

External Report Auto Synchronization for Power BI

The Auto Synchronization functionality automates creation of External Reports from the Microsoft Power BI objects and simplifies the process of updating existing External Reports. This article shows how to set Auto Sync for Power BI External Reports and describes all specific details of Auto Syncing for Microsoft Power BI plugin.

1. Enabling Auto Synchronization

Access **Admin > Collection & Storage > Data Sources** and click the Microsoft Power BI Data Source Active Name link to open the Data Source Editor

The screenshot displays the 'New Microsoft Power BI Cloud Data Source' configuration page. The top navigation bar includes 'Plugin Data Sources / New Microsoft Power BI Cloud Data Source', a search bar, and user controls. The main content area has tabs for 'Info', 'Datasets', 'Microsoft Power BI Cloud Objects', 'Elements', and 'Associations'. The 'Info' tab is active, showing fields for 'Data Source Name' (New Microsoft Power BI Cloud Data Source), 'Tags', 'Auth Type' (OAuth), 'Application ID' (c01245d8-0945-4c17-b437-7be2b260670b), and 'Client Secret'. A 'Get Token' button is present. Below these fields are two toggle switches: 'Enable On-Demand Element Creation' (disabled) and 'Enable Content Auto Synchronization' (enabled, highlighted with callout 1). A 'Parent Category' dropdown menu (highlighted with callout 2) is set to '--'. A checkbox for 'Mirror Folder Hierarchy in Microsoft Power BI Cloud' (highlighted with callout 3) is unchecked, with a note that existing synchronized content will remain as-is. An 'External Report Template' dropdown menu (highlighted with callout 4) is also shown. A 'Save' button (highlighted with callout 5) is located in the top right corner of the main content area.

In the *Info* tab:

1. Activate the **Enable Content Auto Synchronization** toggle
2. **Parent Category:** Choose the Parent Category where External Reports are synced
3. Select the **Mirror Folder Hierarchy in Microsoft Power BI Cloud** checkbox to automatically create subcategories and mirror the structure in the Microsoft Power BI Cloud
 - The hierarchy of categories is based on Workspace
4. **External Report Template:** Choose the Template from the drop-down menu

5. [Save]

2. Synchronizing the Content

The screenshot shows the 'Microsoft Power BI Cloud Objects' tab in the Metric Insights interface. The top navigation bar includes 'Plugin Data Sources / New Microsoft Power BI Cloud Data Source', a search bar, and links for '+ New...', 'Content', 'Admin', and 'Admin'. Below the navigation bar, the 'Info' tab is selected, and the 'Microsoft Power BI Cloud Objects' sub-tab is active. The main content area displays a table of objects with columns: Report ID, Dashboard, App/Workspace, Report Name, Source, and Actions. The table lists four objects, all with 'Source' as the type. At the bottom, there are buttons for 'Refresh List' and 'Run History', and a pagination indicator showing 'Page 1 of 21' and 'Displaying records 1 - 20 of 410'.

Report ID	Dashboard	App/Workspace	Report Name	Source	Actions
/groups/me/dashboards/41ff137c-60e2-433...	Sales and Marketing for Demo		% Units Market Share vs. % Units Ma...	Source	Filter, View
/groups/me/dashboards/d5f69be1-5991-4ce...	Sales and Marketing Sample		% Units Market Share vs. % Units Ma...	Source	Filter, View
/groups/me/dashboards/3b9e228d-d62c-49...	Sales and Marketing Sample		% Units Market Share vs. % Units Ma...	Source	Filter, View
/groups/me/dashboards/b5ac02f4-5c73-4e8...	Customer Profitability Sample		Carlos Gross Margin %	Source	Filter, View

In *Microsoft Power BI Cloud Objects* tab:

- **[Refresh List]** updates the Objects list and creates new External Reports placing them into the Category selected in *Info* tab
- **[Run History]** provides data on all previous sync runs

NOTE: Each new automatically created External Report is named after the object of its origin.

💡 Metric Insights creates one element per Microsoft Power BI Report. Supported types are "Report" and "Dashboard". They are stored in the *Elements* tab of Power BI Data Source Editor.

To check the synced External Reports access their assigned Parent Category from **Content > Categories**. The External Reports are listed in the *Elements* tab.

Categories / Demo Category (Kate)

Search

+ New...

Content

Admin

Admin

Info

Elements

Datasets & User Maps

Publishing Workflows

Child Categories

Discoverability

History

+ Q

Permissions

Saved

Elements

● Disabled Element

Name	Data Source	Visibility	Type
Daily Sales Demo Report	Dataset	Visible	Report
Demo Kate Report	Dataset	Visible	Report
Offering & Customer Framework test / Offering & Customer Framework test	New Microsoft Power BI Cloud Data S...	Visible	Other External Content
Sales Analytics for Dynamics 365 Sales / Sales Analytics for Dynamics 365 Sales	New Microsoft Power BI Cloud Data S...	Visible	Other External Content
Sales and Marketing sample / Sales and Marketing sample	New Microsoft Power BI Cloud Data S...	Visible	Other External Content