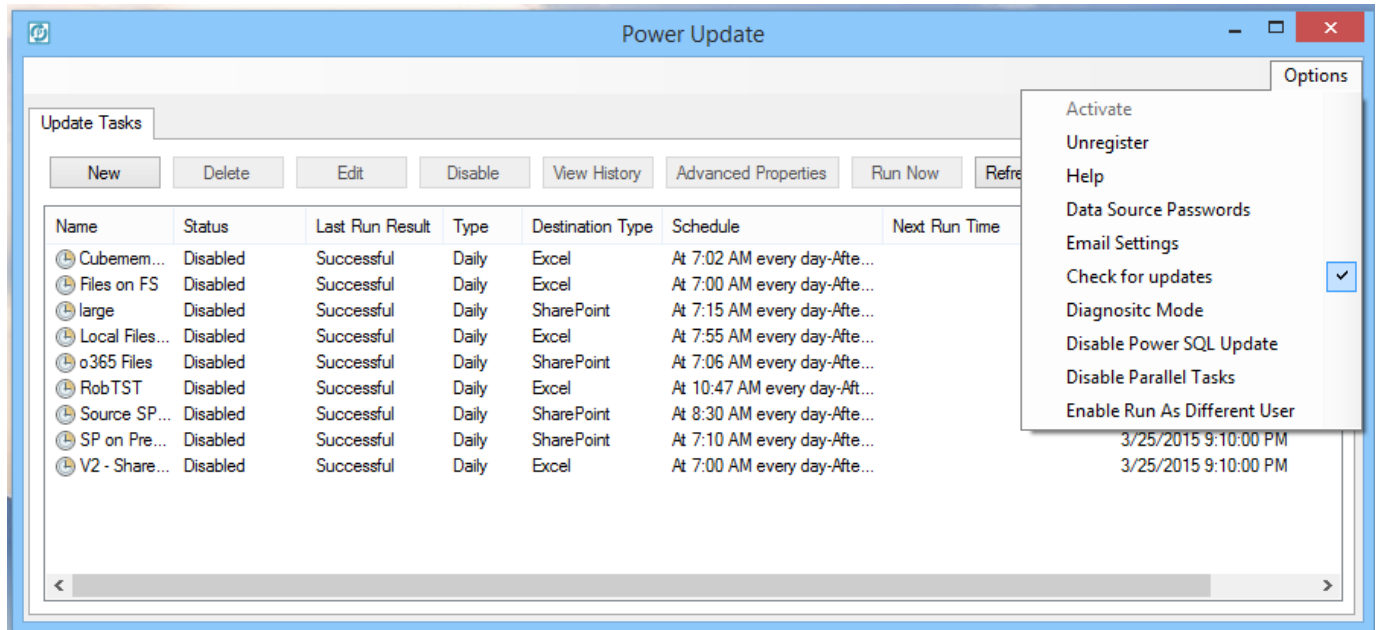# Power Update- Documentation

Power Update Manager

In the PU Manager screen you can create **New Tasks**, **Delete** and **Edit** settings for your current Tasks.

> Note: When making a lot of changes or installing updates, please remember to disable all the Excel Update Tasks.

The **Enable/Disable** button enables you to pause or start current tasks.

View History provides a log of all the logged items of the current tasks, including starting and stopping and error information**.**

In **Advanced Properties** you may define more detailed options for your tasks.

Run Now is will start the task immediately

Under the **Options** menu, users can Register the software, check for Updates, and enable Diagnostic mode that will open up the running Excel window in order to observe and troubleshoot the tasks. This should be turned off by in a production environment.

Installation

Prerequisites

In order to install Power Update from Power Planner, the following components are prerequisites, and need to be installed before the setup starts:

- Microsoft Excel 2010 or Excel 2013
- .NET4.0 Full

Download

Power Update is available for download from:

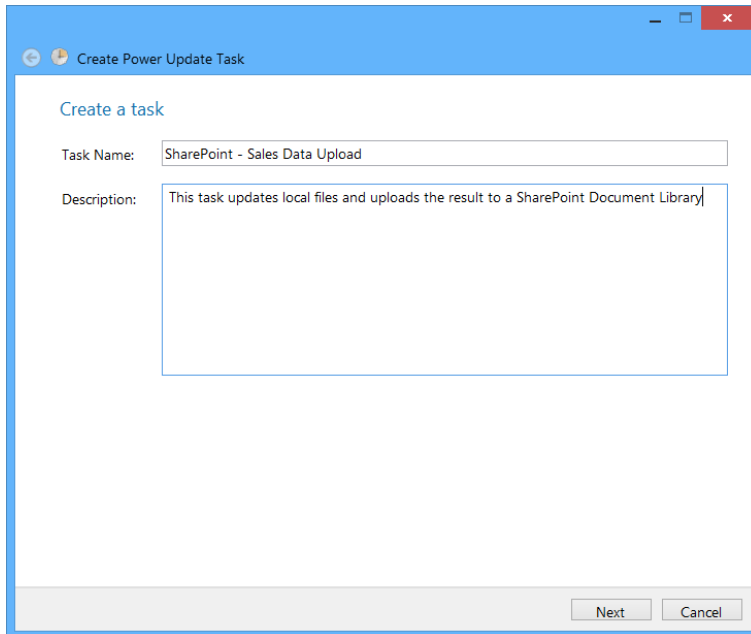http://www.power-planner.com/Portals/0/Downloads/PU/pusetup.exe

Running the Installation

By running the installation program from the link above, Power Update is installed on your computer. The current licensing model is per user that is scheduling jobs. Multiple users can use the same computer.

Using the Task Wizard

A task is scheduled based on a Starting Point and a Frequency on how often you want to update the Excel Power Pivot Files. In order to have the Sales data updated on an hourly basis, and the Inventory data updated daily, two tasks will have to set up with different frequencies.

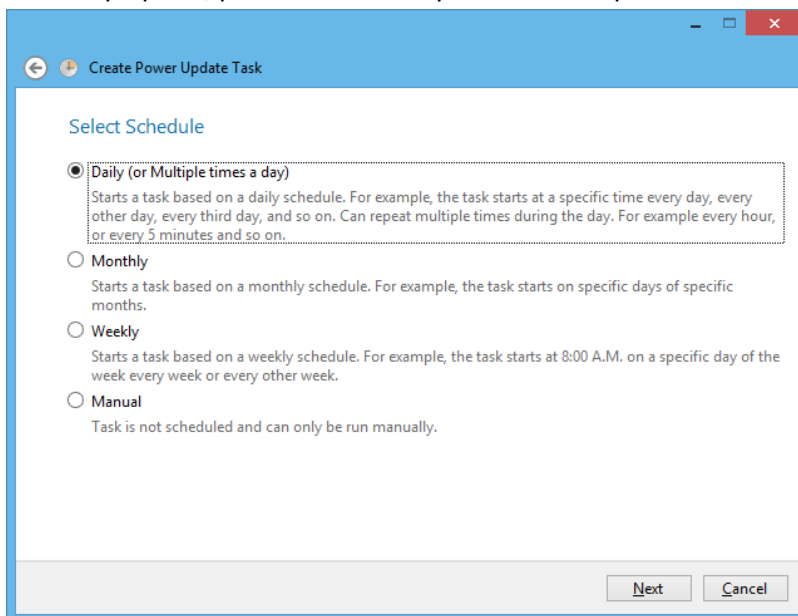In order to update the Sales Data every hour. Click on New Task and enter a name and description:

Defining an Update Schedule for the Task

In order to define the schedule, select the option that is closest to how you want PU to update the workbooks.

The Daily Option, provides the ability to schedule updates down to 1 minute intervals during the day.

Setting the Start Time

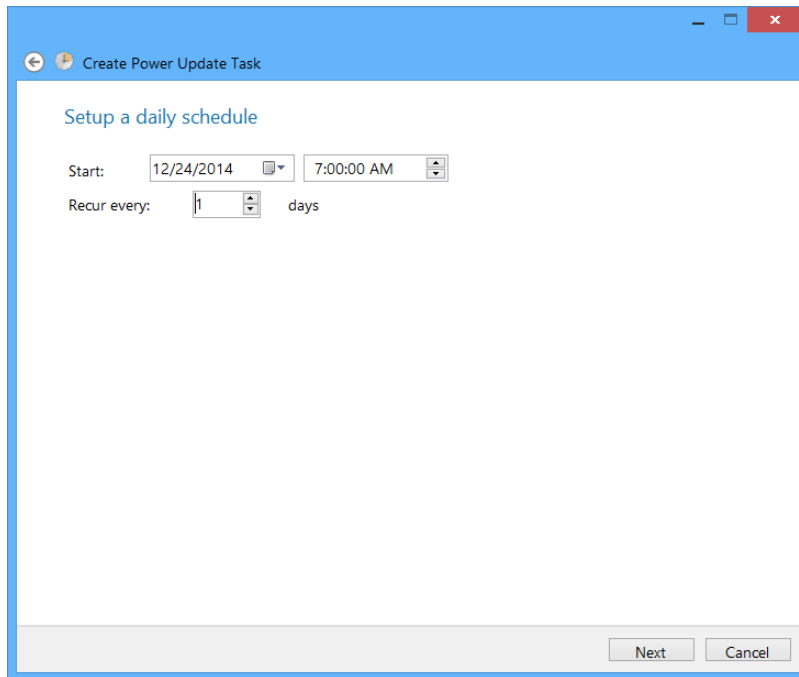Select the date and time and frequency that the task will run at:
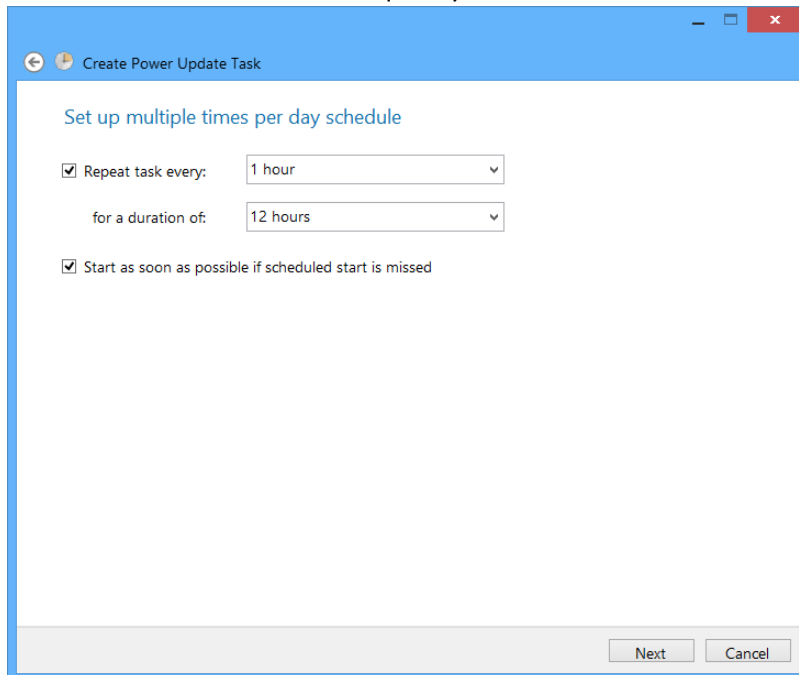
Setting the Frequency

The next screen defines the frequency and the duration of the task.

In the sample above, the task will start at 7 AM and run for every hour for 12 hours, ending at 7 PM. These settings may be further refined in Main Screen by clicking Advanced Settings. (You can also type in custom values in these fields e.g. change "1 Hour" to "2 Hours".)

Selecting types of files

Power Update can automatically update the following model types:

- Power Pivot Models in Excel workbooks on a local drive or a file share.
- Power Pivot Models hosted on SharePoint
- Power Pivot models being hosted in a SSAS Tabular server.

Local and File Share Power Pivot Models – Power Update opens up the Excel workbook file and automatically refreshes all the connections that are in the Workbook, then saves the workbook to the target folder.

SharePoint Power Pivot Models – Power Update downloads the Excel workbook from SharePoint (optional local workbooks can be used as well), automatically refreshes all the connections, and uploads it to SharePoint.

SSAS Tabular Models – Power Update opens up the Excel Workbooks that serve as a base model for Tabular SSAS server cubes. This workbook will be refreshed and restored on the Tabular SSAS server **overwriting** the existing cube, so please make sure that you make all your model changes in the Excel Workbook instead of Visual Studio.
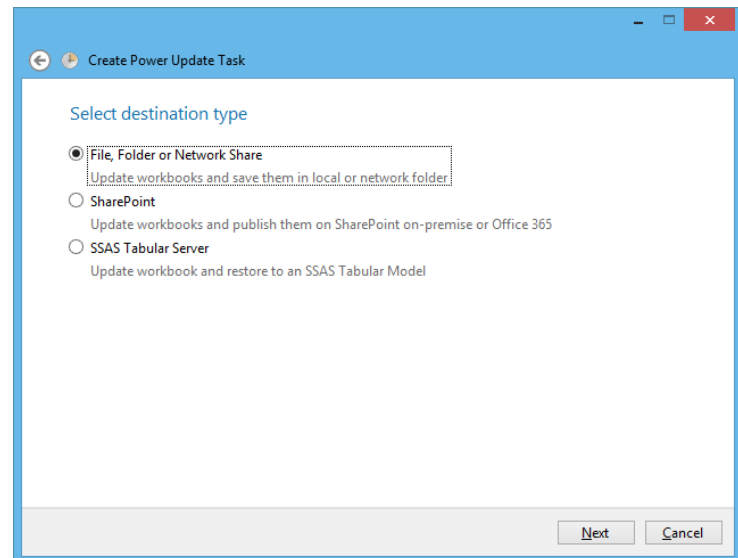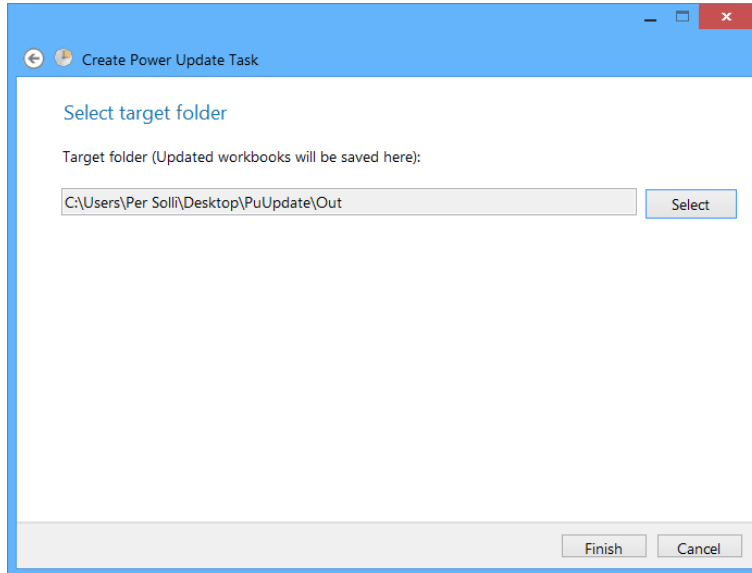
Set Source File of Folder/Document Library

For Local Files or SharePoint files you can chose to update 1 file at the time or update all files in a folder:
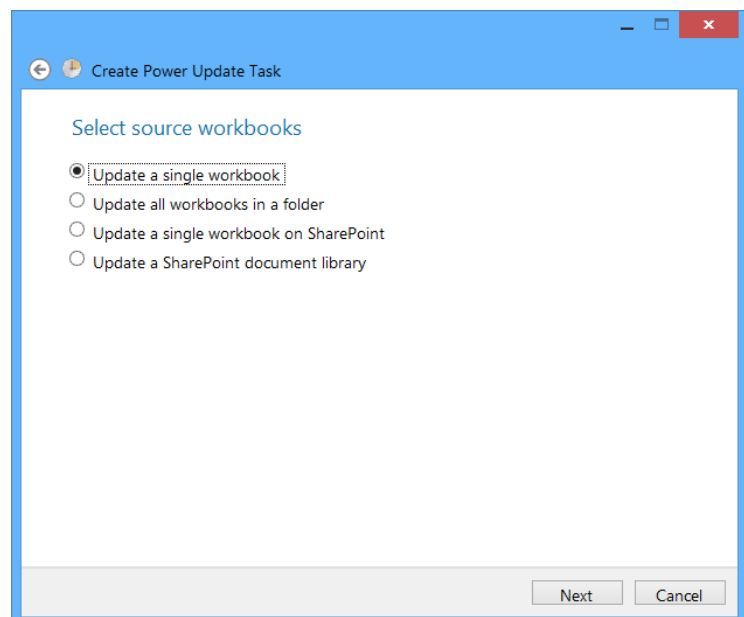
Setting Source and Target Folder:
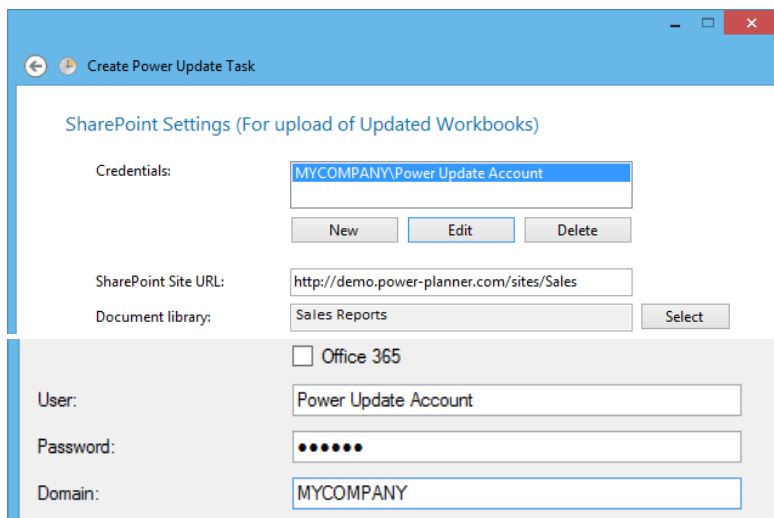
Power Update recommends that you use one source folder and a different Target folder. (They may be one and the same, but then it's recommended to make a backup of the original functional workbooks, in case any problems occur with the model if update the fails.) So first select the files or folder that should be updated in the previous screen, then select the Target Folder for the files, where the end users will reach the updated files:
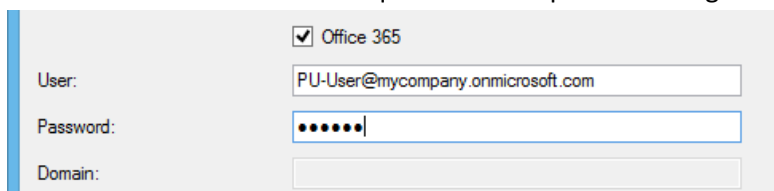
SharePoint Settings:

If the source files or target files are located on SharePoint, Power Update requires separate credentials to log in to an On-Premise installation:

Or Office 365: No Domain is requiered as it is part of the login information

Then specify the SharePoint site, and select the Document Library / Workbook. If the selected Document Library requires Check In / Check Out to update workbooks then select the Check Out workbook during update option.
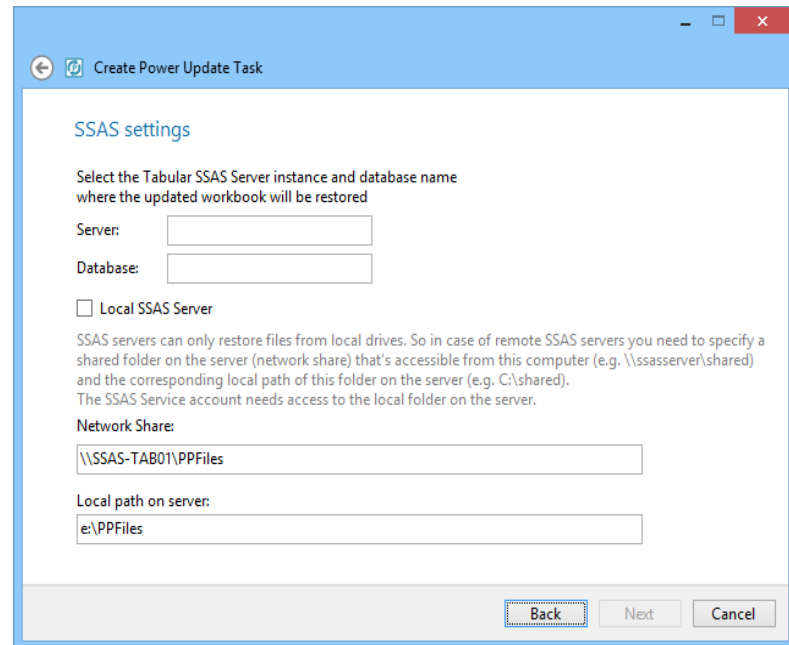
SSAS Settings

A powerful feature of PU is the ability to restore a PowerPivot model to an instance of a SSAS Tabular server after updating the model.

1. Develop the Power Pivot Model in Excel. Make sure all measures are calculated measures in DAX.
2. Setup a job for Power Update to refresh the Excel model and restore it to the SSAS server
3. Create a File Share on the SSAS tabular server where PU can upload the backup file.(needed for upload)
4. Provide the physical location of this share. (needed for restore)

Note: The service account that the SSAS Tabular instance is running under has read access to the Local path on the server you specified.

Additionally the service account has to be added to the Administrators in the SSAS Tabular Server Security settings. This is required to enable overwriting an existing database.

Setting Macros, Timestamp and Workbook Passwords
(Create Schedule Wizard)

Add Timestamp to the Result File
In multi-user environments it is sometimes convenient to add a timestamp to the result file, so users can open the latest version and to avoid file locking conflicts. If you check the box, this job will add date and time to the existing file name when the data refresh is complete.

Run Macros
A very powerful feature is the ability to run Macros before or after the data refreshes. This is commonly used to fix formatting, reset slicer settings, and publish the result as an HTML file or run checks and balances for data validation. With Macros, anything is possible.

Password protected Workbooks
If the workbook you are running is password protected, you may set the password here, for Power Update to refresh and save the file.

Do not refresh workbook connections.
For some jobs you might not want to refresh the data connections, (they might have been in a previous step), but you just want to run a macro, without having to refresh the data.

Set Retry Count.
If updating a workbook fails, Power Update will retry it based on these settings. You can set a retry count, and a Wait Time in seconds.

A note on User Accounts

When setting up Power Update Tasks, the tasks will run under the current user account (This account needs to be a local administrator and logged in for Power Update to run). In order to run tasks under different account use the Options\Enable Run As Different User option and set up Impersonation Settings in the task wizard.

Setup of Excel

When you open Excel, with the current user account, make sure the Power Pivot, and Power Query, and Power SQL Update add-ins are loaded.

Additionally make sure External Content is enabled in the Excel Trust Center:
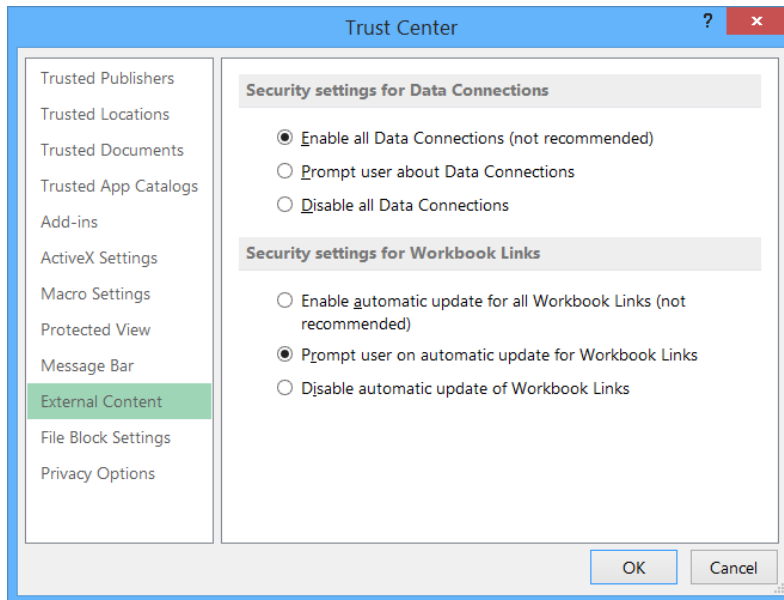
Power SQL Update

The Power SQL Update Excel Add-in allows saving selected data tables from the Power Pivot Model back to SQL Server. Tables can be selected by clicking the Update SQL Data button in any Excel workbook with a Power Pivot Model. After setting the SQL Connection, tables from the Model can be selected to be updated with the following options when the Run Update button is pressed or the update is scheduled:
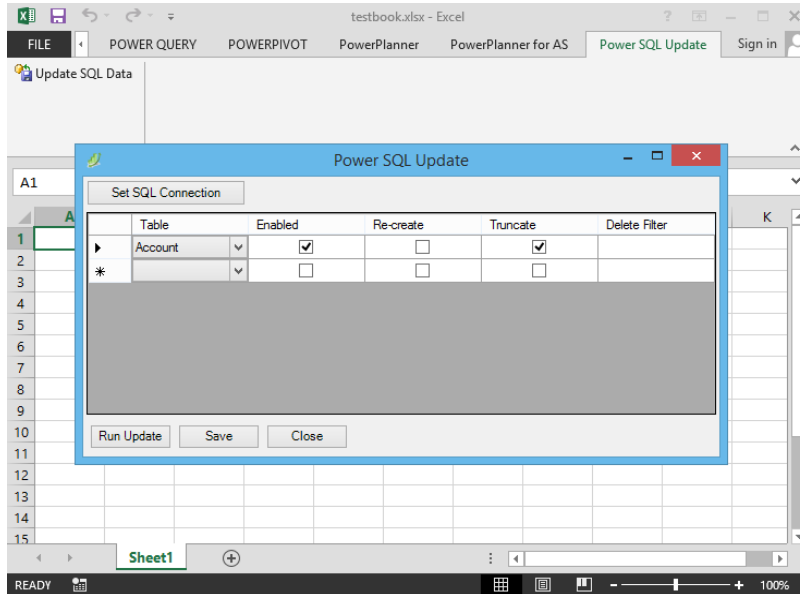
Enabled - Sets whether the table should be stored to SQL Server.

Re-create – The table should be dropped and re-created (useful when table structure can change), if not selected then fields are mapped to existing table fields with matching names.

Truncate – Entire table contents should be cleared before running (faster than delete).

Delete filter – Only table contents specified by WHERE sql filter should be deleted before running (advanced option for clearing only part of the table, useful if only part of the table comes from the update task or if contents come from multiple update tasks).

Test run the Task

From the Main Screen it is now possible to test and check if the task will run successfully in the schedule. Click the 'Run' button and the scheduler will simulate what will happen when it is scheduled to run. If the application was able to open the file, log into the data source and run the refresh, the last task result will display 'Successful'.

Troubleshooting

The application logs all events in the Event Log. You can use the View History button to troubleshoot what might have failed during the execution of the update. If you run into any problems, please make sure that:

- All the parameters are set up correctly according to the documentation.
- The user running the task has access to access to the registry, program files, program data, temp files, SSAS Servers and Excel workbooks specified.
- Credentials set up for SharePoint items are correct and valid.
- No running Excel instances are blocking the specified files.
- Try running the task with Options\Diagnostic Mode enabled, to find the source of the problem

Email Notifications

Power Update can send notifications on two occasions:

- Failing Jobs - If a job fails, PU will notify the scheduler of the job so action can be taken and the problem can be corrected.
- Job Results - When a job has successfully refreshed, the result can be attached as a PDF or as an XLSX and email to recipients.
  - There is a global setting, so the same users always will get a copy of the results.
  - Alternatively this can be overridden on the job, so only certain users will receive the output of the job.

Configuring Email Services
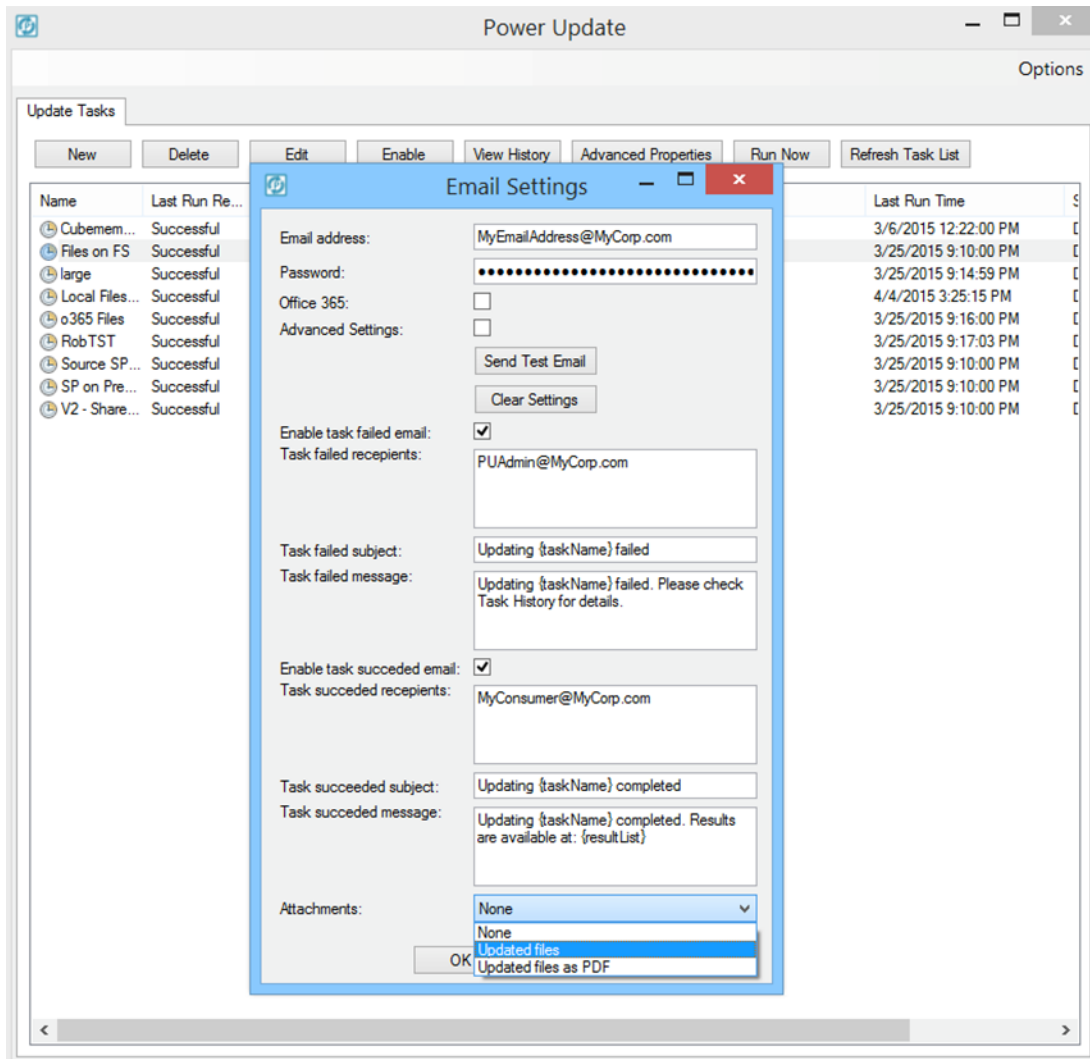
Setting Other Options
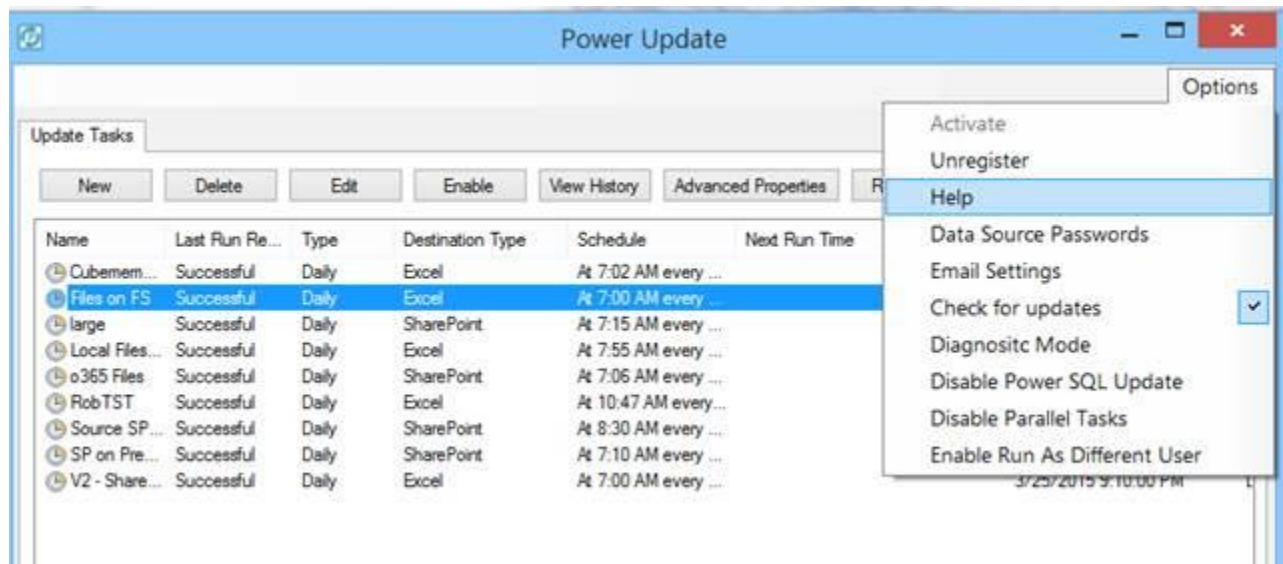
Data Source Passwords

Excel 2010 and 2013 stores passwords for data source that does not support Active Directory credentials in clear text in the connection string. This becomes a problem for many organizations. Power Update can store the login information encrypted and hashed in the PU application, and pass them securely to Excel when prompted for them for these data sources. Oracle, MySQL, Informix, DB2 and ODBC sources can take advantage of this feature.

Disable Parallel Tasks

By default PU starts each task on the scheduled time set by the admin. If you schedule 5 tasks to start at 7.00AM, 5 versions of Excel will start simultaneously. If Disable Parallel Tasks are enabled, the tasks will start one after the other. Note: This option will also automatically kill any other Excel session running on the computer. Only one Excel session will run at a time. Use this option if you are having trouble with Excel instances locking files.

Enable Run As Different User

If the computer running PU is part of different domain than where the data source are located, or if you want to run task with different windows authentication users (e.g. if you have SSAS as a datasource) you can specify "Enable Run as Different User". If the PU computer is logged on to windows with the user "Corporate\User" and the SSAS server is requires the "SECRURE\MyDataAccessUser" user, PU starts Excel with that user and Excel will behave as it was logged in with the second user. You can specify the user running each task in the Impersonation Settings in the task wizard once this option is enabled.

About Power Planner

Power Planner was founded in 2011 by a group of Business Performance Management executives with deep background in Budgeting, Planning and Forecasting Solutions, all with 20+ years' experience from the Microsoft BI stack.

Power Planner core functionality provides users the ability to change numbers in Excel PowerPivot Tables, and have the numbers and allocations written back to a SQL server.

The technology of choice for a planning product was Excel, as it is the de-facto solution for Business Analysts. Excel is also how small-business get started with setting up the initial business plan, and with Power Pivot and SSAS tabular support. Excel is now a solution that companies may grow with and turn into a cost effective Budgeting, Planning and forecasting tool.

Power Planner has also added support for Power BI features and the web based user interface that Microsoft Office 365 offers.

Power Planner has quick start kits for Microsoft Dynamics AX, Dynamics GP and Dynamics NAV.

Best Practices – Tips and Tricks – FAQ

Setting up your first work book

Power Update has a powerful functionality to automatically refresh any connection in your workbook. First, open up your workbook, and make sure all credentials are set correctly for Excel and the Data Source(s) to connect to the source of the data relative to the account/service account you want to run the updates under. Press Update all and verify you don't get any prompts.

Then, open up Power Update and add the file(s)/folder(s) you would like to update.

> All workbooks needs to refresh successfully by manually opening the workbook in Excel, and click Data\Refresh
>
> Tip: use Power Query if you want to do cross domain updates.

What types of files can I automate with Power Update

Power Update supports both XLSX files as well as XLSM files. Make sure your macro run correctly before adding it to Power Update. You can also set the macro to run before the Data Refresh, or a macro to be run after the Refresh is finished.

User needs to be logged in.

For Power Update to run the tasks, it is a requirement that the user the update is running under is 'Logged In' on the computer that will be running the updates. If by accident the user gets logged out, by a Windows Update, or scheduled maintenance, the account has to be logged back in to run the job. This can be automated on the computer running the job using

Enable Plugins

When logged in to the computer that will be scheduling the update, make sure Power Pivot, Power Update and Power SQL add-ins are enabled by just starting an empty workbook in Excel.

Set different Source and Target Folders

As a Best Practice we recommend setting different Source and Target folders. If the Power Update computer goes down for any reason, or the update fails, the target files could get corrupted. By setting different target and source folders, only the target folder would be corrupted, and on the next run of the Power Update the target files would be up to date again.

For local or network shares we recommend setting Source folder as c:\users\<MyUser>\Documents\PowerUpdateSourceFiles, and target would be P:\Sales\PowerPivotFiles\Output.

User Accounts

User logged on when you defined the jobs needs to be logged (the session can be inactive or locked) on when the task is scheduled to run. You also need to make sure that the computer doesn't go to sleep when the task is scheduled to run in windows Power Options.

Configuring Excel

Excel needs to be able to run the jobs in the set environment. To test it, make sure Power Query, Power Pivot, and Power SQL Update plugins are enabled. Make sure there are no lingering message boxes like Recovering Unsaved files, or Excel Update boxes showing up when starting Excel. It's recommended that updates are set to "Manual Update", so deploying new patches is handled in a manual and controlled process.

Logfile structures

Power Update provides logging of events throughout the update process. Click on "View History" and you get a detailed log of events during the last run. If a job fails, jobs can be debugged by typing %tmp%\PU.log in Start menu\Run or Explorer, and it will open up the log file for in-depth trouble-shooting of the current jobs. Also try to run the task with Options\Diagnostic Mode enabled to find out the cause of the problem.

Test the Workbook and test the Excel installation.

Before scheduling the job in Power Update, always open up the workbook, go to Data tab in the Excel Ribbon and click "Refresh All Connections", to make sure there are no errors thrown in the Power Update job.

Diagnostic Mode – How to Troubleshoot

By opening up the Power Update Manager, it is possible to set a Diagnostic Mode in the Options. The Diagnostic Mode will open up Excel as the job is running, and display on the console what message you may be getting. Remember to turn the Diagnostic Mode off for a Production Environment as it does take more resources than running it in 'Hidden' mode.

Does Power Update support Excel 2010 and Excel 2013 to be installed on the Power Update Server?

Excel 2010 and 2013 can both live side-by-side on the computer where Power Update jobs are running. However this is not recommended by Microsoft, due to the fact that 2010 may be the default Excel version and the job may fail. To fix the issue, go to Control Panel\Programs and Features. Then locate Office 2013, Right Click and select 'Change', and opt for a 'Quick Repair' to make sure Excel 2013 is the default version on your Power Update computer. (If you'd like 2010 to become the default version do the same for Office 2010).

Run a Task from a Command (DOS) prompt

You can run a task manually from a command prompt. I.e.:

C:\Program Files\PowerPlanner\Power Update\PQRefresh.EXE" "My JobName"

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