

Connecting to Pereview API Via Power BI

Last updated by | Daniel Gehring | Jan 22, 2024 at 1:29 PM MST

Requirements:

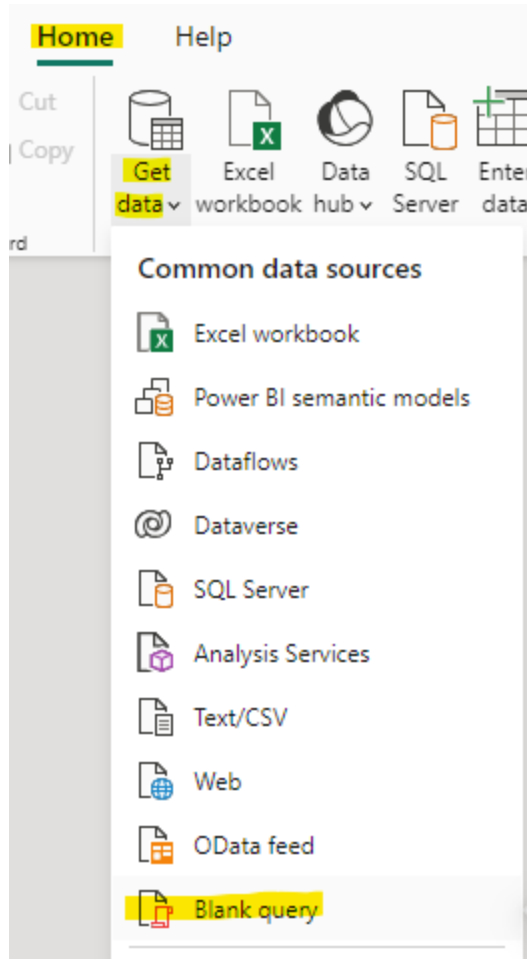
Power BI Pro license: See [Pricing](#) details.

Note: To configure the Power BI query users will need to connect to Postman to view API information. API details with Postman example are located here: [Outbound APIs](#). The example below uses the Assets API.

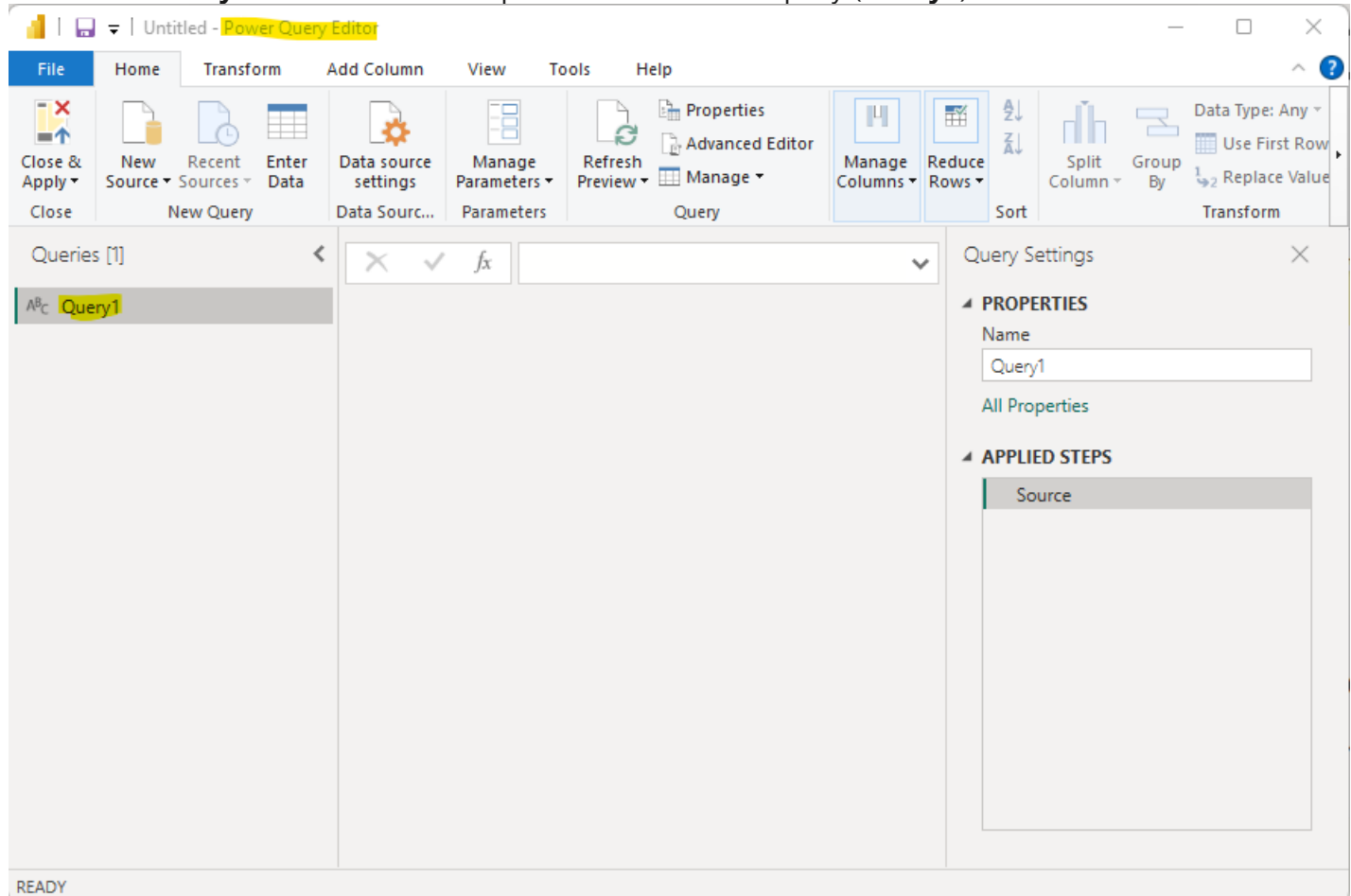
Part One

Create a Blank Power BI Query

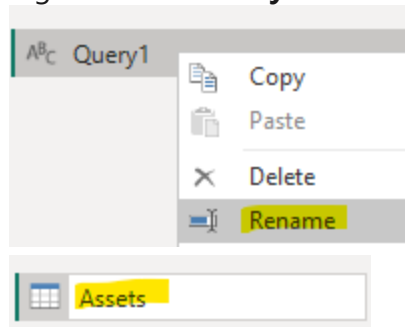
1. Open **Power BI Desktop**.
2. On the **Home** menu tab, click the down arrow on the **Get Data** menu label and select **Blank query**:



3. The **Power Query Editor** window will open with a new blank query (**Query1**):



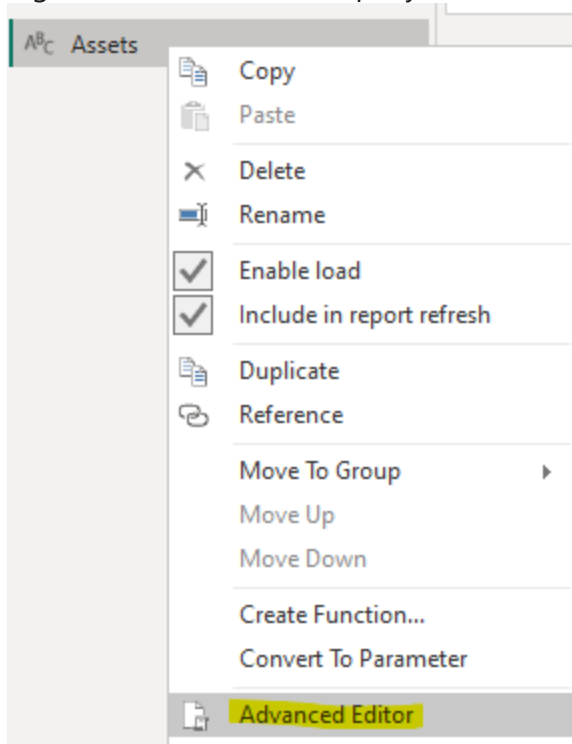
4. Right-click on **Query1** and select **Rename** from the context menu to change the query name to **Assets**:



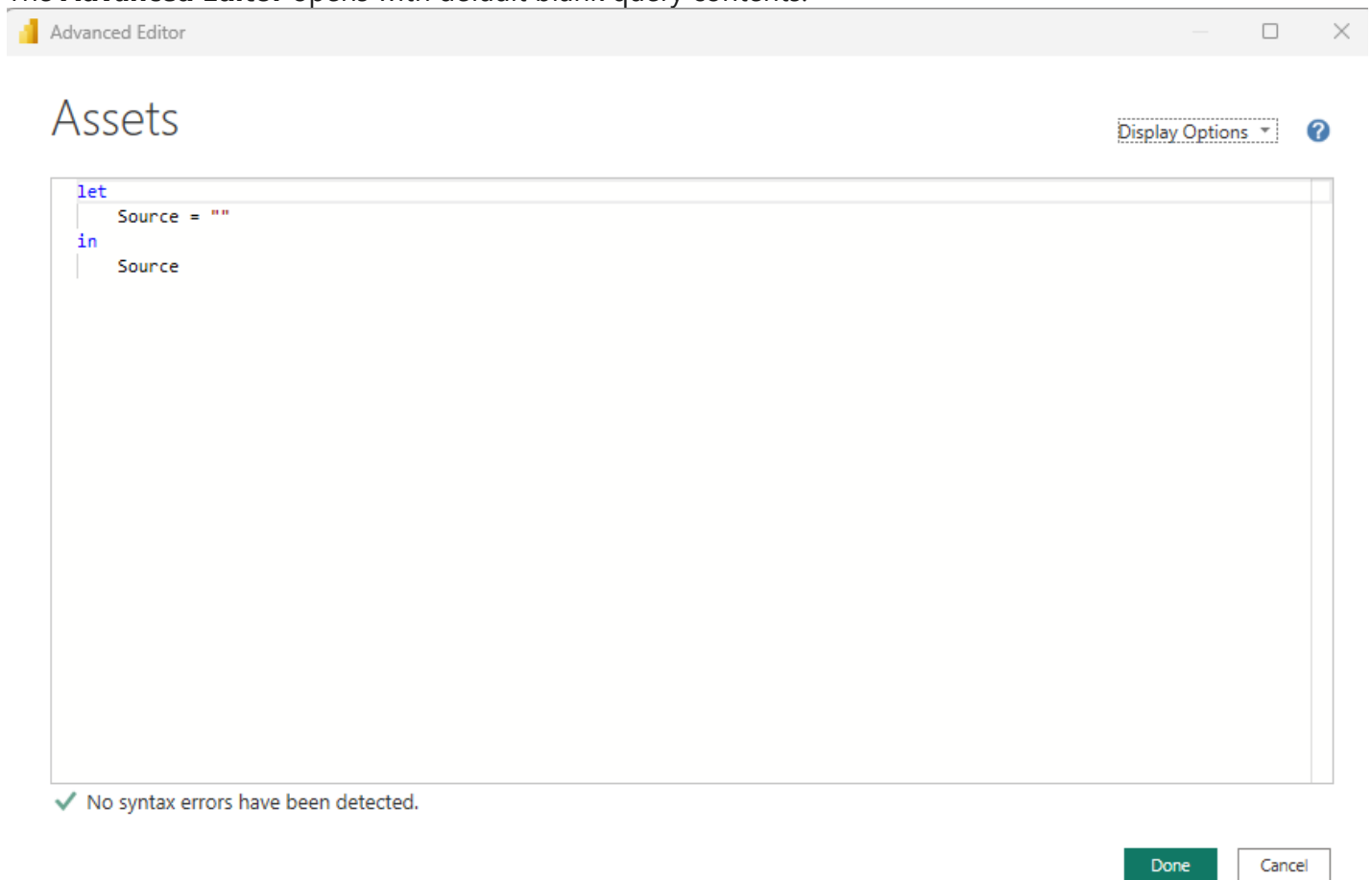
Part Two

Write the API Query

1. Right-click on the **Assets** query and select **Advanced Editor** from the context menu:



2. The **Advanced Editor** opens with default blank query contents:



3. Replace the default query contents with the text below:

```

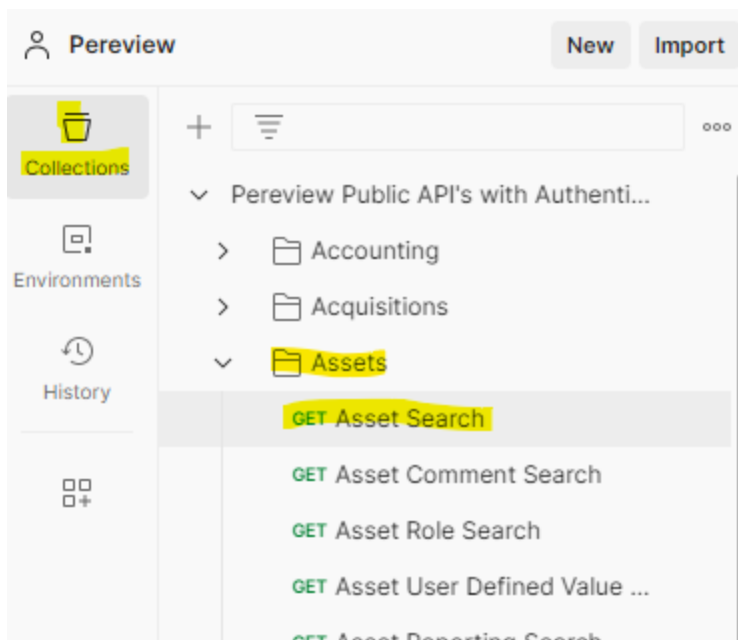
let
    url = "https://api.pereviewsoftware.com/api/client/get/asset",
    body = "{}",
    EncodedCredentials = "Basic " & Binary.ToText(Text.ToBinary("<username@pereviewsoftware.com>:
<password>"),
    BinaryEncoding.Base64),
    header = [
        #"Content-Type" = "application/json",
        #"x-api-key" = "a1a1a1a1-a1a1-a1a1-a1a1a1a1a1",
        #"Authorization"=EncodedCredentials,
        #"From" = "username@pereviewsoftware.com"
    ],
    response = Web.Contents(url, [
        Headers = header,
        Content = Text.ToBinary(body)
    ]),
    Result = Json.Document(response),
    #"Converted to Table" = Table.FromList(Result, Splitter.SplitByNothing(), null, null, ExtraValues.Error),
    #"Renamed Columns" = Table.RenameColumns(#"Converted to Table",{{"Column1", ""}})
in
    #"Renamed Columns"

```

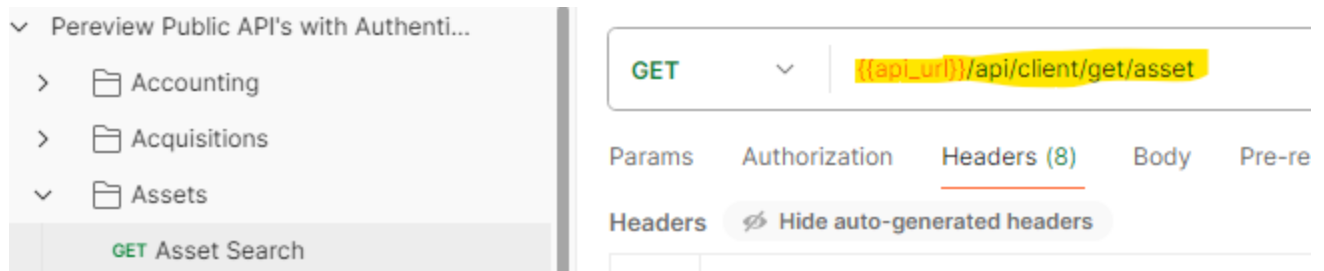
Then update the url, body, EncodedCredentials, x-api-key, and From lines as needed using the definitions provided below:

url - To obtain the **url** value for the API:

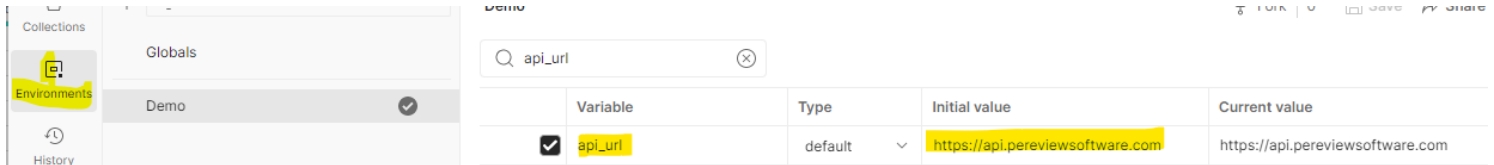
I. Within **Postman** navigate to the desired **Collection** and select the **GET Asset Search** item:



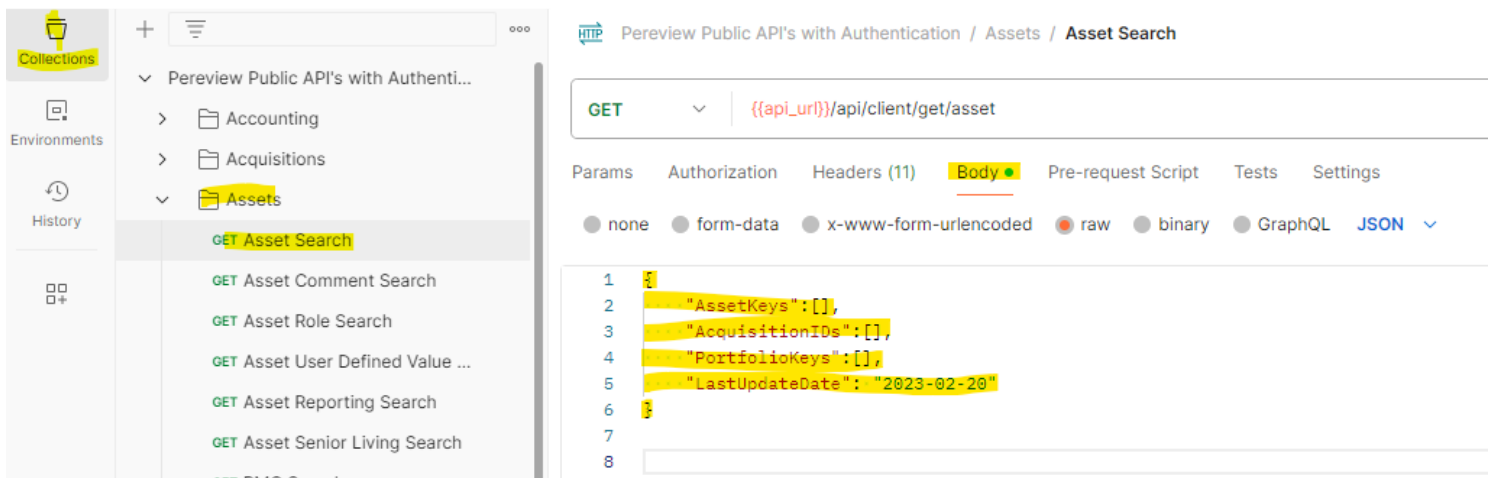
II. Copy the url shown at top of screen next to the word "GET":



III. Replace the **{{api_url}}** portion with the value found in the Environment **api_url** variable to get the url value of "https://api.pereviewsoftware.com/api/client/get/asset":



Body - Available filters can be viewed in Postman in the **Body** location:



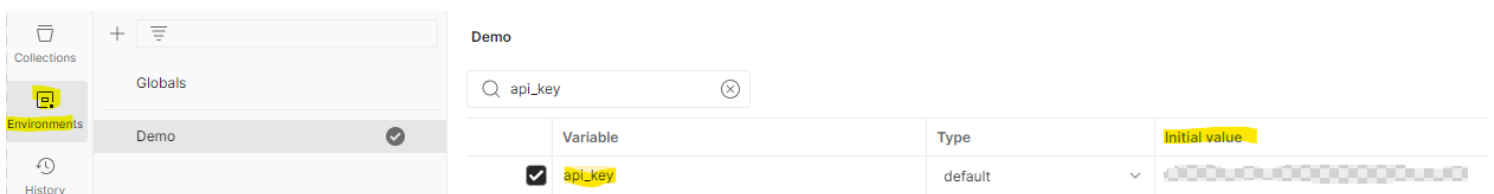
In the example provided we want to return all Assets so no filters are applied:

body = "{}",

EncodedCredentials - Replace the **<username@pereviewsoftware.com>** and **<password>** values with your Pereview-provided API username and password:

EncodedCredentials = "Basic " & Binary.ToText(Text.ToBinary("<username@pereviewsoftware.com>:<password>")), BinaryEncoding.Base64),

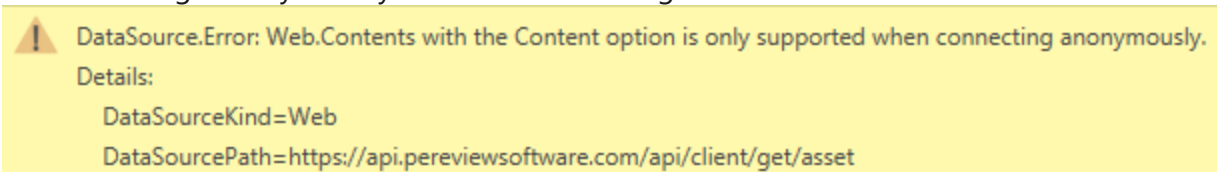
x-api-code - The **x-api-code** value can be found in Postman **api_key** Environment variable:



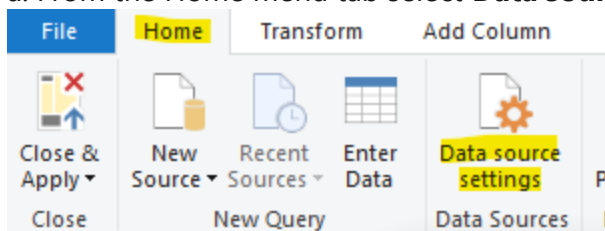
From - The **From** header value is the email address used to access your Pereview site.

4. After entering the query details, click **Done**:

5. After selecting Done you may receive the following error:



To correct:


a. From the Home menu tab select **Data source settings**:b. Within the **Data source settings** window, select the url of the new data source and click **Edit Permissions**:

Data source settings

Manage settings for data sources that you have connected to using Power BI Desktop.

☒ Data sources in current file ☐ Global permissions

Search data source settings

 <https://api.pereviewsoftware.com/api/client/get/asset>

Change Source...

Export PBIDS


Edit Permissions...

Clear Permissions

Close

c. Within the Edit Permissions window, select the Edit button:

Edit Permissions

 <https://api.pereviewsoftware.com/api/client/get/asset>

Credentials

Type: Basic

Edit...

Delete

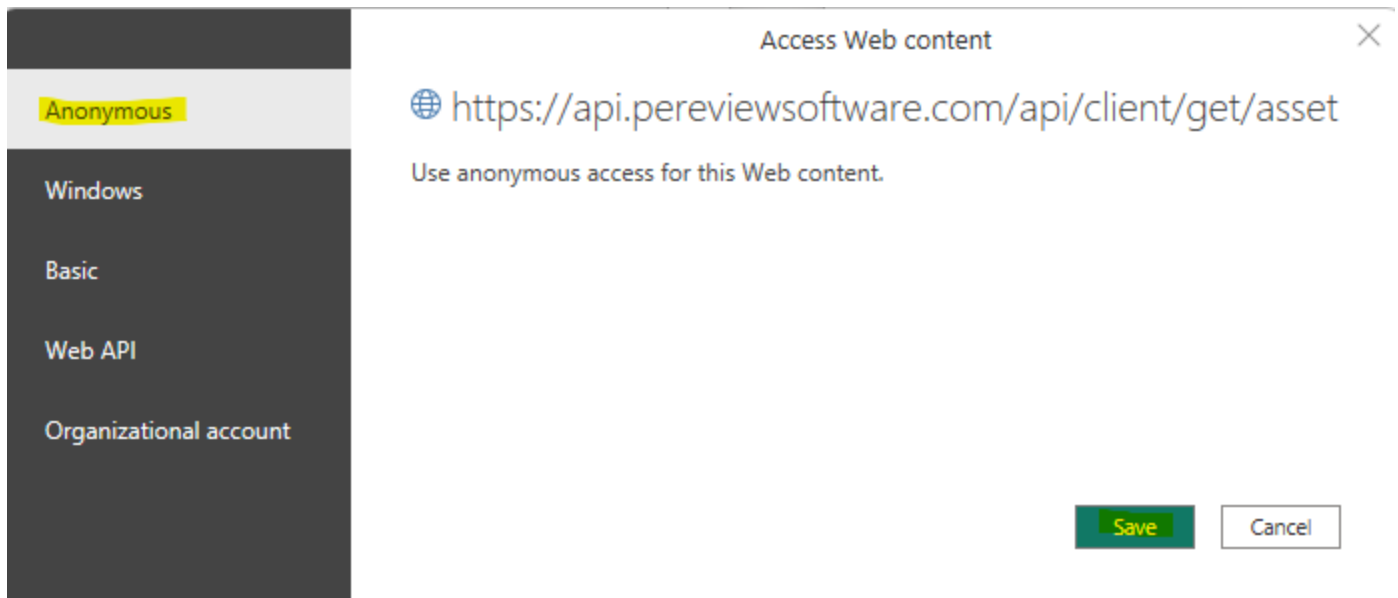
Privacy Level

None

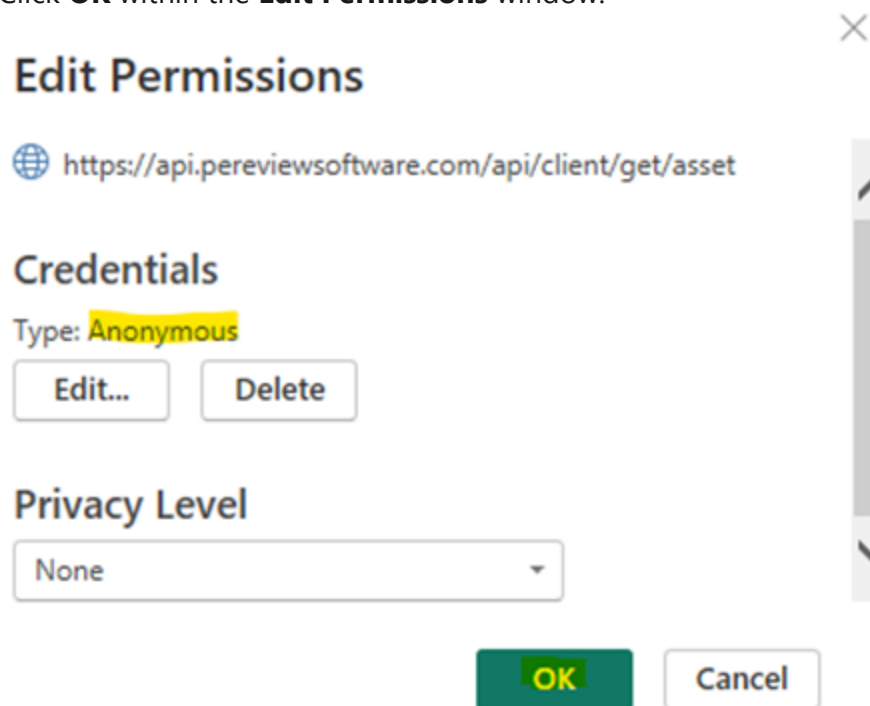
OK

Cancel

d. Within the **Access Web content** window, select **Anonymous** on the left-hand side and click **Save**:



e. Click **OK** within the **Edit Permissions** window:



f. Click **Close** within the **Data source settings** window:

Data source settings

Manage settings for data sources that you have connected to using Power BI Desktop.

☒ Data sources in current file ☐ Global permissions

Search data source settings

https://api.pereviewsoftware.com/api/client/get/asset

Change Source...

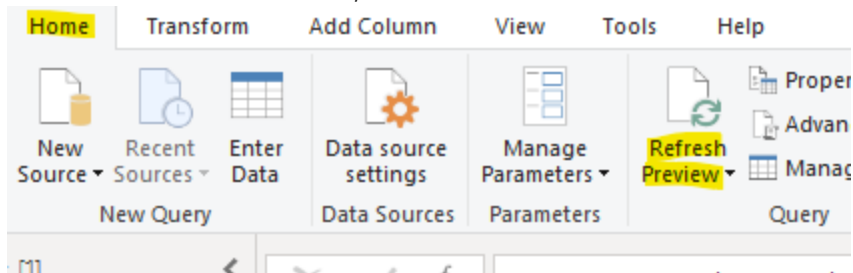
Export PBIDS

Edit Permissions...

Clear Permissions

Close

6. From the **Home** menu tab, click the **Refresh Preview** button:



7. A single column will be returned with the word "Record" in each row.

	ABC 123
1	Record
2	Record
3	Record
4	Record
5	Record
6	Record

Part Three

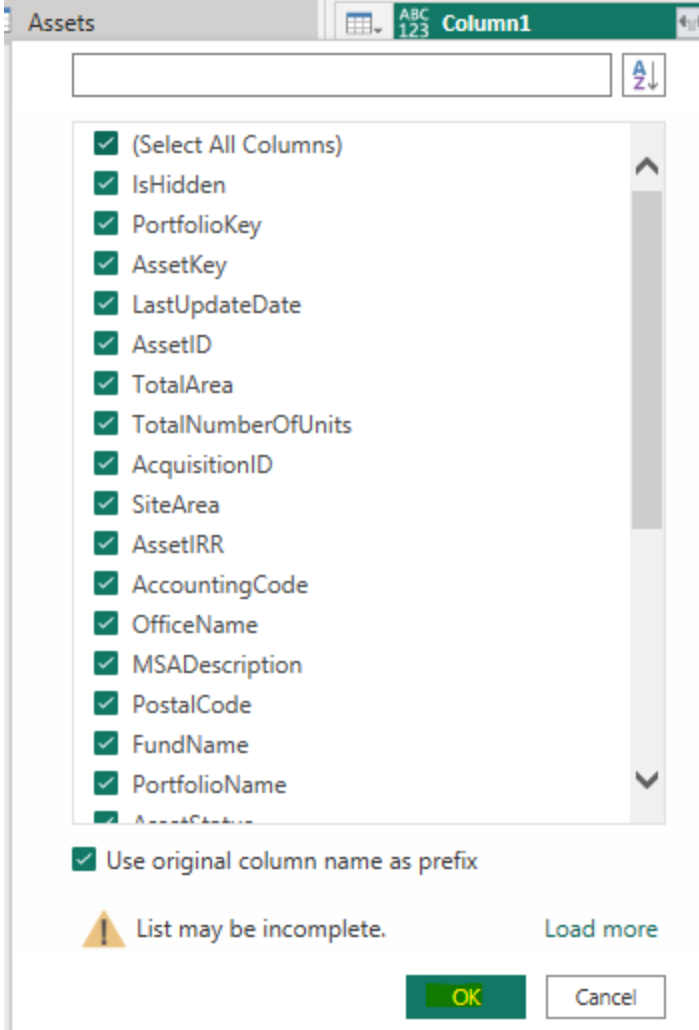
Expand and Load the Table

1. Click the left-right arrows which appear on the right side of the column header:



	Column1
1	Record
2	Record
3	Record
4	Record
5	Record
6	Record

2. Click **OK** on the pop-up screen (no changes needed):



Assets

ABC 123 Column1

Search

☒ (Select All Columns)

☒ IsHidden

☒ PortfolioKey

☒ AssetKey

☒ LastUpdateDate

☒ AssetID

☒ TotalArea

☒ TotalNumberOfUnits

☒ AcquisitionID

☒ SiteArea

☒ AssetIRR

☒ AccountingCode

☒ OfficeName

☒ MSADescription


☒ PostalCode

☒ FundName

☒ PortfolioName

☒ AssetStatus

☒ Use original column name as prefix

 List may be incomplete. [Load more](#)

OK Cancel

3. A table with the selected API data will appear. Click the **Close & Apply** button from the **Home** tab to close the Power Query Editor:

	IsHidden	PortfolioKey	AssetKey	LastUpdateDate
1	FALSE	14	1	2023-10-03T05:00:4
2	FALSE	106	2	2023-10-03T05:00:4
3	FALSE	115	3	2023-10-03T05:00:4
4	FALSE	7	4	2023-10-03T05:00:4
5	FALSE	10	5	2023-10-03T05:00:4
6	FALSE	15	6	2023-10-03T05:00:4
7	FALSE	108	7	2023-10-03T05:00:4
8	FALSE	21	8	2023-10-03T05:00:4

4. The **Asset** table is now available for use in visualizations:

Build visuals with your data
Select or drag fields from the Data pane onto the report canvas.

Visualizations

Build visual

Data

Search

Assets

- ☐ AccountingCode
- ☐ AcquisitionID
- ☐ AcquisitionName
- ☐ AssetID
- ☐ AssetIRR
- ☐ AssetKey
- ☐ AssetName
- ☐ AssetStatus
- ☐ CityName
- ☐ DominantProper...
- ☐ DominantSubAs...
- ☐ FundName

Values

Add data fields here