

Apps4.Pro

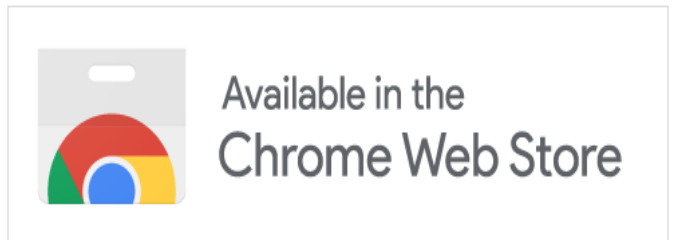
Power BI Connector for Microsoft Planner

What is Apps4.Pro Power BI Connector for Microsoft Planner

Using Apps4.Pro Power BI Connector for Microsoft Planner get all your Planner plan details to Power BI data set to create stunning reports and visuals as per your choice.

This extension offers

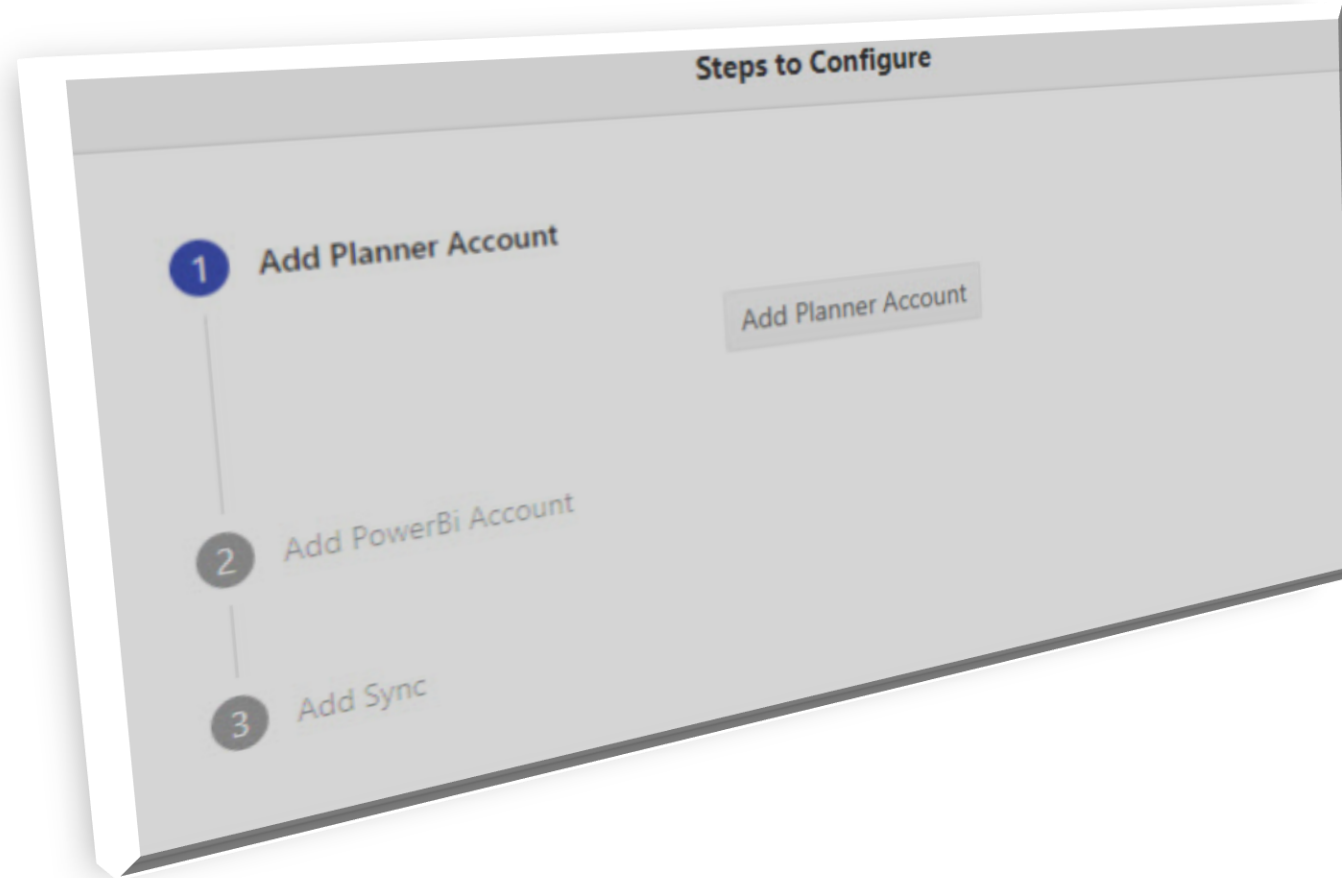
- Schedule Sync - Sync Planner data to Power BI at regular intervals
- Manage multiple accounts – Add and manage multiple Planner / Power BI accounts for reporting.



Steps to get started

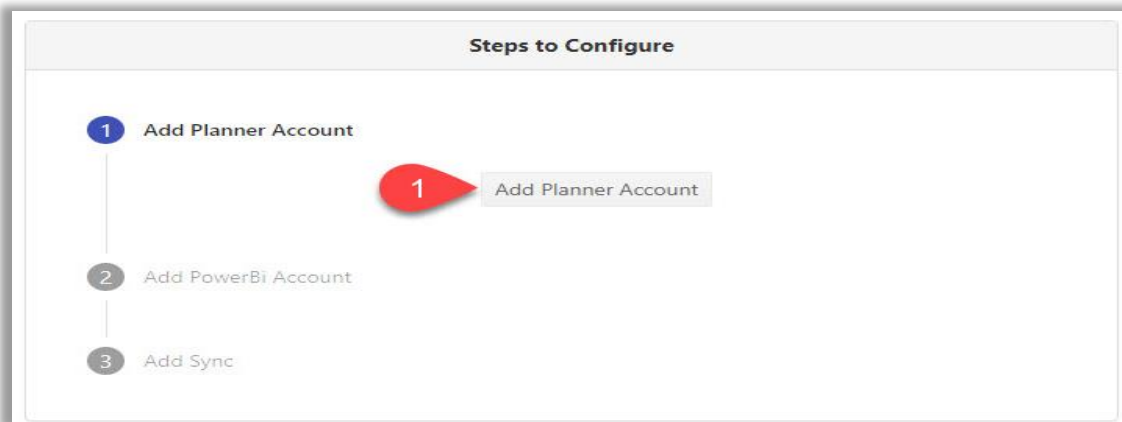
This is 3-step process.

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



3 Paste Your Code

Microsoft Office

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




Continue **Cancel**

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Pick an account

4 Select Your Account

-  MOD Administrator
Signed in
-  [admin@M365AD7972.onmicrosoft.com](#)
-  Use another account

Back

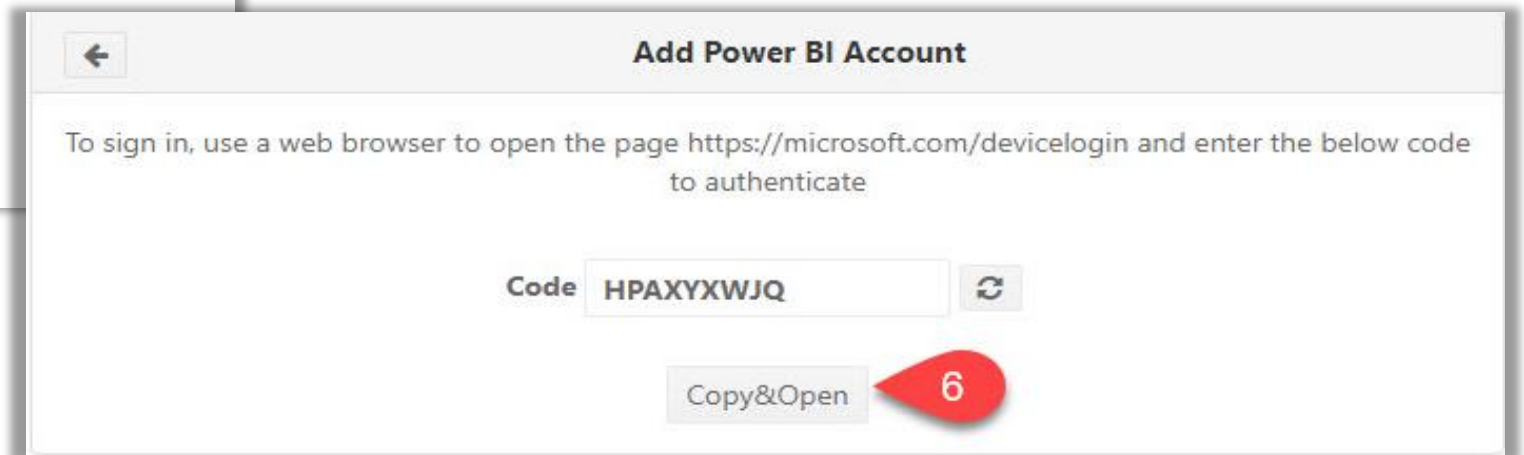
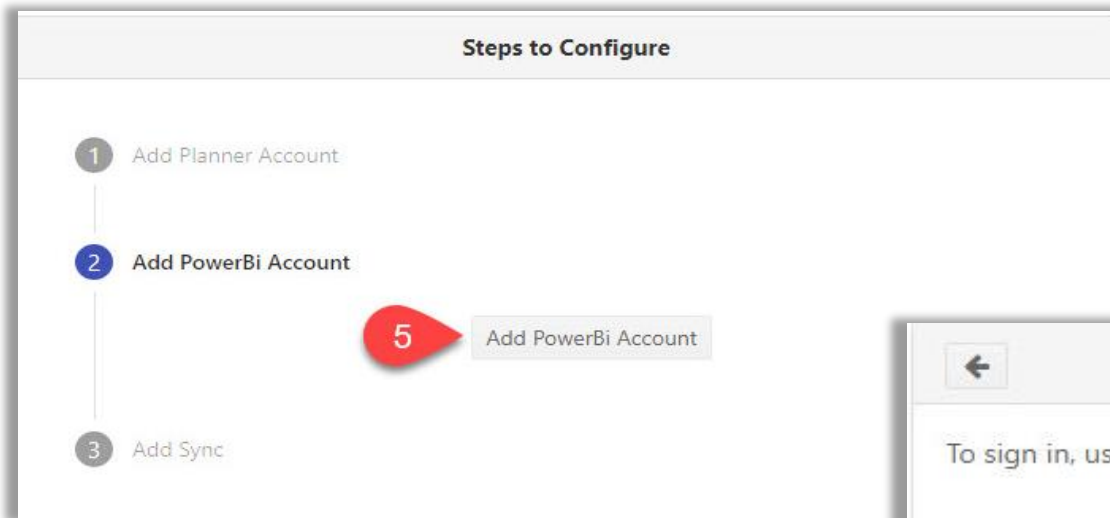
You have signed-in as: [admin@M365AD7972.onmicrosoft.com](#)

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.



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

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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@MKTG.MKTG.COM](#)

Power BI Account have been added Successfully

8 OK

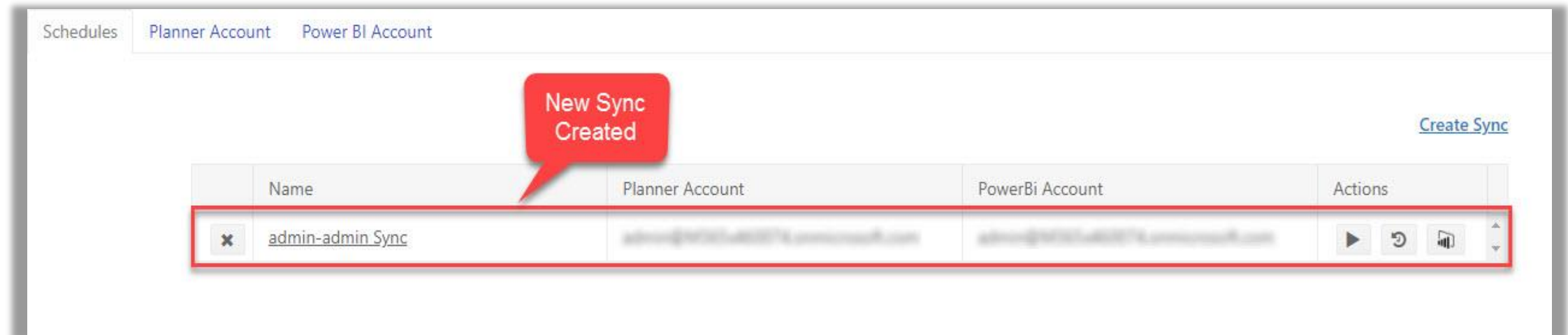
3 – Create Sync

Configure Scheduler to Sync Planner data with Power BI on regular intervals. This sync name is used as Power BI Dataset name and `.` is not allowed.





The image shows two overlapping screenshots from a software interface. The top-left screenshot, titled "Steps to Configure", displays a vertical list of three steps: "1 Add Planner Account", "2 Add PowerBi Account", and "3 Add Sync". The third step is highlighted with a blue circle. A red callout bubble with the number "9" points to a button labeled "Add Sync". The bottom-right screenshot, titled "Create Sync", shows a form with the following fields: "Sync name" (text input with "admin-admin Sync"), "Select Planner account" (dropdown menu with a user icon), "Select Power BI account" (dropdown menu with a bar chart icon), and "Run Sync" (dropdown menu with "Repeat", "Hour: 0", and "Minute: 30"). A red callout bubble with the number "10" points to the "Create" button.

Schedulers

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



The screenshot displays a web interface for managing schedulers. At the top, there are tabs for 'Schedules', 'Planner Account', and 'Power BI Account'. A red callout bubble with the text 'New Sync Created' points to the first row of a table. The table has columns for 'Name', 'Planner Account', 'PowerBi Account', and 'Actions'. The first row contains the name 'admin-admin_Sync', two email addresses, and a set of control icons (play, refresh, and a document icon). A 'Create Sync' link is visible in the top right corner.

	Name	Planner Account	PowerBi Account	Actions
	admin-admin_Sync	admin@10101-400174.onmicrosoft.com	admin@10101-400174.onmicrosoft.com	  


Edit Sync schedule


Click on the Sync name to update Planner account , Power BI account and scheduler time. You can't edit name

	Name	Planner Account	PowerBi Account	Actions
	admin-admin Sync	admin@M365L40374.onmicrosoft.com	admin@M365L40374.onmicrosoft.com	  


Create Sync

Sync name:

Select Planner account: 




Select Power BI account: 





Run Sync: Repeat Hour: Minute:



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
	admin-admin Sync	admin@M365L01712.onmicrosoft.com	admin@M365L01712.onmicrosoft.com	  

	Name	Planner Account	PowerBi Account	Actions
	admin-admin Sync	admin@M365L01712.onmicrosoft.com	admin@M365L01712.onmicrosoft.com	  

Sync History

View status of sync history with run date time, status and error message if any

[Create Sync](#)

	Name	Planner Account	PowerBi Account	Actions
	admin-admin Sync	admin@M365L27972.onmicrosoft.com	admin@M365L27972.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

1 2 items per page 1 - 5 of 8 items

Open reports in Power BI

Click on the Power BI icon button in the sync to open your report. By default the reports are added in **My Workspace**. The name of the report will be sync name. If a report already exists with same name, the Power BI icon won't be visible for the sync.

	Name	Planner Account	PowerBi Account	Actions
	admin-admin Sync	admin@M365L407972.onmicrosoft.com	admin@M365L407972.onmicrosoft.com	  

Delete Sync

Deleting the sync does not affect your dataset in Power BI

[Create Sync](#)

	Name	Planner Account	PowerBi Account	Actions
	admin-admin Sync	admin@M365L4027274.onmicrosoft.com	admin@M365L4027274.onmicrosoft.com	  
	admin-admin Sync test	admin@M365L4027274.onmicrosoft.com	admin@M365L4027274.onmicrosoft.com	  

1

Thank You

sales@jijitechnologies.com

support@jijitechnologies.com

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

[@Apps4ProPlanner](https://twitter.com/Apps4ProPlanner) 

