Get the complete customer behavior picture.

5 tips and tricks to leverage Adobe Analytics and Microsoft Power BI integrations.

Adobe Analytics gives you the industry-leading solution for collecting, organizing, analyzing, and reporting on everything your customers do. Adding Microsoft Power BI lets you translate that rich data into interactive visualizations that generate actionable insights.

Jeremy is a senior manager on the Adobe Analytics product management team. He helps organizations understand and report on how their customers interact across business channels—including digital events, call centers, and offline transactions. Previously, he led the Customer Analytics and Attribution practices for Adobe Consulting. Jeremy has extensive experience in the areas of web analytics, customer analytics, attribution modeling, and data integrations.

With the benefit of his real-world insight, we've curated the following tips and tricks to help you simplify reporting and get the complete picture of customer behaviors.

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Tip 1: Publish Excel Workbooks from Report Builder.

The Adobe Report Builder application lets you use Adobe Analytics data to create customized reports and perform specialized analyses in Microsoft Excel. Rather than having to distribute those reports by email, the integration between Report Builder and Microsoft Power BI allows you to publish them through the Power BI online service instead.

To publish workbooks to Power BI, first generate and save a workbook in Report Builder. Next, from the Report Builder toolbar, click "Schedule" and then "New." When the Basic Scheduling Wizard appears, check the "Publish Workbook to Microsoft Power BI" box. After specifying your email and scheduling frequency, click "OK" to publish. You'll be prompted to authenticate to your Microsoft account, and then your Report Builder workbook will be published to Power BI.

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Tip 2: Create native Power BI reports with workbook data.

The integration also lets you publish workbook data inside Power BI in a way that leverages its native reporting and dashboard visualization capabilities. You can do this in two ways. The first uses Report Builder's API requests to Analytics to publish dataset tables directly into Power BI. To use this method, open or create a workbook with Report Builder requests, click "Schedule" on the Report Builder Toolbar, and then click "New." Next, from the Publishing Options tab, select "Basic Scheduling Wizard" and click "Advanced Scheduling Options."

The second method is to publish the contents of your formatted workbook tables into Power BI dataset tables. To accomplish this, first generate a table of data inside Report Builder that includes a header row followed by a row of data. Next, select the table and choose the "Format as Table" option from the Home menu. From the Report Builder Toolbar, click "Schedule" and then "New." Next, from the Publishing Options tab, select "Basic Scheduling Wizard" and click "Advanced Scheduling Options." Check the box for "Publish all Formatted Tables as Power BI Dataset Tables" and click "OK."

Once you've used either of these methods, you can create reports and visualizations for those datasets using the Datasets option in the Power BI Workspaces menu.

Helpful hint: If you double-click a workbook under the Power BI "Workbooks" menu, it will display the workbook's dashboard data. You can select sections of that data and pin them in your workbook to include in the Power BI dashboards you provide to users.
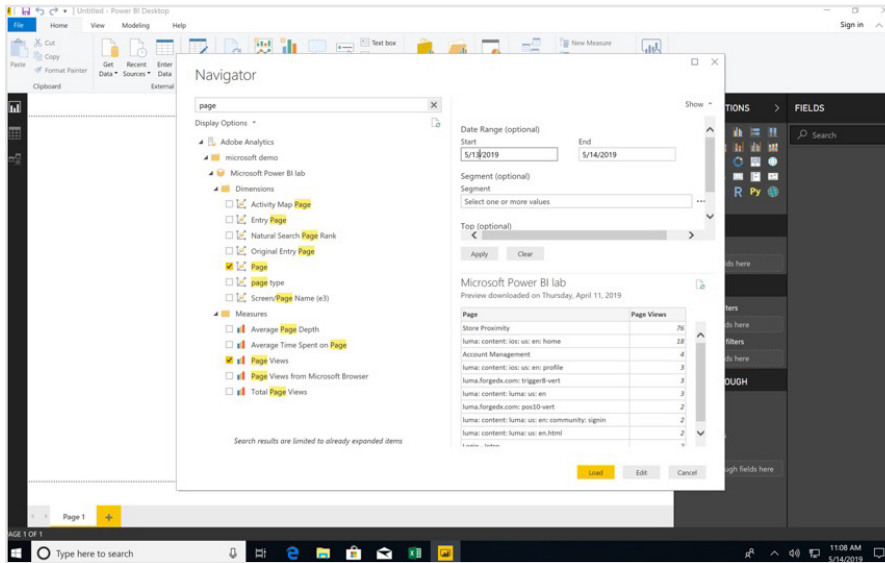
Good to know: The integration between Power BI and Report Builder lets you connect Analytics to third-party data sources tied to your Power BI solution, enabling you to build reports with that combined data that help you discover unique customer insights, associations, and opportunities.

Helpful hint: When you view dataset tables in Power BI that were published using Report Builder's API requests, it can sometimes be difficult to remember the context of those requests. The Legend table in the Power BI visualization helps you gain that context by displaying the name of each request under Table ID.

Tip 3: Directly query Adobe Analytics from the Power BI Desktop app.

Another Adobe integration for Power BI is the Adobe Analytics connector, which lets you make requests for Analytics data and create associated report visualizations from within the Power BI Desktop application for Windows. To use the connector, click "Get Data" in the Power BI application's Home menu, select "Online Services" from the categories on the left, select "Adobe Analytics," and click "Connect." After you authenticate with your Adobe ID, the Navigator will present all the available Analytics report suites. These will be organized in the following categories: Data Granularity (provides Power BI-friendly data columns), Dimensions (contains Analytics reporting dimensions), and Measures (leverages Analytics metrics).

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Tip 4: Get more flexibility with the reporting date range in the Power BI Desktop.

Whenever you make a data request to Analytics, you need to specify a time period for that query. The current version of the Power BI Desktop application only allows you to enter static start and end dates when building the first request. This hampers your ability to reuse that request since you'll need to manually change dates to coincide with each reporting schedule. You can have those time periods automatically refreshed based on a variety of criteria by using the Power Query M functions available in the Power BI Desktop app.

Microsoft developed the Power Query M formula language for building highly flexible data mashup queries. To use Power Query M functions to automate time period refreshes, create the request in Navigator, then select the request, click on "Edit query" in the right rail, and select "Advanced Editor" in the main menu ribbon. A dialog box will appear with a code representation of your specified date range, such as the following: *{Cube.ApplyParameter, "DataRange", {#date(2019, 5, 13), #date(2019, 5, 14)}},.*

From within the Advanced Editor you can change the "DataRange" parameters with a variety of date functions that can be found in the Power Query M reference documentation. The appendix of the Experience League lab session for the connector has a variety of examples of how you can combine these date functions to produce the desired results of your query, such as yesterday, last seven days from yesterday, month to date, and so on. The date function results will be relative to when the reports run.
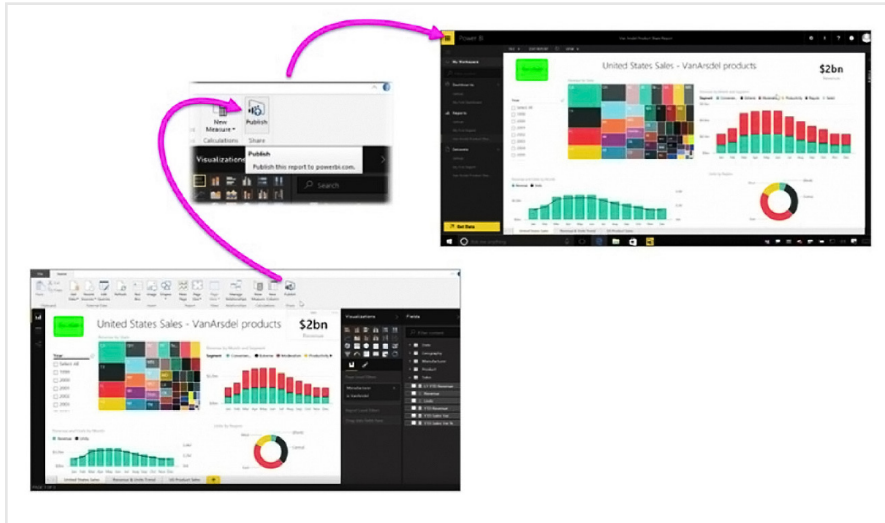
View Experience League lab session >

Tip 5: Publish to the online service from the Power BI Desktop.

The Power BI Desktop app requires Windows. So if you want others to be able to view reports you create in the app from non-Windows devices, you will need to publish the report to the Power BI online service. To do so, simply click the "Publish" button in the Power BI Desktop main menu ribbon, save your changes, and authenticate to Power BI. And then it will be uploaded to the Power BI service.

Learn more: You can view a generic example of how to publish a report to the Power BI service on YouTube.

Good to know: Publishing to the Power BI online service is different than "sharing" a Power BI Desktop PDIX file, which is the standard output of the app.

Take a deeper dive into our ocean of information.

Visit our **Publishing to Power BI with Report Builder documentation**, **Connect to Adobe Analytics in Power BI Desktop documentation**, or our **Experience League Lab** to learn more about how to use integrations between Adobe Analytics and Microsoft Power BI. You can also access our general **Adobe Analytics documentation**.