

How to use excels stored in OneDrive for your Power BI app workspace

Version 1.0

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What is OneDrive for Business?

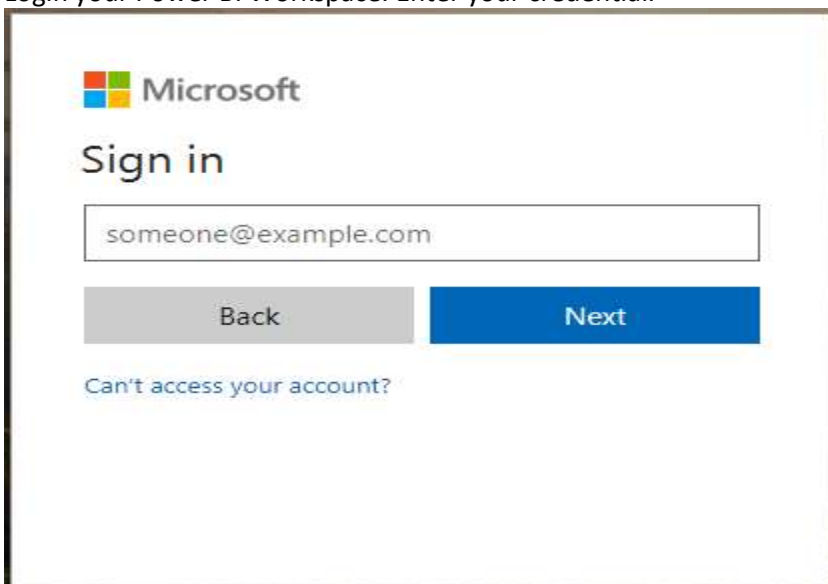
OneDrive for Business is an integral part of Office 365 and provides place in the cloud where you can store, share, and sync your work files. You can update and share your files from any device with OneDrive for Business.

You can store your excel files on the OneDrive for Business for your Power BI app workspace. You can update the files you store in OneDrive anytime, and those updates are automatically reflected in the Power BI reports and dashboards based on the files.

Follow the below steps to connect to files stored in OneDrive for your Power BI workspace:

1. How to upload files to the OneDrive for Business for your Power BI workspace.

- Login your Power BI Workspace. Enter your credential.

A screenshot of the Microsoft Sign in interface. At the top left is the Microsoft logo. Below it, the text "Sign in" is displayed. Underneath is a text input field containing the email address "someone@example.com". Below the input field are two buttons: a grey "Back" button on the left and a blue "Next" button on the right. At the bottom, there is a link that says "Can't access your account?".

Microsoft

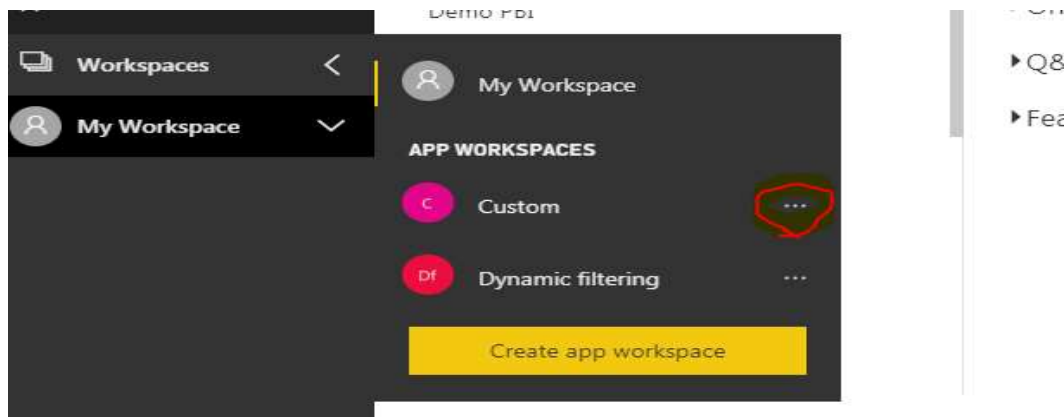
Sign in

someone@example.com

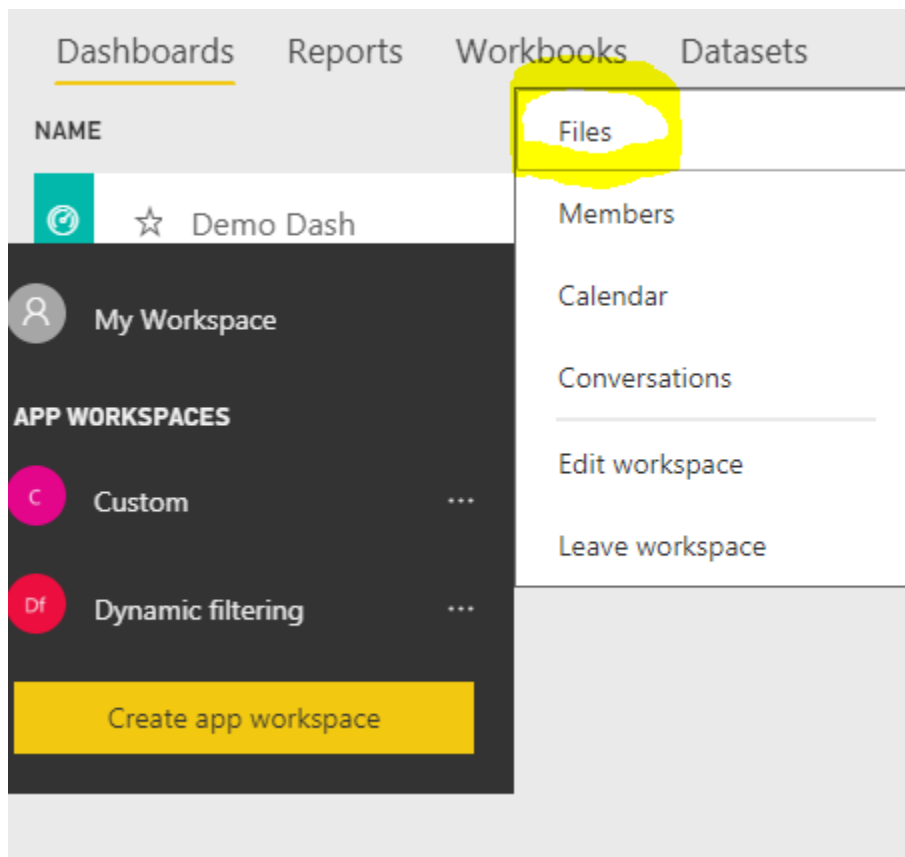
Back Next

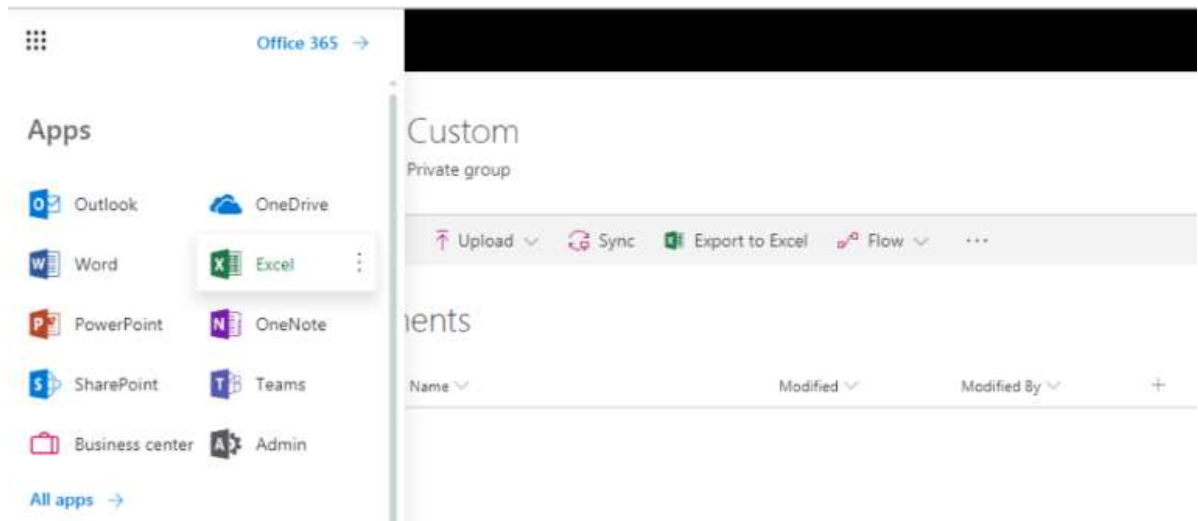
[Can't access your account?](#)

- In the Power BI service, click on workspace on the left panel. Then click on Custom to navigate to the next window.

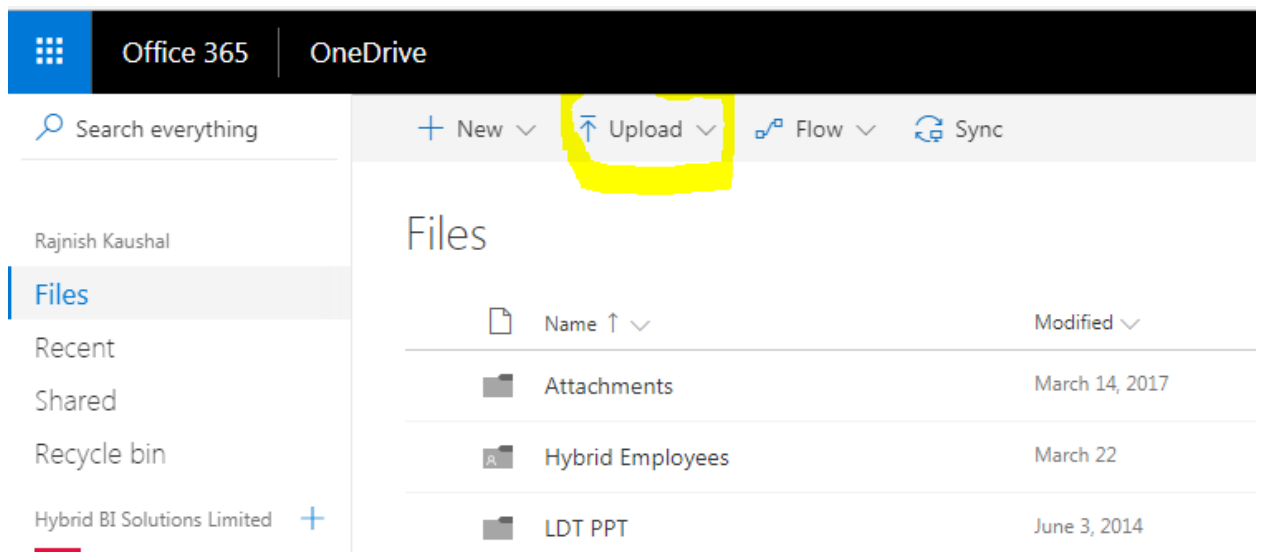


- Click on "Files". It will open new window. Click on OneDrive from the top left corner to connect to your one drive.





- Here you can upload excel files to the OneDrive for Business which we can later use on Power BI.



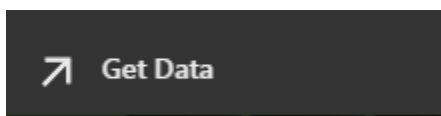
2. Import Excel files as datasets or as Excel workbooks

Following are the two choices for the users:

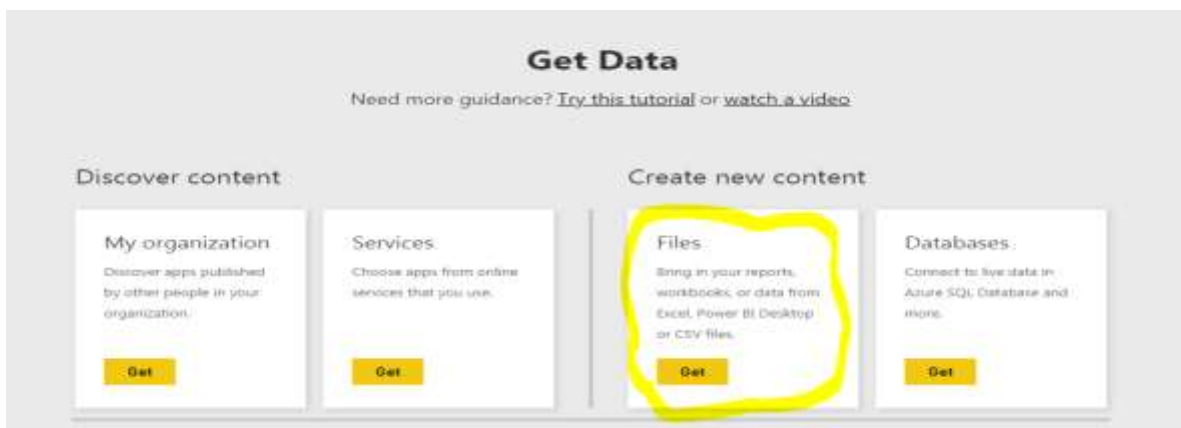
- Import the Excel workbook as a dataset, and use this dataset to build reports and dashboards. After Import, excel workbook is available under “Dataset”.
- Connect to a Excel workbook in Power BI and display it exactly as it appears in Excel Online. After we connect, excel workbook is available under “Workbooks”.

Import or connect to the excel in your Power BI workspace:

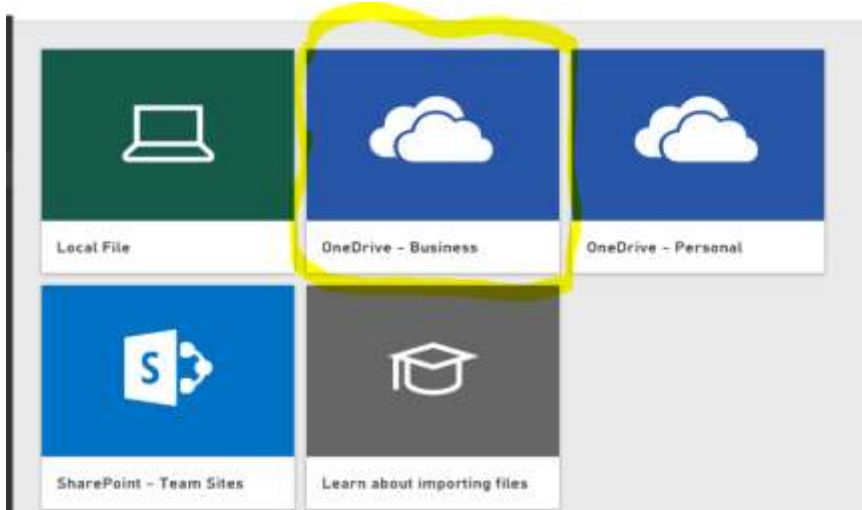
1. Select **Get Data** at the bottom of the left navigation pane.



2. Power BI service opens a “Get Data” window with multiple options like My Organization, Services, Files, Databases. In the files box, click on Get.



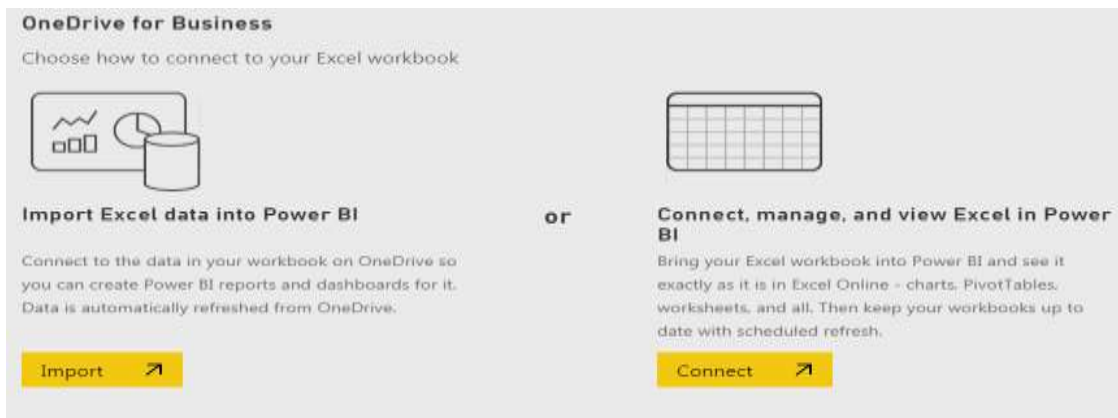
3. Please select OneDrive - Your App Workspace Name.



4. Now you are inside OneDrive. Here you can see all the files which you have uploaded. Select the excel you want and click on “**Connect**” button.



5. Select "Import" or "Connect" in the next window.



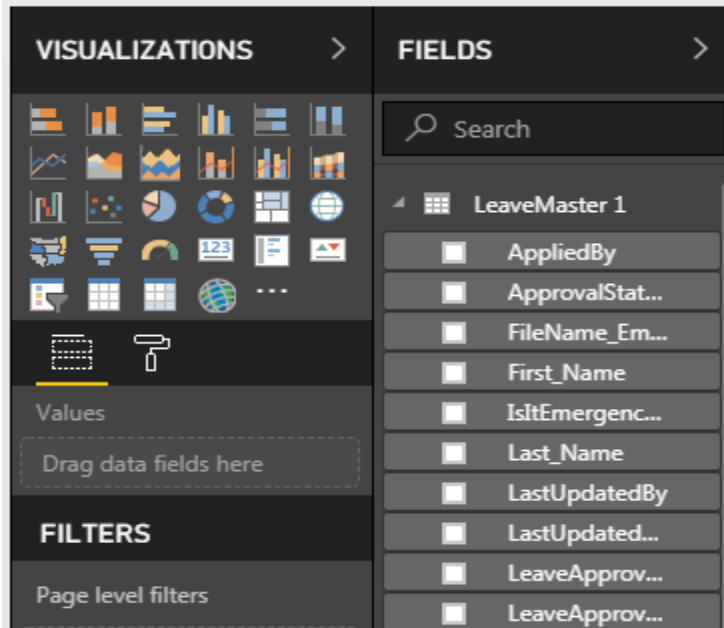
If you select Import, then the workbook appears on the Datasets tab. If you select Connect, then the workbook is on the Workbooks tab.

Here I have selected Import, so that my workbook appears on the Datasets.

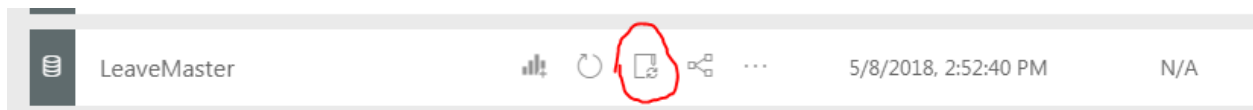
Dashboards Reports Workbooks Datasets Showing 21 item(s) Name (A-Z) ▾

NAME	ACTIONS	LAST REFRESH	NEXT REFRESH	API ACCESS
Hybrid Travels_Shivani1		4/20/2018, 11:38:33 AM	N/A	—
IncomeStatement		5/3/2018, 2:35:17 PM	N/A	—
India Banks		5/1/2018, 2:43:58 PM	N/A	—
LeaveMaster		5/8/2018, 2:52:40 PM	N/A	—
Leaves Dashboard5		5/1/2018, 10:20:59 AM	N/A	—

7. You can create report or dashboard based on imported / connected workbook. Create new Report then go to the home and we can see that workbook is available with objects under the Fields pane.



8. Go to Datasets tab then click on schedule refresh button in front of your dataset.



By default, OneDrive updates excel files hourly. See below image.

