Leverage Nexl's deep relationship data using PowerBI

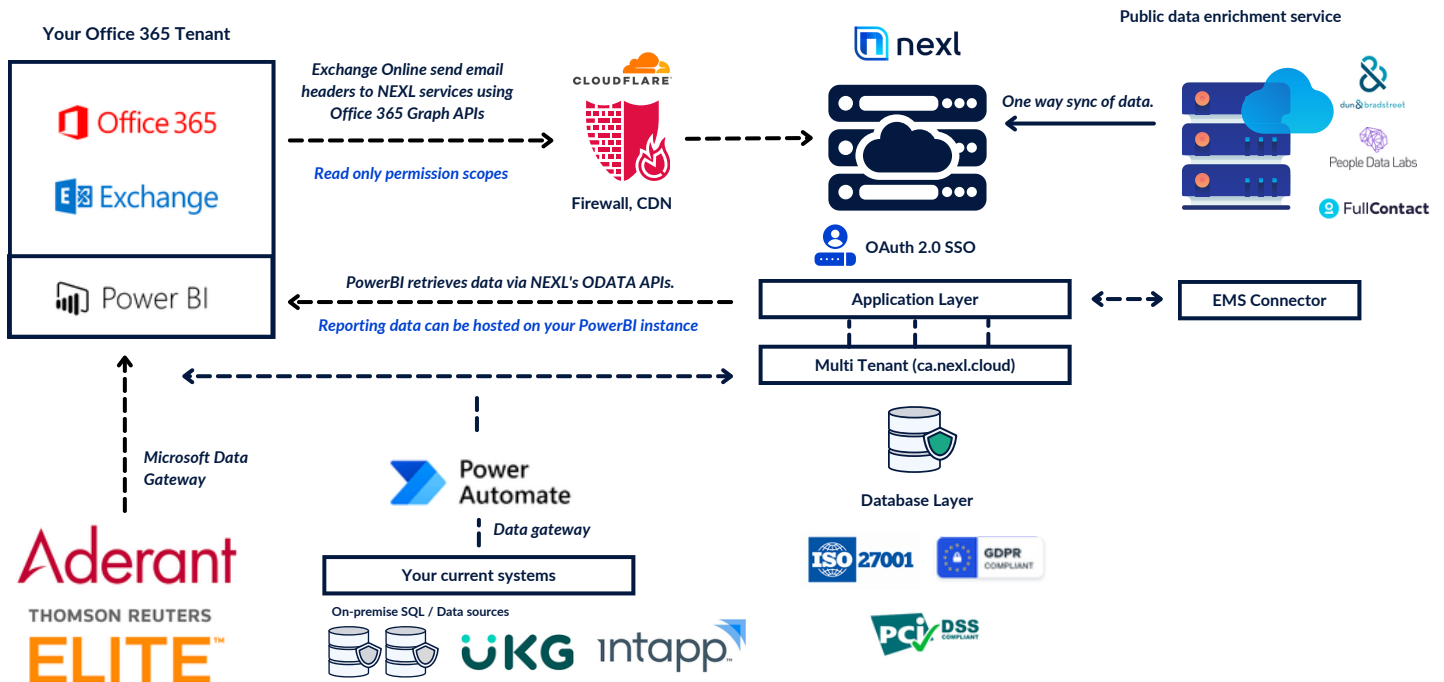Nexl Integration with Power BI: Product Documentation

Overview

Nexl's integration with Power BI enables seamless embedding of Power BI reports within the Nexl cloud system, utilizing iFrames for a smooth user experience and heightened data access and security controls. This document outlines the integration process, licensing requirements, and data management for a comprehensive understanding of the Nexl-Power BI synergy.

Key Details:

- Nexl integrates with Power BI to provide a seamless data visualization experience.
- The integration is realized through the use of iFrames, ensuring a cohesive user interface.
- This synergy aims to enhance data-driven decisions within the legal industry

NEXL data flow - Power BI

Licensing Requirements

For Creators:

- **Nexl Reports:** To create and publish reports in Power BI Desktop, creators require the free Power BI Desktop app. For sharing content within their My Workspace in the Power BI service, a Power BI Pro or Premium Per User (PPU) license is mandatory.
- **Sharing Reports:** To share a report in a shared workspace, creators need a paid license. If the workspace is in Premium capacity, a free license suffices for sharing links to reports.

For Consumers:

- **Viewing Reports:** Consumers require a paid license to view content in other people's My Workspace or shared workspaces, unless these are in Premium capacity, where a free license is adequate.
- **Accessing Shared Reports:** A paid license is necessary to access a linked report unless it is hosted in Premium capacity, which again, only requires a free license.

Role	Requirement	Details
Creator	Free Power BI Desktop app Power BI Pro or PPU license for sharing within My Workspace	Creators can use the free desktop app for personal report creation but require a paid license to share content with others in My Workspace.
Consumer	Paid license for viewing content in other people's MyWorkspace or shared workspaces Free license for viewing in Premium capacity workspaces	Consumers need a paid license to view reports in standard workspaces, while a free license is sufficient for workspaces in Premium capacity.

License Types:

- **Fabric (free)**: Allows access to content creators make for themselves.
- **Power BI Pro:** Grants the ability to publish and share content across workspaces and with other Pro users.
- **Power BI Premium Per User (PPU)**: Similar to Pro but also allows sharing with users who have free or Pro licenses.

License Type	Shared Capacity Capabilities	Premium Capacity Additional Capabilities
Fabric (Free)	Access to content they create for themselves	Consume content shared with them by Pro or PPU users.
Power BI Pro	Publish content to other workspaces, share dashboards, subscribe to dashboards and reports, share with users who have a Pro license	Distribute content to users who have free or PPU licenses.
Power BI Premium Per User (PPU)	Publish content to other workspaces, share dashboards, subscribe to dashboards and reports, share with users who have a PPU license	Distribute content to users who have free and Pro icenses.

Licensing Requirements

Data Requirements

The data management aspect of the integration ensures that data remains current and secure. Customers are required to utilize their own Power BI instance to host data, while on-premise data users must implement the Microsoft Data Gateway for data refreshes. Nexl's approach to data is read-only, emphasizing security and integrity.

- **Hosted Data:** Customers must use an Office 365 Power BI license or their own on-premise PowerBI server to host data and reports.
- **On-Premise Data:** Installation and configuration of Microsoft Data Gateway are essential for data refresh once reports are published.
- **Nexl Data Access:** Nexl requires read-only access to customer data and provides an ODATA connection for syncing data to a data lake or data warehouse.

Integration Details

The versatility of Nexl's integration with Power BI is showcased in the ability to embed tailored reports in various sections of the Nexl system. This enables a level of customization and relevance that ensures users are presented with data that's pertinent to their specific context, be it a company profile or a specialized workspace.

Embedding Reports:

- **Company Profile:** Reports can be embedded within the Company Profile section in Nexl, utilizing Power BI's query parameters to filter reports automatically based on the selected company.

- A**dmin Reporting & Workspaces**: Embedding is also supported within the Admin Reporting section and workspaces for industry-specific insights.

Embedding Reports:

- **Company Profile**: Reports can be embedded within the Company Profile section in Nexl, utilizing Power BI's query parameters to filter reports automatically based on the selected company.
- **Admin Reporting & Workspaces:** Embedding is also supported within the Admin Reporting section and workspaces for industry-specific insights.

Data Access to your internal systems:

- **Remote Access:** For accessing data outside of Nexl, a remote desktop connection is set up using Teamviewer or another customer-provided solution.

Nexl-Power BI Embedded Reporting Features:

- **Read-Only Access:** Nexl handles data securely, requiring only read-only access to ensure data integrity.
- **Customization**: Power BI Apps can be customized with names, descriptions, and branding and controlled through user roles and permissions.
- **Real-Time Updates:** Embedded reports reflect the latest data updates, offering current insights.

Using Nexl with Power BI

To maximize the capabilities of Nexl's integration with Power BI:

1. **Embed Power BI Reports:** Utilize the iFrame embedding to integrate reports seamlessly into Nexl's interface.
2. **Data Syncing:** Establish an ODATA connection to keep Nexl's data source synchronized with your firm's data lake/warehouse.
3. **Licensing Management:** Ensure all users viewing shared reports are appropriately licensed according to Power BI's licensing structure.
4. **Report Customization:** Customize reports for specific practices or industries using query parameter filters for targeted analytics.

By following these guidelines, Nexl users can leverage the powerful analytics of Power BI within a collaborative and efficient framework, enhancing decision-making and strategic insights.

ODATA Structure

The Nexl OData API is a powerful tool designed to seamlessly connect the wealth of data captured within Nexl to external platforms like Power BI. This connection allows law firms and legal professionals to unlock a deeper understanding of their business, enhancing decision-making through comprehensive analytics. Here's how it works:

Key Concepts
- Entities: These are the primary data types or tables where information is stored. For example, "Company," "CompanyOpportunity," and "ContactInfo" are entities that might store information about companies, business opportunities, and contact details, respectively.
- EnumTypes: Enumerations (or Enums) define a set of named constants to describe a value that can be one of several possible values. For instance, "CompanyTypeDefaultType" might list "client," "prospect," and "unclassified" as the types a company can be categorized as.
- ComplexTypes: These are structured types containing multiple fields. They are used to represent information that doesn't fit into a single field, like "CompanyInfo," which might include details such as the company's name, industry, and headquarter location.

Entities and Fields
Let's simplify some of the entities and their fields to understand what kind of information can be stored:
1. Company
   - ID: Unique identifier for the company.
   - Category: The category of the company (e.g., client, prospect).
   - Info: Detailed information about the company, like name, industry, and size.
2. CompanyOpportunity
   - ID: Unique identifier for the opportunity.
   - Title: The title or name of the opportunity.
   - Outcome: What happened with the opportunity (won, lost, pending).
   - Tags: Keywords or tags associated with the opportunity.
3. ContactInfo
   - First Name & Last Name: The contact's full name.
   - Job Title: The contact's job role.
   - City & Country: Where the contact is located.
   - LinkedIn URL: The contact's LinkedIn profile link.

EnumTypes Examples
- CompanyOpportunityOutcome: Indicates whether an opportunity is pending, won, or lost.
- CompanyTypeDefaultType: Classifies a company as unclassified, a client, or a prospect.

ComplexTypes Examples
- CompanyInfo: Includes detailed information about a company, such as its name, industry, and headquarters location.
- CompanyInsight: Contains insights about a company's interactions, like the last interaction date and total number of emails sent.

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About NEXL™

Nexl is a leading provider of innovative legal technology solutions aimed at creating efficiencies, accelerating growth and providing data-driven insights that drive smart decision making. We offer scalable solutions for law firms of all shapes and sizes

Founded by legal professionals with vast experience working within legal firms, Nexl grew out of a desire to fundamentally change the way that legal firms grow and engage with internal and external stakeholders. The existing way of managing these relationships doesn't work. Today, we're driving the delivery of smart, innovative and technology-driven services to clients worldwide.

Smart, insight-driven solutions underpin Nexl's purpose. Drawing from our own practical experience working within the professional services industry, our purpose is to develop and deliver technology solutions that will drive positive change in how law firms manage their client relationships and grow their practice.