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Power BI On Prem Guide

https://docs.microsoft.com/en-us/power-bi/

https://scaniaazureservices.sharepoint.com/sites/SelfServiceBI

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PowerBI

PowerBI is a business analytics service provided by Microsoft. It provides interactive visualizations with self-service business intelligence capabilities, where end users can create reports and dashboards by themselves, without having to depend on information technology staff or database administrators.

- We at Scania IT have chosen PowerBI as our strategic choice for creating BI-reports.
- It is well suited for self service and has been developed from Excel and Power Pivot.
- To use PowerBI you need the Desktop software, it´s free. This is where you connect to data sources and create reports. You will get a choice when you get your data, import or live connect this important from a security perspective.
- When you have created your report and would like to share it there are two ways to go. You can use our on Prem Report servers or use the cloud service. This is also important whether you import data or live connect. If you import data and save the report in the cloud, all data will be in the "pbix" file which is stored in Azure. Depending on the classification of the data it might be a risk for Scania.
- Since there are two different ways to publish there is also two different versions available in Order IT.
- If you would like to use the cloud service you need a pro license to be able to share your report, read the license and access section.

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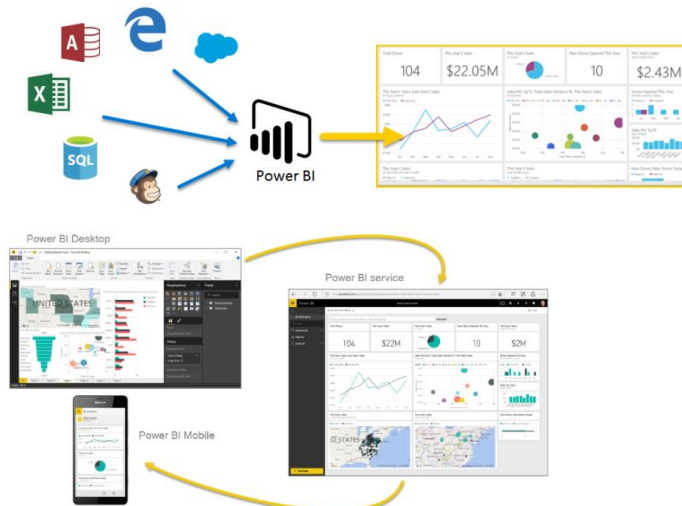
Introduction to Self Service

General Info

Self-Service business intelligence(SSBI) is an approach to data analytics that enables business users to access and work with corporate data even though they do not have a background in statistical analysis, business intelligence (BI) or data mining.

Allowing end users to make decisions based on their own queries and analyses frees up the organization´s business intelligence and information technology (IT) teams from creating the majority of reports and allows those teams to focus on other tasks that will help the organization reach its goals.
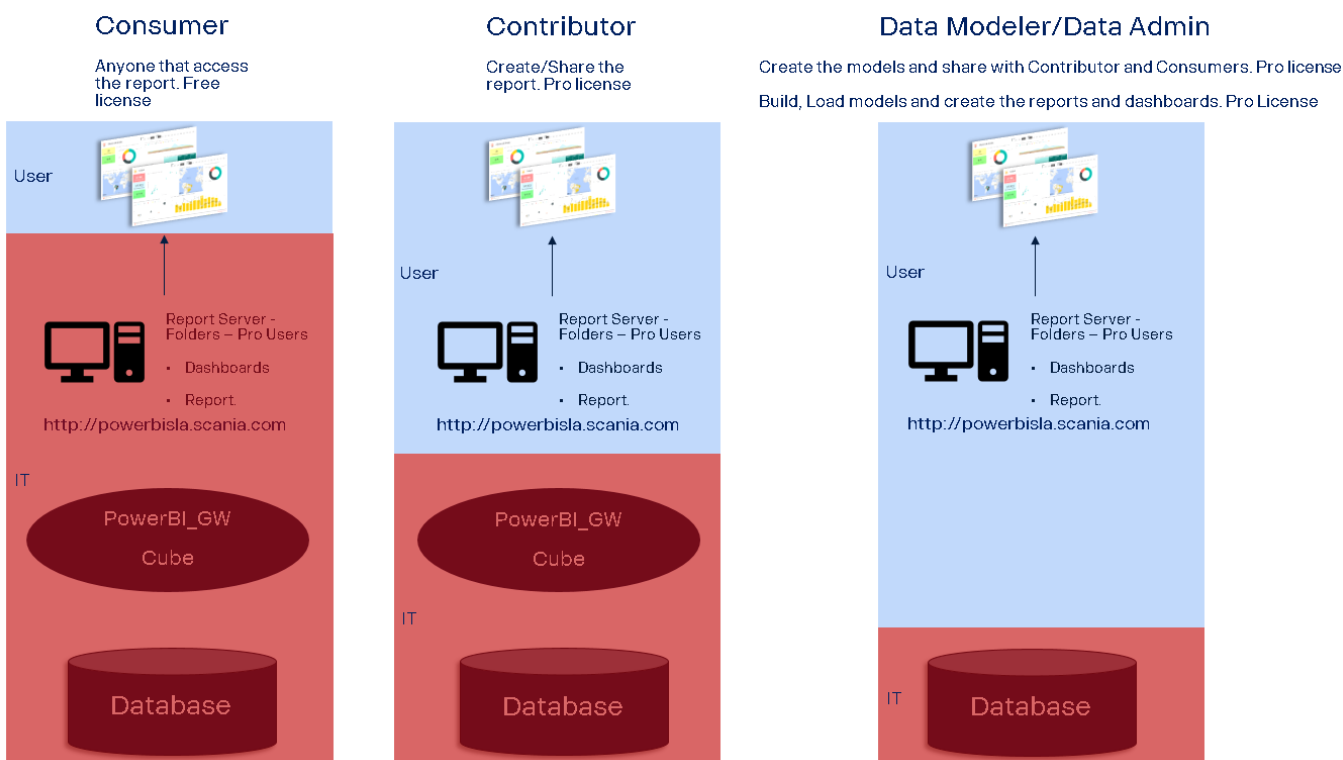
Scania Info

We at the BI-department (BIAN) at Scania have been working to enable a wider level of self service BI to the Scania employees. We see this to become more data driven and allow users to access updated data from our common data warehouse and to create their own BI-solution.

Self service BI does come with some challenges that we would like you to be aware of:

- Data awareness. Understand your data to avoid misguiding your users/managers. Before you start you need to make a risk evaluation IRAM.
- BI-Skills. You build it, you run it. We at BIAN cannot guarantee support for self service projects. If you want quality data, production stability and business critical reports you are welcome to initiate a project with us.

You are responsible for the data you are sharing in your reports. If you import your data in PowerBI reports consumers will be able to extract that data to excel.
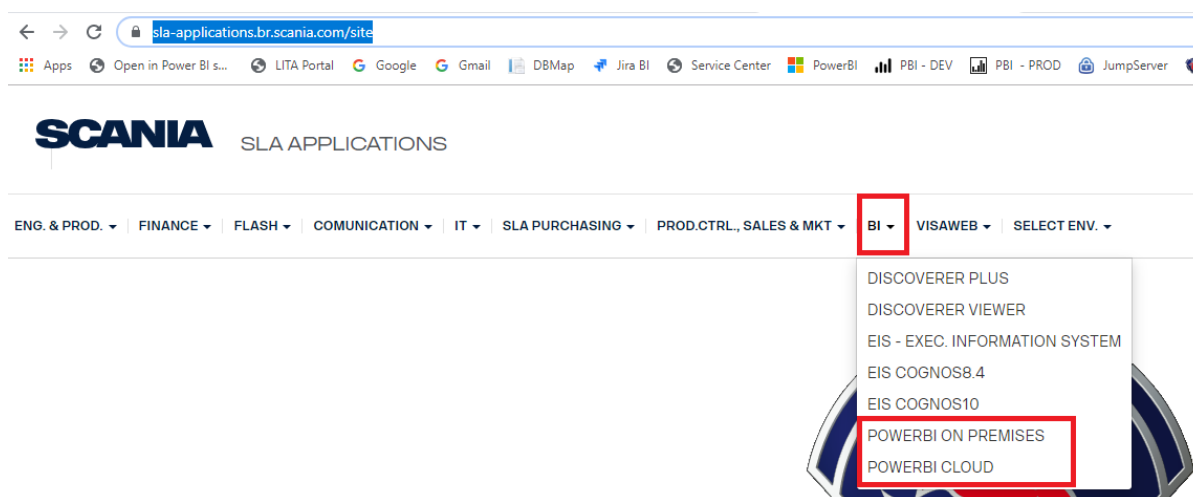
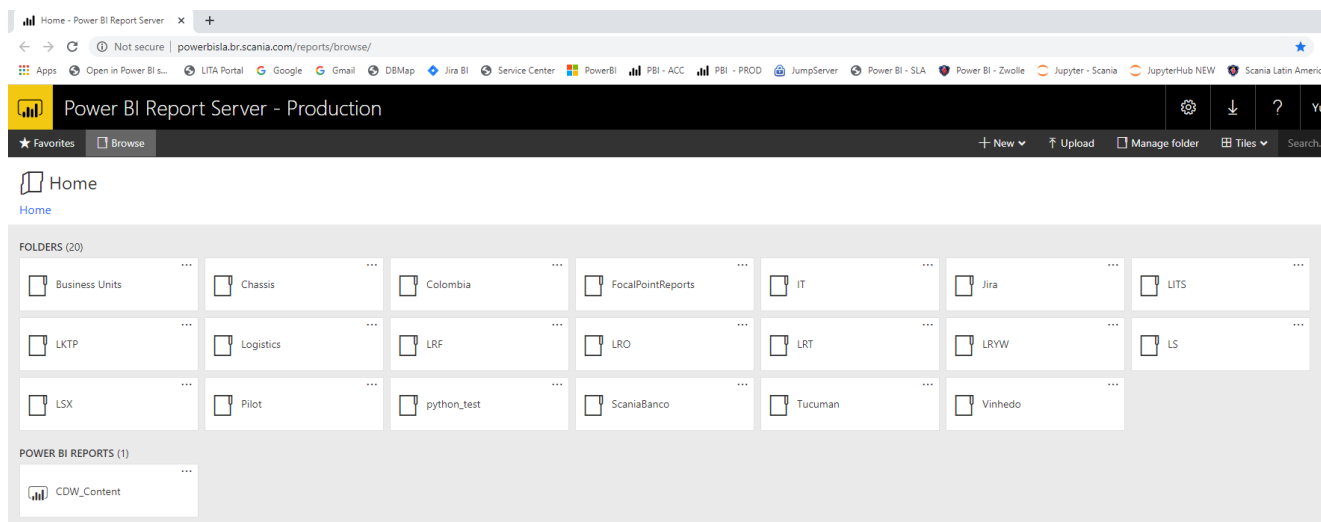|	Document type	
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Self Service Levels

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License and Access

You do not need to have PowerBI PRO license to use the PowerBI Report Server(On-Premises)

If you would like to use that platform please open by SLA-Application https://sla-applications.br.scania.com/site on the menu BI\PowerBI On Premises as below:

If you would like to create a new folder please open an issue by Jira on the group POWER BI - Platform (POWERBI).
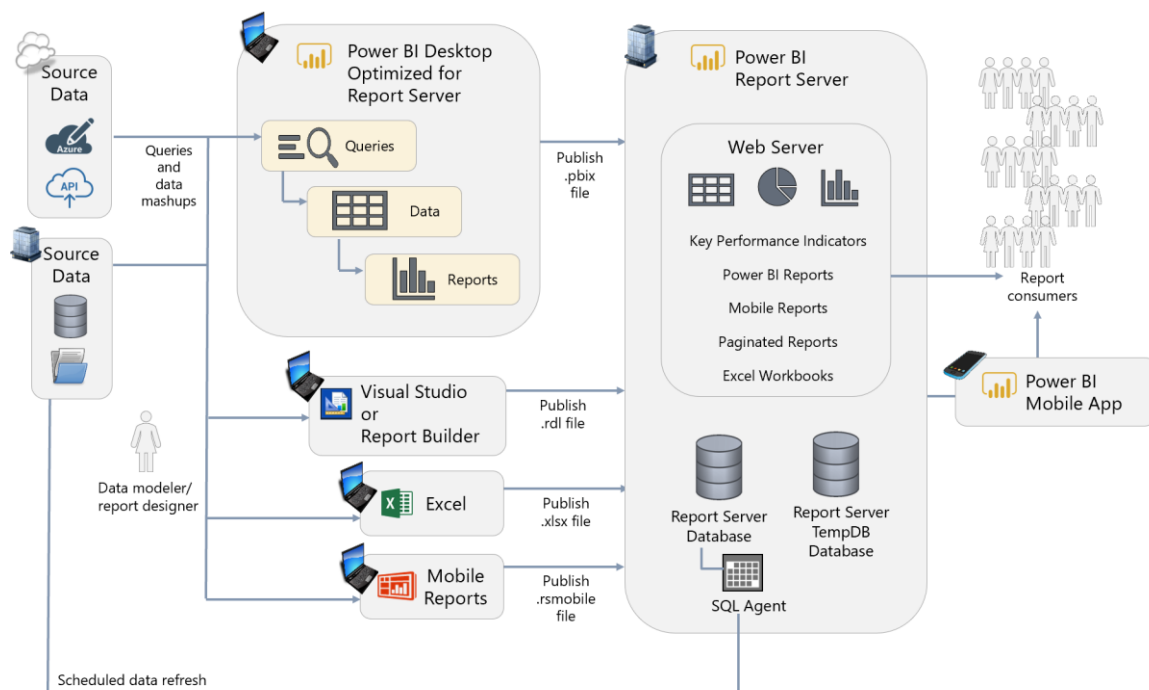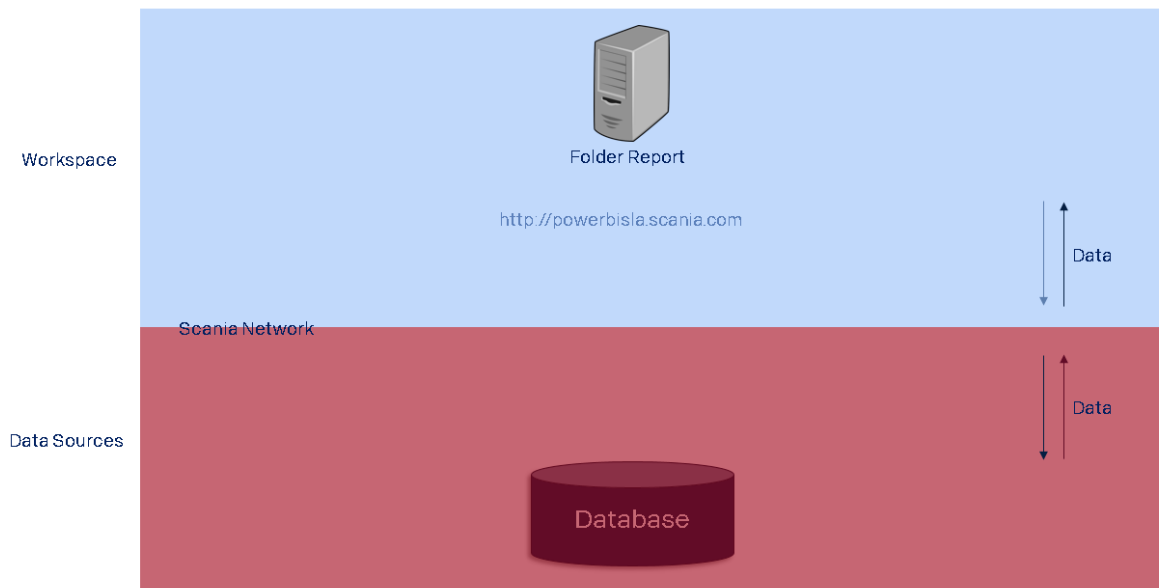
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PowerBI On-Premises vs Cloud

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Technical structure

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Architecture Cloud vs On Prem

Cloud
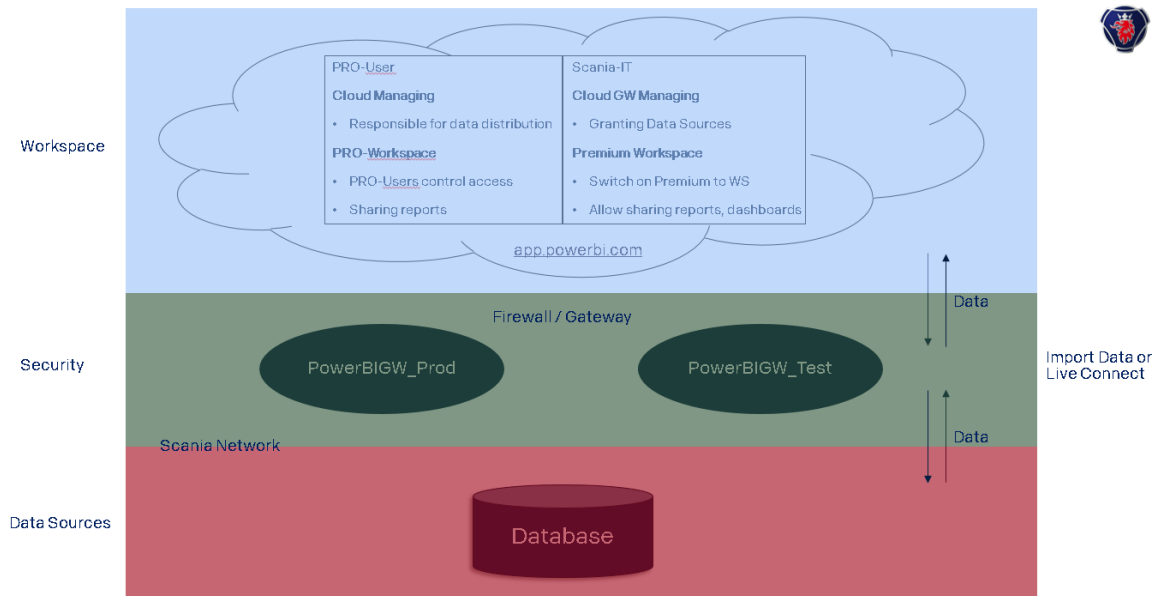
On Prem
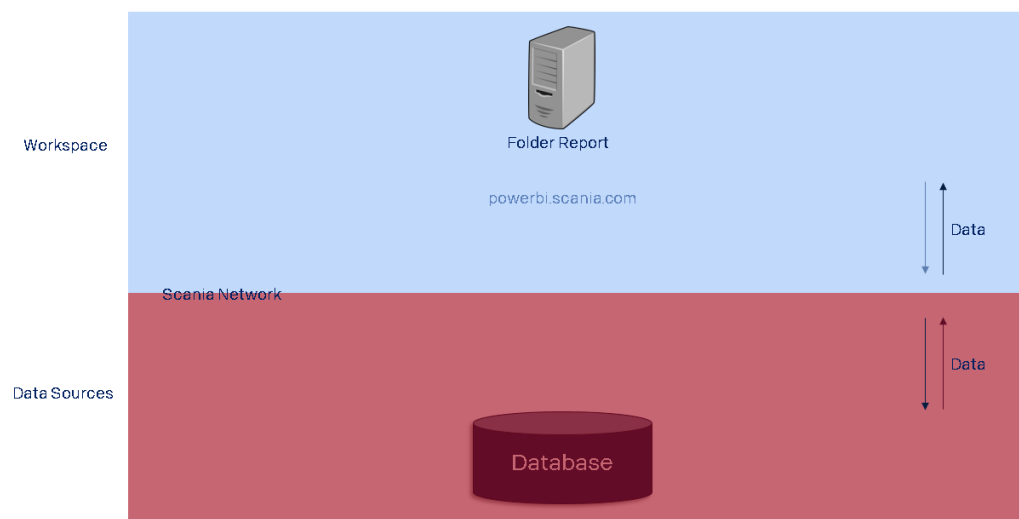
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Cloud vs On Prem

Features	Power BI Report Server	Power BI Service	Notes
Deployment	On-premises or hosted cloud	Cloud	Power BI Report Server can be deployed in Azure VMs (hosted cloud) if licensed through Power BI Premium
Source data	Cloud and/or on-premises	Cloud and/or on-premises	
License	Power BI Premium or SQL Server EE with SA	Power BI Pro and/or Power BI Premium	
Lifecycle	Modern lifecycle policy	Fully managed service	
Release cycle	Once every 4 months	Once a month	Latest features and fixes come to Power BI Service first. Most core functionality comes to Power BI Report Server in the next few releases; some features only meant for the Power BI service.
Create Power BI reports in Power BI Desktop	Yes	Yes	
Create Power BI reports in the browser	No	Yes	
Gateway required	No	Yes for on-premises data sources	
Real-time streaming	No	Yes	Real-time streaming in Power BI
Dashboards	No	Yes	Dashboards in the Power BI service
Distribute group of reports using apps	No	Yes	Create and publish apps with dashboards and reports
Content packs	No	Yes	Organizational content packs: Introduction
Connect to services like Salesforce	No	Yes	Connect to the services you use with the Power BI service
Q&A	No	Yes	Q&A in the Power BI service and Power BI Desktop
Quick insights	No	Yes	Automatically generate data insights with Power BI
Analyze in Excel	No	Yes	Analyze in Excel
Paginated reports	Yes	No	Paginated reports aren't available in the Power BI service, but you can pin paginated report items to Power BI dashboards
ARC GIS maps	No	Yes	ArcGIS maps in Power BI service and Power BI Desktop by Esri
Email subscriptions for Power BI reports	No	Yes	Subscribe to a report or dashboard in the Power BI service
Email subscriptions for paginated reports	Yes	No	E-Mail delivery in Reporting Services
Data alerts	No	Yes	Data alerts in the Power BI service
Row-level security	Only through data source in DirectQuery mode	Available in both DirectQuery (data source) & Import mode	Row-level security (RLS) with Power BI
Full screen mode	No	Yes	Full screen mode in the Power BI service
Advanced Office 365 collaboration	No	Yes	Collaborate in an app workspace with Office 365
R visuals	No	Yes	Create R visuals in the Power BI service
Preview features	No	Yes	Opt in for Power BI service preview features
Custom visuals	Yes	Yes	Custom visuals in Power BI
Power BI Desktop	Version optimized for Report Server, available for download with Report Server	Version optimized for Power BI Service, available from the Windows Store	Power BI Desktop for the report server Power BI Desktop for the Power BI service

https://docs.microsoft.com/en-us/power-bi/report-server/compare-report-server-service

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Installation for PowerBi RS desktop (PBIDesktopRS_x64)

There are two versions in PowerBI Desktop and the black icon is for On-Premises and yellow icon is for Cloud so you need always to remember before is where I will publish my report.
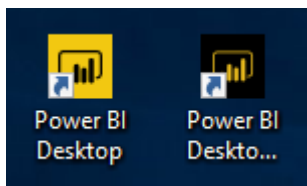
You can order the PowerBI Desktop by Order-IT http://orderit.scania.com/Site/ProductAndCatalogNavigation_View.aspx?CategoryID=CAT-486&node=_CAT-279 and the software will be available in Software Center to be installed in your computer, and when there is a new version automatically will be available to install also.

Choose please the PowerBI Desktop On Prem and the Report-Server 64 bit as below.

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The installation can be manually also by link https://www.microsoft.com/en-us/download/details.aspx?id=56723 but the new PowerBI versions will not be available in Software Center.

The installation´s instruction of Oracle Client is available on the link https://docs.microsoft.com/en-us/power-bi/desktop-connect-oracle-database

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Level Security

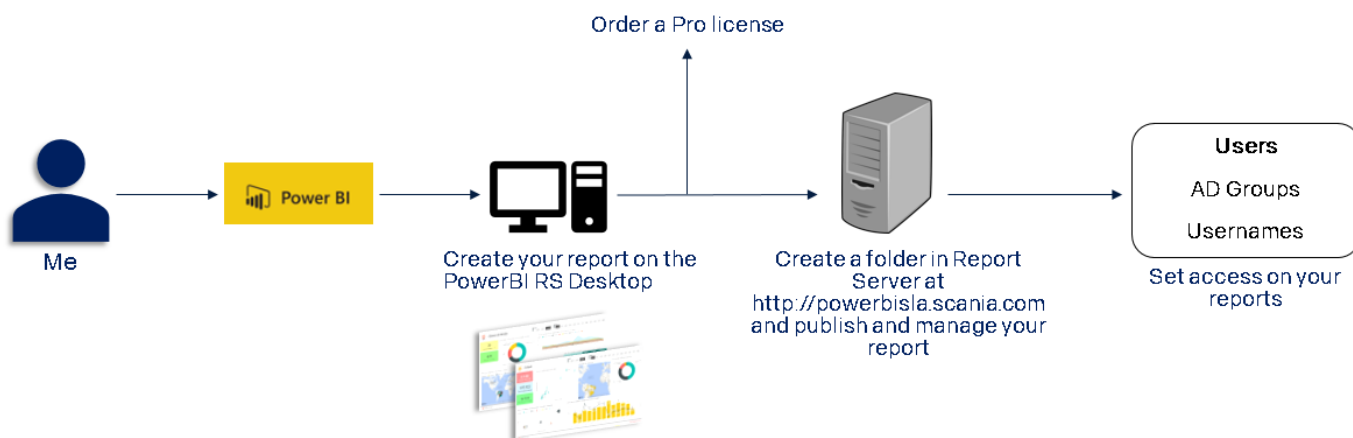|	Document type		
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Support

- When the issue is with PowerBI the BI infra team can check it first and if the problem is related to the infra;
- The incident about infra can be redirected to the **AMS PowerBI Advanced Support Scania Latin America** group;
- The incident about reports developed by IT can be redirected to the their groups according to application;
- If the PowerBI report has been developed by Sweden, please contact the Customer Support +46 8 553 81795 or cs.sodertalje@scania.com , if the report is an Self Service report the user should contact whomever it is that has made the report.
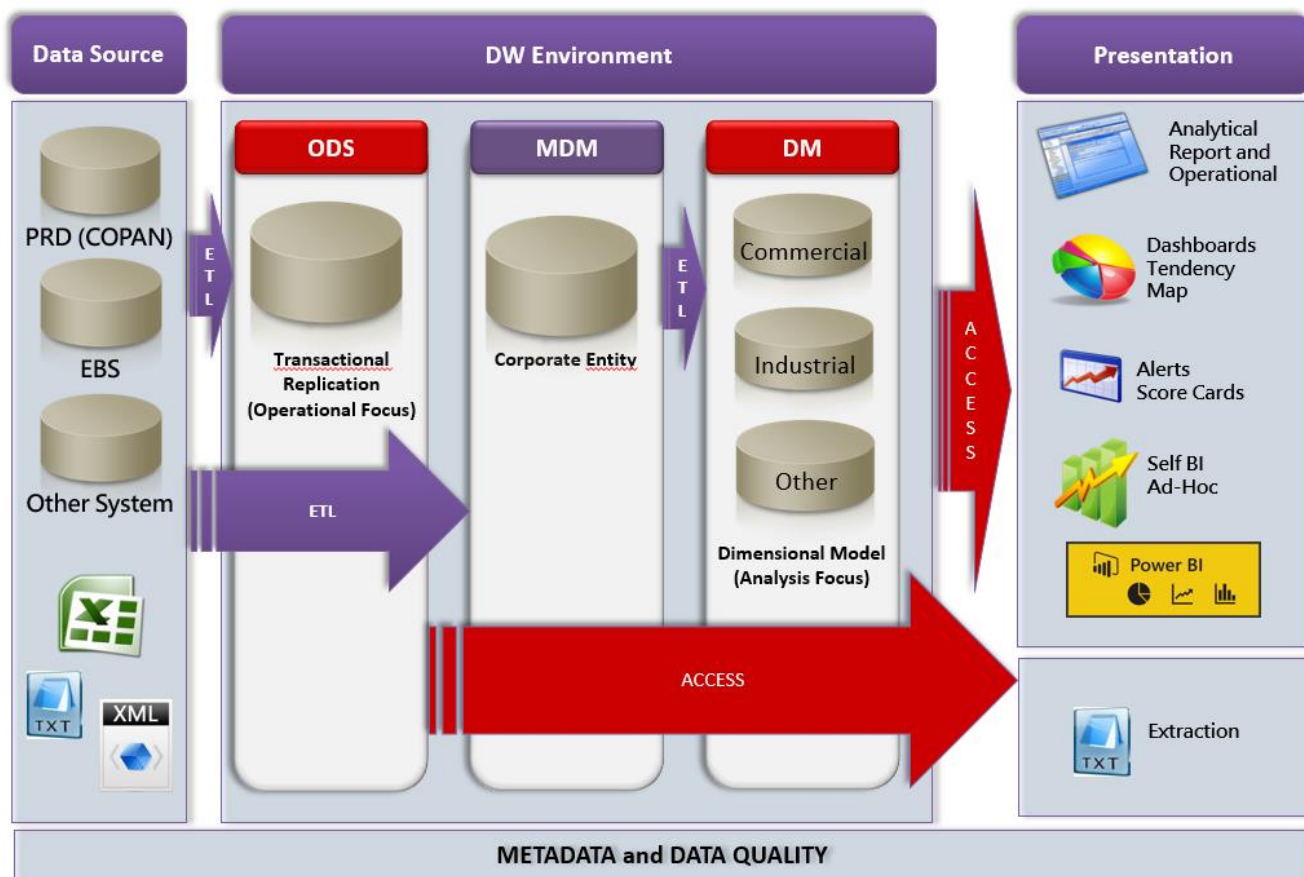
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Flow

1) User needs to know if the report will be shared or not:
     a. if yes:
          i. The data source(database) must be configured on the Report Server and it is handled by BI infra team;
     b. If no:
          i. No activity to do because the user will work in stand-alone mode.
2) User open the PowerBI RS desktop using the O365 credential and create the report;
3) User open the PowerBI Report Server by http://powerbislaacp.br.scania.com/reports or http://powerbisla.br.scania.com/reports and create a folder with a name;
4) In PowerBI RS desktop the user publishes the report choosing the folder created on the Report Server;
5) In PowerBI Report Server the user can set the permissions and who(username or AD group) can access the report.

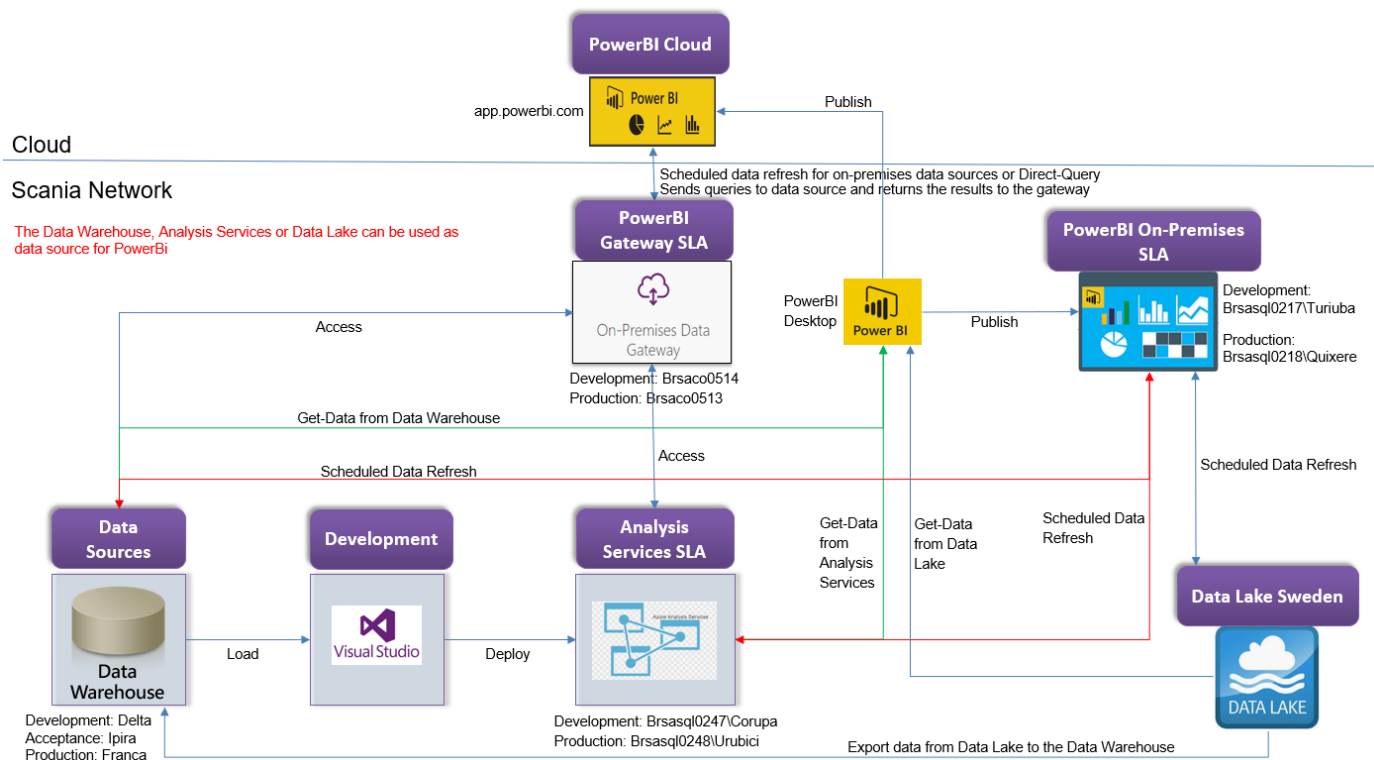|		
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Education

Tips and demos to improve your BI-Skills:

- Get started with PowerBI guide: https://docs.microsoft.com/en-us/power-bi/service-get-started
- PowerBI Youtube channel with guides: https://www.youtube.com/user/mspowerbi
- PowerBI tutorial: https://www.youtube.com/watch?v=gqO0EiCn4cY
- Tutorial
  - https://docs.microsoft.com/pt-br/power-bi/service-connect-to-services
  - https://docs.microsoft.com/pt-br/power-bi/sample-tutorial-connect-to-the-samples
  - https://docs.microsoft.com/pt-br/power-bi/desktop-getting-started
- Self Learning
  - https://docs.microsoft.com/pt-br/power-bi/guided-learning/
  - https://docs.microsoft.com/pt-br/power-bi/guided-learning/gettingstarted
  - https://powerbi.microsoft.com/pt-br/learning/
- Demo
  - \\global.scd.scania.com\proj_Public\PowerBI\Demo 20171024
  - https://app.powerbi.com/groups/me/reports/3b7cd9fd-f06f-4cb6-9e4d-f0ea7b68af0d?ctid=3bc062e4-ac9d-4c17-b4dd-3aad637ff1ac
- Dashboards in Zwolle
  - https://pages.github.scania.com/ScaniaNL/PowerBI-dashboards/
  - https://pages.github.scania.com/ScaniaNL/PowerBI-KB/
- Internal Education at Scania – The education at Scania is still in stand-by due to pandemic but a new PowerBI education on-line will be available ASAP.
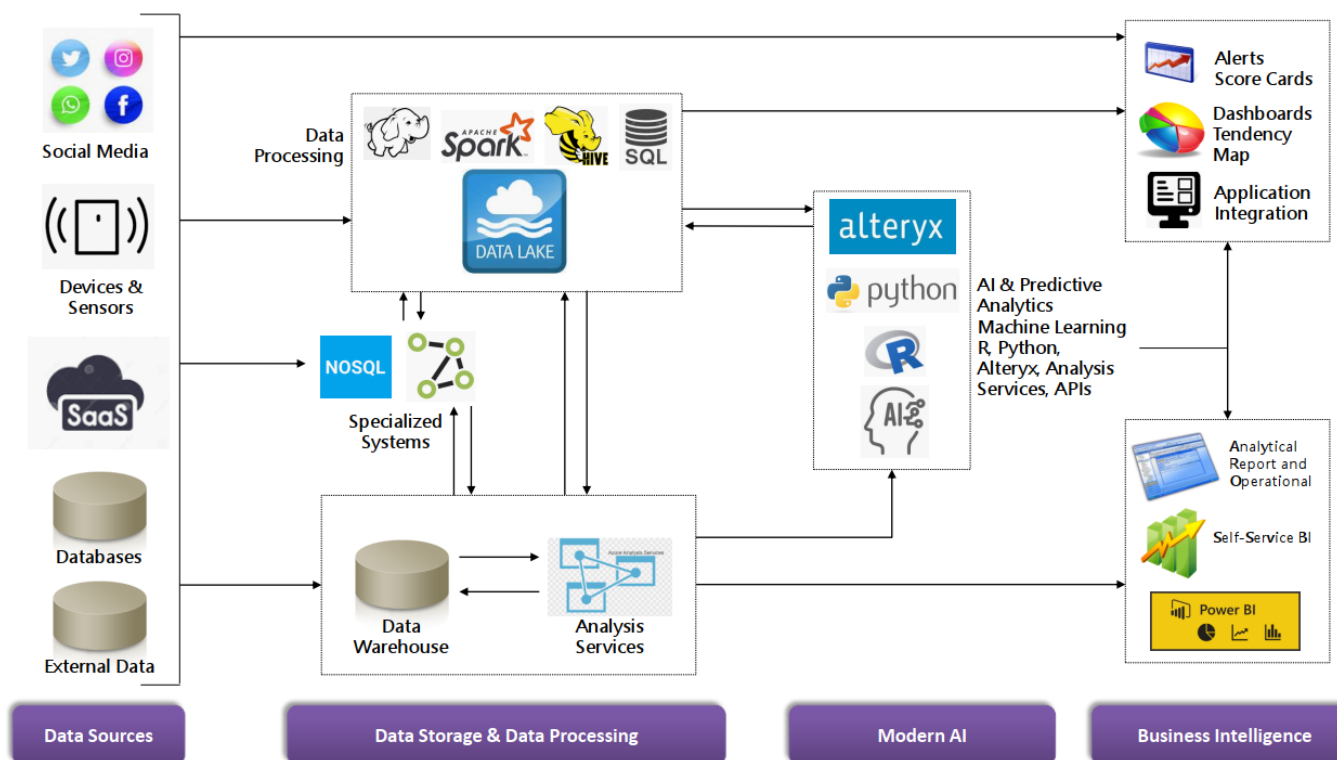
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Reference Architecture

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PowerBI Architecture

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General Architecture

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Step by Step

1) Open the PowerBi and click on the Get Data;

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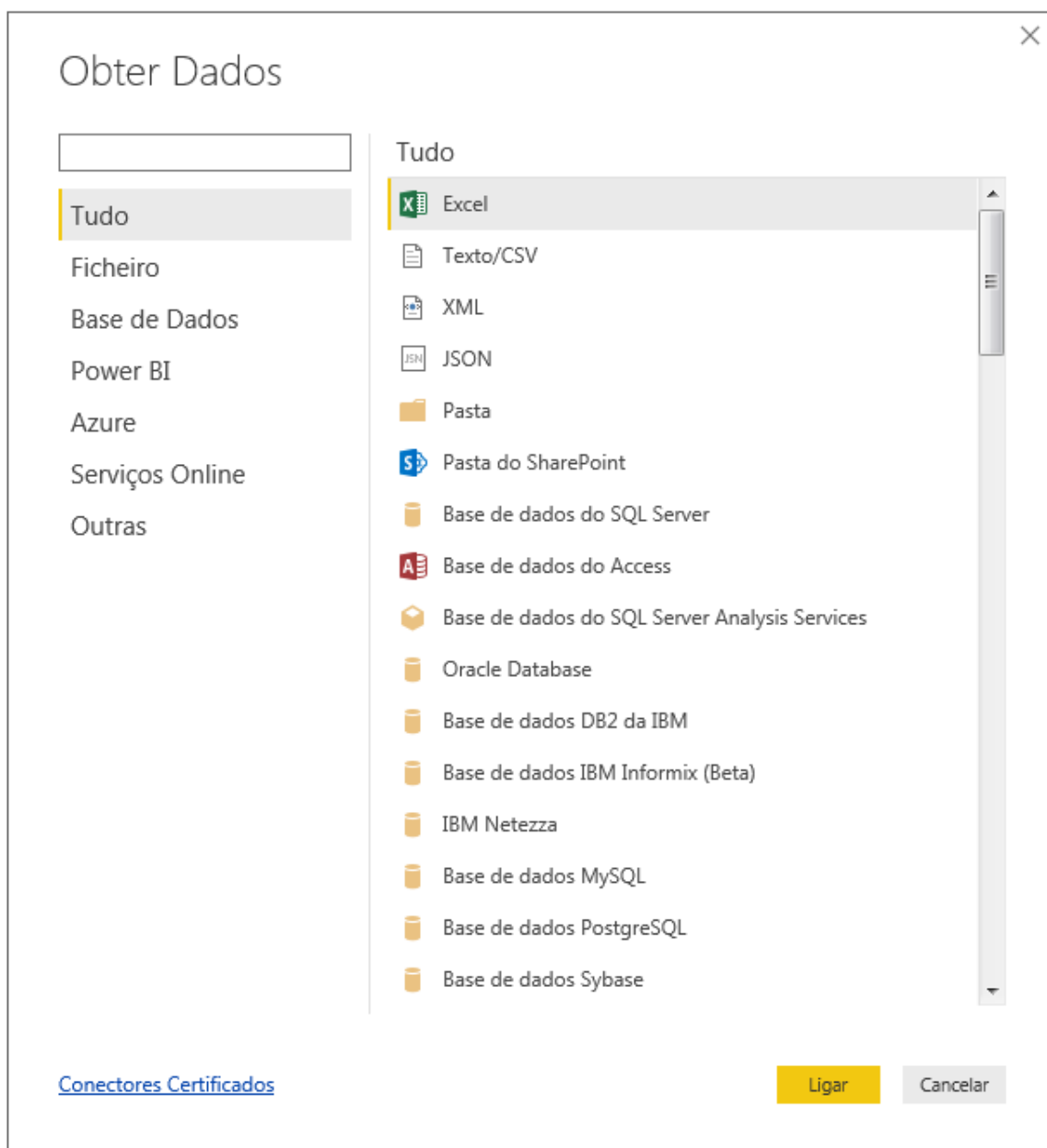
2) Inform the database name, the connectivity mode if is import data or live connect and the query string;

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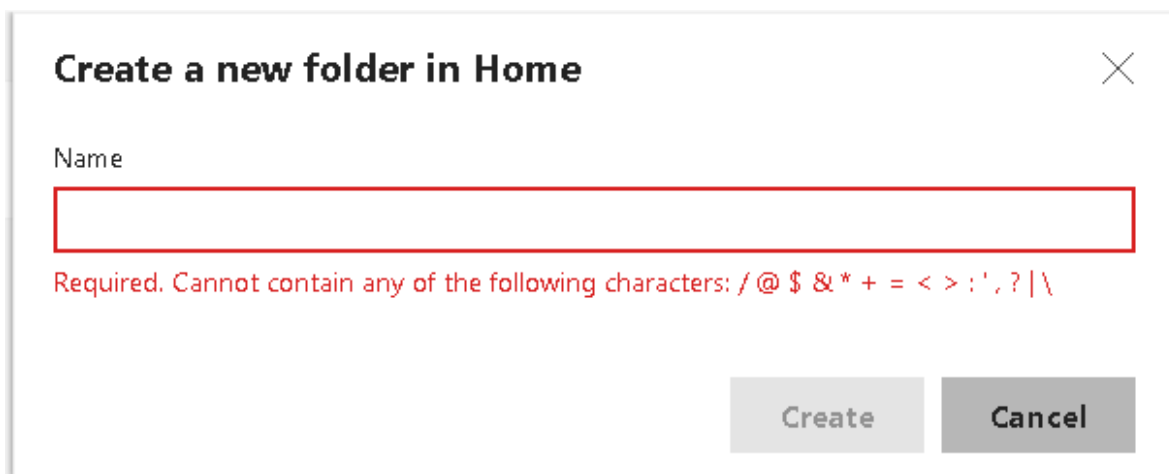
3) The information is showed:

erere.br.scania.com

COUNT(*)
20

Carregar   Editar   Cancelar
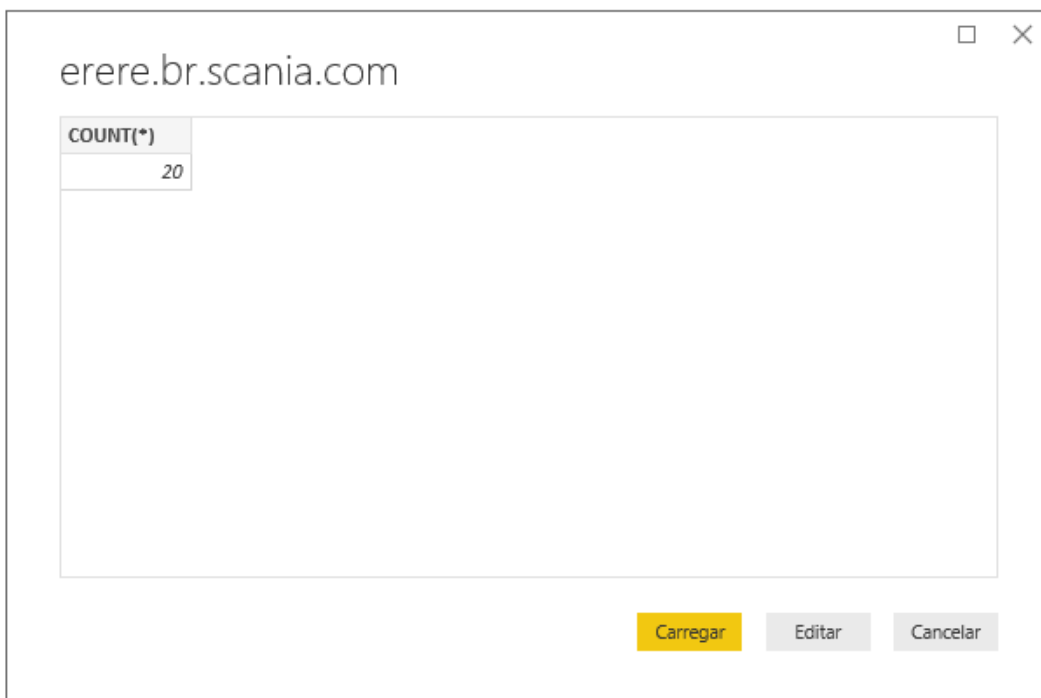
4) Develop a report to show the data saving on the Pbix file:

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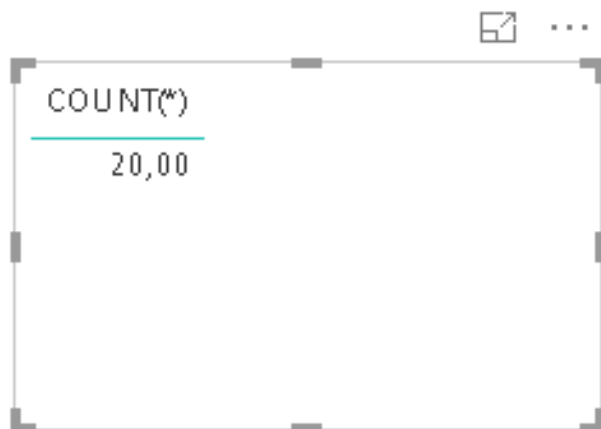
5) Open the PowerBi On Prem and create a folder:

6) Publish your report on the report server choosing that folder clicking on Save As, choose the Power BI ReportServer, inform the server name and the folder

PowerBI Development: http://powerbisla_dev.scania.com/Reports

PowerBI Production: http://powerbisla.scania.com/Reports

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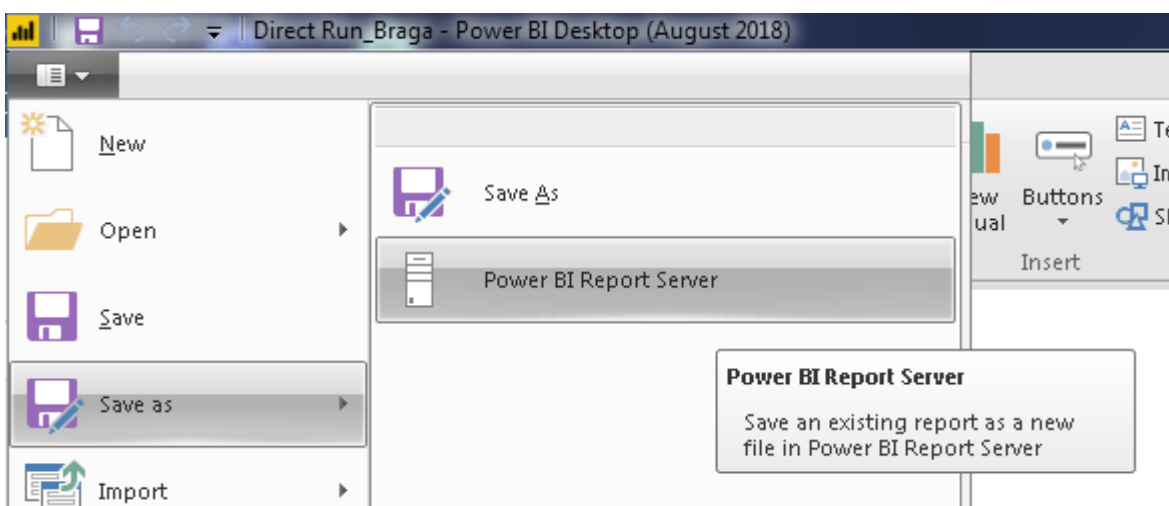
Power BI Report Server Selection

×

Choose the report server you would like to save your report to. You can select from the recent report server list or enter a new report server address.

Recent report servers

brsasql0185/Reports

New report server address (Example: http://reportserver/reports or https://reportserver/reports)

http://brsasql0185/Reports

OK   Cancel

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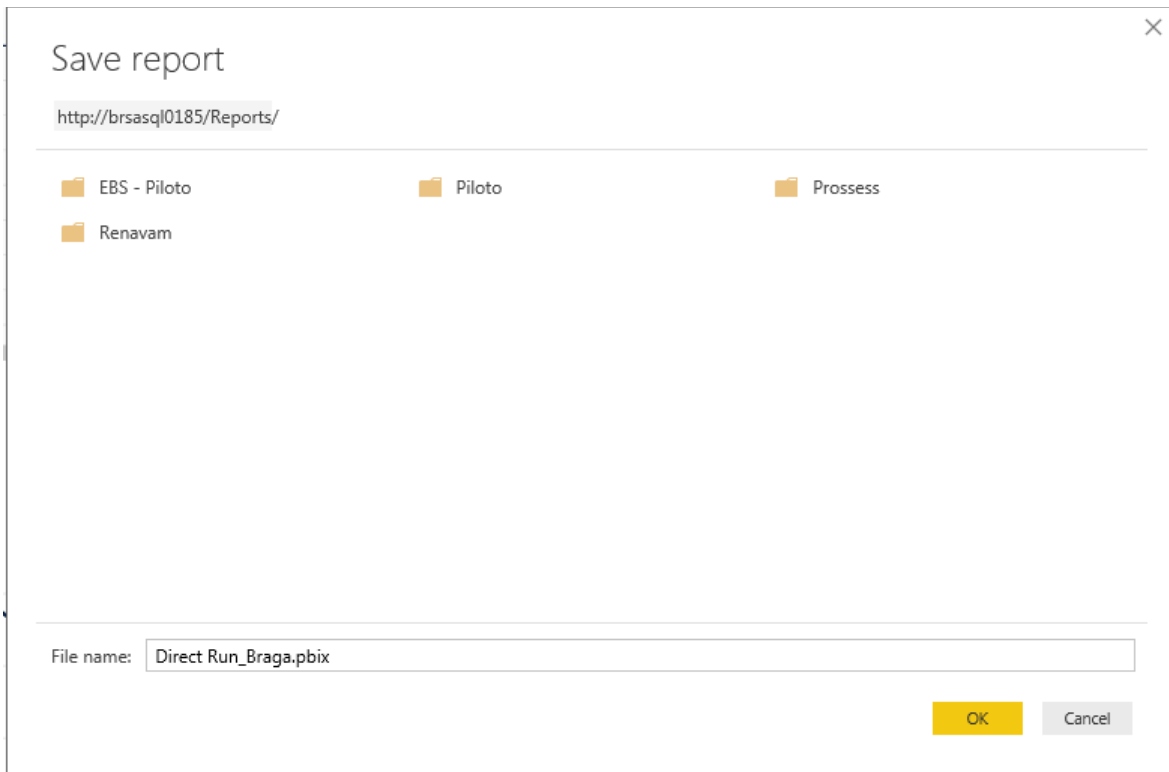
7) Report published:
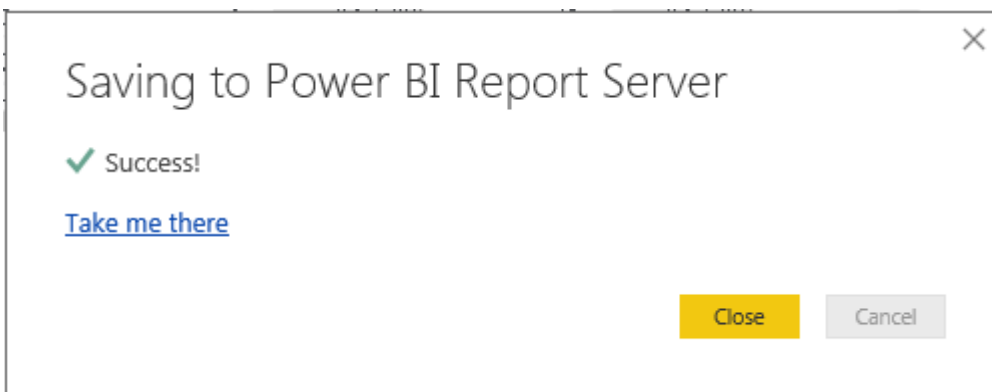
8) Report opened on the report server:

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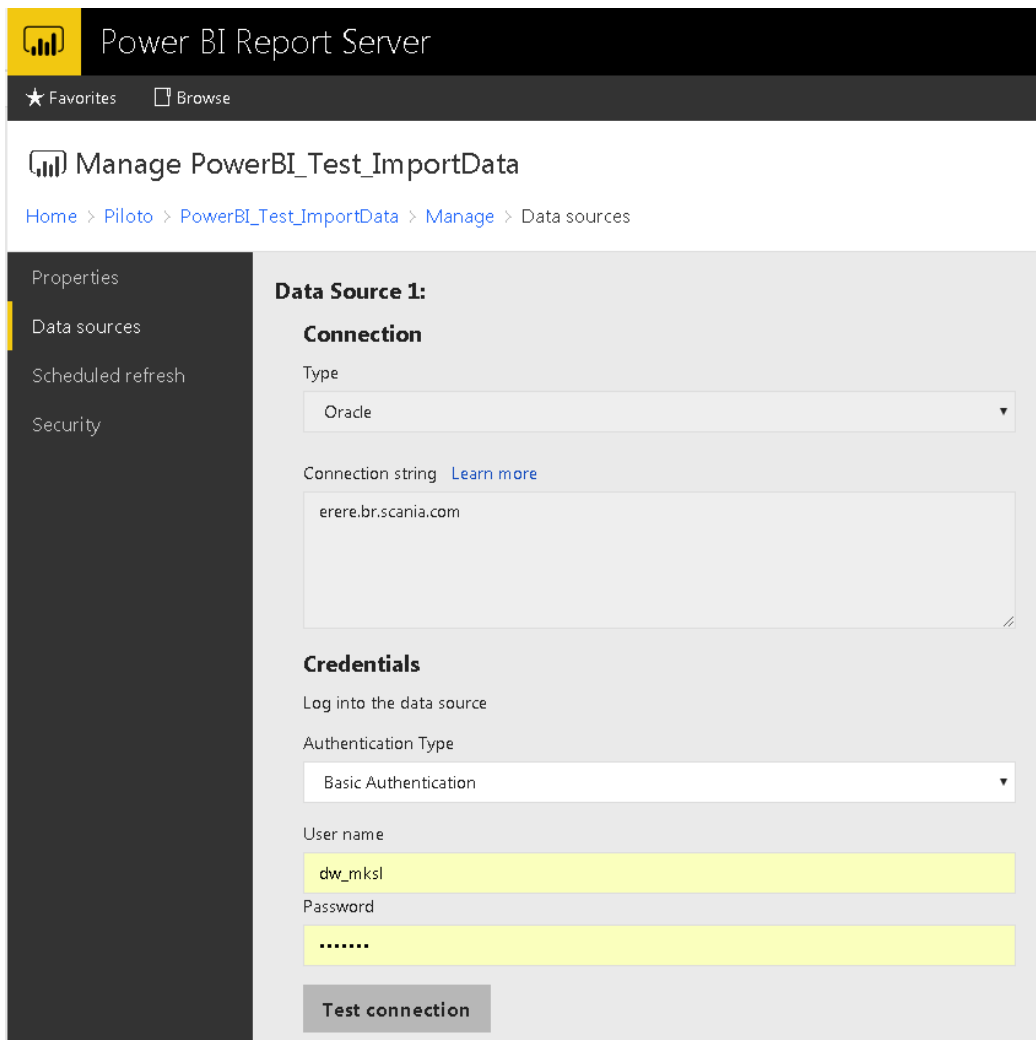
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9) Know the data sources configuration:

10) Configure the refresh:

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11) Sharing the report to the AD group and handling the permission:

12) Changing the permission on the folder:

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Power BI Report Server

★ Favorites   ☐ Browse

📓 Manage Prossess

Home > Prossess > Manage > Security

Properties	+ Add group or user	🗑 Delete	⤴ Use same security as parent folder	Search...	
Security					

☐	Edit	Group or user ∧	Roles
☐	Edit	BUILTIN\Administrators	Content Manager
☐	Edit	GLOBAL\ssbilj	Content Manager
☐	Edit	GLOBAL\SSBMYN	Content Manager

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Security

To manage the security in PowerBI On Prem you can choose the role below for each user or for AD group.

Use this page to assign role-based security for **Home**.

Group or user: Name...

Select one or more roles to assign to the group or user.

	Role ∧	Description
☐	Browser	May view folders, reports and subscribe to reports.
☐	Content Manager	May manage content in the Report Server. This includes folders, reports and resources.
☐	My Reports	May publish reports and linked reports; manage folders, reports and resources in a users My Reports folder.
☐	Publisher	May publish reports and linked reports to the Report Server.
☐	Report Builder	May view report definitions.

OK   Cancel

If you need to create a new folder to publish your reports please open a Jira issue to the POWER BI - Platform (POWERBI) product so IT area can define the responsible and also the access control.

Power BI Report Server - Production

★ Favorites   Browse

Home

Home

FOLDERS (3)

Jira   Logistics   Pilot
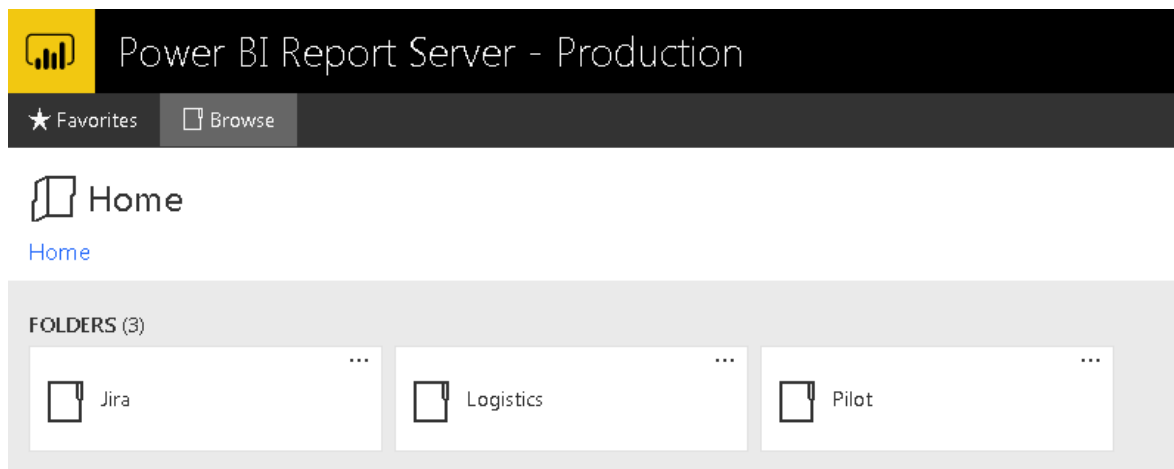
The responsible for that folder can handle the permission for each report like who can open the report, who can publish a new report and who can create a new sub-folder.

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Or each responsibility could be also handled by AD group where the access is done by Access Control system.

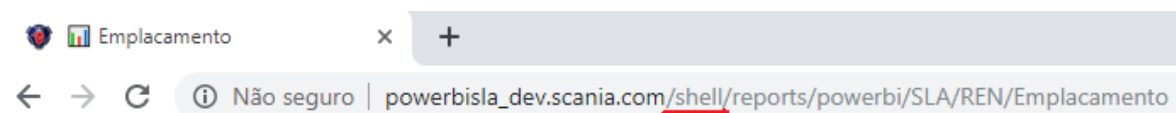|	Document type	
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Auto-Refresh on report

That functionality is available in PowerBI On Premises where you can open your report on TV for example in full-screen mode and the refresh will be for every 3 minutes automatically and do not need to press the refresh button manually.

To configure Auto-Refresh on PowerBI report you need to include the word "/shell" before of the "/reports" on the url report.
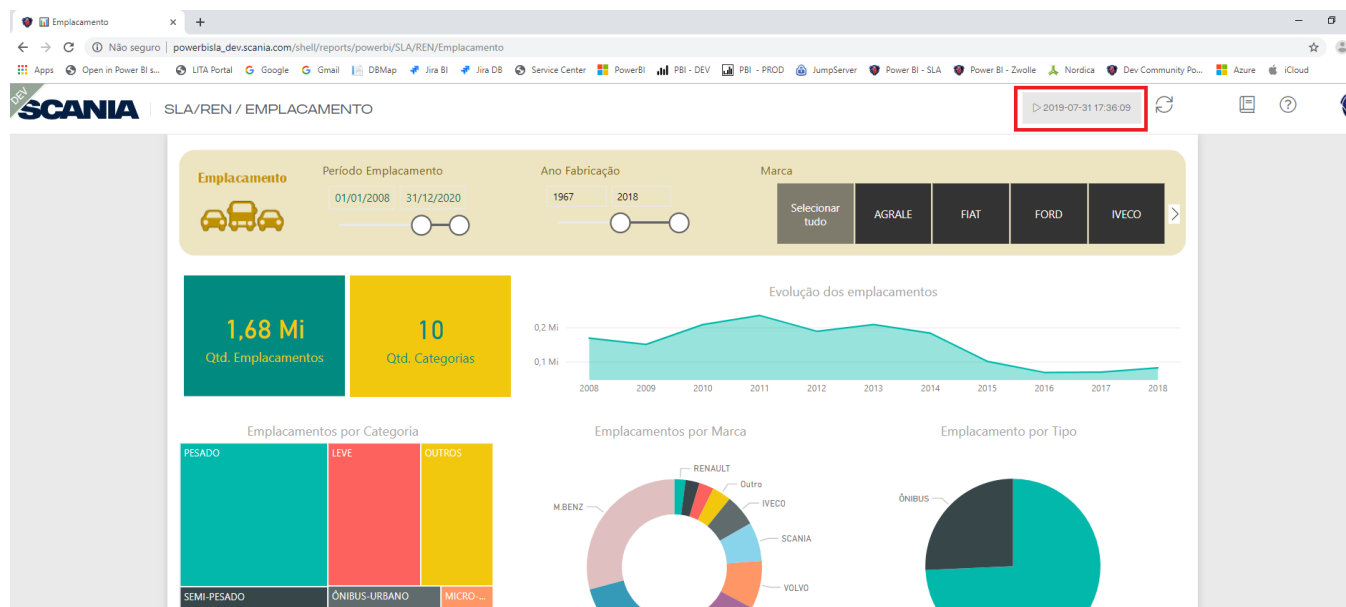
An example below showing the original URL:
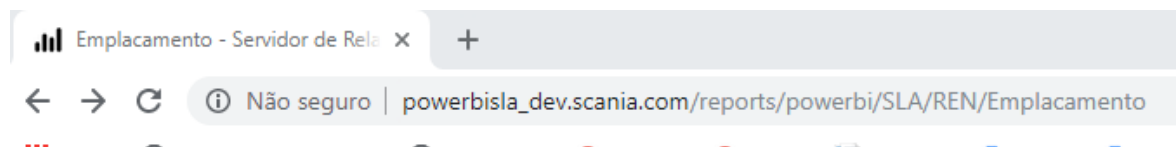
So you include the **/shell** on the URL:

Your report will be opened with Scania header showing the last time of the refresh.

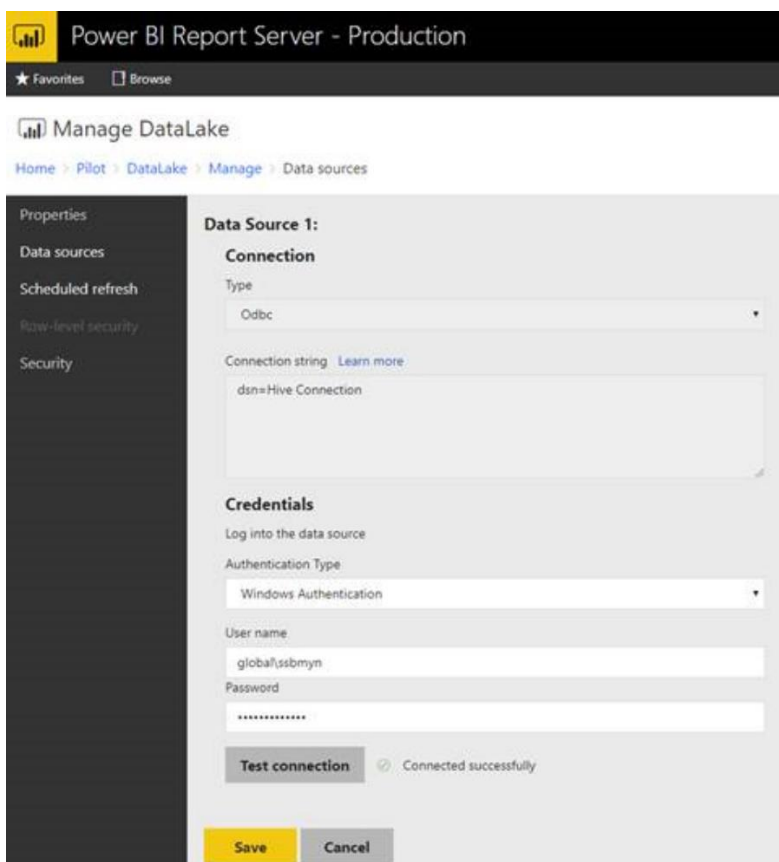|	Document type	
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Automatic Refresh taking data from Data Lake in Sweden

The interface between PowerBI On-Premises Report Server and Data Lake in Sweden has been configured so if you have a PowerBI report that is using data from Data Lake in Sweden you can configure now the refresh data.

That interface is working only in PowerBI On-Premises and it is not available in the Cloud according to Isec issues.

For more details to use the Data Lake By PowerBI please read the document UsingDataLakeByPowerBI _V02.pdf.
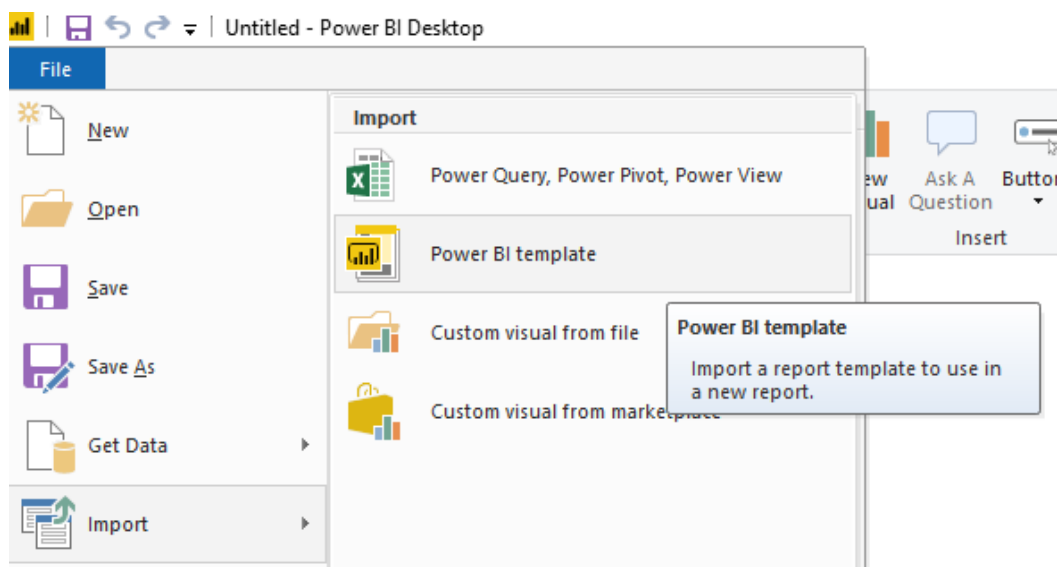
If you are already using this you need only configure the data source following in this way as example.

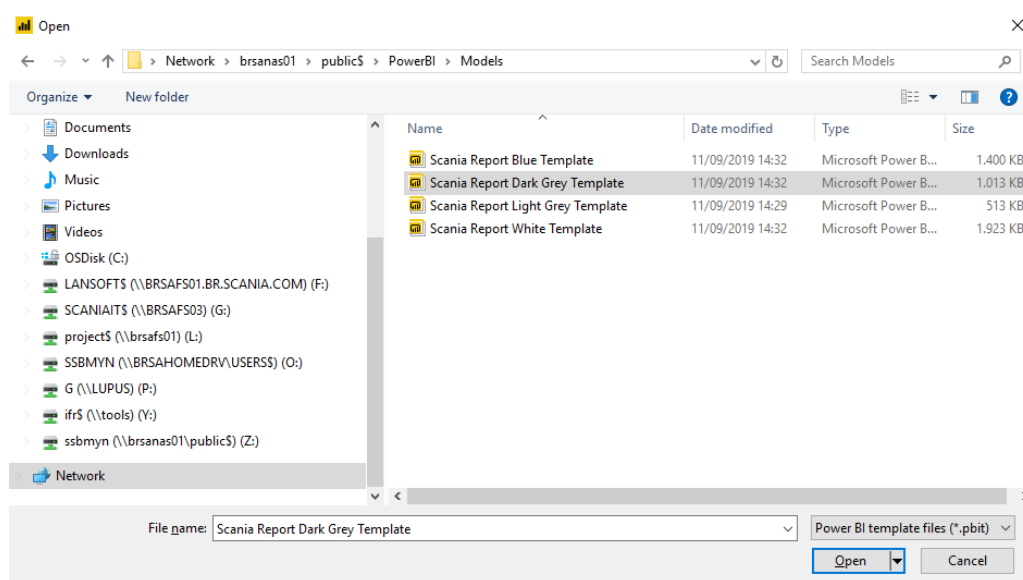|	Document type	
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Scania Template and Theme

If you would like to use the Scania template or theme on the PowerBI the step-by-step is:

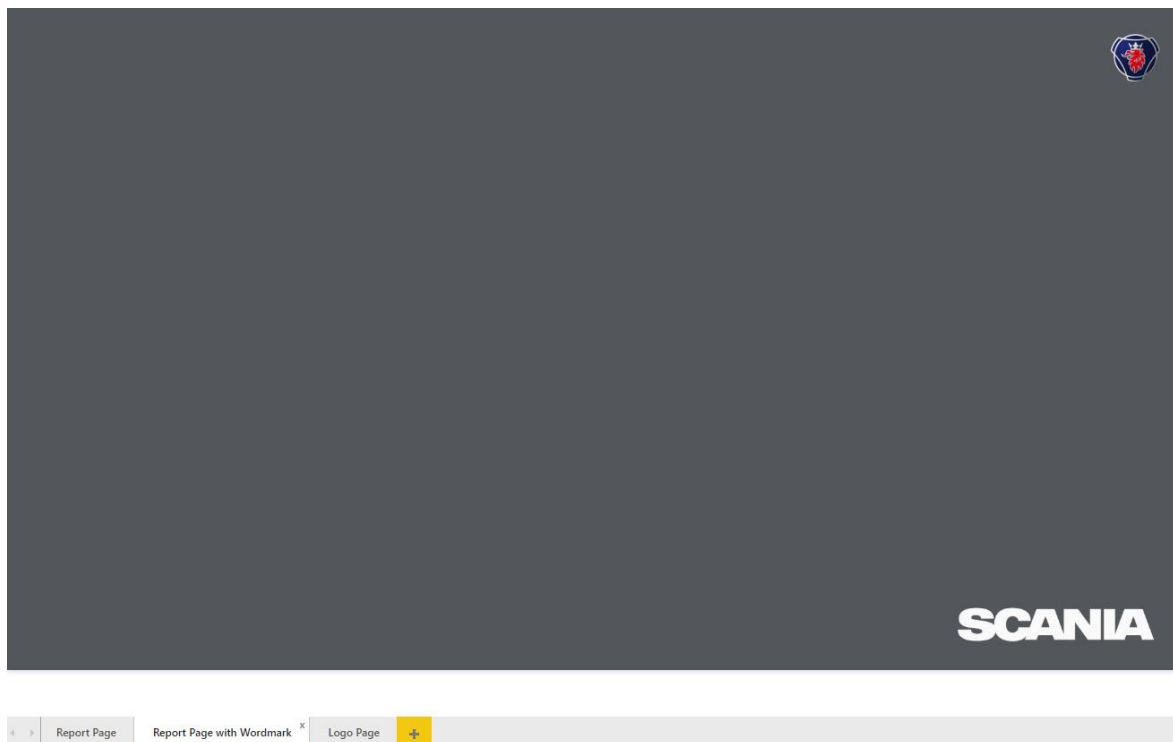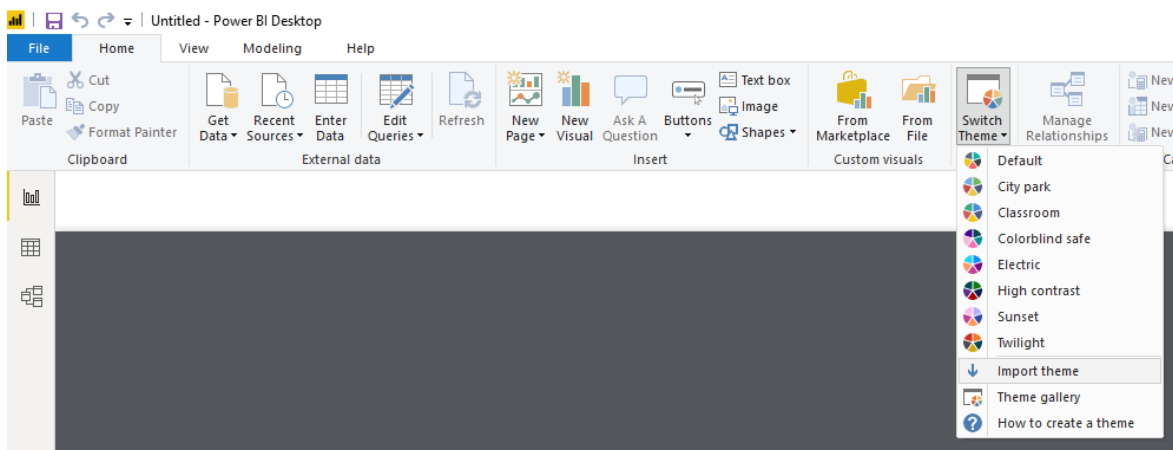a) PowerBI Template: Menu File\Import\PowerBI Template:

b) Fill the path \\brsanas01\public$\PowerBI\Models and choose a template:

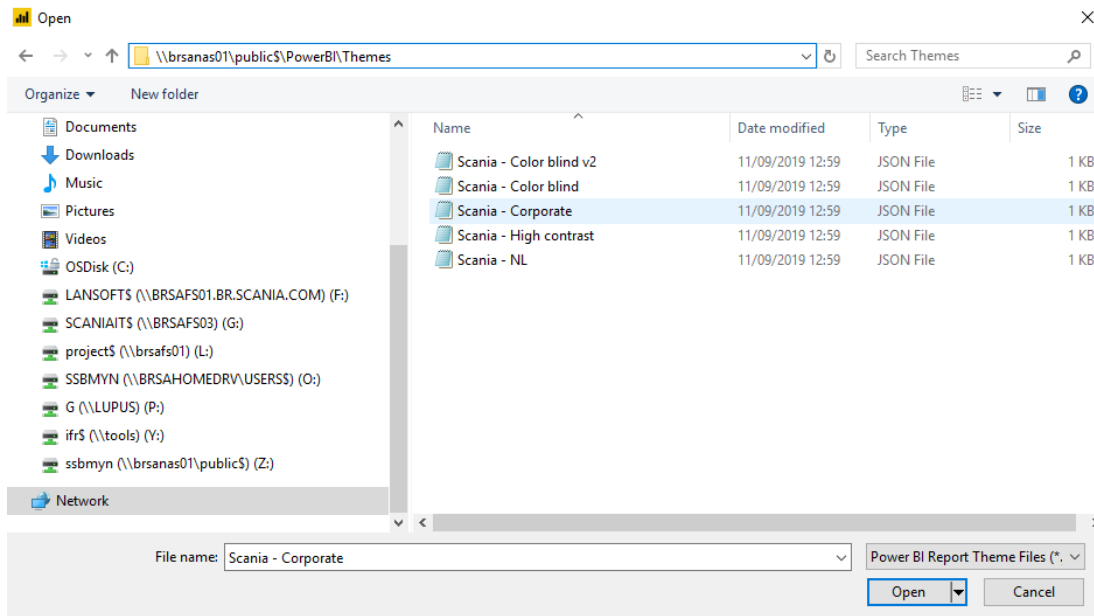|	Document type	
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c) The template will be loaded with Scania logo:

d) PowerBI Theme: Menu Home\Switch Theme\Import theme:

e) Fill the path \\brsanas01\public$\PowerBI\Themes and choose a theme:

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f)   You will receive a message as below: