



Configure Power BI Dashboards

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1 Introduction

This guide provides step-by-step instructions for connecting Power BI dashboards to a customer's on-premises SQL Server and embedding them into the Lanteria HR or any other system. This setup allows automatic data refresh and dashboard access through the Power BI Service using the On-premises Data Gateway.

2 Prerequisites

Before starting, ensure the following are in place:

2.1. SQL Server Requirements

SQL Server is accessible from the machine running the On-premises Data Gateway.

A dedicated domain account with read access to the required databases/tables.

SQL server name: _____

Database Name: **ESDB**_____

2.2. Power BI Requirements

A Power BI Pro license.

Access to Power BI Service (<https://app.powerbi.com>).

[Power BI Desktop](#) is installed to adjust the data source and publish reports.

The user running Power BI Desktop has access to the database.

2.3. Gateway Machine Requirements

A 64-bit version of Windows 10 or a 64-bit version of Windows Server 2016+ that is always on and accessible.

.NET Framework 4.8 or higher.

See also: <https://learn.microsoft.com/en-us/data-integration/gateway/service-gateway-install#requirements>

2.4. Network/Firewall

The gateway communicates on the following outbound ports: TCP 443, 5671, 5672, and from 9350 through 9354. The gateway doesn't require inbound ports.

See also: <https://learn.microsoft.com/en-us/data-integration/gateway/service-gateway-communication#required-ports-for-the-gateway-to-function>

SQL Server must be accessible locally from the gateway machine (named instance or IP).

3 Install and configure the On-Premises Data Gateway

3.1. Please refer to the guide in [this](#) article to download, install, and configure a standard gateway.

4 Configure Gateway in Power BI Service

4.1 Go to <https://app.powerbi.com>.

4.2 Click Workspaces on the left pane and create a new Workspace.

4.3 Navigate to Settings → **Admin Portal** → **Tenant settings** → **Publish to web**
Enable publish to web and allow users to create new embedded code.

4.4 Navigate to **Settings** → **Manage connections and gateways** → **On-premises data gateways and**
ensure your newly registered gateway appears in the list and the status is Online.

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- 4.5 At the Manage Connections and Gateways page, navigate to the Connections tab and click **+New**
 - 4.6 Select your gateway in the Gateway cluster name field
 - 4.7 Provide connection name (e.g. Lanteria UAT DB)
 - 4.8 For the Connection type, select **SQL Server**
 - 4.9 Server = **FCDEVSPADB16** (SQL server name/instance where Lanteria ESDB is hosted)
 - 4.10 Database = **ESDB_568d6a3800c24e85a870897c297b546e**
 - 4.11 For **Authentication**, choose the **Windows** authentication method and provide domain account credentials created in step 2.1 of this guide.
 - 4.12 Click Save. The connection will be created successfully if there are no errors.

5 Configure and publish a Power BI dashboard in Power BI Desktop

- 5.1 Download the Lanteria Power BI dashboards .pbix file from https://download.lanteria.com/PowerBIDashboards/Lanteria_dashboard.pbix

Please note: Before downloading the .pbix file, please install the latest version of Lanteria HR. This is highly recommended to avoid compatibility issues between Lanteria HR and the Power BI report.

- 5.2 Make sure that the **LHR - Power BI Data Export** system job is enabled and has run successfully at least once. This job exports the data required for the Power BI report to connect to the database. If a system update was recently installed, run the job again to ensure that any data missing after the update is exported.

- 5.3 Open the downloaded file in Power BI Desktop.

- 5.4 Navigate to File → **Options and settings** → **Data source settings**

- 5.5 Click Change Source...

- 5.5.1.1.1 Type the Server name used in step 4.9, where the SQL Server name/instance is specified.

- 5.6 Type the Database name used in step 4.10, where the database is specified.

- 5.7 Click Ok and then Close.

- 5.8 Click Apply Changes on the red info box. The dashboards should be refreshed with the data from SQL Server.

- 5.9 From the Home ribbon panel, click the Publish Button

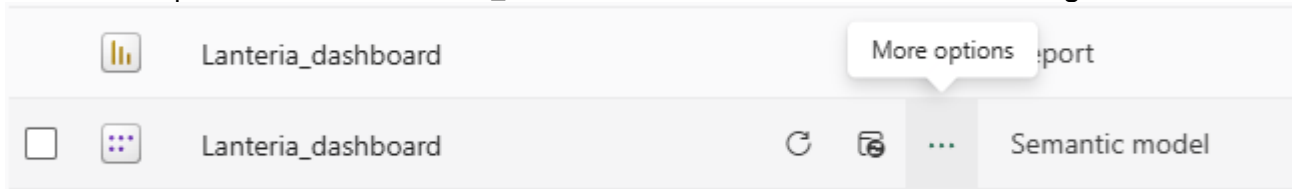
- 5.10 Sign in with the account that has access to Power BI Service (<https://app.powerbi.com>)

- 5.11 Select the workspace created at step 4.2 and click Select. Wait until the dashboard is published successfully.

6 Configure a Power BI dashboard in Power BI Service

6.1 Go to <https://app.powerbi.com> and select the workspace where you published the report.

6.2 Click “More options” near the “Lanteria_dashboard” Semantic model and choose **Settings**



6.3 On the settings page, expand the **Gateway and cloud connections** option.

6.4 You should see the previously created on-premises gateway with the status “Running on [SERVER NAME]”, select all datasources to use”.

6.5 Click the View Datasources icon 

6.6 Map the data source to the connection created at step 4 and click the Apply button.

6.7 Expand the **Refresh** option.

6.8 Select the appropriate Time zone.

6.9 Enable the **refresh schedule**, select the **Refresh frequency - Daily**

6.10 Click “**Add another time**” and specify a time when the dashboard will be refreshed (it is better to choose any time between 6 AM and 8 AM).

6.11 Click the Apply button.

7 Embed the Lanteria dashboard

7.1 Go to <https://app.powerbi.com> and select the workspace where you published the report.

7.2 Click on the Lanteria_dashboards Report

7.3 Select **File** → **Embed report** → **Publish to web (public)**

Note: If you are using Single Tenant, instead of embedding report via “Publish to web (Public)” you may use “Embed report to Website or Portal”. See corresponding article here:
<https://learn.microsoft.com/en-us/power-bi/collaborate-share/service-embed-secure>

7.4 Click Continue and then Publish

7.5 Copy the link and send it to the Lanteria support engineer or use.

7.6 The link could also be shared with the team members who should have access to the Dashboards or embedded into the other systems by using the iFrame tags.

8 Adding report into Lanteria

8.1 Download LanteriaHRAalytics.aspx file from <https://files.lanteriaonline.com/index.php?/files-pub/3UfWQVzbh>

8.2 Using SharePoint Designer import this file to /SitePages/Reports/

8.3 Edit the file and replace “xxxxyyyzzz” in src=“xxxxyyyzzz” with the report URL copied in step 7.5.

8.4 Save the file.

8.5 Create new Menu Item for the new page. You can follow this guide to create new Menu Item:

<https://help.lanteria.com/docs/menu-items>

Before completing the setup, verify that the report opens from the new Lanteria menu item, displays the expected SQL Server data, refreshes according to the configured schedule, and is accessible to users with the intended Lanteria roles.

8.6 By default, the page with the report is available only to users with HR role, but if you want this page to be shared with users with other roles, you might need to create new Permission record. Here you can find more details on how to use Permissions Editor: <https://help.lanteria.com/docs/permissions-editor>