

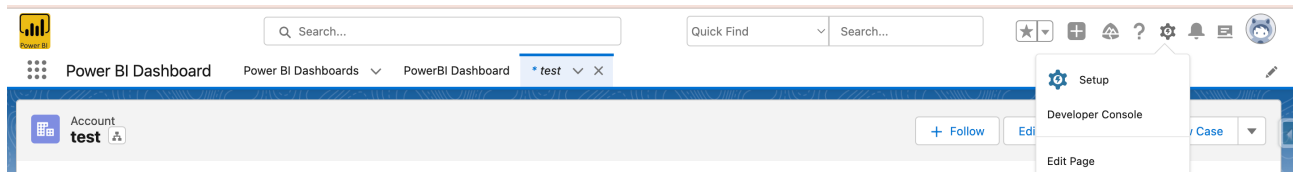
PowerBI in SF:

In this documents I will explain how work the PowerBI package in SF.

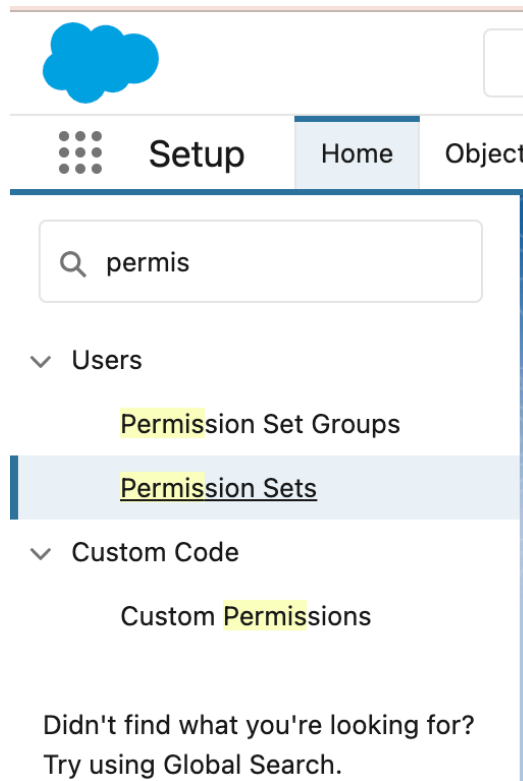
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PERMISSION SET:

After that you downloaded the app from the Apexexchange , you need to install the PowerBI Permission Set. This permission set give to a user access to the app and related object and tab. Go to Setup :



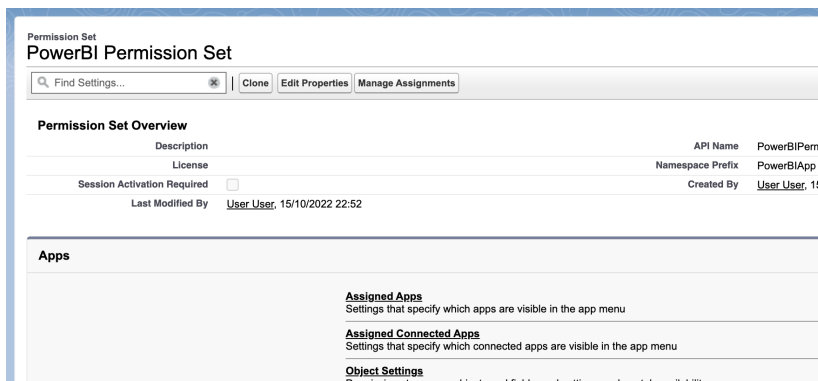
In the setup go to Permission Sets:



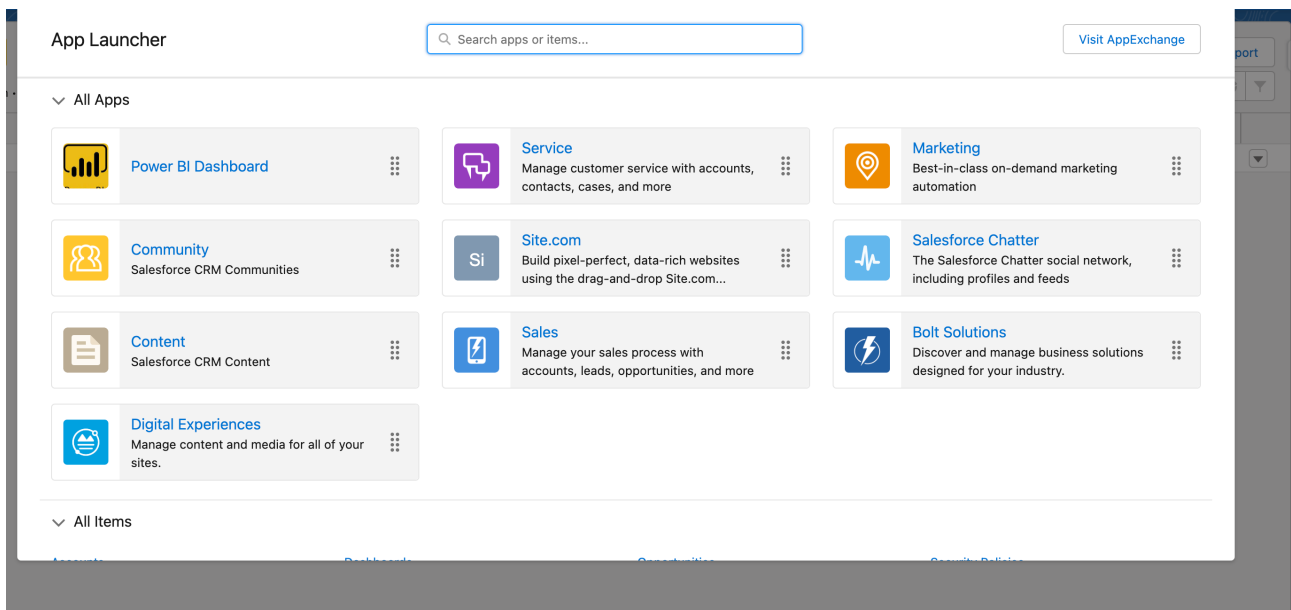
In the permission set you will see a new one called : PowerBI Permission Set. Click on it.



Under Manage Assignments, you need to give this permission to all user who will have access to a powerBi dashboard.



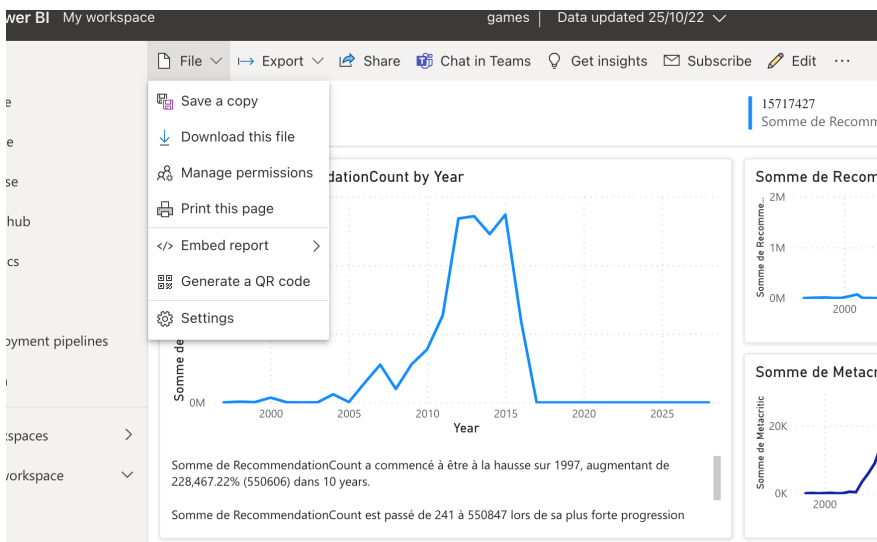
After that, all assigned user will be able to see the PowerBi App under application :



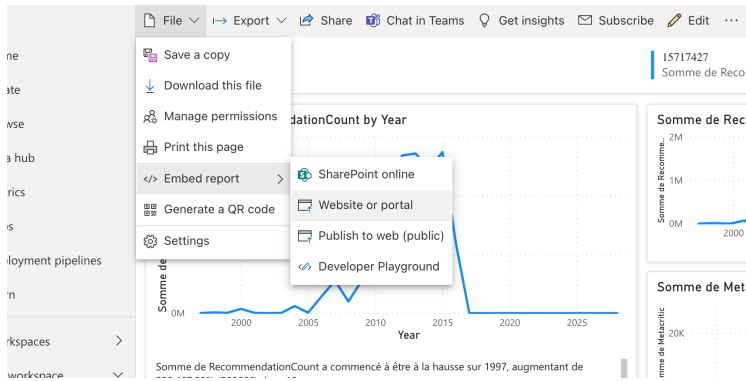
MAKE A DASHBOARD AVAILABLE:

The first thing to get your PowerBI in SF is the url of your dashboard .

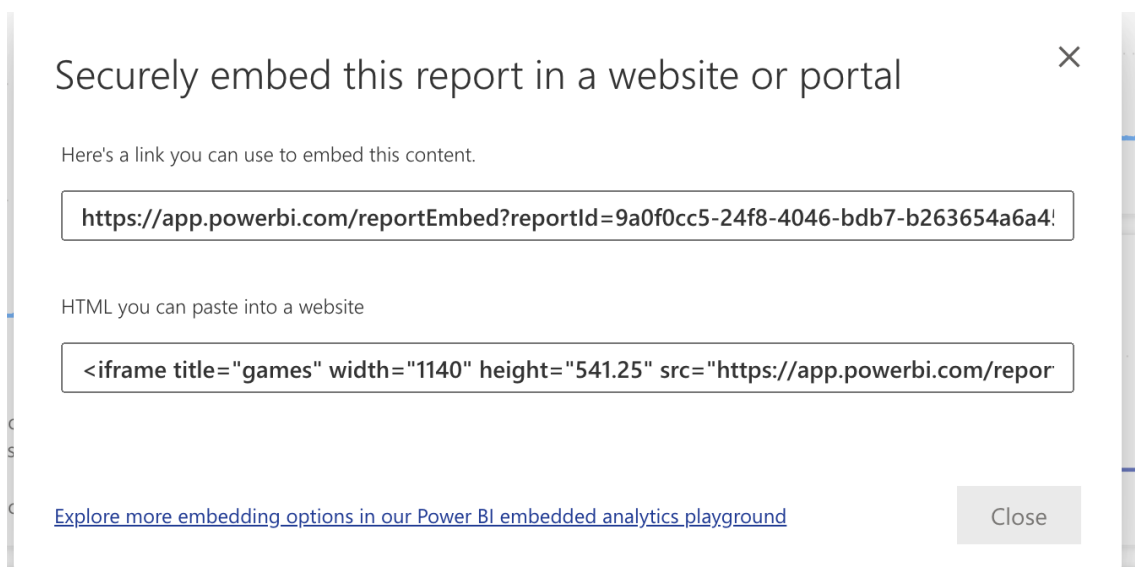
Go to your dashboard in PowerBI and click on File:



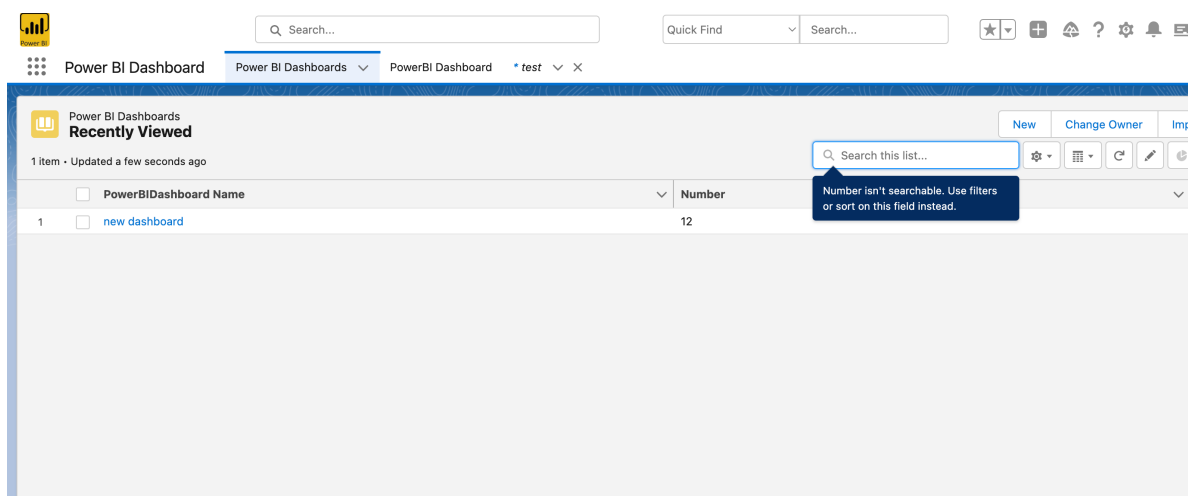
And click on Embed report > website or portal .



Take the first link (not the one that start with <iframe ...).

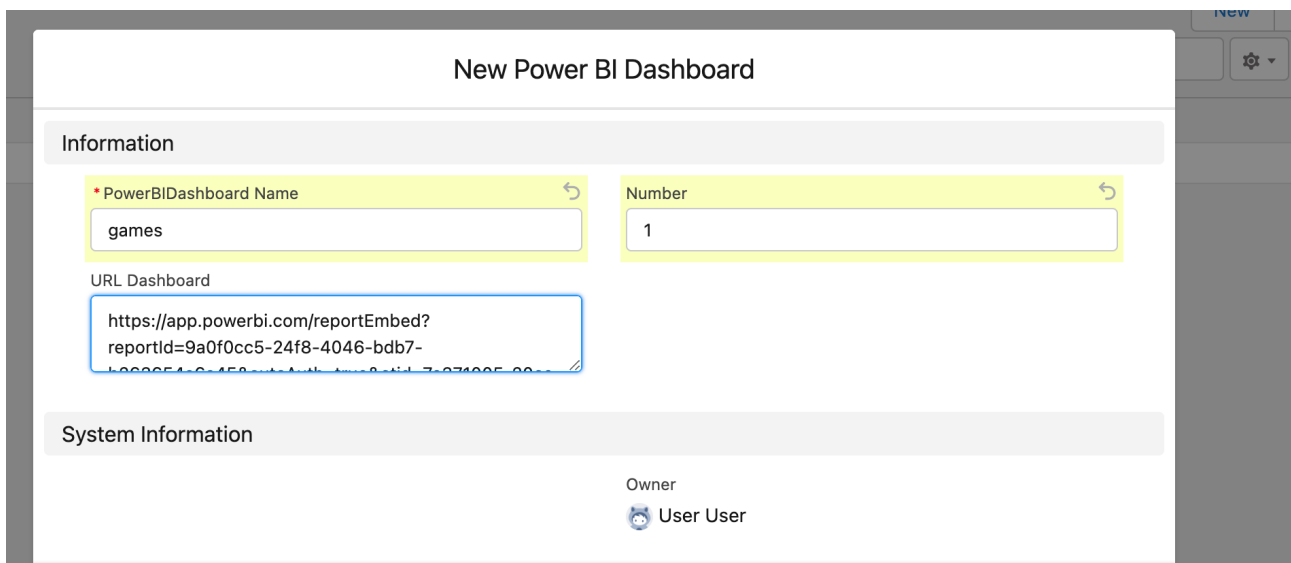


Come back to SF under the PowerBi app and go to the first power BI Dashboards tab.



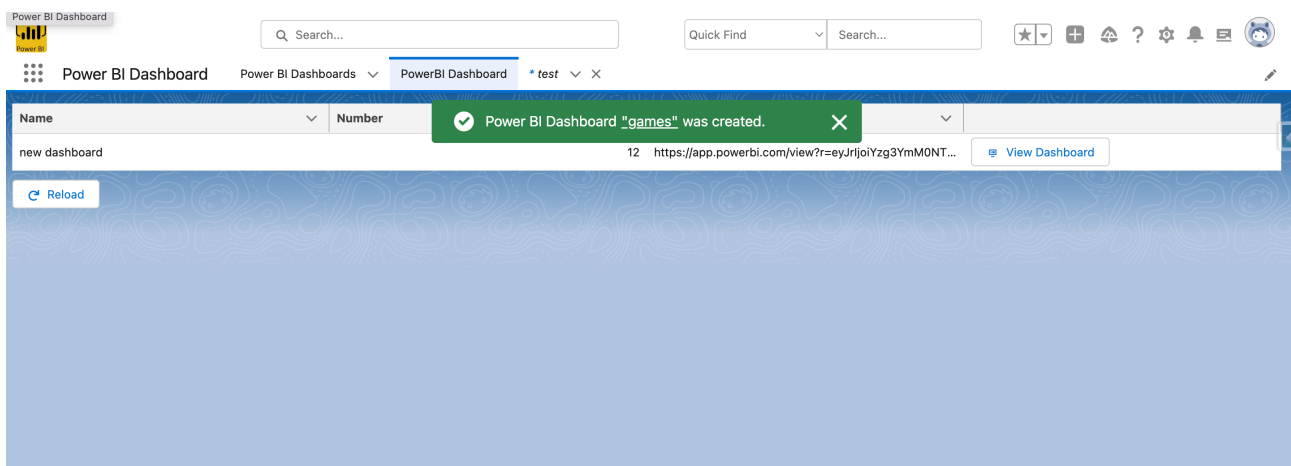
And click on new :

Enter the URL, a name and a unique number (number__c) that will represent the dashboard in the app.



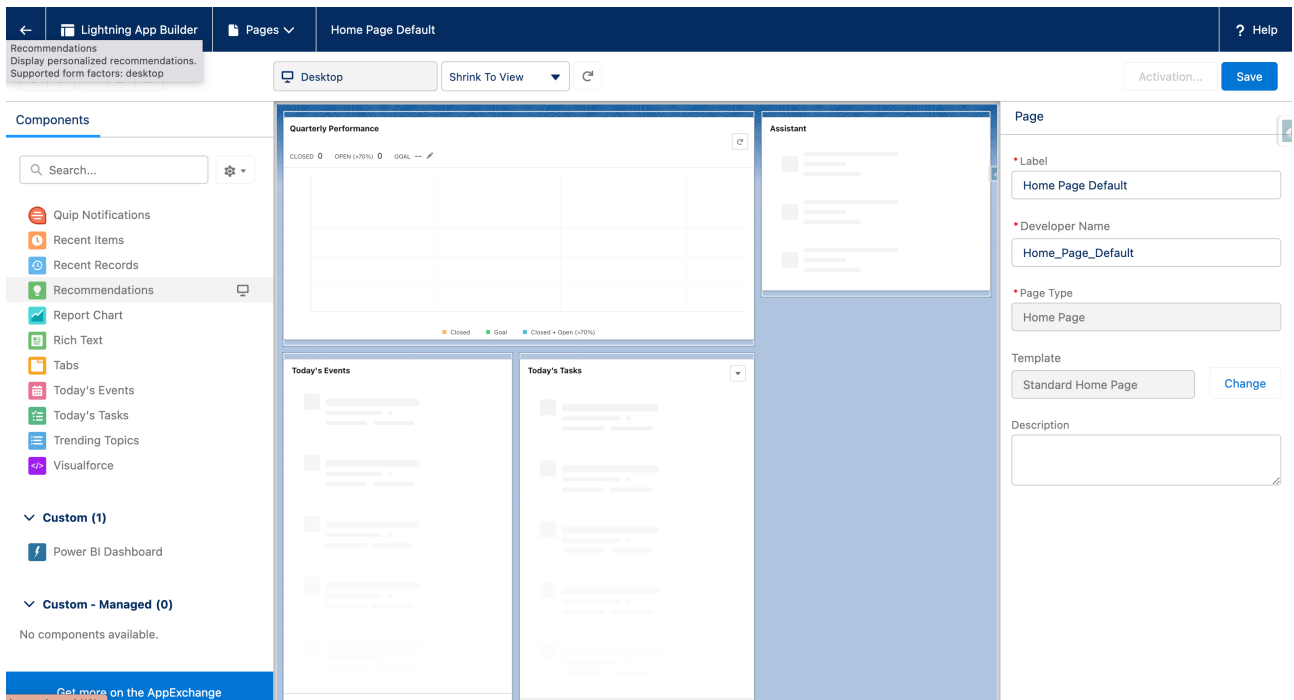
The screenshot shows a form titled "New Power BI Dashboard". It has two main sections: "Information" and "System Information". In the "Information" section, there are three input fields: "PowerBIDashboard Name" with the value "games", "Number" with the value "1", and "URL Dashboard" with a long URL starting with "https://app.powerbi.com/reportEmbed?". The "System Information" section shows the "Owner" as "User User".

After that you can go to the next tab and click on view Dashboard (if you can't see your dashboard click on reload) .

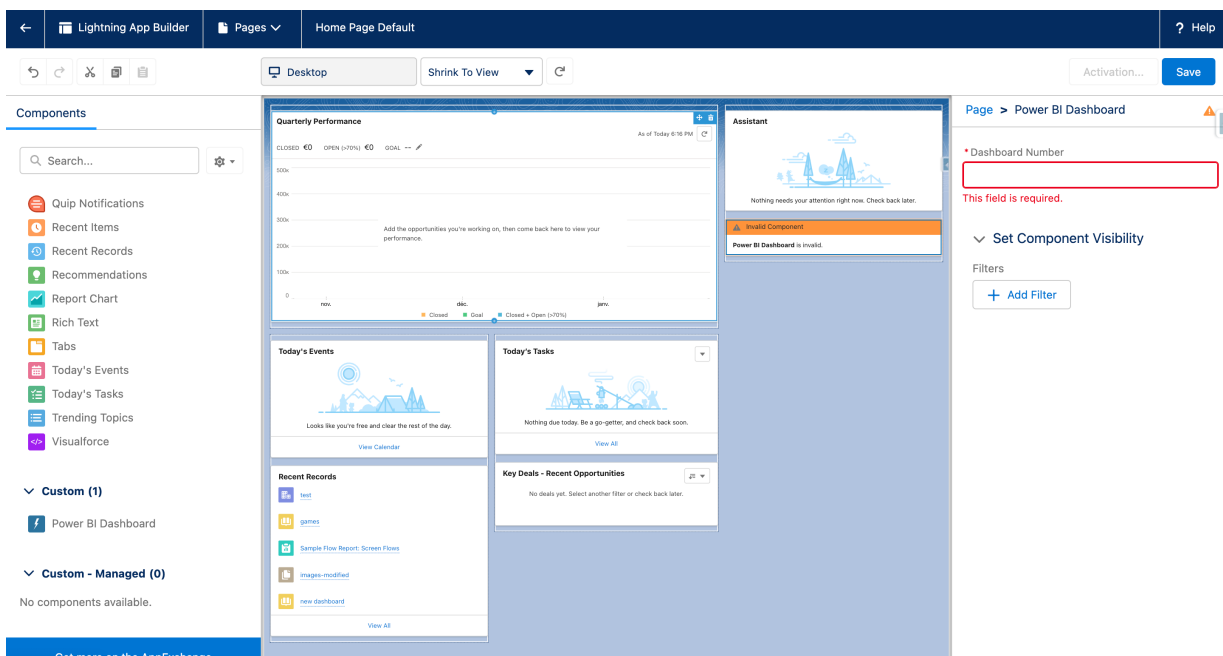


DASHBOARD ON A HOME PAGE OR RECORD PAGE :

You can put any dashboard on a home page or a record page , for this go to the lightning builder and under components you will see the Power BI Dashboard components .



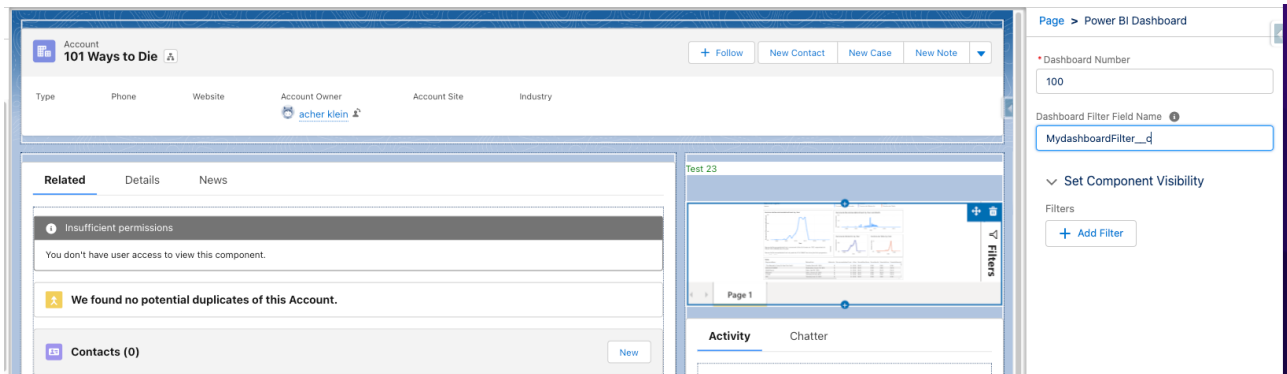
Put this components on your page and you will ask to give two parameter (one only on a home page):
 The first parameter is the dashboard number (number__c) that you want to display .



DYNAMIC FILTER ON A RECORD PAGE :

A new feature is the dynamic filter on a record page.
 The process is a but complex but I will try to explain you.

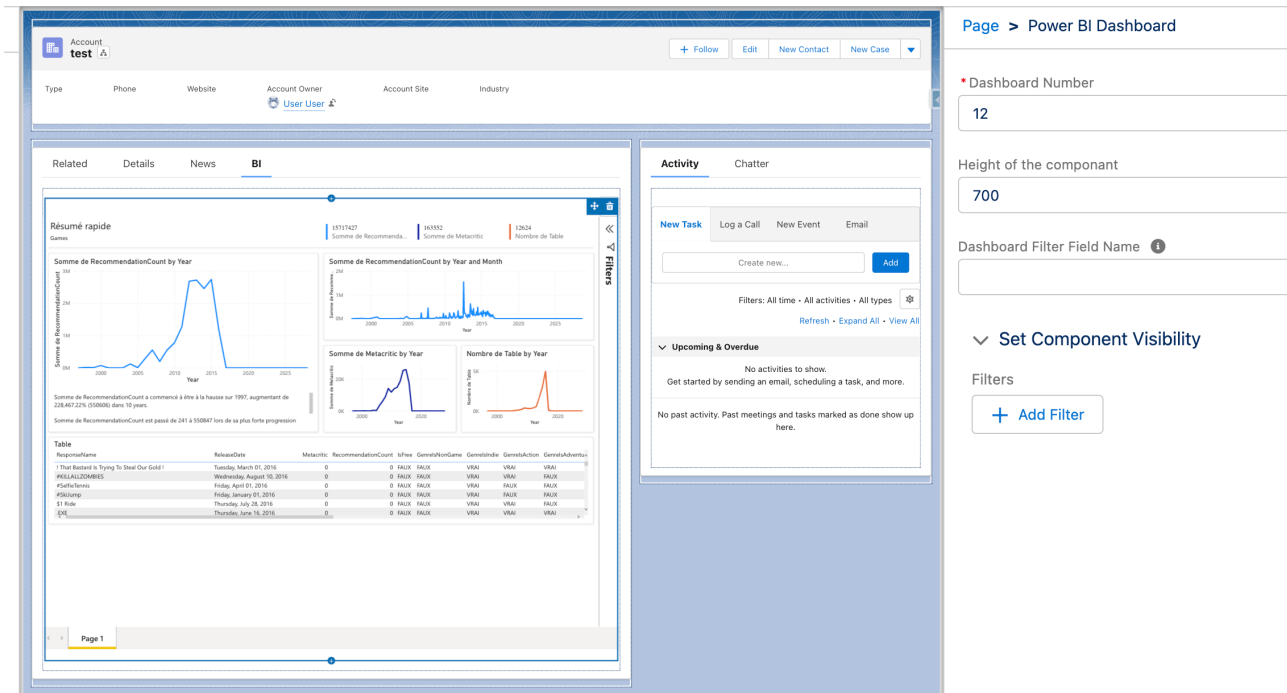
In the record lightning builder you can put another parameter , it's the api name of the formula field .



NEW VERSION 3.2:

DEFINE THE SIZE OF THE WINDOW:

We can now define the height of the window that solve the bug of little report or not enough place in record page or home page . To do it go in the lightning app builder under the components you will see a third parameter it's the size in pixel of the window . Play with it to get the optimal size.



I also added a little button above the report to open the report inside a modal.



Résumé rapide

Games

15717427

Somme de Recommenda...

163552

Somme de Metacritic

12624

Nombre de Table

Somme de RecommendationCount by Year



Somme de RecommendationCount by Year and Month



KNOWN ISSUE:

Only Administrator can see Dashboard :

This problem come from an older version of the powerBI permission set . You just need to update it with the correct class .

Go To permission Set and click on the Power BI permission set

Permission Set

PowerBI Permission Set

Find Settings...

Clone

Manage Assignments

Permission Set Overview

Description	API Name	Power
License	Namespace Prefix	Power
Session Activation Required	Created By	acher
Last Modified By	acher klein, 25/10/2022 18:53	

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Click on Clone and clone the permission set to a new one.
On the new permission set click on Apex Class Access

Permission Set

PowerBI Permission Set 2

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

Permission Set Overview

Description	API Name	PowerBIPermissionSet2
License	Namespace Prefix	
Session Activation Required	Created By	acher klein, 01/11/2022 21:13
Last Modified By	acher klein, 01/11/2022 21:13	

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Visualforce Page Access

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External Data Source Access

Permissions to authenticate against external data sources

Flow Access

Permission Set

PowerBI Permission Set 2

Find Settings...



Clone

Delete

Edit Properties

Manage Assignments

Permission Set Overview > Apex Class Access

Items per page: 50 Items

View: All

Apex Class Access

Edit

Apex Class Name

Installed Package

Click on edit and add the PowerBIApp.LWC_Dashboard and PowerBIApp.LWC_DashboardTest

Save

Close

Enabled Apex Classes

PowerBIApp.LWC_Dashboard

PowerBIApp.LWC_DashboardTest

Add



Remove

Click on save and give this permission to your user . It will fix it.