



VALD CONNECT

Power BI Advanced Setup

Intended for more advanced use cases, the manual setup method offers increased flexibility and customization when configuring VALD Connect. Note that this route is best suited to users with preexisting knowledge of Power BI who are comfortable managing their own setup.

For the simplest setup experience, consider using the [quick start](#) method instead.

Before you begin

Check that you have the following prerequisites in place:

- A valid **VALD account** part of an organization that has been provisioned for VALD Connect.
Only our team can grant your organization access to VALD Connect.
- A device with [Power BI Desktop](#) * installed.
** Desktop version available only on Windows operating systems incl. virtual machines.*
- Your **Delta Sharing URL** to perform the setup.
You will have received this in your welcome email from our team.

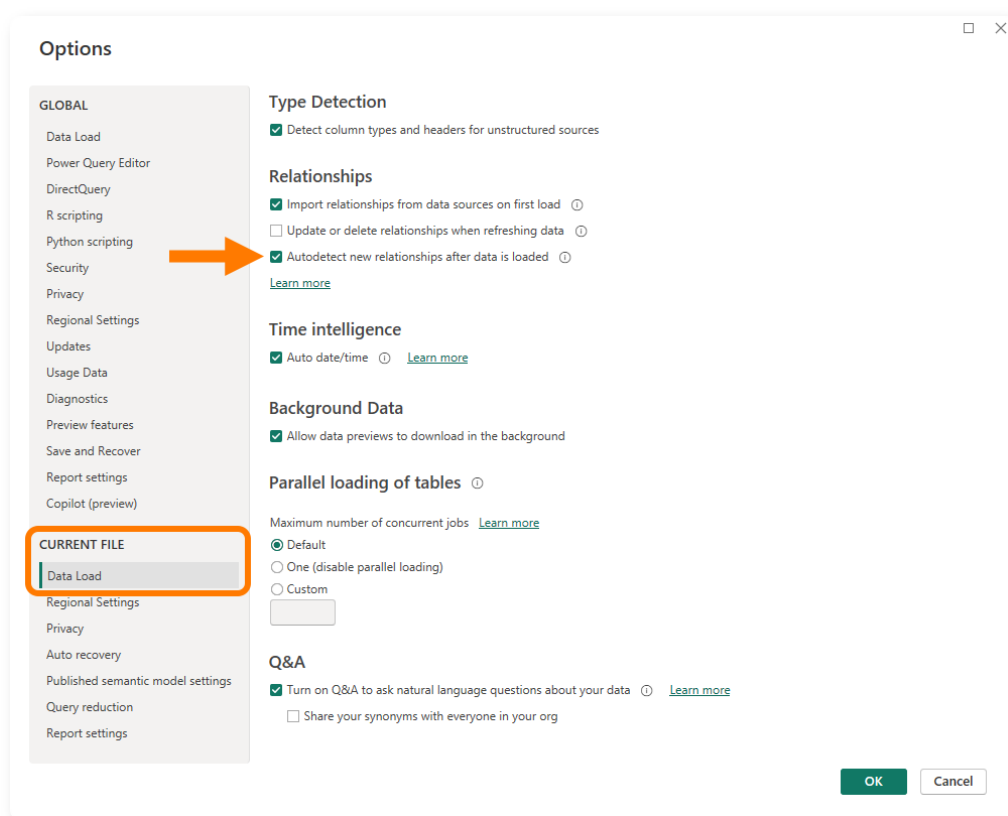
Setup walkthrough

Initial checks

When you load data, Power BI may attempt to establish relationships between tables by automatically matching columns.

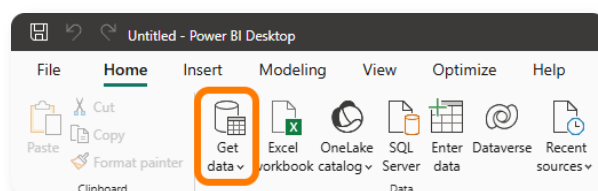
Relationships auto-detected by Power BI have the potential to be incorrect. With this in mind, it is strongly recommended to **turn off this feature** before loading your data.

1. Open Power BI and create a new blank report.
2. Navigate to **File > Options and settings > Options > (Current File) Data Load > Relationships** and locate the setting 'Autodetect new relationships after data is loaded'.
3. If this functionality is enabled, disable it by unchecking the box. Press **OK** to apply changes.

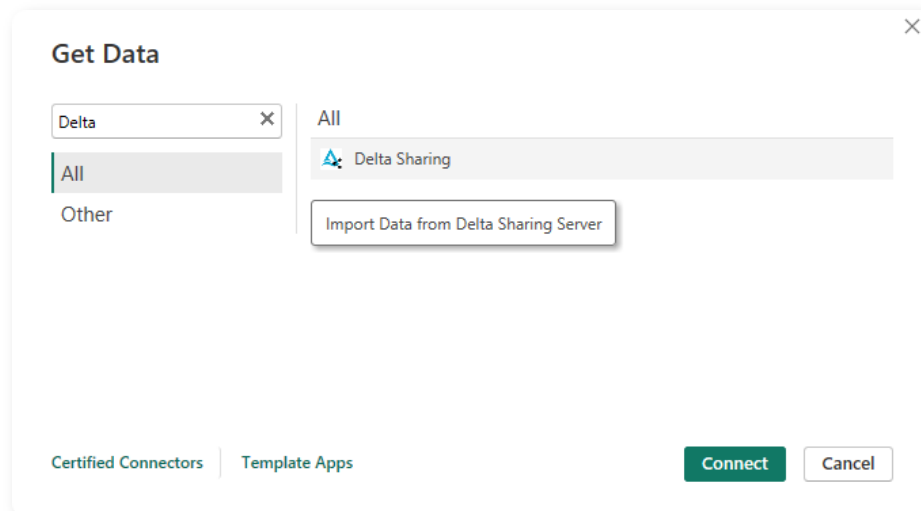


Load your data

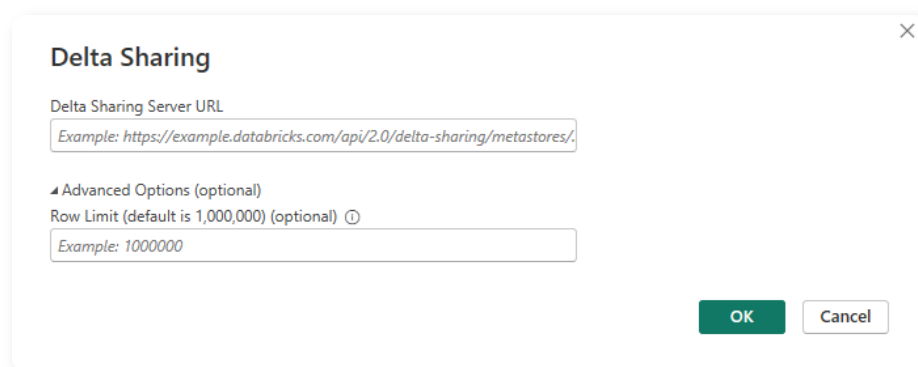
4. In the **Home** toolbar, click **Get Data**.



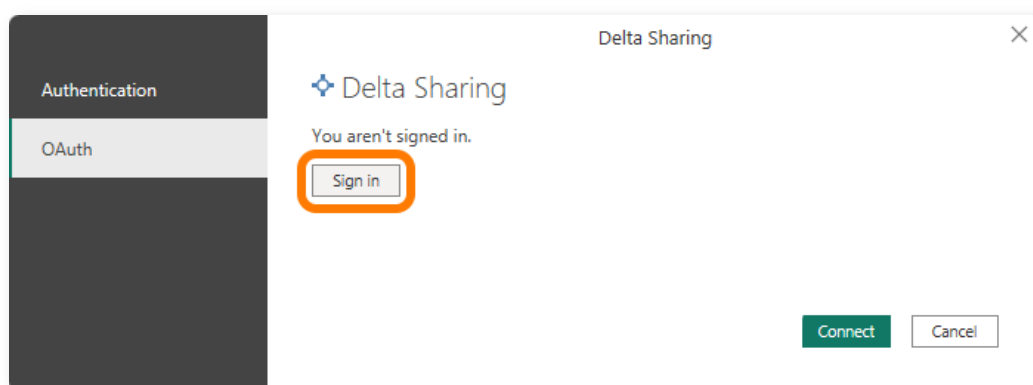
5. Search for **Delta Sharing**. Select this option and click **Connect**.



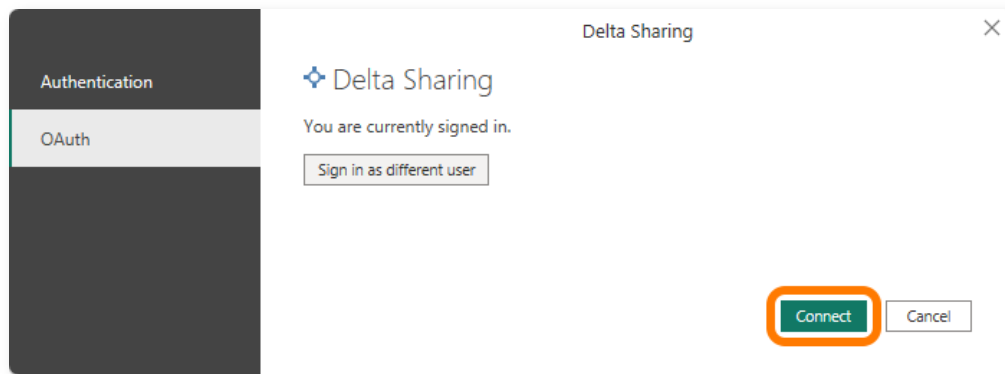
6. Paste in the **Delta Sharing URL** provided in your email from VALD.
7. Under **Advanced Options**, set the **Row Limit** to a high value (e.g., 1,000,000,000). Press **OK**.



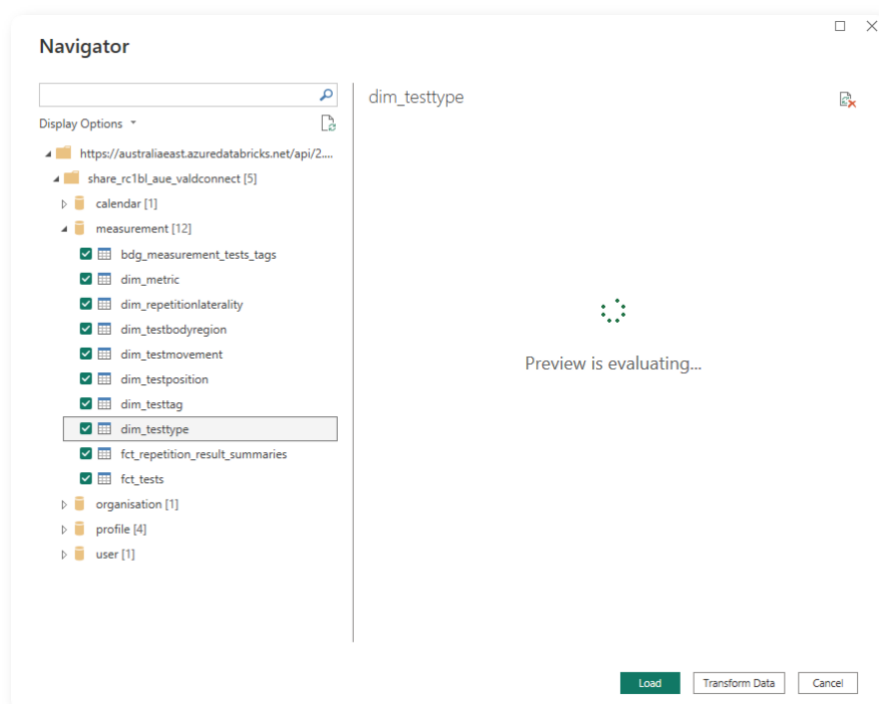
8. A login prompt will appear. Click the **Sign in** button and log in with your VALD account.



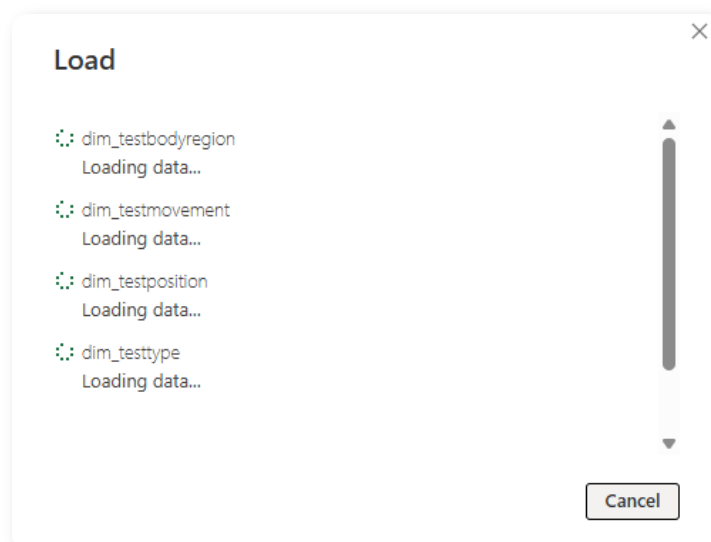
9. Once authentication has completed, click **Connect**.



10. In the **Navigator** pop-up, expand schemas and select the tables you wish to load.



11. Click **Load** and wait for the data to be fetched.



Configure relationships

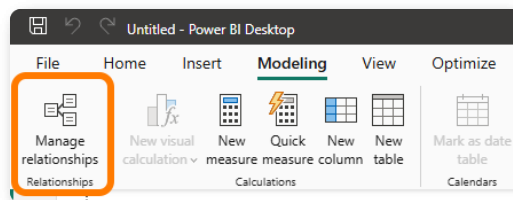
As referenced earlier, correct relationships between table columns are essential to ensure your analysis is accurate and complete.

Note: Incorrect relationships can lead to **missing, duplicated or inaccurate data** in your analysis. If you are unsure, opt to use the [Power BI template](#) where relationships are pre-configured.

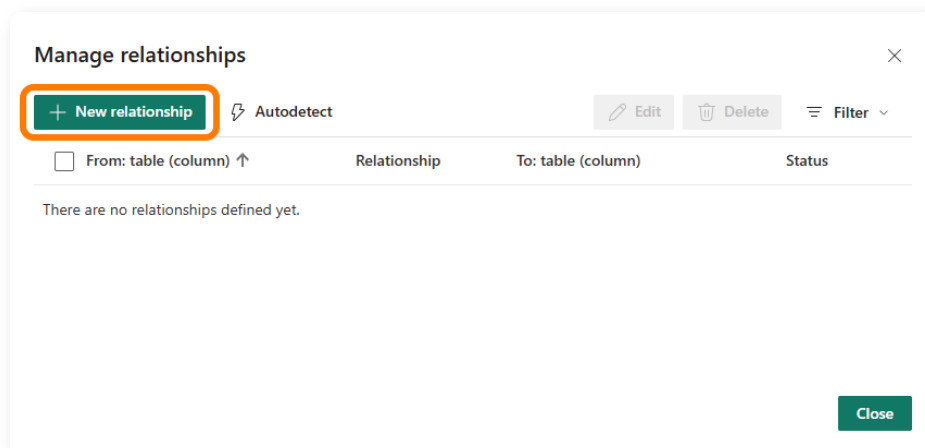
Having turned off auto-detection of relationships, you will need to create fresh relationships using the correct fields and structure.

If you have some familiarity with dimensional data models this may be completed independently. To help you along, VALD data model documentation can be provided upon request: reach out to valdconnect@vald.com for more details.

12. Navigate to **Modeling > Manage relationships**.



13. Add new relationships, and press **Close** to save them.



With this, you have completed your manual setup in Power BI, ready to begin using VALD Connect to analyze your data.