

Install Microsoft Power BI connector for Creatio

Setup OAuth authorization

To authenticate Power BI to Creatio you need to set up OAuth 2.0. If you are using Creatio Cloud version, please contact Creatio support team to enable Identity Service. Otherwise, if you are using On-premise installation follow this link.

Once Identity service is up and running, please follow these instructions to set up OAuth authorization.

Power BI connector

CLOSE

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Basic information

Name* Power BI connector

Application URL* http://v_mamontov:5000/

Description

Created on 2/9/2022 4:44 PM Active

OAuth client credentials

Client Id 51433FAAC86F539AE022A7146E813984

Client secret 9814F242862C141CB621F1F24F500DD5FA2C2C2B09DC7606839EC7CC72D96F8E

System user* Supervisor

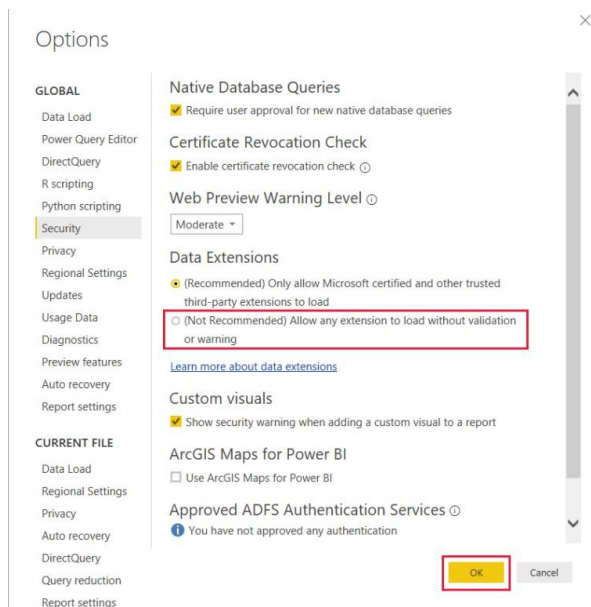
Install connector

To use a Creatio connector, put the Creatio.mez file in the [Documents]\Power BI Desktop\Custom Connectors folder. If the folder doesn't exist, create it.

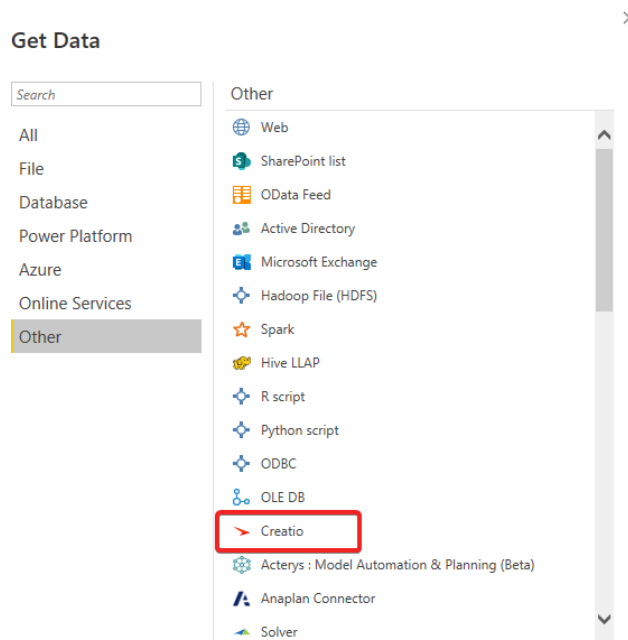
In Power BI Desktop, select File > Options and settings > Options > Security.

Under Data Extensions, select (Not Recommended) Allow any extension to load without validation or warning.

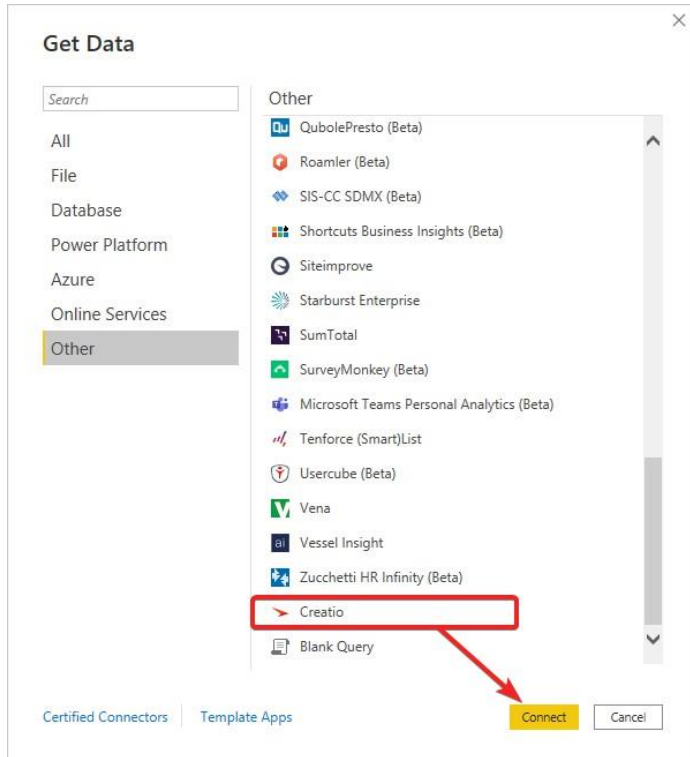
Select OK, and then restart Power BI Desktop.



After re-opening Power BI Desktop, you should see a new connector under the Other section.



Connect Power BI to Creatio



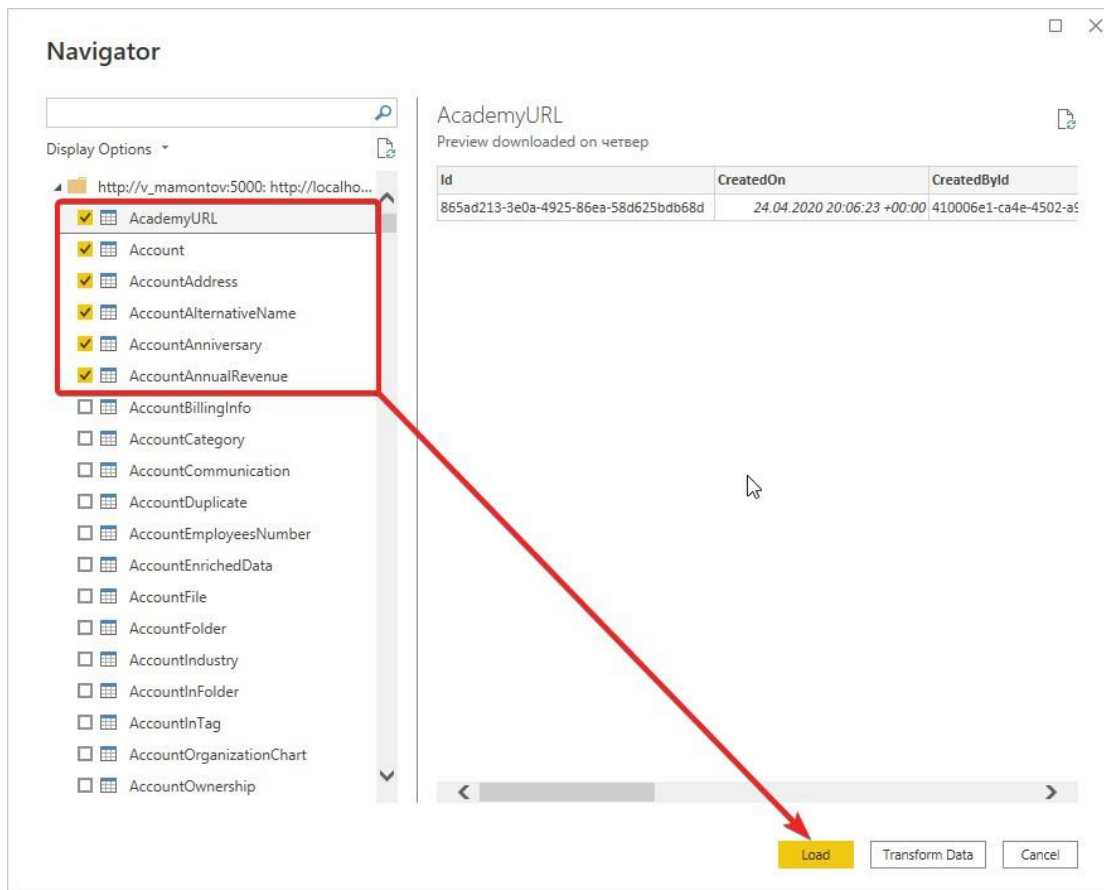
The screenshot shows the 'From Creatio.GetData' configuration dialog box. It contains four input fields with example values:

- URL of Creatio instance:
- URL of identity service:
- Client id:
- Client secret:

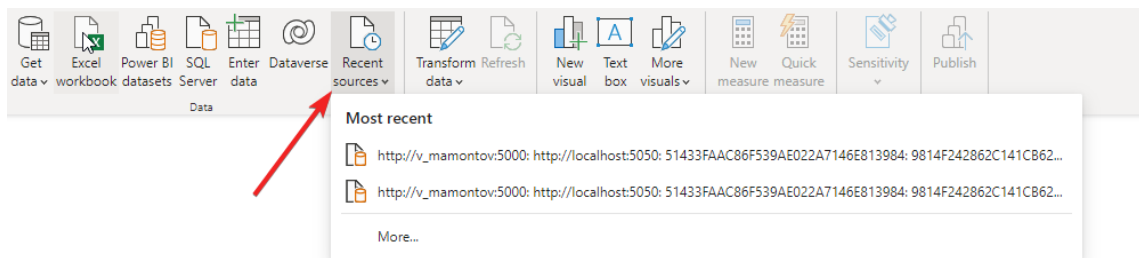
At the bottom right, there are two buttons: 'OK' (highlighted in yellow) and 'Cancel'.

- URL of Creatio instance (e. g. <http://mysite.creatio.com>)
- URL of identity service (e. g. <http://mysite-is.creatio.com>)
- Client id
- Client secret

The result of reading data from Creatio:



To use a previous data source, use Recent sources:



Additional functions

- 1. To read tables with more than 20,000 rows, use the Creatio.GetBigData function. Reading all Contacts:

Result of calling GetBigData function:

ColumnId	ColumnName	ColumnOwner	ColumnCreatedOn	ColumnCreatedBy	ColumnModifiedOn	ColumnModifiedBy	ColumnProcessListeners	ColumnDear	ColumnSalutationType
4100061-c4e-4502-efec-e54922a2c000	Supervisor	00000000-0000-0000-0000-000000000000	2020-04-24T20:08:39.354296Z	4100061-c4e-4502-efec-e54922a2c000	2020-06-28T13:08:58.547397Z	4100061-c4e-4502-efec-e54922a2c000	0		74287b3-566-d11-971b-00108
9c0b38a-ba48-4723-f98-430998384ac	SysPortalConnection	00000000-0000-0000-0000-000000000000	2020-04-24T20:25:08.477015Z	00000000-0000-0000-0000-000000000000	2020-04-24T20:25:08.477015Z	00000000-0000-0000-0000-000000000000	0		00000000-0000-0000-0000-0000
1519f08b-2e4f-4c18-e198-09194008005	User2	4100061-c4e-4502-efec-e54922a2c000	2022-02-15T13:19:39.255687Z	4100061-c4e-4502-efec-e54922a2c000	2022-02-15T13:19:39.255786Z	4100061-c4e-4502-efec-e54922a2c000	0		00000000-0000-0000-0000-0000
08a4932-6666-440c-854c-4174e3e31515	Account	4100061-c4e-4502-efec-e54922a2c000	2022-02-15T13:41:14.125058Z	4100061-c4e-4502-efec-e54922a2c000	2022-02-15T13:41:14.125088Z	4100061-c4e-4502-efec-e54922a2c000	0		00000000-0000-0000-0000-0000
f69a4039-e33e-4985-e95e-629570c29376	User	4100061-c4e-4502-efec-e54922a2c000	2022-02-15T12:58:27.483428Z	4100061-c4e-4502-efec-e54922a2c000	2022-02-15T12:58:27.483428Z	4100061-c4e-4502-efec-e54922a2c000	0		00000000-0000-0000-0000-0000

- 2. To read a certain number of records from a table, use the Creatio.GetTopBigData function.

Reading first 50 Accounts:

Result of calling GetTopBigData function:

45	1c94d5d9-4872-42b8-8529-694a1966a2...	RealWay	76929f8c-7e15-4c64-bdb0-adc62d383727	2022-05-02T15:22:32Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
46	f17e089f-1fe9-4ca9-bc30-2d76ad39d178	Gateway	c38d46fd-e405-491a-a508-01bb9760eccc	2022-05-01T12:14:14Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
47	7e5c0784-5cb9-4a08-b2b4-a38824122282	Console Solutions	8850d33c-b783-45dc-a86c-5d29f9e7c03a	2022-04-18T11:12:28Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
48	1cae3e40-f36b-1410-1599-0015d043204	Elite Systems	8f9b52f9-b494-4642-8563-25d706f2d5db	2022-04-08T13:57:37Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
49	23d61e7a-d128-48f5-8335-15e746e741e8	FlashNet Consulting	c38d46fd-e405-491a-a508-01bb9760eccc	2022-02-28T15:34:21Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727
50	e1421cf4-3af8-4bce-ad82-e6aea1fff2c6	Axiom	cad50d15-f28d-49fc-aa79-21615ac35b86	2022-02-24T14:59:31Z	76929f8c-7e15-4c64-bdb0-adc62d383727	2024-01-07T09:33:25.97836Z	76929f8c-7e15-4c64-bdb0-adc62d383727