MYPBIWIKI: REFRESH / CONNECTORS: Connecting and/or Refreshing Excel Document that resides in SharePoint

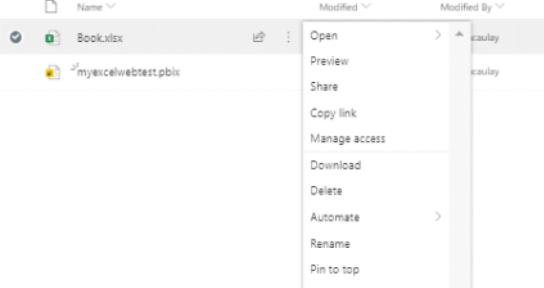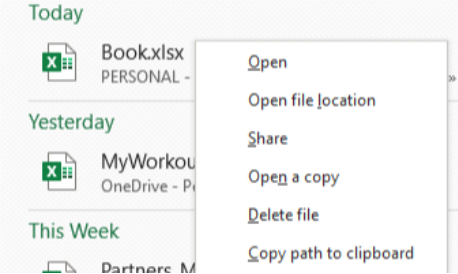Thursday, December 12, 2019   7:15 PM

PRODUCTS INVOLVED/ POWER BI FEATURES INVOLVED

- Microsoft Power BI Desktop
- Microsoft Power BI Service (Scheduled Refresh)
- SharePoint Online and/or SharePoint On-Premise
- Microsoft Excel (XLSX)

PROBLEM SCENARIO DESCRIPTION

- Are you building a Microsoft Power BI solution that is pulling data from a Microsoft Excel (XLSX) file that is residing on a SharePoint Site? Are you experiencing issues trying to get that connection to work? Maybe you have tried the Web Connector or the Excel Connector with still no luck in getting it to work. Well, my goal for this article is to assist in understanding how to get this to work in your Power BI Solution.

EXCEL FILE PATH EXAMPLES THAT DO NOT WORK

Copy Link Menu Item	
	
	How the path looks
	https://exceltestinglinkscenario.sharepoint.com/:x:/t/some-tboguseam-test/ETCnElhrOvBJtrAYPeMBJyYB_Xw8FyS4PeigPv82EAJ4jA?e=60ElaD
		• Does not work for Web Connector
		• Does not work for Excel Connector
		• Power BI does not work well with this URL pathing to the file. The reason, is that Power BI does not understand
		  • the :x/t in the path
		  • The end of the path with the long alphanumeric string.
		  •
		•

URL from Excel Online	https://exceltestinglinkscenario.sharepoint.com/:x:/r/teams/some-bogusteam-test/_layouts/15/Doc.aspx?sourcedoc=%7B5812A730-3A6B-49F0-B6B0-183DE3012726%7D&file=Book_Book.xlsx&action=default&mobileredirect=true	• Does not work • Power BI does not work well with this URL pathing to the Excel file.
Copy path to clipboard	 https://exceltestinglinkscenario.sharepoint.com/teams/some-bogusteam-test/Shared%20Documents/General/BookBlah.xlsx?web=1	• Does not work • Power BI does not like the ?web=1 at the end of this URL

RESOLUTION

- To resolve this issue, the bad URL path to the Excel Document stored on SharePoint Online, will need to be converted to a URL that is fully understandable to Power BI.

EXCEL DOCUMENT URL FORMAT

HTTPS	If this is SharePoint Online, HTTPS will always need to be utilized. If it is not, authentication errors and other errors will be displayed
Sharepoint Path	If this is SharePoint Online, the format should be something like this: companyname.sharepoint.com **EXAMPLE** Microsoft.sharepoint.com
Sites Path	If the document exists on a Site within SharePoint, that will need be included without extra characters. This format should be something like this: sharepoint-online-path/sitename **EXAMPLE** Microsoft.sharepoint.com/teams
File Name	This will be the file name of the Excel Document. **EXAMPLE** Microsoft.sharepoint.com/teams/myexceldoc.xlsx

- Resolving this issue, we had to modify the bad URL to be a URL that Power BI understands.

Bad Hyperlink	https://exceltestinglinkscenario.sharepoint.com/:x:/t/timmac-team-test/ETCnElhrOvBJtrAYPeMBJyYB_Xw8FyS4PeigPv82EAJ4jA?e=60ElaD

Power BI understanding URL	https://exceltestinglinkscenario.sharepoint.com/some-bogusteam-test/bookblah1.xlsx

ADDITIONAL INFORMATION

- Get data from files for Power BI: https://docs.microsoft.com/en-us/power-bi/service-get-data-from-files
- Get data from Excel Workbook Files: https://docs.microsoft.com/en-us/power-bi/service-get-data-from-files
- Connect to Excel in Power BI Desktop: https://docs.microsoft.com/en-us/power-bi/desktop-connect-excel
- Connect to CSV file in Power BI Desktop: https://docs.microsoft.com/en-us/power-bi/desktop-connect-csv