dataintelligence

Get your free diagnostic

Your free diagnostic is a short savings summary built from your own Microsoft Azure data. It arrives within 48 hours.

It is free. There is no commitment and no payment step. Our access is read-only: we can look but never change anything.

The screens in this guide show example data.

1 Blue filled marker: click. ① Outlined marker: type, choose or check.

The steps in one view

Step 1	On the website, click Get your free 48hr diagnostic	page 2
Step 2	Sign in with Microsoft and pick your work account	page 3
Step 3	In the app, set up and connect Azure: four screens	page 4
Screen 1	Your organisation	page 4
Screen 2	Subscriptions	page 5
Screen 3	Storage	page 5
Screen 4	Review & connect	page 6
Step 4	Confirm the email address for your diagnostic	page 7
Step 5	Check the overview	page 9
Step 6	Optional: add Microsoft Fabric and Power BI data	page 11
Screen 1	1. Choose the data to collect	page 13
Screen 2	2. Grant access	page 17
Screen 3	3. Verify and save	page 19
Screen 4	4. Check what was collected	page 21
Help	How to remove access, and where to get help	page 22

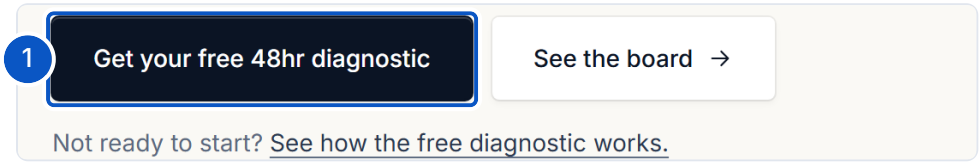
Start at www.dataintelligence.com, or go straight to the sign-in page: https://onboarding.dataintelligence.com/signin

Begin on the website

Step 1 of 6

Click the button on our website

1 On www.dataintelligence.com, click **Get your free 48hr diagnostic**. The same button is in the top bar. It takes you to the sign-in page.



Before you start

- A Microsoft work account with access to your Azure subscriptions. Personal Microsoft accounts are refused.
- The app says you need “an account that holds Owner on each subscription you connect and can register applications in your directory (Global, Application or Cloud Application Administrator). User Access Administrator alone is not enough. Your Azure administrator can help. To add Fabric afterwards, you’ll also need Fabric administrator access.”
- The name of your organisation, who sends your Azure invoice (Microsoft or a partner), and an email address for your diagnostic. It can differ from your sign-in address.

Your Microsoft account

Step 2 of 6

Sign in with your Microsoft work account

1 At onboarding.dataintelligence.com/signin, click **Continue with Microsoft**. Then pick your work account.

> The app says: “Use your Microsoft work or school account. Signing in doesn’t grant access to your Azure resources, or to Fabric if you use it; you review and approve access to Azure next.”

Microsoft

Microsoft’s own pages look different from ours. You see them when you sign in, and again when you click **Find my subscriptions** in step 3.

When you click **Approve & connect with Microsoft** at the end of step 3, Microsoft shows a permissions screen. Microsoft will list the permissions needed to set up the connection. Once it is set up, our access is read-only. Read the list. If you are the right person to approve it, accept it.

can then add Fabric if you use it.



Use your Microsoft work or school account. Signing in doesn’t grant access to your Azure

Set up and connect Azure

Step 3 of 6

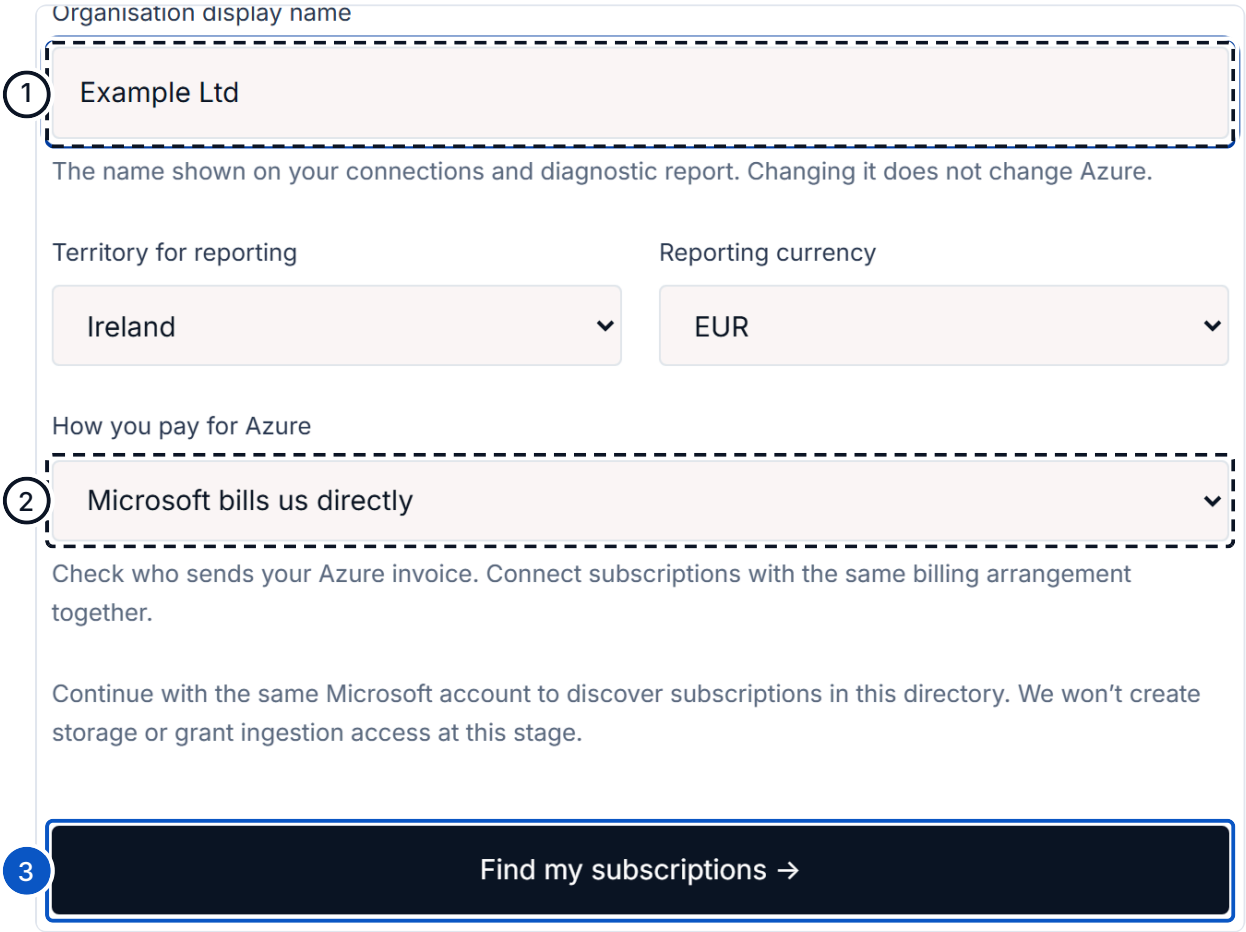
Follow the four app screens

The bar at the top of the app shows where you are: **Your organisation**, **Subscriptions**, **Storage**, **Review & connect**. The next pages take the screens in order.

Screen 1 of 4

Your organisation

1. Type the name of your organisation in **Organisation display name**.
2. Choose who sends your Azure invoice in **How you pay for Azure**.
3. Click **Find my subscriptions**. The app says it won't create storage or grant ingestion access at this stage.

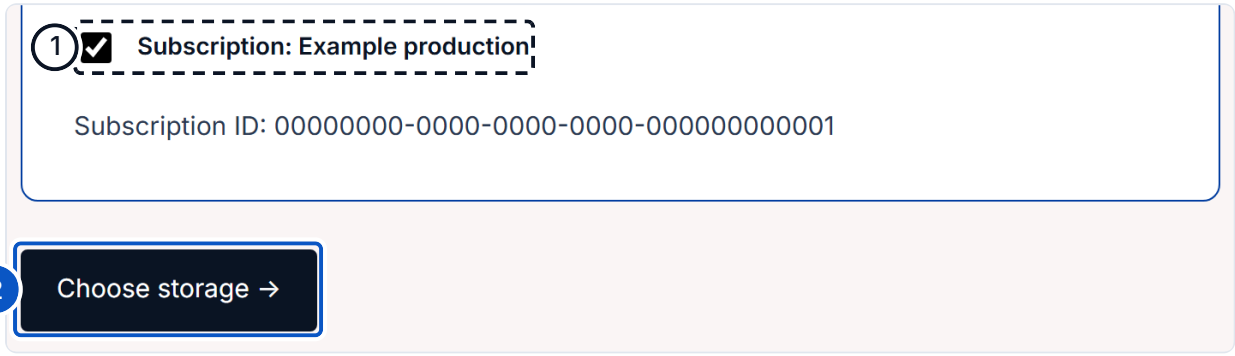


Choose and prepare

Screen 2 of 4

Subscriptions

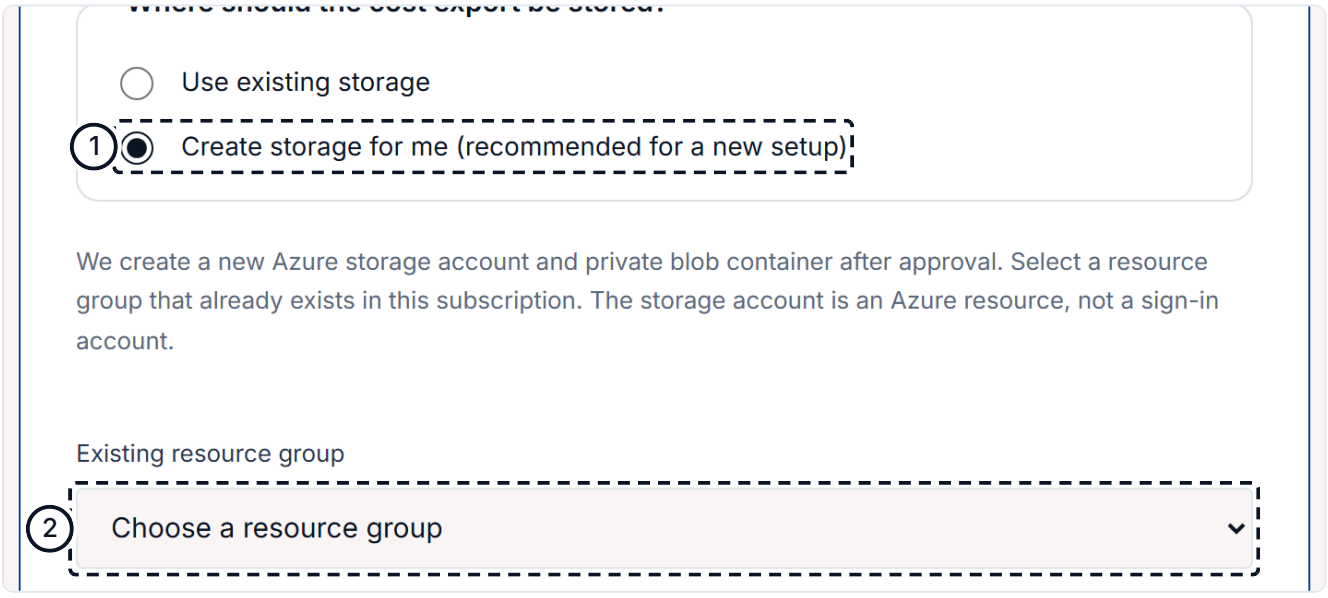
1. Tick the box next to each **Subscription** you want to connect.
2. Click **Choose storage**.



Screen 3 of 4

Storage

1. Choose **Create storage for me**. Or choose **Use existing storage** if you already have it.
2. If you create storage, choose a group in **Existing resource group**.
3. Click **Review permissions** at the bottom of the screen.



Approve the connection

Screen 4 of 4

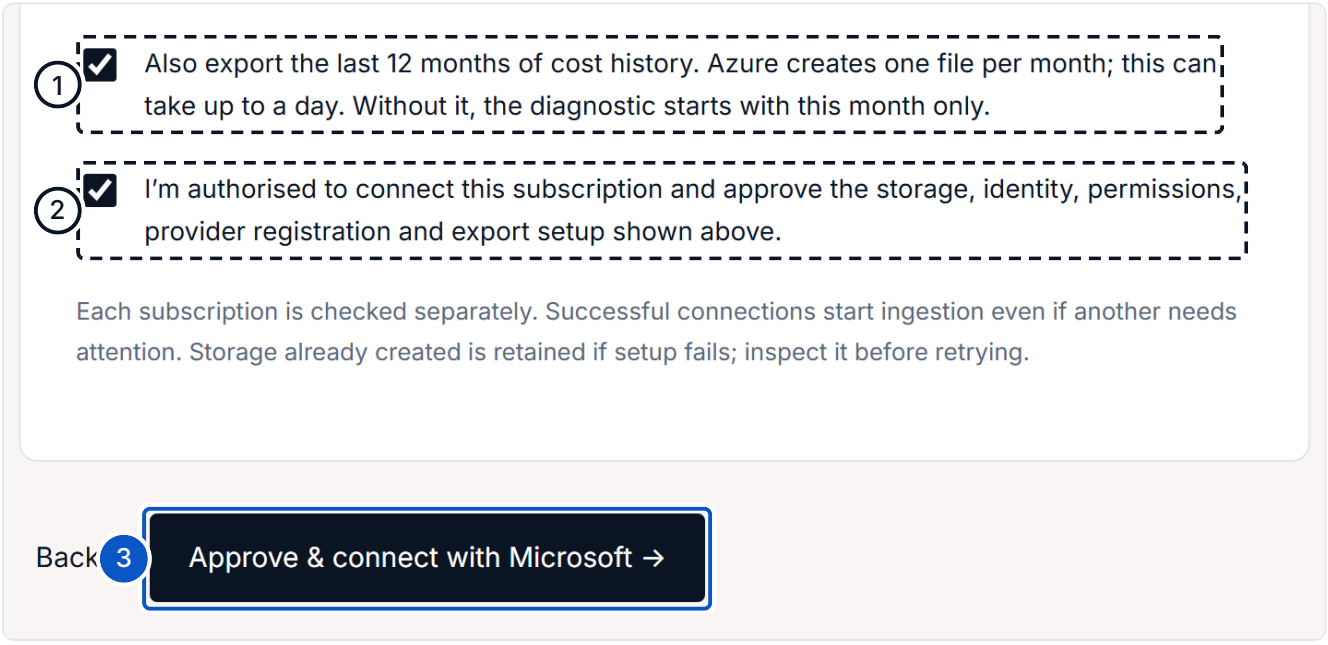
Review & connect

1. Read **The access you approve**. The box that begins “Also export the last 12 months of cost history” is ticked for you. Leave it ticked, unless you want the diagnostic to start with this month only.
2. Tick the box that begins “I’m authorised to connect this subscription”.
3. Click **Approve & connect with Microsoft**.

> The app says: “We use cost files, resource inventory and metrics to analyse your Azure spending. Approval allows the setup listed below; ongoing ingestion uses read-only access. The app does not resize, stop or delete your workloads.” And: “Nothing is set up until you approve with Microsoft.” About the cost history: “Azure creates one file per month; this can take up to a day. Without it, the diagnostic starts with this month only.”

Microsoft

Microsoft then shows its permissions screen (step 2). Keep this tab open.



Tell us where to send it

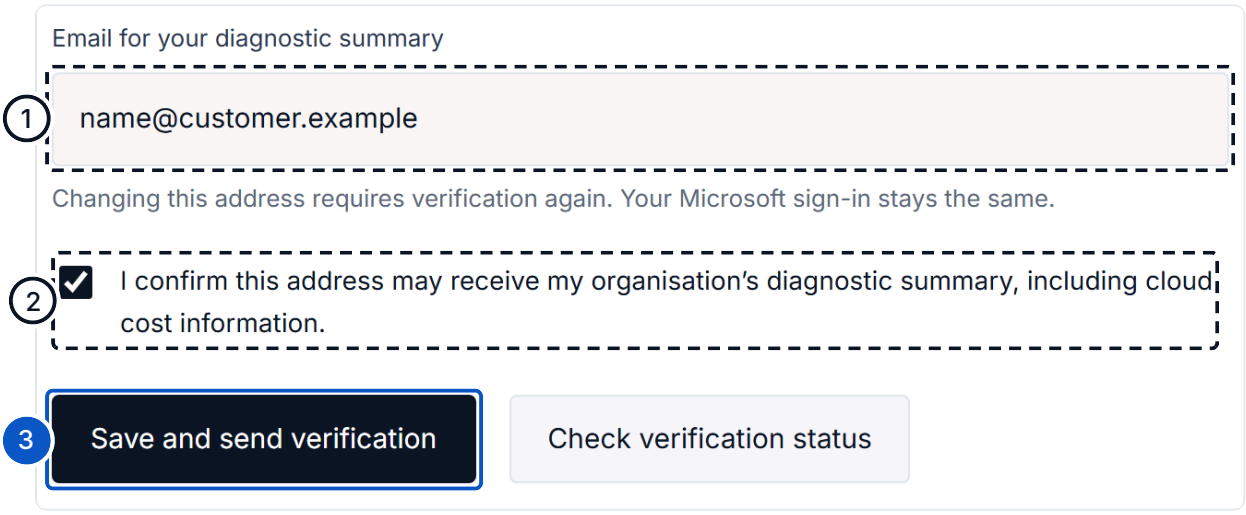
Step 4 of 6

Confirm your email address

1. Check the address in **Email for your diagnostic summary**.
2. Tick the box that begins “I confirm this address”.
3. Click **Save and send verification**.

> The app says: “One verified address receives the diagnostic summary.” On the confirmation page it says: “Links expire after 24 hours. Only the latest link works. Ignore this request if you were not expecting it.”

You can do this on the **Your organisation** screen, or later under **My account**.



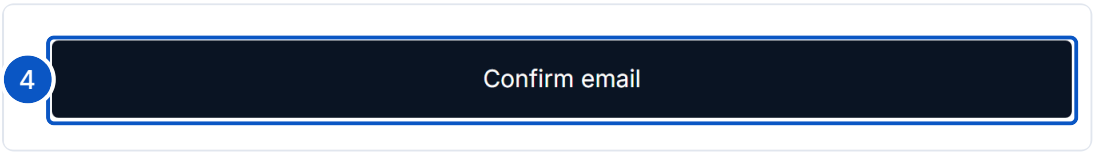
Confirm from the email

Confirm your email address, continued

4 Open the email titled “Confirm the email for your diagnostic summary”, then click **Confirm email**.

5 The page then reads **Report email confirmed.** You can close it.

> The app says, before you click: “Confirm that the mailbox which received this link may receive the requested diagnostic summaries, including the organisation’s cloud cost information.” “This confirms only the report address. It does not sign you in or grant access to Azure or Fabric.” Once confirmed: “This mailbox is verified for diagnostic summaries. You can close this page and return to onboarding. No report has been sent by this confirmation.” If the link is incomplete: “Open the complete link from the verification email. If you refreshed this page, reopen the original link.”





After you connect

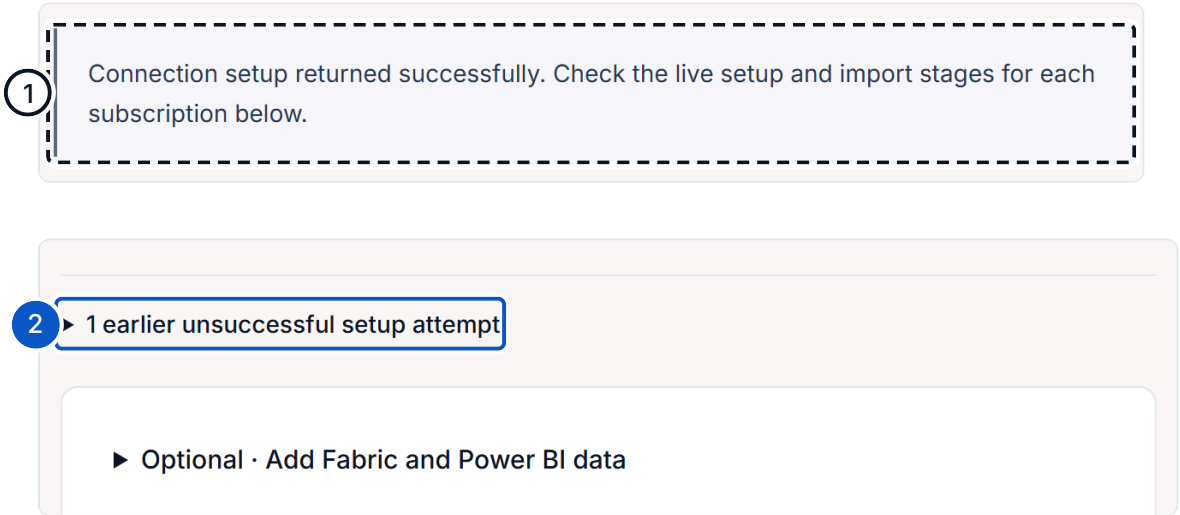
Step 5 of 6

Check the overview

1. After Microsoft approval, on **Connection overview**, check that the message begins **Connection setup returned successfully**.
2. If the overview shows a line such as **1 earlier unsuccessful setup attempt**, you do not need to do anything. Click the line only if you want to read the earlier attempt.

> The app says: “These subscriptions were connected successfully after these attempts. Keep the earlier errors and support references for troubleshooting.” And: “Refreshing checks progress; it does not start an import, analysis or report.” Under **What happens next** the card says, such as: “No action needed. Progress updates automatically; you can close this page.” or “Your connection is saved. Check the latest collection and coverage for each source below. You do not need to reconnect.” If it needs attention: “Contact support to check this connection. You do not need to reconnect Azure.” If you left the cost-history box ticked in step 3, the card shows a **Cost history** block: “It writes one file per month and can take up to a day; they are imported automatically.”

The overview updates by itself while it is open. You do not need to click anything else to get your diagnostic. We build it and send it to you within 48 hours, by email to the address you confirmed in step 4. Our access is read-only: we can look but never change anything.



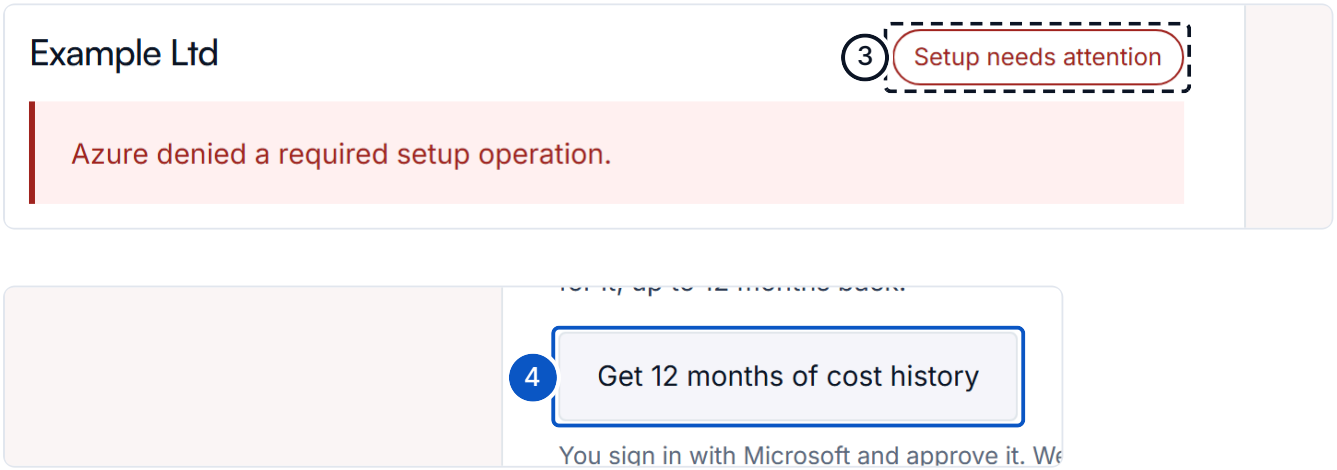
If the overview needs attention

Check the overview, continued

3. If the connection card reads **Setup needs attention**, read the message under it and the sentence under **Your next step**: the app names the cause and what to do.

4. If you unticked the cost-history box in step 3, the **Cost history** block shows **Get 12 months of cost history**. Click it if you want the past months; Microsoft then asks you to sign in and approve.

> The app says, for the most common cause: “Azure denied a required setup operation.” and, under **Your next step**: “The approving account needs Owner on each selected subscription and a directory role that can register applications. Ask your administrator to check, then start a new connection.” When Azure gives no detail: “Connection setup did not complete. Import has not started.” and “Contact support before retrying. Any storage already created is retained.” When only some subscriptions connected: “Review the subscriptions that did not connect below. The ones that did are importing normally; you do not need to reconnect them.” About the cost history: “You sign in with Microsoft and approve it. We then ask Azure to run your existing cost export once for each past month. If Azure is too busy to take a month, we ask for that month again a few times. Nothing else changes.”



Add more to your diagnostic

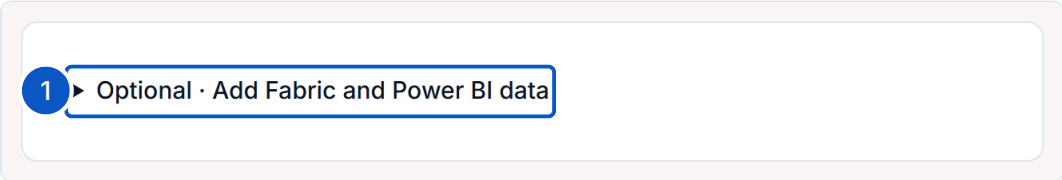
Step 6 of 6

Optional: add Microsoft Fabric and Power BI data

1. On the overview, click **Optional · Add Fabric and Power BI data** to open the panel. It appears once a connection shows **Azure access verified**.
2. Click **Review optional Fabric setup**. If your directory already shows “Fabric access verified”, the button reads **Manage Fabric** instead.

> The app says: “Enrich your diagnostic with Fabric inventory and usage. Azure setup and cost imports can continue without it.” And: “Configure Fabric once per Microsoft directory. We use an existing Fabric connection when one is available.” The panel lists each directory by name and ID with “Fabric access not yet verified”. If its check fails: “Some directory details could not be checked. Retry before adding Fabric so we can find any existing setup.” with the button **Retry directory check**.

This step is optional. Add it after your Azure connection is verified; you can finish without it.





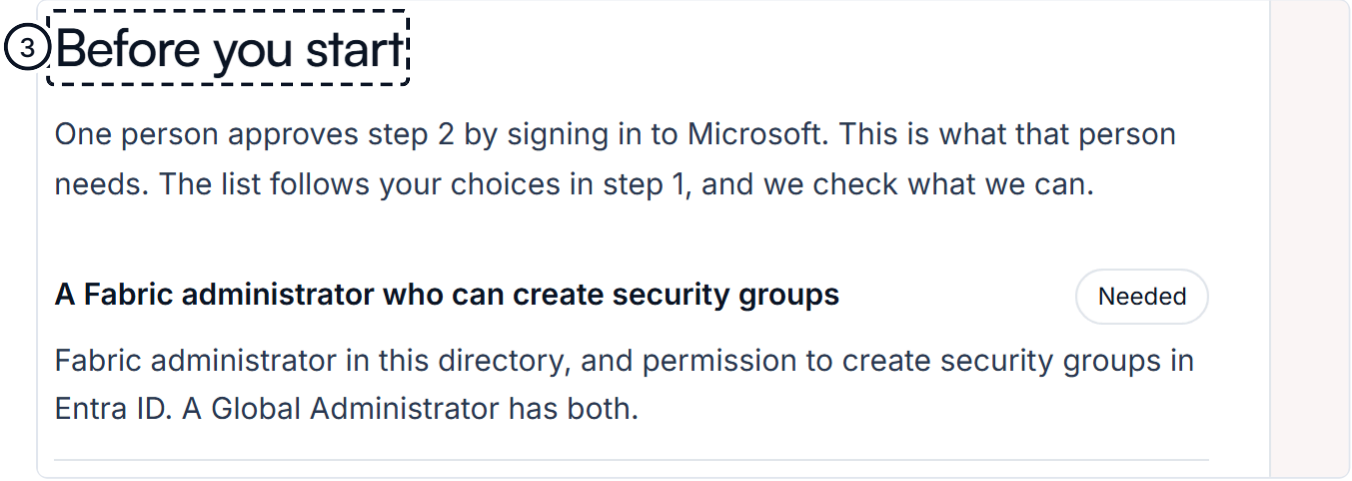
The Fabric page

Before you start, then four numbered steps

3 Read **Before you start**: who needs what, for your choices in step 1.

The page **Connect Microsoft Fabric** opens with **Connection identity and scope** (collapsed) and **Before you start**, then four numbered steps: **1. Choose the data to collect**, **2. Grant access**, **3. Verify and save** and **4. Check what was collected**, the last once Fabric is verified.

> The app says: “Include your organisation’s Fabric and Power BI data in its diagnostic. Choose the data, grant access and verify it, then check what was collected.” Under **Connection identity and scope**: “Use the identity created during this Azure connection’s setup. You can find it in Microsoft Entra ID → Enterprise applications by its application ID.” with “Microsoft directory (tenant ID)”, “Application (client) ID” and “Saved Fabric status”. Under **Before you start**: “One person approves step 2 by signing in to Microsoft. This is what that person needs. The list follows your choices in step 1, and we check what we can.” Each row carries a tag: **Needed**, **Check**, **In place** or **Optional**. The rows read “A Fabric administrator who can create security groups” — “Fabric administrator in this directory, and permission to create security groups in Entra ID. A Global Administrator has both.”; “Capacity usage: an administrator of the capacity” — “Only if you include capacity usage. The Capacity Metrics app collects data only for capacities whose administrator signed it in.”; “OneLake files: Member or Admin in each workspace you choose” — “Only if you include OneLake files.”; “Licence data: a Global Administrator or Privileged Role Administrator” — “Only if you include per-user licence data.” Once you choose OneLake workspaces, that row reads: “Being a Fabric administrator does not give access to workspaces. In each one, the approver needs Member or Admin (Manage access in the workspace), then has to sign out of Fabric and back in, so the new role is part of their sign-in.”



What we collect

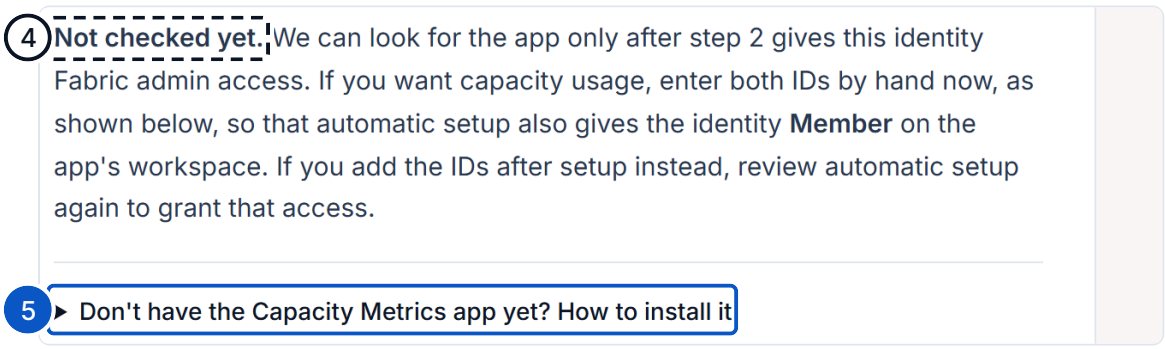
Screen 1 of 4

1. Choose the data to collect

4. Read the notice under **Capacity usage**. On your first visit it reads **Not checked yet.** Leave both ID fields blank to skip capacity usage, or type both IDs if you have them: the app says “If you want capacity usage, enter both IDs by hand now, as shown below”.

5. If you do not have Microsoft’s Capacity Metrics app, click **Don't have the Capacity Metrics app yet? How to install it**: the app lists the steps (next page). You can also add capacity usage later, from the overview.

> The app says: “Tenant inventory — capacities, workspaces, items and activity — is always included. The three below are optional; step 2 lists what each needs.” About capacity usage: “Whether a capacity is bigger than you need, could be paused when idle, or would cost less reserved.” And: “We look for the app in your tenant and fill in its two IDs.” And: “Leave both blank to skip capacity usage. The app covers active paid dedicated capacities; trial, suspended and per-user capacities may have no metrics.” After step 2, **Check again** looks for the app. If it is installed: “Capacity Metrics app found.” and both IDs are filled in for you.



Capacity usage data

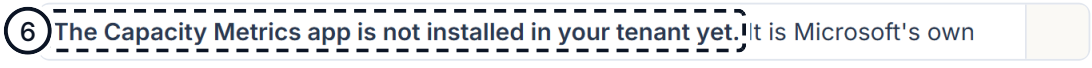
1. Choose the data to collect: the Capacity Metrics app

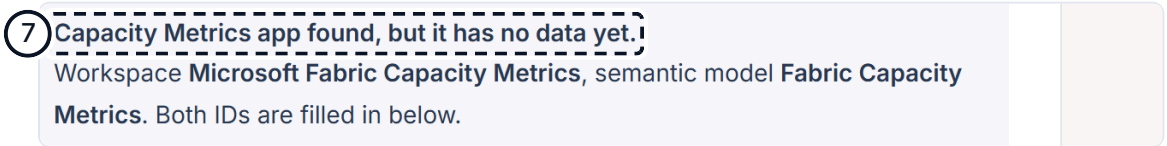
6 If **Check again** reads **The Capacity Metrics app is not installed in your tenant yet.**, follow the app's steps, then click **Check again**.

7 If it reads **Capacity Metrics app found, but it has no data yet.**, finish the app's first-run setup as it says, then click **Check again**.

> The app says: "It is Microsoft's own app and only a capacity administrator can install it, so this step is yours:" "Open Microsoft Fabric Capacity Metrics on AppSource, select Get it now, then Install. You need to be a capacity administrator with a Power BI Pro, Premium Per User or trial licence." "Open the installed app and select Connect. Enter your UTC offset (for example 0), keep OAuth2 with the Organizational privacy level, and sign in with an account that administers the capacity. The same sign-in is also in the app's semantic model, under Settings, Data source credentials, Edit credentials." "Choose your capacity when asked." "Wait for the app's first refresh to finish. If its semantic model's Refresh history shows none, select Refresh now there rather than waiting for the scheduled one." "Come back here and select Check again; we fill in both IDs for you." And: "The app reports active, paid capacities. Trial, suspended and per-user capacities show no metrics."

> With no data yet: "Until it has data, capacity usage stays empty and the app itself shows errors such as "data source credentials missing". Finish its first-run setup:" the Connect step above, "Choose your capacity when asked." "Then select Refresh now on the app's semantic model rather than waiting for its scheduled refresh, and wait until its Refresh history shows Completed. Then select Check again." Just after installing: "If you have only just installed the app, finish its first-run setup too". When no listed administrator matches your account: "Is your account one of these administrators? The app only collects data for a capacity whose administrator signs it in. If yours isn't listed, add it as an administrator (open the capacity in the Azure portal, then Settings, Capacity administrator), or ask one of the administrators listed here to do the sign-in step." and it lists "Who administers each capacity".





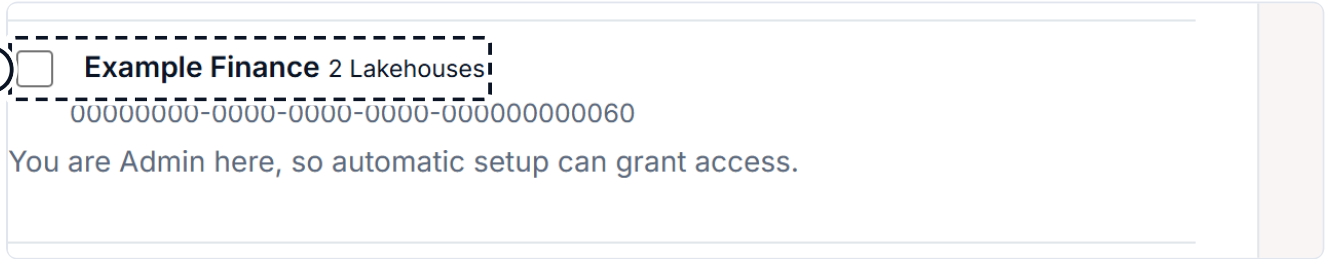
Lakehouse workspaces

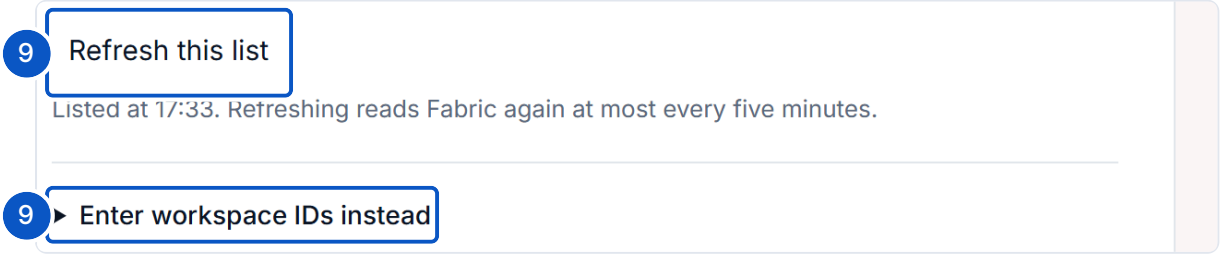
1. Choose the data to collect: OneLake files

8 Under **OneLake files and storage**, leave **OneLake workspace IDs** empty to skip it, or type workspace IDs, one per line. Once Fabric is verified, the page lists each workspace by name, its number of **Lakehouses** and whether access can be granted there.

9 Under the list, click **Refresh this list**, or open **Enter workspace IDs instead** for the ID field.

> The app says: “Lakehouse storage and files, from the workspaces you choose.” Before step 2: “We can list your Lakehouse workspaces by name once Fabric access is set up in step 2. Until then, enter their IDs below.” The field reads “OneLake workspace IDs (optional, one per line; automatic setup grants at most five)”. Under each workspace: “You are Admin here, so automatic setup can grant access.”, “Dataintelligence already has Contributor here, so no grant is needed.”, “You are Viewer here. Granting access needs Member or Admin: ask a workspace admin to make you Member, or have them grant access by hand.”, “Your account is not listed on this workspace directly. If you have access through a group, nothing more is needed; if not, add yourself as Member first.” or “We could not check the roles on this workspace.” If you tick one you cannot grant: “Get Member or Admin there first, then sign out of Fabric and back in before approving step 2, or automatic setup is refused.” Also: “This tenant has more Lakehouses than we list here. Enter any others by ID below.”, “No Lakehouses were found in this tenant.” or “We could not list your workspaces just now. Enter their IDs below, or try again.” While listing: “Listing your Lakehouse workspaces...”; buttons “List my Lakehouse workspaces”, “Try listing again”.



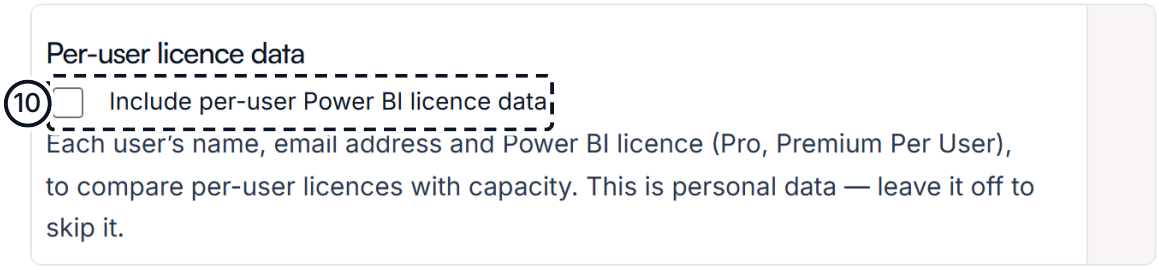


Per-user licences

1. Choose the data to collect: licence data

10 Leave **Include per-user Power BI licence data** unticked, unless your Entra administrator has first done what the app lists under “What your Entra administrator has to do first” in step 2. The app says: “This is personal data — leave it off to skip it.”

> The app says: “Each user’s name, email address and Power BI licence (Pro, Premium Per User), to compare per-user licences with capacity.” Under “What your Entra administrator has to do first”: “We do not request this permission for you. Letting an application read every user in your directory is your Entra administrator's decision; it is granted once, in the Microsoft Entra admin center, by a Global Administrator or Privileged Role Administrator (Application Administrators cannot consent to Microsoft Graph application permissions).” Then four steps: “Open this connection's application in the Microsoft Entra admin center; it opens on API permissions.” “Select Add a permission → Microsoft Graph → Application permissions (not Delegated), search for User.Read.All, tick it and select Add permissions.” “Select Grant admin consent for your organisation and confirm. The permission's status turns to a green Granted.” “Back here, keep Include per-user Power BI licence data ticked and save it with Verify and save Fabric in step 3 (automatic setup does not turn licence data on).” And: “While you are there, do not add any Power BI Service permission to this application: an admin-consented Power BI permission stops service principals using the read-only admin APIs this connection relies on. Microsoft Graph permissions are fine.” “To stop collecting licence data later, untick the box here and verify again; your administrator can then remove the permission in the same place.” If you tick the box, step 3 shows: “Your per-user licence data change (on) is waiting to be saved here — the Entra consent in step 2 must be in place first.”



Grant access and approve

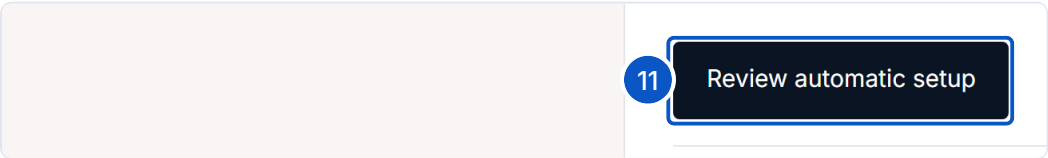
Screen 2 of 4

2. Grant access

11 Under **Automatic (recommended)**, click **Review automatic setup**. If an administrator grants access outside the app, open **Grant access by hand instead**.

The app says: “We can make these changes with your approval, or your administrator can make them by hand.” Under **What this sets up**: “Fabric inventory: the two Fabric tenant settings, scoped to a security group that contains this identity. Tenant settings do not reach workspace contents, so the choices below add workspace roles.” “Capacity usage: Member for this identity on the Capacity Metrics app’s workspace.” “OneLake files: Contributor for this identity on 1 workspace. Contributor permits writes in Microsoft, although our collector only reads. Do not choose Dataintelligence’s destination workspace. Verification checks that this identity can read each workspace; which Lakehouses hold data is confirmed after collection.” “Per-user licence data: not granted here. Your Entra administrator consents once, by hand. A change to the licence choice is saved with Verify and save in step 3; automatic setup carries the setting already saved.”

Under **Grant access by hand instead** the app lists: “In Microsoft Entra ID, add this enterprise application to a security group intended for Dataintelligence access.” “Open Fabric tenant settings (also under OneLake catalog → Govern → Configurations). Enable Service principals can call Fabric public APIs and Service principals can access read-only admin APIs, scoped to that security group.” “Check the identity is a member of the group allowed by each setting. The person configuring this needs Fabric administrator rights; the application itself does not need the Fabric Administrator role.” then, per choice, “Give the identity Member on the Capacity Metrics workspace” and “Give the identity Contributor on workspace” with each ID, and “Per-user licence data needs the Entra consent described above; it is the same step on either path.” And: “Do not add admin-consent Power BI API permissions to this application: they prevent service principal access to these read-only admin APIs.”



Review and approve

2. Grant access, continued

12 Read what the app lists under **Review permitted changes**. Then tick the box that begins "I authorise these permission changes".

13 Click **Approve and continue to Microsoft**.

> Under **Automatic (recommended)**: "With your approval, we create the security group, allow it in the two tenant settings, and grant exactly the workspace roles step 1 needs. Approve with the same Microsoft account used to connect Azure: it needs Fabric administrator access, permission to manage Entra security groups, and Member or Admin on each workspace listed. Microsoft asks for temporary delegated setup permissions; we discard the tokens after setup, and your ingestion identity never receives an administrator role."

> Under **Review permitted changes** the app lists: "Create a dedicated security group" with its name "and ensure it contains only this ingestion identity." "Allow that group for Service principals can call Fabric public APIs, only if needed. Preserve existing enabled groups and stop if tenant policy requires manual review." and for "Service principals can access read-only admin APIs"; per chosen workspace "Grant Member" or "Grant Contributor" "to this identity on workspace" with its ID, "only if its direct role is lower or missing. Keep any higher role."; with licence data "Verify the per-user licence data access already saved on this connection. No permission is granted for it." Then: "Existing access remains in place. Failed setup retains any completed permission changes for review; it does not roll them back automatically."

Microsoft

Microsoft then shows its own approval page, which looks different from ours. Keep this tab open.



Check the result

Screen 3 of 4

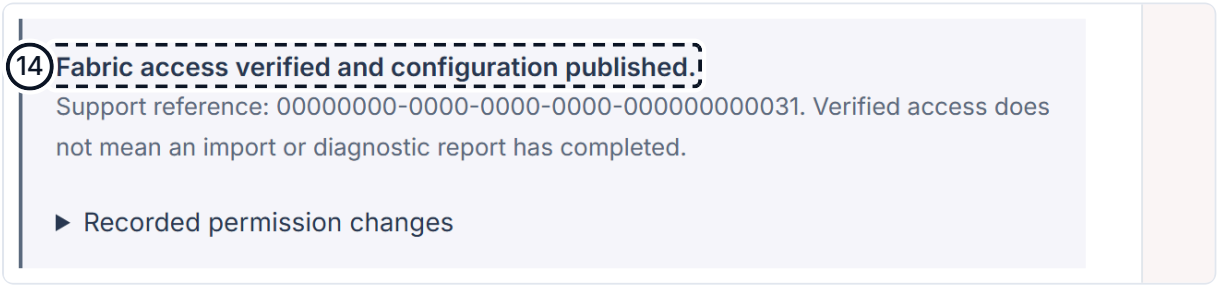
3. Verify and save

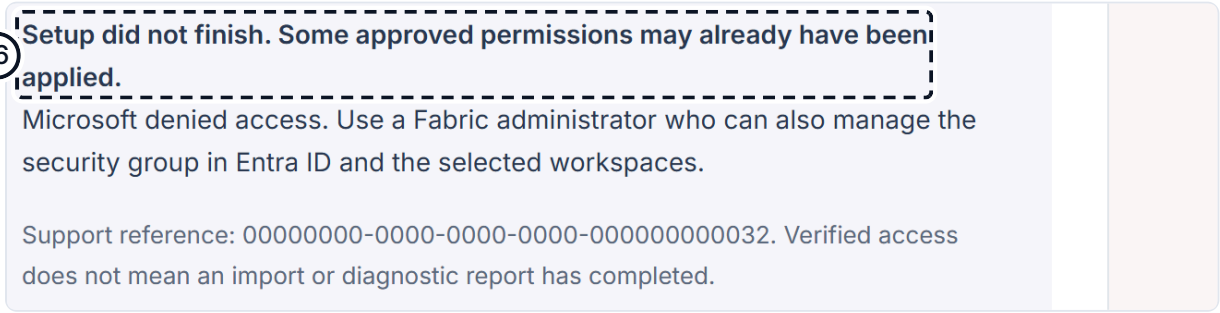
14 When you return to the app, check the notice under **Automatic (recommended)**. Success reads **Fabric access verified and configuration published.**

15 If it reads **Permissions applied** and “Fabric is still activating them.”, the app checks for you: “You can leave this page open, or close it and verify later. A check changes nothing.” Or click **Verify approved Fabric access again**.

16 If it reads **Setup did not finish.**, read the message under it, then click **Run automatic setup again** if it says so. Otherwise contact us with the **Support reference**.

> The app says: “After automatic setup, verification runs as part of your approval — nothing more to do here. Use this to verify access granted by hand, or to save a change that needs no new permissions, such as licence data once consent is in place.” Under every result: “Verified access does not mean an import or diagnostic report has completed.” Other headlines: “Microsoft approval was cancelled.”, “Setup is in progress. Refresh to check its result.”, “Setup is awaiting your approval.” and “This approval was replaced by the choices saved in step 3, so it needs no further checks.” If the checks stop: “Automatic checks have stopped. Select Verify approved Fabric access again to check now.” or “Automatic checks stopped: the last one failed for a reason that waiting will not fix, shown below.”





Verify by hand, and the notices

3. Verify and save: by hand, and the notices

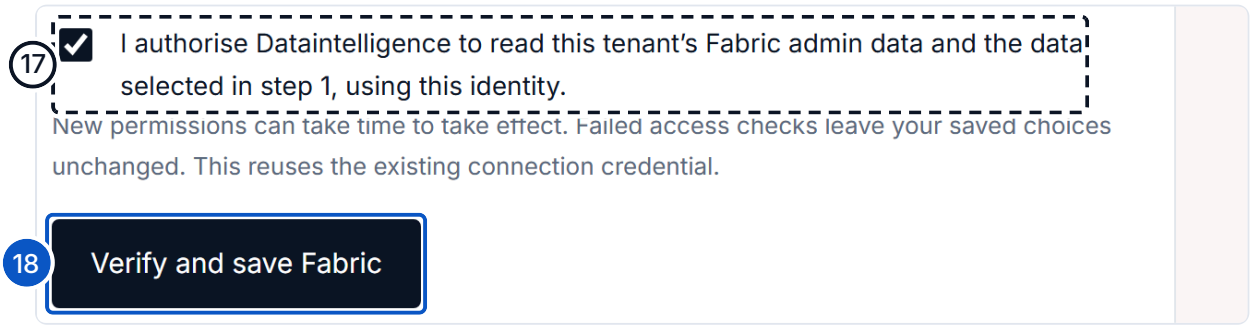
17 Only if an administrator granted access by hand: tick the box that begins “I authorise Dataintelligence to read”.

18 Then click **Verify and save Fabric**. Success reads “Fabric access verified and settings saved.” **Access check results** lists each check as “Access verified”, “Not requested” or a refusal.

19 After approval the app can show two notices that do not stop setup: **The Capacity Metrics app has no data yet.** and **OneLake access is not active yet.** Read them; they say what to do.

> On success the app says: “Your connection is configured for Fabric collection. This does not confirm a completed import or a ready diagnostic report. The scheduled collector picks up these settings; an Azure import already in progress may not include them.”

> The notices say: “Access verified, but the Capacity Metrics app has no data yet. An administrator of the capacity needs to sign its data source in: open the app and select Connect (UTC offset, OAuth2, Organizational privacy level), or open its semantic model's Settings, then Data source credentials, Edit credentials. Then select Refresh now on the semantic model rather than waiting for its scheduled refresh. Nothing else needs to change: capacity usage is collected once the app has data.” And: “Automatic setup granted Contributor on the workspaces chosen in step 1, but OneLake did not accept this identity in at least one of them when we checked. A new workspace role can take a few minutes to apply. Use Verify and save in step 3 shortly to check again. The rest of Fabric is collected meanwhile, and those workspaces are reported as a gap until OneLake can be read.”



Collection results

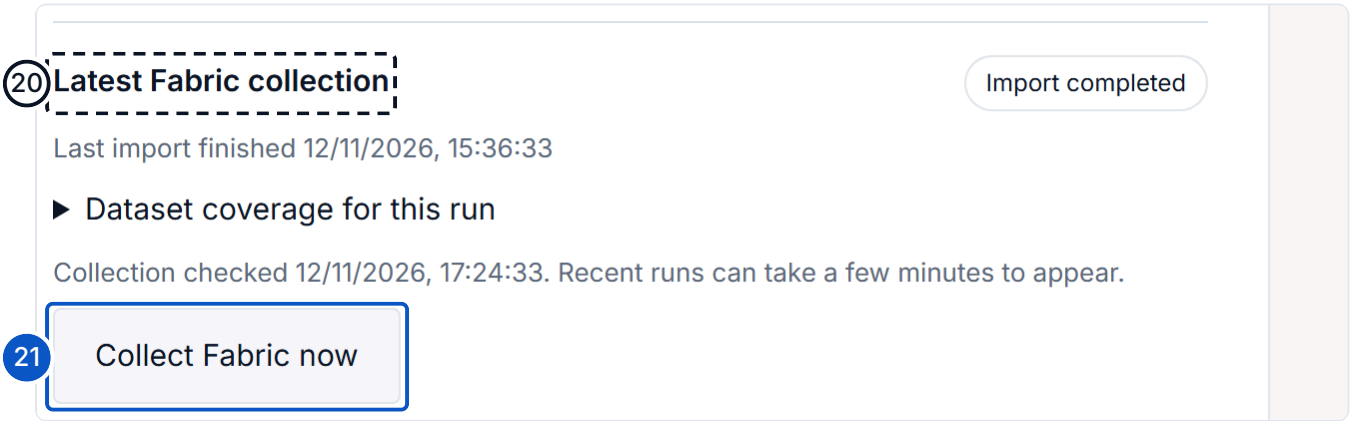
Screen 4 of 4

4. Check what was collected

20 Read **Latest Fabric collection** and open **Dataset coverage for this run**. The app says: “Verifying checks access. This shows what the latest collection actually brought in, dataset by dataset.”

21 Click **Collect Fabric now** to check a change straight away. The button then reads “Starting collection...”; while a run is on: “A collection is running. You can collect again when it ends.”

> The app says, when a run is partial only because some Lakehouses are very large: “Collected. Some Lakehouses are larger than we read in full, so their storage size and file list are a minimum. Nothing for you to do.” Otherwise: “This collection has coverage gaps. Review any dataset results below or contact support; reconnecting is not required.” If a run fails: “The latest collection failed. Previously imported data is not removed. Contact support to check this run.” A dataset can read “No data yet. A capacity administrator needs to sign the Capacity Metrics app in (Connect or Edit credentials), then select Refresh now”, “very large Lakehouses are read up to a limit, so this is a minimum. Nothing for you to do” or “some Lakehouses refused access. Give the identity Contributor on their workspaces”. Also: “This collection returned no new data. It does not mean previous imports are empty.”, “Checking the latest collection result. This page updates automatically.” and “Dataset coverage was not recorded for this run.”



Finish and get help

Your Fabric status on the overview

22 On the overview, the panel then reads “Fabric access verified”, its button reads **Manage Fabric**, and a **Fabric collection** block shows the latest import; the connection card reads “Fabric admin access verified”. If the card reads **Capacity usage is not collected yet.**, click **Add capacity usage** to add it.

> When you add capacity usage later the app says: “Your Fabric connection is already set up without capacity usage. Once both IDs are filled in, select Review automatic setup in step 2 and approve it with Microsoft again.”



How to remove access

> The app says: “To remove access, ask your Azure administrator to review the assigned roles and ingestion identity and, if you added Fabric, your Fabric administrator to review its security group and workspace roles; contact support to stop scheduled imports.”

Where to get help

Contact us at www.dataintelligence.com/contact, or email dave@dataintelligence.com. If a connection needs attention, the app shows a **Support reference**. Include it in your message.