

README: Power BI Files

You can open a **.pbix** file directly from your desktop if you have Microsoft Power BI Desktop installed. Simply open Power BI Desktop and then use the **File** menu → **Open**, and locate the **.pbix** file. You'll be able to open the file and edit it, but to view your own data, you'll need to **change the data source**.

Changing the Data Source

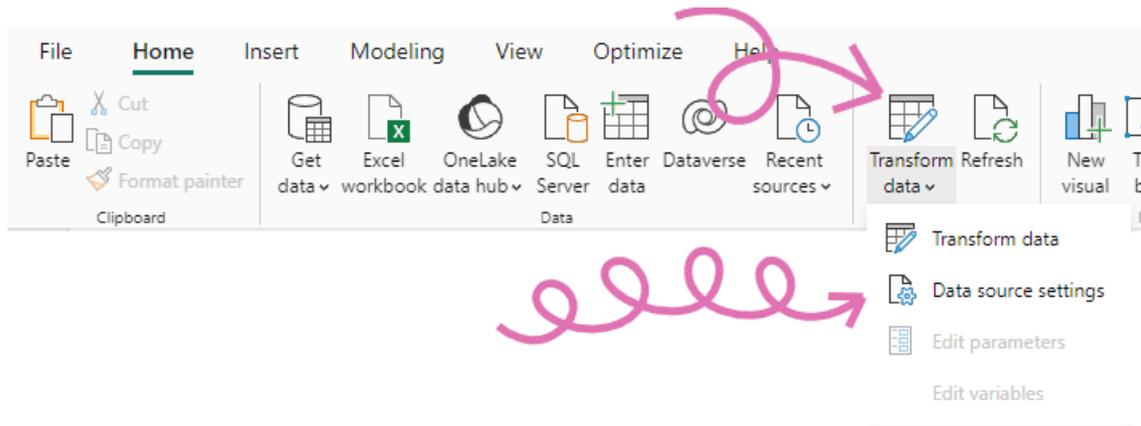
Each **.pbix** file includes with it a memory of the last database it connected to, and in some cases may contain stored data from that database. So for example, files available for download from ACRE Consulting remember the ACRE Consulting database.

You'll need to change the database that the **.pbix** file is connected to. For that, you'll need:

- The name of your server
- The name of your database
- A username
- A password for that username

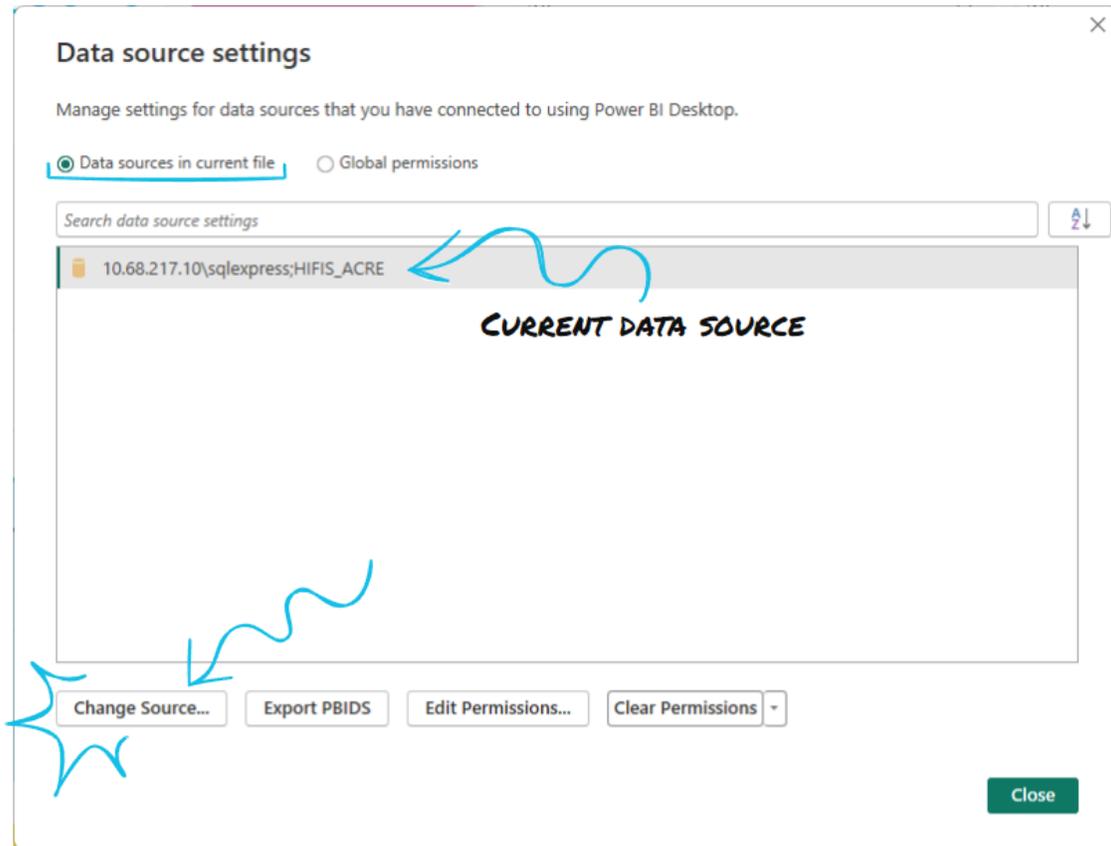
You can get the above information from your database administrator (DBA), or ask your IT support person.

With the above information, go to the **Home** tab > **Transform data** > **Data source settings**.



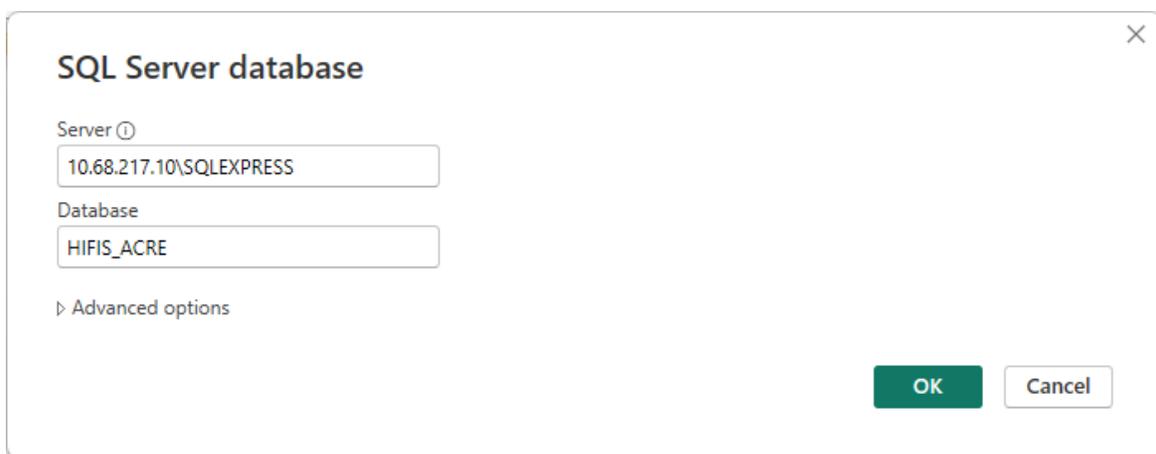
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It will open the **Data Source Settings** window that looks something like this:



Make sure that “Data sources in current file” is selected. There should be one (or more) data source listed. Click on the name of the current data source. It should have an icon to the left that looks like a yellow cylinder. Then, click on the “Change Source...” button in the lower left.

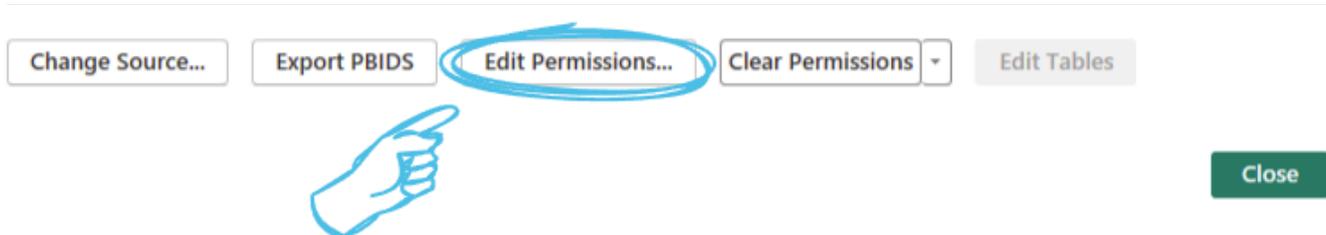
You should see a window pop up that looks like this:



Enter your server name/address, and the name of the database you wish to connect to. Then click **OK**. You may also be prompted to enter the username and password for credentials to login to the database.

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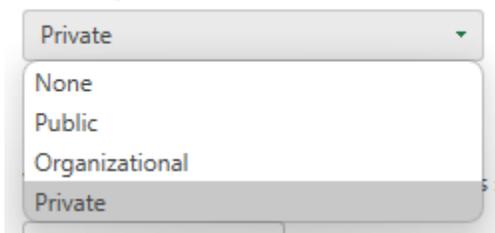
You'll be returned to the **Data source settings** window. Now select the source you have changed and click on **Edit Permissions**.



In Power BI, the **Privacy Level** setting controls the extent to which the data in this dashboard can be combined with other data sources. According to Microsoft:

Setting	Description
None	There are no privacy settings. Be careful setting this option. Make sure that privacy regulations are otherwise maintained.
Private	Data sources set to Private contain sensitive or confidential information. Visibility can be restricted to authorized users. Data from a private data source can't fold in to other data sources, including other private data sources.
Organizational	Data sources set to Organizational can fold in to private and other organizational data sources. They can't fold in to public data sources. Visibility is set to a trusted group.
Public	Files, internet data sources, and workbook data can be set to Public. Data can fold in to other data sources. Visibility is available to everyone.

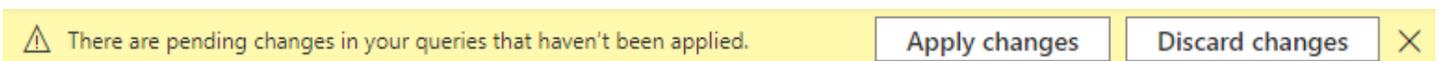
Privacy Level



It is recommended that you set your Privacy Level to "Private" in order to protect your sensitive data.

Verify that all data sources have been replaced with the desired data sources, and then click **Close**.

You'll see a yellow banner across the top saying "There are pending changes in your queries that haven't been applied." Click on **Apply changes**.



You'll see a window indicating that Power BI is loading data from the new source. Wait for it to complete and you are ready to go!

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Native Database Query Permission (Sometimes)

Depending on the dashboard, some **.pbix** files contain a **Native Database Query**. This means there is a SQL command that directly queries the database in this dashboard. You must provide approval for Power BI to run the native query, and rightly so because it could compromise your database, up to and including deleting all of your data. You should not approve a native query unless you trust the author.

In order to approve the native database query, click the Run button at the bottom right. You can review the query before you approve it in the window.

