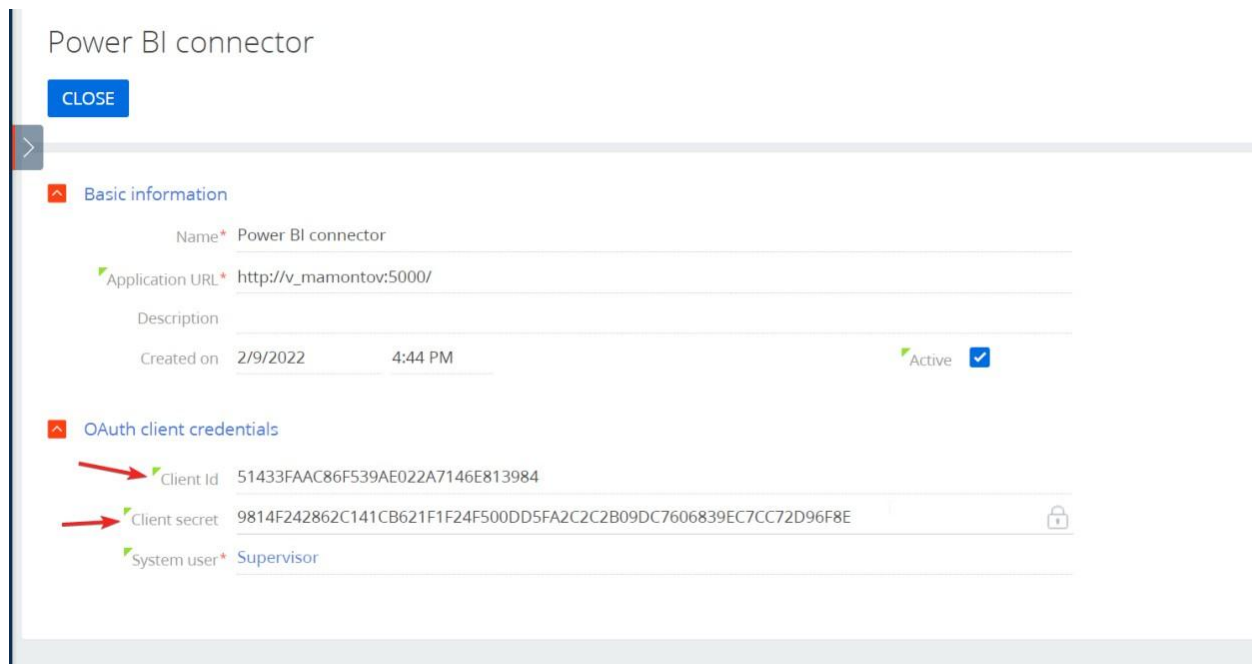


Install Microsoft Power BI connector for Creatio

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.



The screenshot shows the 'Power BI connector' configuration window. It has a 'CLOSE' button at the top left. Below the title bar, there are two expandable sections: 'Basic information' and 'OAuth client credentials'. The 'Basic information' section contains fields for 'Name' (Power BI connector), 'Application URL' (http://v_mamontov:5000/), 'Description', and 'Created on' (2/9/2022 4:44 PM). There is an 'Active' checkbox which is checked. The 'OAuth client credentials' section contains fields for 'Client Id' (51433FAAC86F539AE022A7146E813984), 'Client secret' (9814F242862C141CB621F1F24F500DD5FA2C2C2B09DC7606839EC7CC72D96F8E), and 'System user' (Supervisor). Red arrows point to the 'Client Id' and 'Client secret' fields.

Power BI connector

CLOSE

>

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

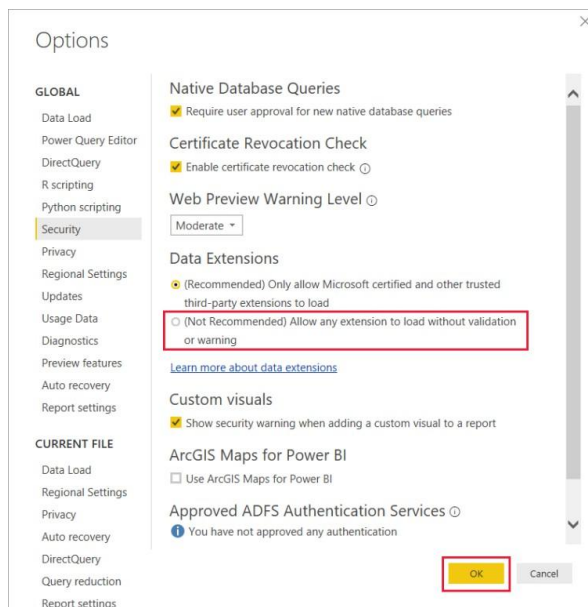
Install connector

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.

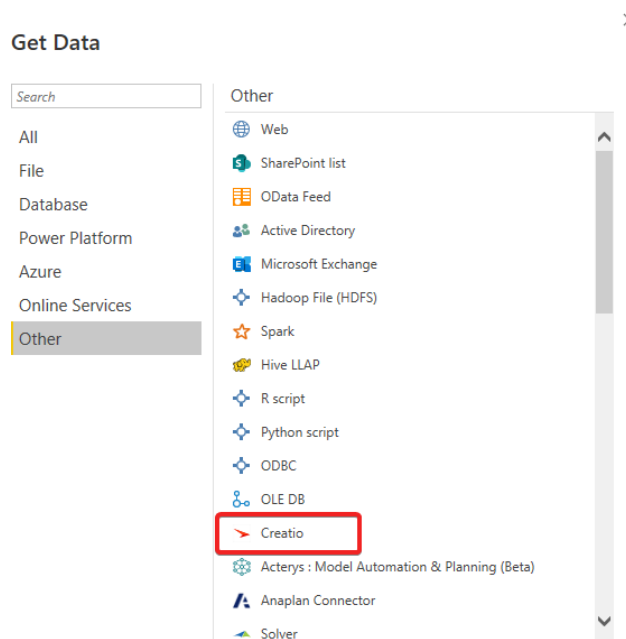
In Power BI Desktop, select File > Options and settings > Options > Security.

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

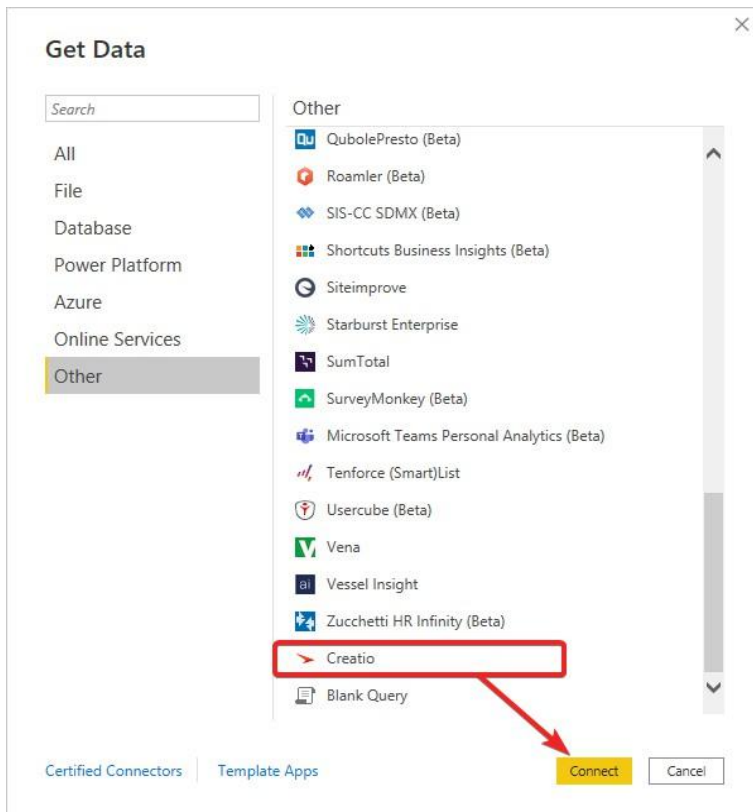
Select OK, and then restart Power BI Desktop.



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



Connect Power BI to Creatio



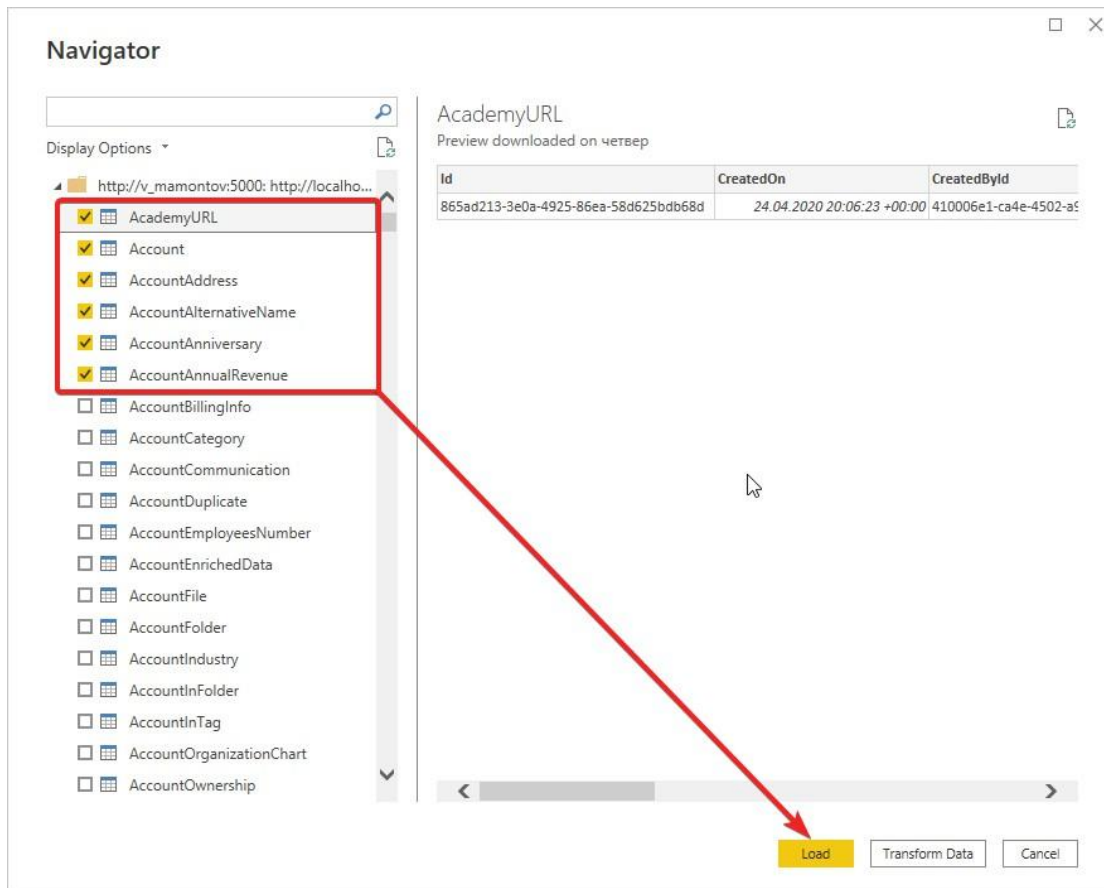
The screenshot shows the 'From Creatio.GetData' configuration dialog box. It contains four input fields with the following labels and example values:

- URL of Creatio instance:
- URL of identity service ^①:
- Client id ^①:
- Client secret ^①:

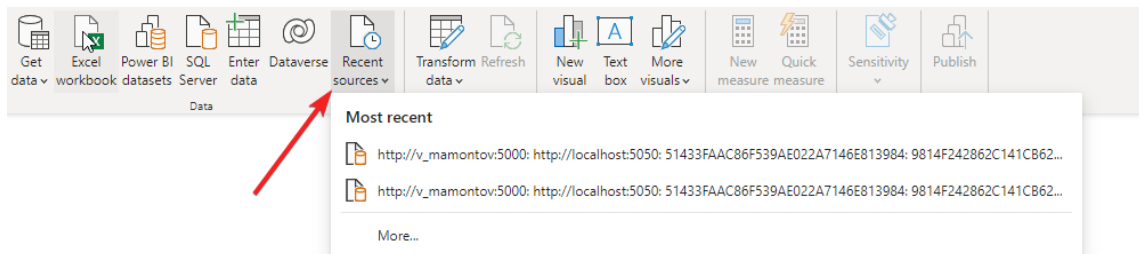
At the bottom right, there are two buttons: 'OK' (highlighted in yellow) and 'Cancel'.

- 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:

✕

✓

fx

= Creatio.GetBigData

Enter Parameters

URL of Creatio instance

http://v_mamontov:5000

URL of identity service

http://localhost:5050

Client id

51433FAAC86F539AE022A7146E813984

Client secret

D5FA2C2C2B09DC7606839EC7CC72D96F8E

Table name

Contact

Invoke

Clear

Result of calling `GetBigData` function:

	ColumnId	ColumnName	ColumnOwner	ColumnCreatedOn	ColumnCreatedBy	ColumnModifiedOn	ColumnModifiedBy	ColumnProcessListeners	ColumnDesc	ColumnSalutationType
1	4100061-cake-4502-ebec-e546922d2d00	Supervisor	00000000-0000-0000-0000-000000000000	2020-04-24T20:06:39.514296Z	4100061-cake-4502-ebec-e546922d2d00	2020-06-26T13:08:50.567397Z	4100061-cake-4502-ebec-e546922d2d00	0	7420M3 56ed d11 971b 00148	0
2	9c9b38a-8e46-4723-f986-4309fda5d6ac	SysPortaConnection	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	00000000-0000-0000-0000-0000-0000	0
3	b19f80b-2c4f-4c18-b198-09196a8a805c	User2	4100061-cake-4502-ebec-e546922d2d00	2022-02-15T13:19:39.255667Z	4100061-cake-4502-ebec-e546922d2d00	2022-02-15T13:19:39.255716Z	4100061-cake-4502-ebec-e546922d2d00	0	00000000-0000-0000-0000-0000-0000	0
4	c6e49582-6666-445c-854c-4c7493e33e15	sbcd1	4100061-cake-4502-ebec-e546922d2d00	2022-02-15T13:41:14.125055Z	4100061-cake-4502-ebec-e546922d2d00	2022-02-15T13:41:14.125058Z	4100061-cake-4502-ebec-e546922d2d00	0	00000000-0000-0000-0000-0000-0000	0
5	fe94a09-b33e-4985-e90e-929070c9367b	User	4100061-cake-4502-ebec-e546922d2d00	2022-02-15T12:58:27.463418Z	4100061-cake-4502-ebec-e546922d2d00	2022-02-15T12:58:27.463421Z	4100061-cake-4502-ebec-e546922d2d00	0	00000000-0000-0000-0000-0000-0000	0

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

Reading first 50 Accounts:

✕

✓

fx

= Creatio.GetTopBigData

Enter Parameters

URL of Creatio instance

https://142007-crm-bundle.creatio.com

URL of identity service

https://142007-crm-bundle-is.creatio.com

Client id

92BBAC7489B8240B375316F623C01526

Client secret

B243B7E3FFC90A1D64AFC2E1BEAB982EE22

Table name

Accounts

Amount of the rows which will be read from the top

50

Invoke

Clear

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	f77e089f-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	clae3e40-f36b-1410-1599-001550043204	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

Tips and Recommendations

Reducing data load time

Loading large datasets into Power BI can be slow, especially as more columns and rows are selected. While Creatio sends data quickly through the OData service, Power BI processes it using Power Query, which can be quite heavy and sensitive to internet speed.

To improve performance:

- Select only the fields you truly need for your report.
- Filter data in advance to reduce its volume.
- Avoid applying complex transformations in Power Query.
- Start with a smaller data load, then gradually expand.

A well-prepared, filtered dataset is key to working efficiently with Power BI.

Handling large tables

When connecting large tables like *Account* using the *GetData* function, Power BI might show an error like:

"Microsoft Power BI connector for Creatio. Unable to connect to Power BI."

This can happen if all columns are selected at once. In cloud environments, this creates a URL that's too long and causes the request to fail. Also, Power BI doesn't support image-type fields, such as the default *Logo* column.

To avoid this:

- Choose only the specific columns needed.
- Exclude image fields from your query.
- Use filters to reduce data size.
- Test your query step-by-step to catch issues early.

This is especially important in cloud setups, where URL length limits apply.

Access to the resource is forbidden

While setting up the connection, you might see this message:

"Unable to connect. Details: Access to the resource is forbidden."

This usually means the user defined in the OAuth settings doesn't have permission to use OData. It often happens when a new technical user is created without proper access rights.

Make sure the user has permission for the system operation called *"CanUseODataService"*.

Once granted, the connection should work as expected.

Server error when loading data

A generic 500 error like this:

"DataSource.Error: Creatio: Request failed: The remote server returned an error: (500)"

Can appear when table columns have underscores in their codes. OData may interpret underscores as spaces and try to access non-existent fields.

To fix this, update the column codes by removing underscores. This requires the object to be part of an unlocked package, or the changes can be made by deploying a new package version from the development environment. After updating, regenerate the code and recompile the application.