Directory. The type of plan you purchase is dependent on the size of your capacity. The more reports you have, the larger the plan you need. Please see the link below for guidance on setting up your Power BI Embedded capacity:

<https://learn.microsoft.com/en-us/power-bi/developer/embedded/azure-pbie-create-capacity?tabs=portal>

Having an owned application

Once you are an admin, go to your Azure homepage and type 'App Registrations' in the search bar at the top of the page. You will see a page that has 3 tabs, 'All applications', 'Owned applications' & 'Deleted applications (Preview)'. If you have any owned applications that link to your PBI account, then you will already have the necessary credentials to link this up to Clientshare.

By clicking on the owned application, you will see a set of IDs. You will need the **Application (client) ID** & the **Directory (tenant) ID**. You will also need the **Client Secret**. This can be found by going to 'Certificates & secrets'. Under 'Client secrets', you should see a secret that is linked with your PBI account. The ID you need is under 'Value'. If this is hidden from you, you need to speak to the admin who created this

secret as they are the only ones who will be able to see it.

No owned applications

If you do not have an owned application, you will need to create one.

On the 'App Registrations' page, click **New Registration**. Enter a user-facing display name, then select the second option under Supported account types (*Accounts in any organisational directory (any Azure AD directory – multitenant)*). This is so that Clientshare can pull the report from your PBI directory to our platform.

Once you have done this, you will automatically be given your **Application (client) ID & Directory (tenant) ID**.

Next, click on 'API Permissions' which is found on the left-hand side of your App Registration page. Click on 'Add a permission' and select the 'Microsoft APIs' tab at the top of the pop-up. Scroll down to 'Power BI Service', select this and then click 'Application permissions' and tick 'Tenant.Read.All'. Once this is done, you will see this appear under 'Configured permissions'. You should also see a button that says, 'Grant admin consent for X'. This will allow you to grant permissions for this API to be used in external platforms such as Clientshare.

Now that you have granted permissions for your app registration, you can create the **Client Secret**. Go back to the 'Certificates & secrets' page and select 'New client secret'. Add a brief description and select an expiry date for this client secret. It is recommended to select 6 months, but this may vary depending on your company's security policies. Once this secret expires, you will need to generate a new one and update this accordingly on Clientshare as well as your Azure account.

When you click 'add', the secret will appear under the Client secrets section. We advise you to copy and save the code under the 'Value' column straight away so that it cannot be lost or unavailable. This will be your **Client Secret**.

Now that you have the 3 IDs from Azure, all that is left is to connect your Azure credentials to your PBI account. To do this, you must also be an admin on your PBI workspace. Once you are on your workspace, on the homepage, click on 'Access'. It will then ask you to add admins, members, or contributors. In the email address, type the name of the app registration you just created in Azure. This should show up as a user, select this, and set it as an admin.

You will need to allow a short amount of time for the Azure account to link up to your PBI account. Once this is complete, you are now able to link your PBI reports & dashboards to Clientshare.



Add your PBI credentials on to Clientshare

You must be an admin on your Clientshare account to add any PBI information. If so, go to your settings page which is found on the top left-hand side of your page. Once there, select the 'Power BI' tab.

The credentials that you gathered from the previous instructions can be added via the 'Manage PBI credentials' button. Click 'Add New' and you will see a pop-up asking you to provide the IDs that you gathered from your Azure site. You must name the credentials as well under the 'Visual Name' box.

Find your PBI Report/Dashboard Credentials

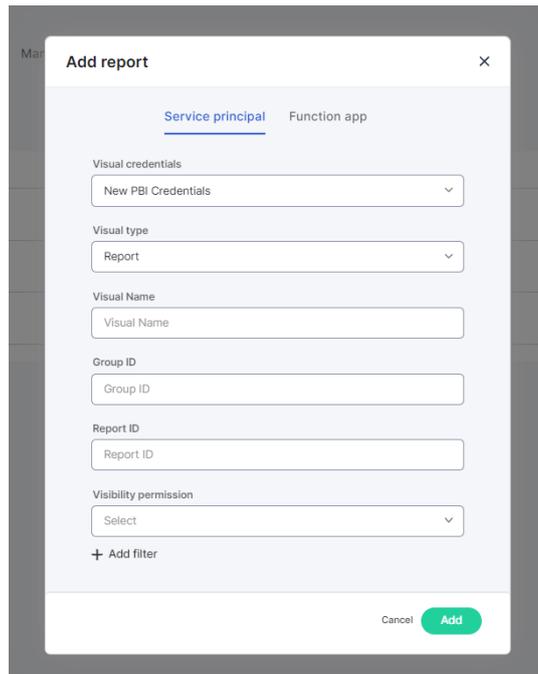
Once you have retrieved your PBI account credentials, you are now able to start adding your reports to Clientshare. To do this, you will need a **Group ID** & a **Report ID**. Both of which can be found on the report itself within your PBI account.

Click on the report that you want to add to Clientshare. When the report is on your screen, the 2 IDs that you need can be found in the URL. The **Group ID** follows '/groups/' and the **Report ID** follows '/reports/'. This should look like the below example:

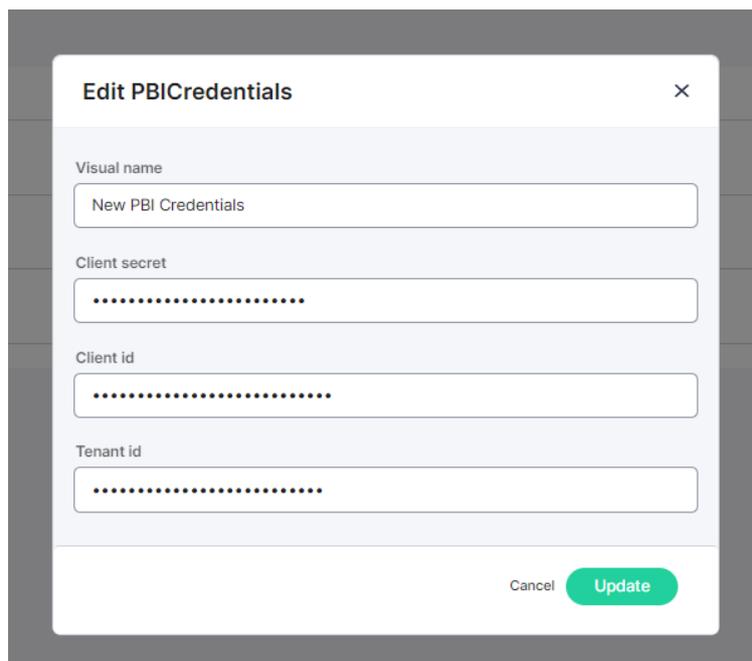
```
groups/8d4387f5-5d11-464e-bdf8-6883450a1a71/reports/5c113350-5hj7-380f-8158-64df2w45a701
```

Adding your PBI Report/Dashboard to Clientshare

Once you have gathered all the information in the previous steps, you can now enter the **Group ID** & **Report ID** for the report that you wish to add to Clientshare. Once again, you will need to be an admin within your Clientshare account to be able to add the report to your account.



When adding the report, you will need to add the PBI credentials you previously attained. You need to make sure that the credentials you select are relevant to the PBI account in which the report sits on. Otherwise, the report will fail to load on Clientshare.

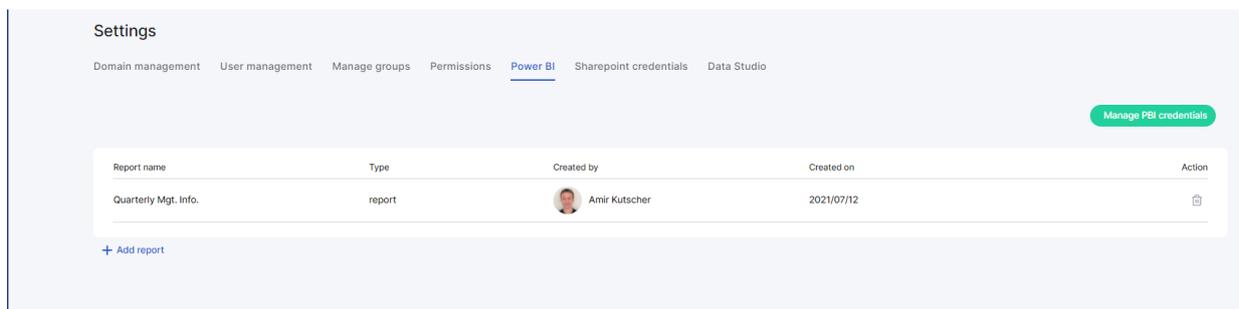


The last piece of information you will need to include before sharing your report is the visibility of the report within Clientshare. Clientshare allows you to restrict visibility of reports to a set number of individuals which are created through the 'Manage Groups' section of the site, or you can share the report with everyone. Clientshare is a secure site

so only those with access to that account will be able to see the report. You can also add filters within your report to manage what data you want to display. For this, you will need to have the master copy file of where the PBI data is stored. This could be on excel, PBI desktop, or whatever format you use to create your reports. On the pop-up, it will ask you for the name of the table where your filtering data sits, the name of the column where the value you are formatting for sits, and finally the value which you are filtering for. You can add more than one filter for each report. You can also add more than one value for the filter you create by clicking enter after submitting your value.

For more information about Power BI filters, please contact chris.jones@myclientshare.com.

Once you have added your report, it will be shown on a list on the Power BI page you are currently on. To see your report, live on Clientshare, refresh your page and click on the Power BI button located on the left-hand side of the page. From there, your report will be displayed just as it is on your PBI account.



Settings

Domain management User management Manage groups Permissions Power BI Sharepoint credentials Data Studio

Manage PBI credentials

Report name	Type	Created by	Created on	Action
Quarterly Mgt. Info.	report	 Amir Kutscher	2021/07/12	

+ Add report