

Altair® Monarch® v2020.0
Monarch Server
Automator Client API Settings for Power
BI

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OVERVIEW

The DataPrep Export element in Automator's Visual Process Designer allows data to be exported in various formats. Before exporting Power BI file types, the API settings of these connectors need to be modified. Use the Client API Settings page to configure the settings for Power BI API.

To access the Client API Settings page

1. On the Navigation Tree, click **System Settings**, and then select **System Preferences**.
2. At the top of the page under Automator Settings, select the **Client API Settings** tab.

For the settings of Power BI, the following details should be provided:

- Client ID:** It is a string that carries user information as provided during registration in Power BI. It is used by these connectors to identify Automator once it is registered. The Client ID is public information that goes hand in hand with the Client Secret Key.
- Client Secret Key:** It is used to authenticate Automator when it requests access to user accounts in Power BI. It goes hand in hand with the Client ID and should be kept private.



NOTES

To get the Client ID and Client Secret Key for Power BI, click [here](#).

- Host Name:** It is the full name of the machine on which Automator is installed.
- Port:** It is the value of the port on which Automator is installed.
- Redirect URI:** It is the URI to which Power BI directs after authenticating the user. The field is automatically filled after supplying the Client ID, Client Secret Key, and host name.

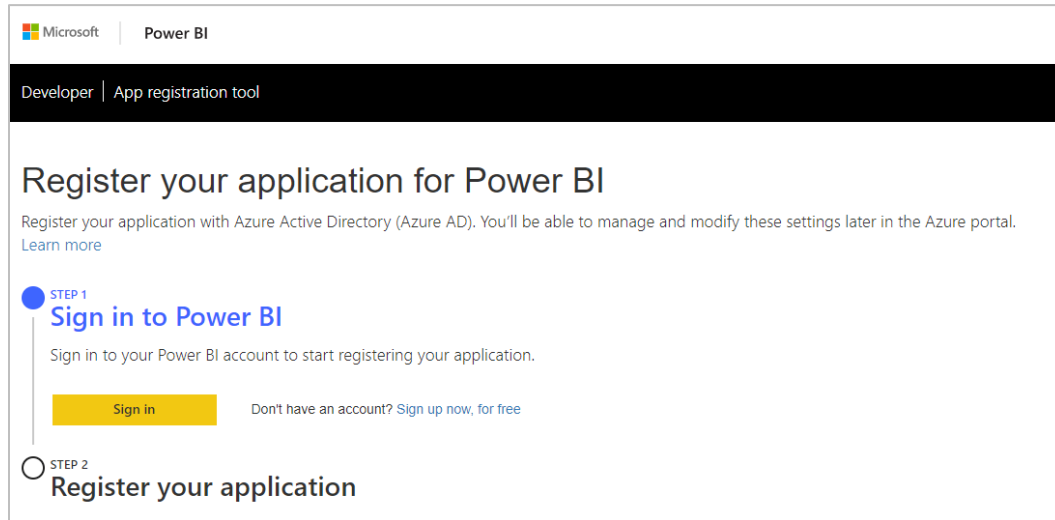
Other settings:

- Save:** Click this button to save the application settings.
- Clear:** Click this button to remove the information in the fields.

POWER BI API KEYS

To get a Client ID and Client Secret Key for Power BI

1. Access Power BI's Registration Tool at <https://dev.powerbi.com/apps>.



NOTES

The registration process in Power BI requires an Azure Active directory, an organizational user, and a Power BI service account. To sign up for an Azure subscription or to log in using an account with such subscription, click [here](#).

To learn how set up your Azure Active Directory and organizational user, click [here](#).



2. Sign in using your Power BI account in Step 1 of the Registration Tool.
3. Provide the following details:
 - a. **App Name** – The name of your app, i.e., Automator.
 - b. **App Type** – Choose “Server-side Web app.”
 - c. **Redirect URL** – This provides Power BI with more details about the app requesting the authentication. An example of a redirect URL is `http://<hostname>/MSAdmin/ProcessDesignerEditor/PowerBIRedirect`.
 - d. **Home Page URL** – Use the sign in page of Automator, i.e., `http://<hostname>/MSAdmin`.



NOTES

In Monarch Server v2020.0 that is upgraded from previous versions (e.g., v13.2), the virtual folders could still be labeled as “DSAdmin” (or “DSClient”). In this case, use “DSAdmin” (or “DSClient”) instead of “MSAdmin” (or “MSClient”) to open the Admin (or Client) page.



STEP 2
Register your application

Register your application with Azure AD to allow your application to access the Power BI REST APIs and to set resource permissions for your application. You can change this later in the Microsoft Azure portal. [Learn more](#)

Application Name
Enter a display name to identify your application in Azure

Application Type
Choose the type of application you are developing

Home Page URL
Enter your application's homepage URL

Redirect URL
Enter a URL where users will be redirected upon sign in so your application can receive an authorization code.

- 4. Select the APIs you need as well as the level of access required. For details about permissions in Power BI, click [here](#).

API access
Select the APIs and the level of access your application needs. You can change these settings later in the Azure portal. [Learn more](#)

Select all

Read only APIs ⓘ	Read and write APIs ⓘ	Create APIs ⓘ
<input type="checkbox"/> Read all datasets	<input type="checkbox"/> Read and write all datasets	<input type="checkbox"/> Create APIs
<input type="checkbox"/> Read all dashboards	<input type="checkbox"/> Read and write all dashboards	
<input type="checkbox"/> Read all reports	<input type="checkbox"/> Read and write all reports	
<input type="checkbox"/> Read all workspaces	<input type="checkbox"/> Read and write all workspaces	
<input type="checkbox"/> Read all capacities	<input type="checkbox"/> Read and write all capacities	
<input type="checkbox"/> Read all storage accounts	<input type="checkbox"/> Read and write all storage accounts	
<input type="checkbox"/> Read all dataflows	<input type="checkbox"/> Read and write all dataflows	
<input type="checkbox"/> Read all gateways	<input type="checkbox"/> Read and write all gateways	
<input type="checkbox"/> Read all Power BI apps		

5. Click **Register**.

The Registration Tool generates an Application ID and an Application secret key. Use these keys to configure the API settings for Power BI in Automator.

Success!

Your application has been registered.

Note: You can retrieve your client ID from the Azure portal, if needed. If you lose your client secret, you'll need to create a new one in the Azure portal

Application ID:

Application secret:

Close