

Apps4.Pro

# Power BI Connector for Microsoft Planner

# What is Apps4.Pro Power BI Connector for Microsoft Planner ?

It is an Edge extension which connects Microsoft Planner to Power BI. With this connection you can create powerful dashboards for your Planner plans.

This extension offers

- Schedule sync - Sync Planner data to Power BI at regular intervals
- Plan picker – Select plan which is to be sync
- Workspace picker – Select workspace for creating dashboard
- Manage multiple accounts – Add and manage multiple Planner / Power BI accounts for reporting.

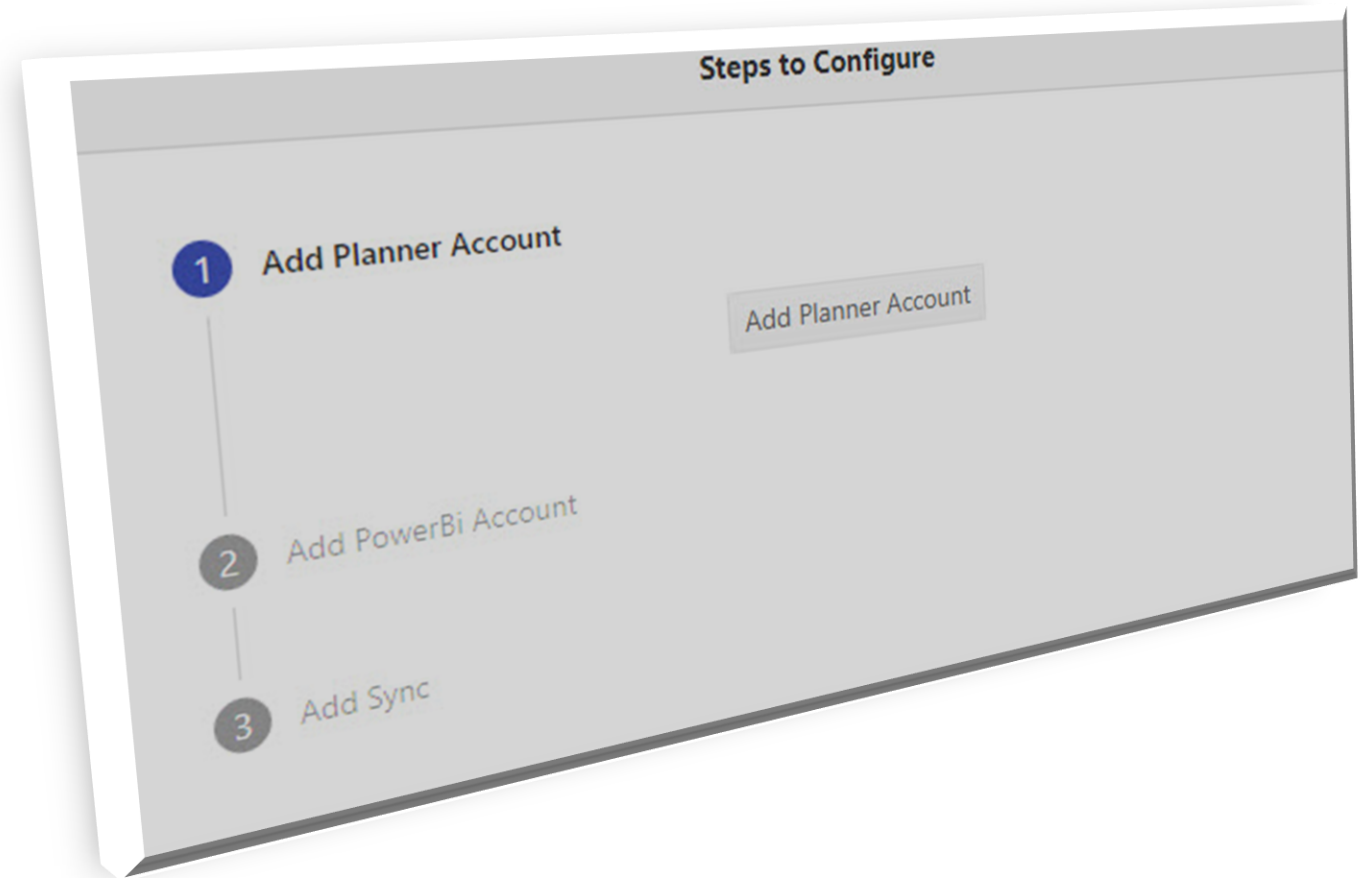
# Steps to get started

Add this extension to your Edge browser using below link

<https://microsoftedge.microsoft.com/addons/detail/apps4pro-powerbi-connect/mkckkonohigbeohepdpifohjhdmdnce>

Configuration process:

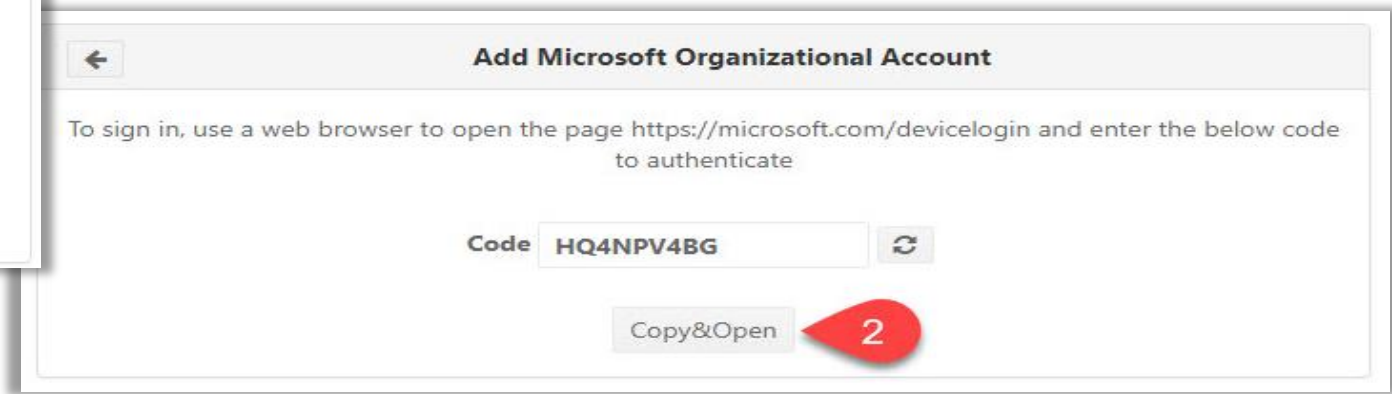
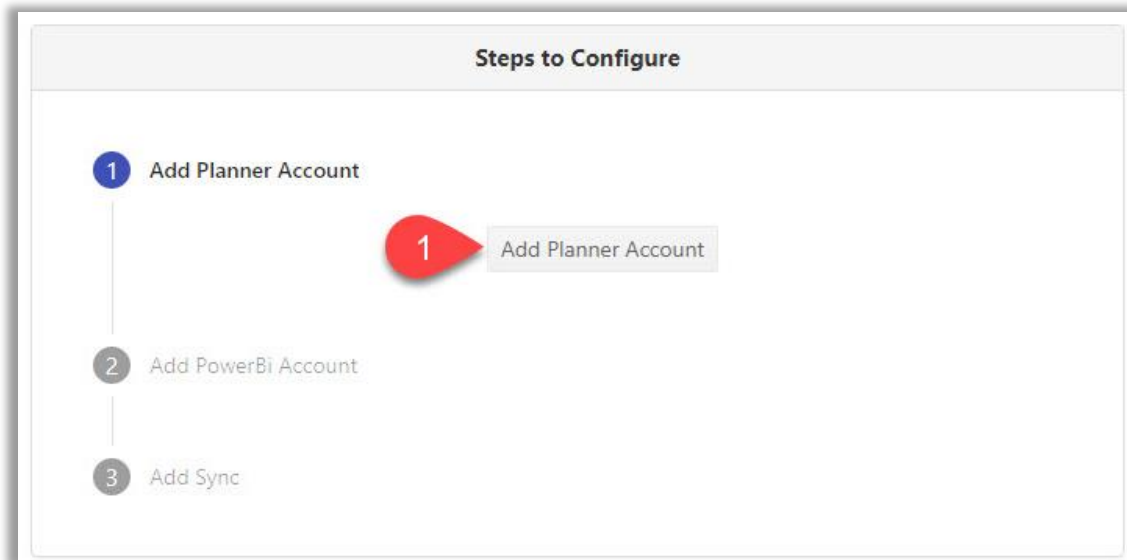
1. Add Planner Account
2. Add Power BI Account
3. Create Sync Schedule



## 1.1 – Add Planner Account

1 -> Click on 'Add Planner Account' button. This extension uses Microsoft device login authentication and hence you will be presented with a code. This code needs to be entered in <https://microsoft.com/devicelogin> and sign in with your Planner account.

2 -> Click 'Copy & Open' button. This will take you to the Microsoft sign in page. Now paste the code and sign in with your Office 365 account.



# 1.2 – Sign-in

## Device Login


Enter the code that you received from the application on your device

**Microsoft Office**

Click Cancel if this isn't the application you were trying to sign in to on your device.


**Continue** Cancel

**3**

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Paste Your Code



## Pick an account

**Select Your Account**

- 
 MOD Administrator  
 Signed in
- 
 [Redacted]
- 
 Use another account

Back

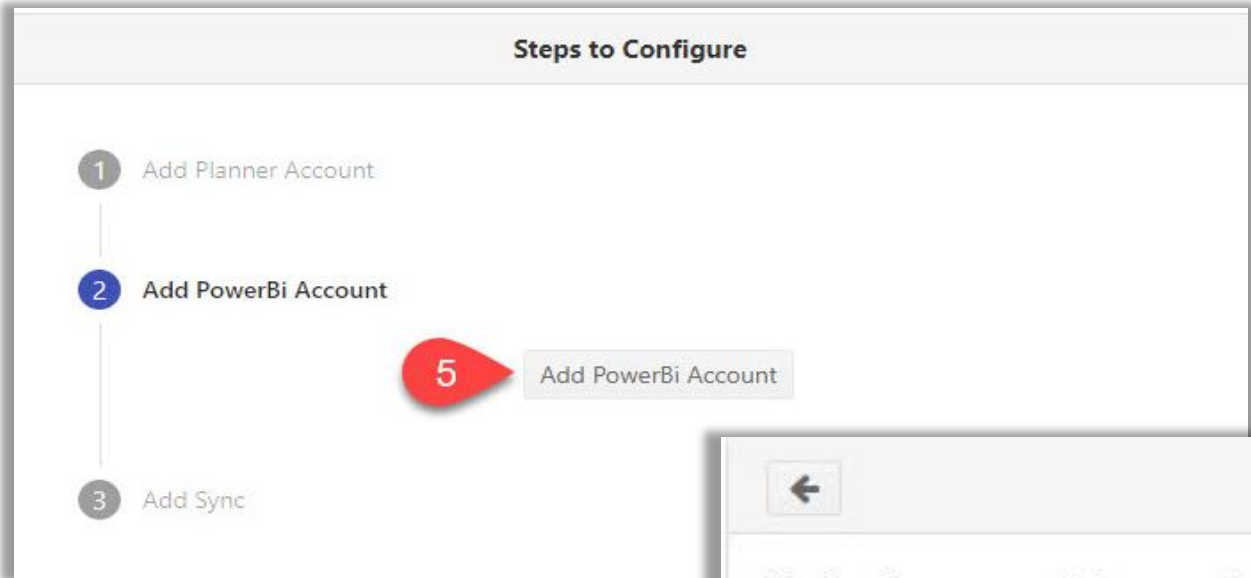
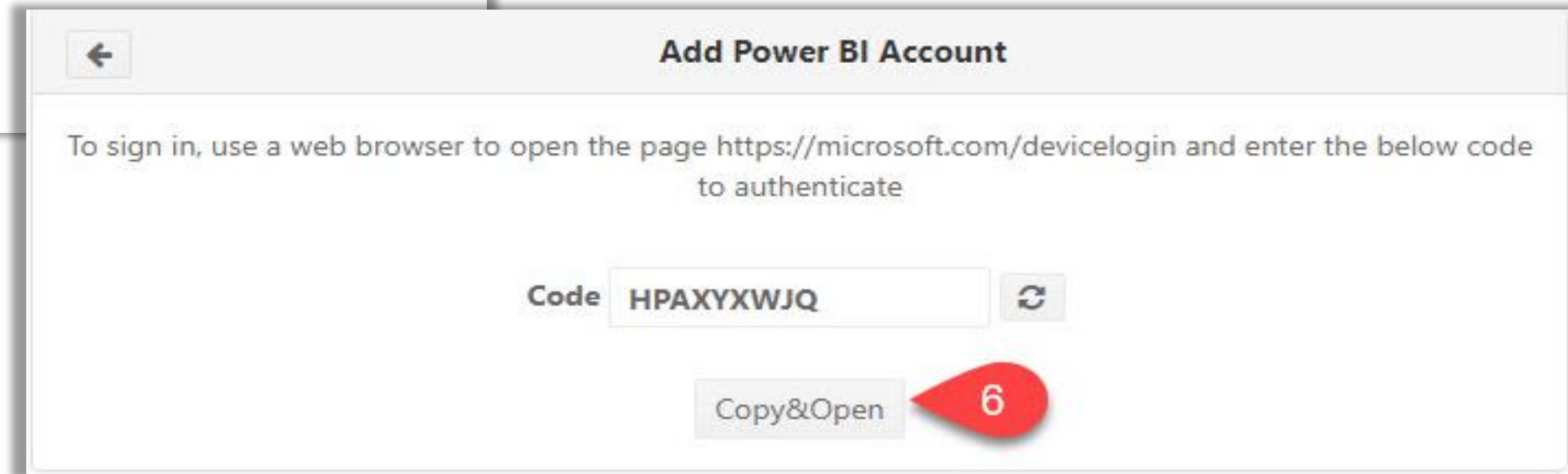
You have signed-in as: [Redacted]

Planner Account have been added Successfully

**4** OK

## 2.1 - Add Power BI Account

Now you have to complete sign in for Power BI account. Follow the numerical points as in screenshots to complete this.

**Add Power BI Account**

To sign in, use a web browser to open the page <https://microsoft.com/devicelogin> and enter the below code to authenticate

Code

6

## 2.2 - Add Power BI Account

### Device Login

Enter the code that you received from the application on your device

**Paste Your Code**



### Power BI Gateway

Click Cancel if this isn't the application you were trying to sign in to on your device.

**Continue** **Cancel**

**7**

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### Pick an account


You will be signed in to Power BI Gateway if this isn't the application you were trying to sign in to on your device.


**Select your Account**

---

 MOD Administrator  
 Signed in

---

 MOD Administrator  
 Signed in

 Use another account

**Back**

You have signed-in as: [admin@MODSOLUTIONS.com](#)

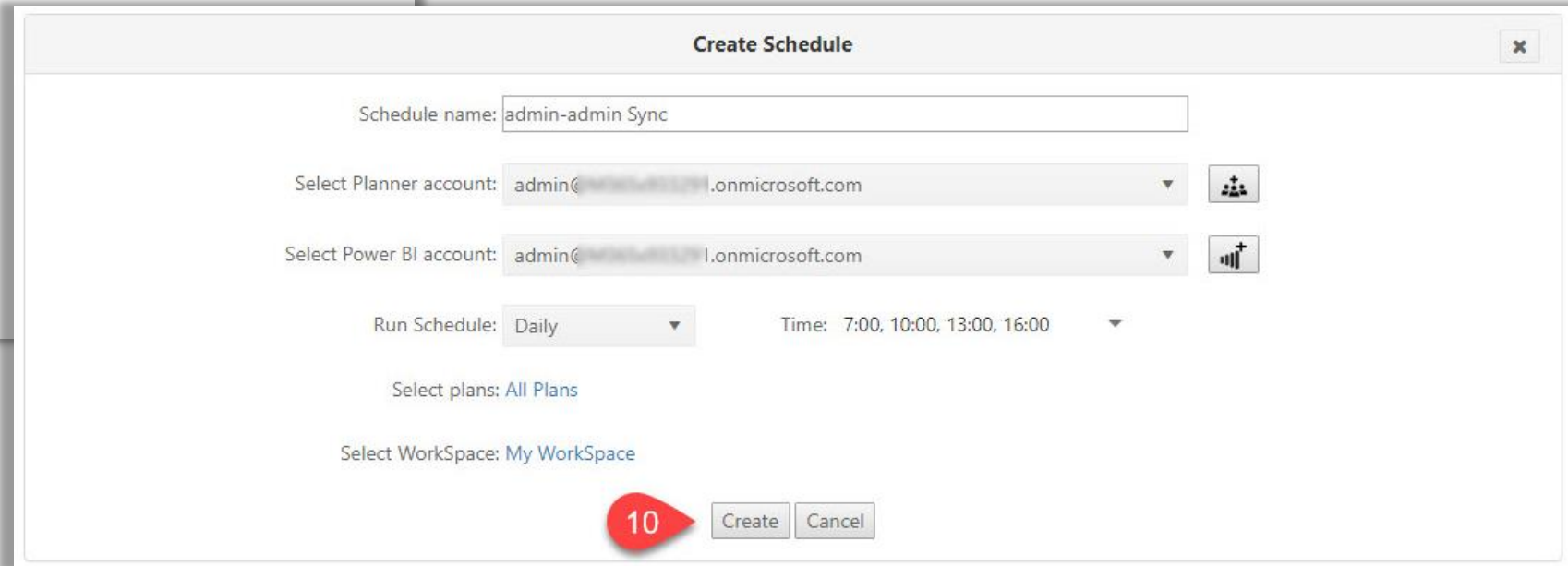
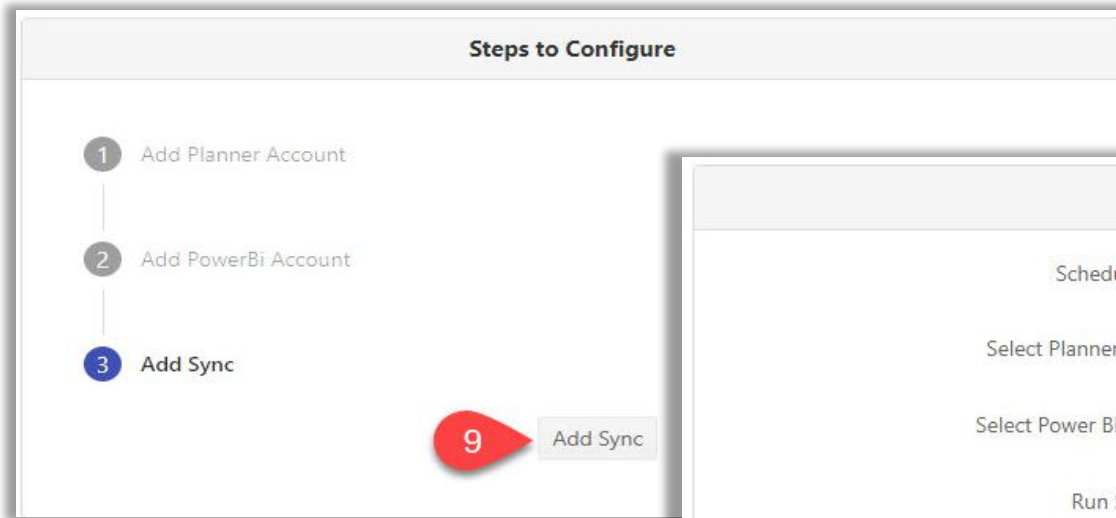
Power BI Account have been added Successfully

**8** **OK**

## 3 – Create Sync

Configure Scheduler to Sync Planner data with Power BI on regular intervals.

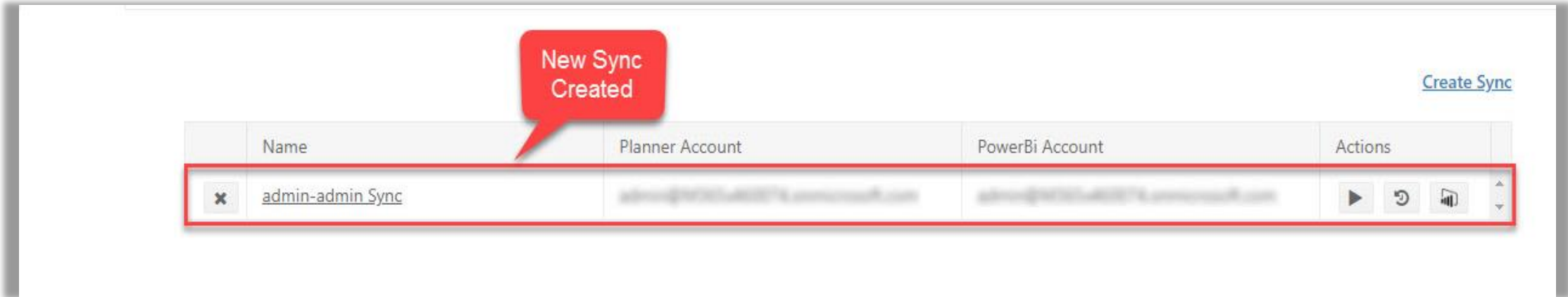
- Type a name for this Sync. This name is used as Power BI DataSet name. (Hence `.` is not allowed)
- Select the Planner and Power BI accounts
- Set Sync interval (Hours, Day)
- Select plans and workspace





# Schedules

Now we have completed the Sign in process and Configured Sync. The configuration details will appear as in below screenshot.







The screenshot shows a table with the following columns: Name, Planner Account, PowerBi Account, and Actions. A red callout bubble points to the first row, which is highlighted with a red border. The first row contains the name 'admin-admin\_Sync', the same email address for both accounts, and a set of control icons (play, refresh, and a bar chart icon). A 'Create Sync' link is visible in the top right corner of the interface.


Name	Planner Account	PowerBi Account	Actions
admin-admin_Sync	admin@9470714d0074.onmicrosoft.com	admin@9470714d0074.onmicrosoft.com	▶ ↺ 📊

# Edit Sync schedule


- Click on the Sync name to update Planner account , Power BI account , plan ,workspace and scheduler time
- You can't change the sync name


	Name	Planner Account	PowerBi Account	Actions
	<a href="#">admin-admin Sync</a>	admin@9470146074.onmicrosoft.com	admin@9470146074.onmicrosoft.com	  


**Edit Schedule** 

Schedule name:

Select Planner account:  

Select Power BI account:  

Run Schedule:  Time:

Select plans:  

Select Workspace:

# Select Plan

- Select plans which needs to be sync to Power BI dashboard. By default all plans are selected.

### Select Plans

All

#### Selected Plans

VP	Video Production Plan2	✕
IT	IT	✕
NH	New Hires	✕
HR	HR	✕

#### Favorite Plans

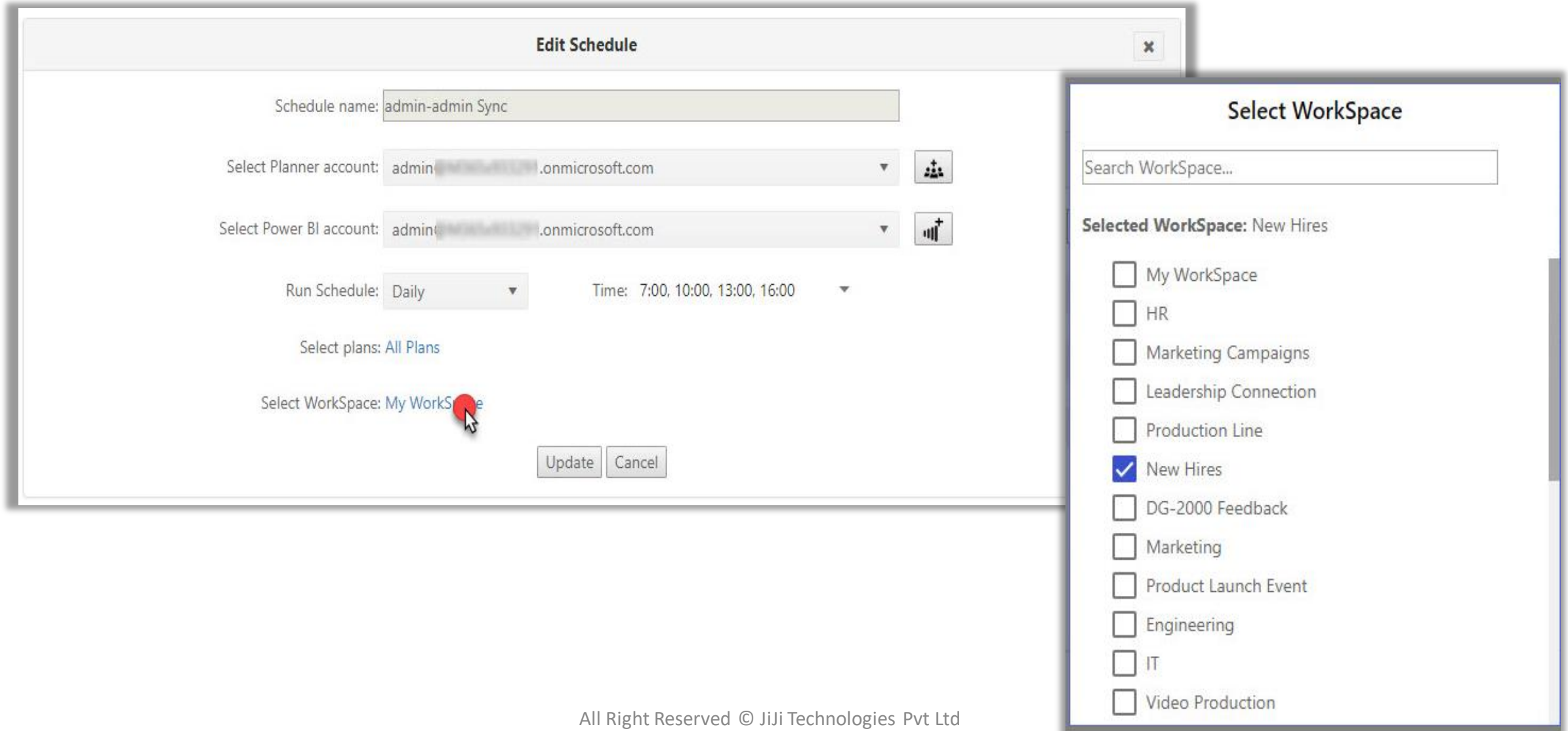
- HR
- Repairs
- Video Production Plan1
- Video Production Plan2

#### All Plans

- Accounting and Finance
- DG-2000 Feedback
- IT
- Marketing Campaigns
- Marketing Records
- New Hires
- Planner
- Potential Employees

# Select Workspace

- Select workspace for creating dashboard in power BI. By default My Workspace is selected



**Edit Schedule**

Schedule name: admin-admin Sync

Select Planner account: admin@...onmicrosoft.com

Select Power BI account: admin@...onmicrosoft.com

Run Schedule: Daily Time: 7:00, 10:00, 13:00, 16:00

Select plans: All Plans

Select Workspace: My WorkSpace

Update Cancel

**Select Workspace**



Search WorkSpace...

**Selected WorkSpace:** New Hires





- My WorkSpace
- HR
- Marketing Campaigns
- Leadership Connection
- Production Line
- New Hires
- DG-2000 Feedback
- Marketing
- Product Launch Event
- Engineering
- IT
- Video Production

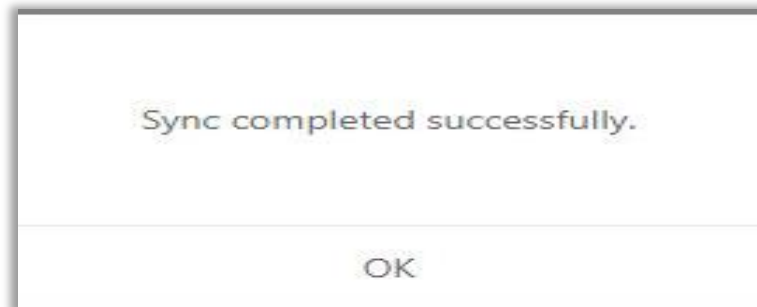
# Run Sync

Click on this button to trigger the Sync manually (if needed). The app will follow the schedule you have created to sync the tasks

	Name	Planner Account	PowerBi Account	Actions
	<u>admin-admin Sync</u>	admin@M365L0792.onmicrosoft.com	admin@M365L0792.onmicrosoft.com	  







	Name	Planner Account	PowerBi Account	Actions
	<u>admin-admin Sync</u>	admin@M365L0792.onmicrosoft.com	admin@M365L0792.onmicrosoft.com	  



# Sync History

View status of each Sync with its date, time and error messages if any.

[Create Sync](#)

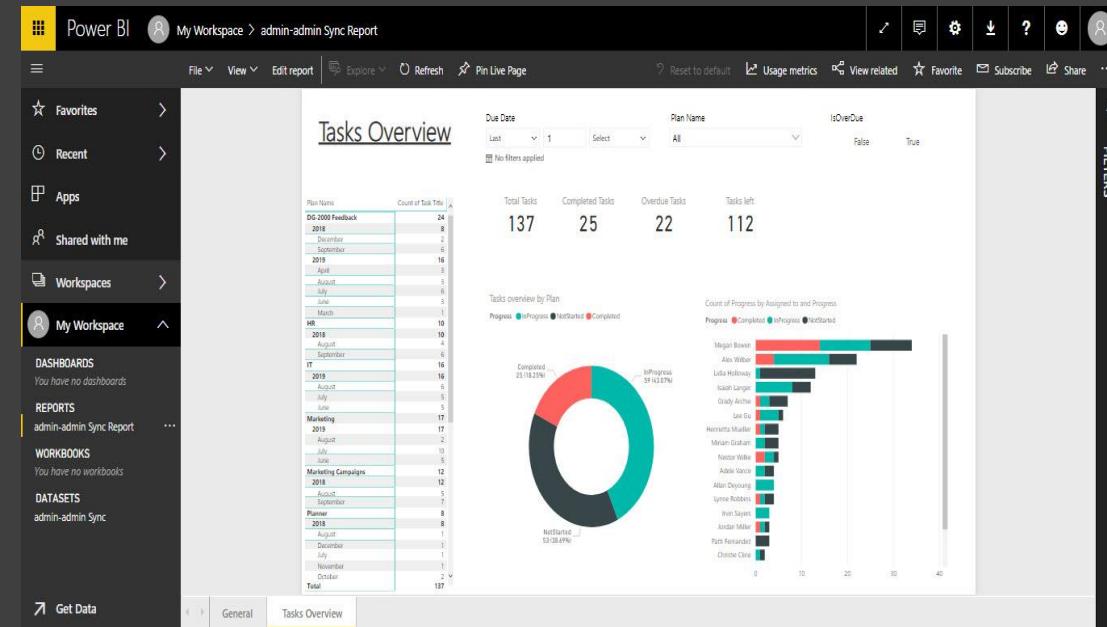
	Name	Planner Account	PowerBi Account	Actions
	<a href="#">admin-admin Sync</a>	admin@M365L827972.onmicrosoft.com	admin@M365L827972.onmicrosoft.com	  




Last RunTime	Message	Status
9/20/2018, 4:03:26 PM	Success	Success
9/20/2018, 4:08:30 PM	Success	Success
9/20/2018, 4:15:22 PM	Success	Success
9/20/2018, 4:10:55 PM	Success	Success
9/20/2018, 4:15:05 PM	Success	Success


5 items per page
1 - 5 of 8 items

# Open reports in Power BI

- Click on this button to open the Planner report in Power BI web. Apps4.Pro Power BI connector will create a new dashboard under selected Workspace and populate the reports.
- You can create similar dashboards in Power BI.











	Name	Planner Account	PowerBi Account	Actions
	<a href="#">admin-admin_Sync</a>	admin@1473514817921.com	admin@1473514817921.com	 1 

# Delete Sync

- By deleting your sync, it will be removed from this app scheduler
- It will not affect your dataset in Power BI

[Create Sync](#)

	Name	Planner Account	PowerBi Account	Actions
	<a href="#">admin-admin Sync</a>	admin@44335487972.onmicrosoft.com	admin@44335487972.onmicrosoft.com	  
	<a href="#">admin-admin Sync test</a>	admin@44335487974.onmicrosoft.com	admin@44335487974.onmicrosoft.com	  





# Thank You

You can reach us at

[sales@jijitechnologies.com](mailto:sales@jijitechnologies.com)

[support@jijitechnologies.com](mailto:support@jijitechnologies.com)

<https://www.yammer.com/apps4pro>

<https://twitter.com/Apps4ProPlanner>

