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Power BI Analytics by AlphaBOLD

Configuration and Support policy

01/10/2020

Overview

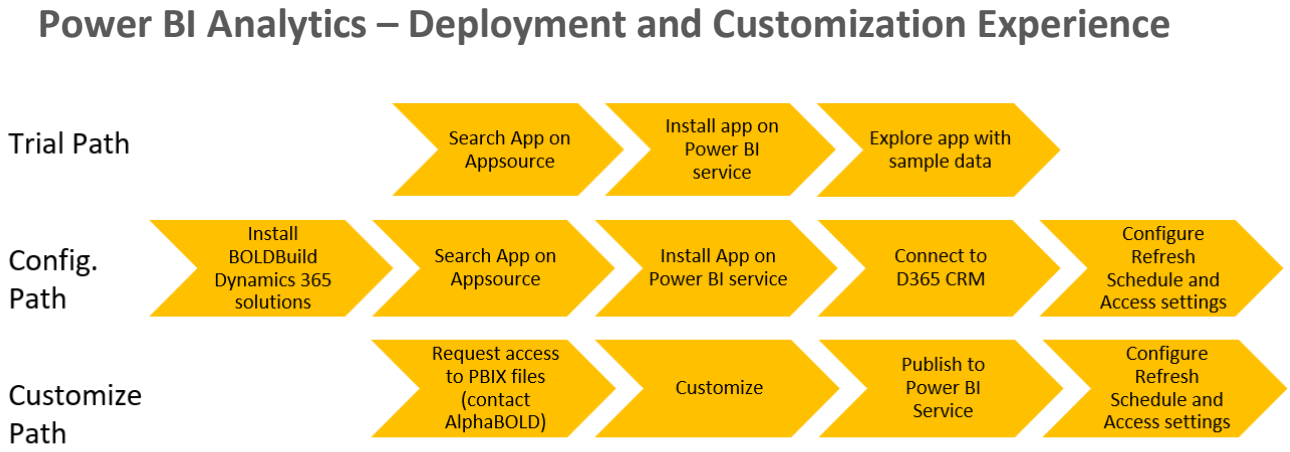
This article covers the following:

- Power BI Apps Overview
- Downloading and configuring Apps
- Support policy for deployment types and connectivity options
- Support policy for customizations

AlphaBOLD has packaged a set of Power BI Apps targeting analytics for Architecture, Engineering and Construction companies. AlphaBOLD has hosted these Power BI Apps specifically for companies that are utilizing their BOLDBuild Dynamics solutions. Power BI Apps source data from Microsoft Dynamics 365.

Note: BOLDBuild Sales Analytics and BOLDBuild Foreman App are pre-requisites for all of AlphaBOLD's Power BI Apps to work. Otherwise, you may experience errors and inconsistencies in the report data.

Power BI Apps are packaged by AlphaBOLD and are available on Microsoft AppSource.



There are several pathways for deploying AlphaBOLD's Power BI Apps. Apps are free of charge and come with sample data and can therefore be trialed. While the **Trial** pathway only consists of installing and exploring the Apps, the below configuration step-by-step guide for Apps applies both the **Trial** and **Configuration** pathways. The **Customize** pathway involves sourcing the PBIX files from AlphaBOLD Support and doesn't require installing the Apps.

Power BI App Installation (2 different ways)

1. You may install Apps directly from AppSource by clicking **Get it now** and authenticating to Power BI service

2. You may log in to Power BI Service and navigate to **Apps** section

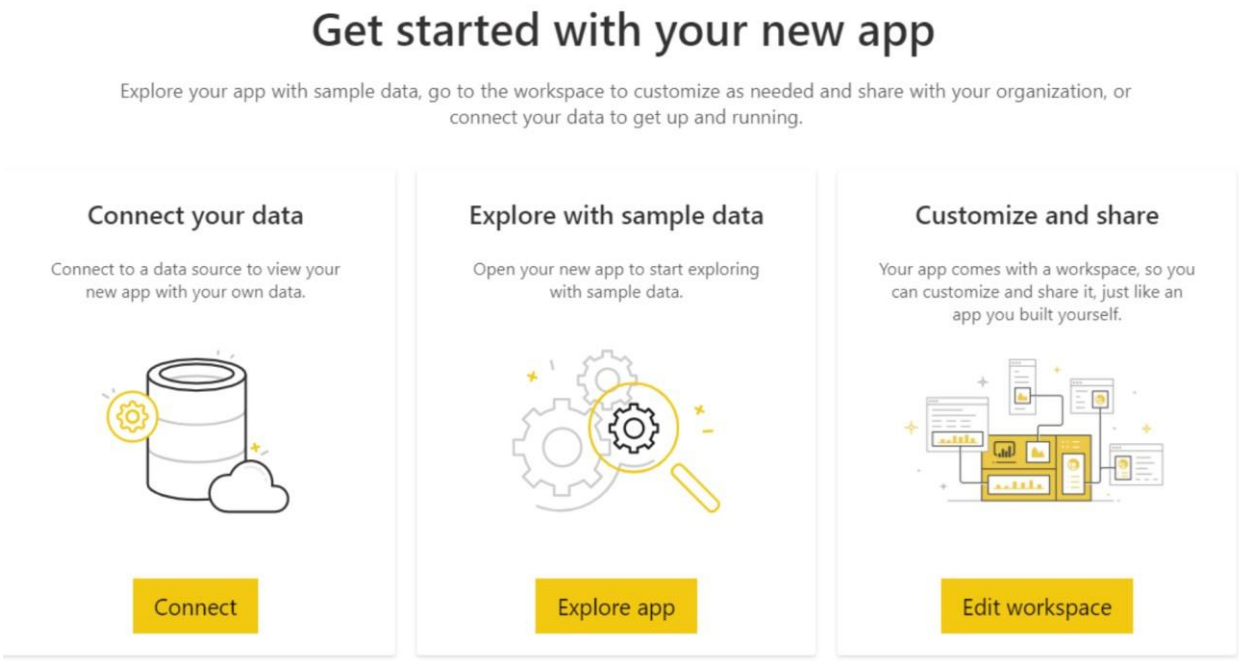
    - Click on the "**Get more apps from Microsoft Appsource**" option
    - Search for the app and install

Power BI App Configuration - Step by Step

3. Once installed, the below screen displays:

- To trial the App with embedded sample data, click the **Explore app** button. The Trial pathway ends on this step.
- To connect the App to your organization's Dynamics data, click the **Connect** button

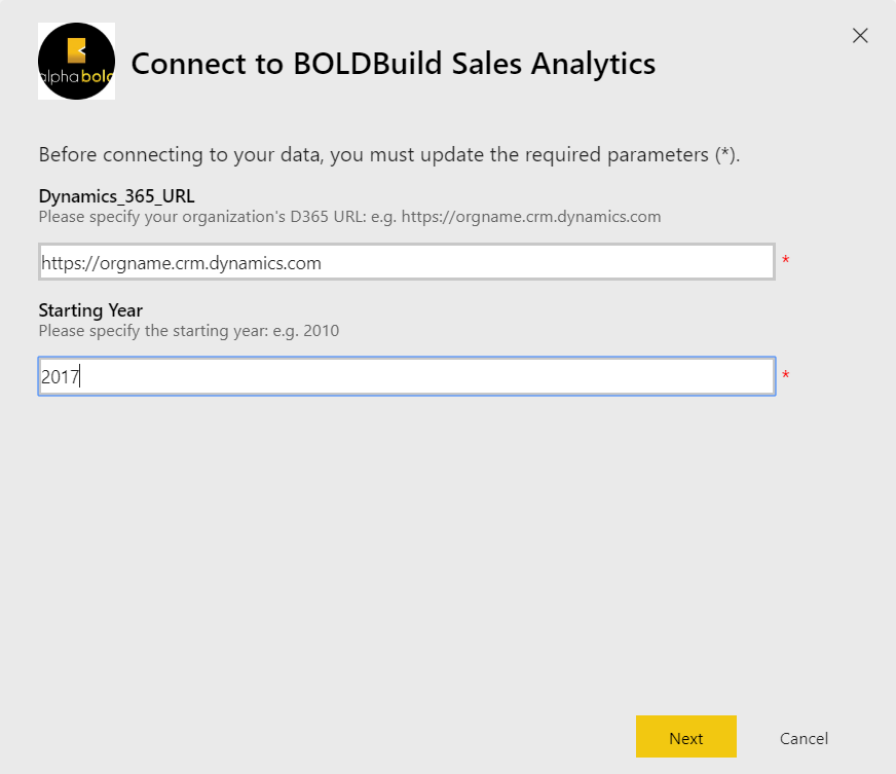
Note: You can trial the App first, before connecting to it to your data, you will always be able to configure the App's connection to your data.



4. The following screen will pop-up:

- Replace the value of the **Dynamics 365 URL** to your organization's D365 URL
- Update the value of the **Starting Year** (This configures report data to be shown starting from this year)

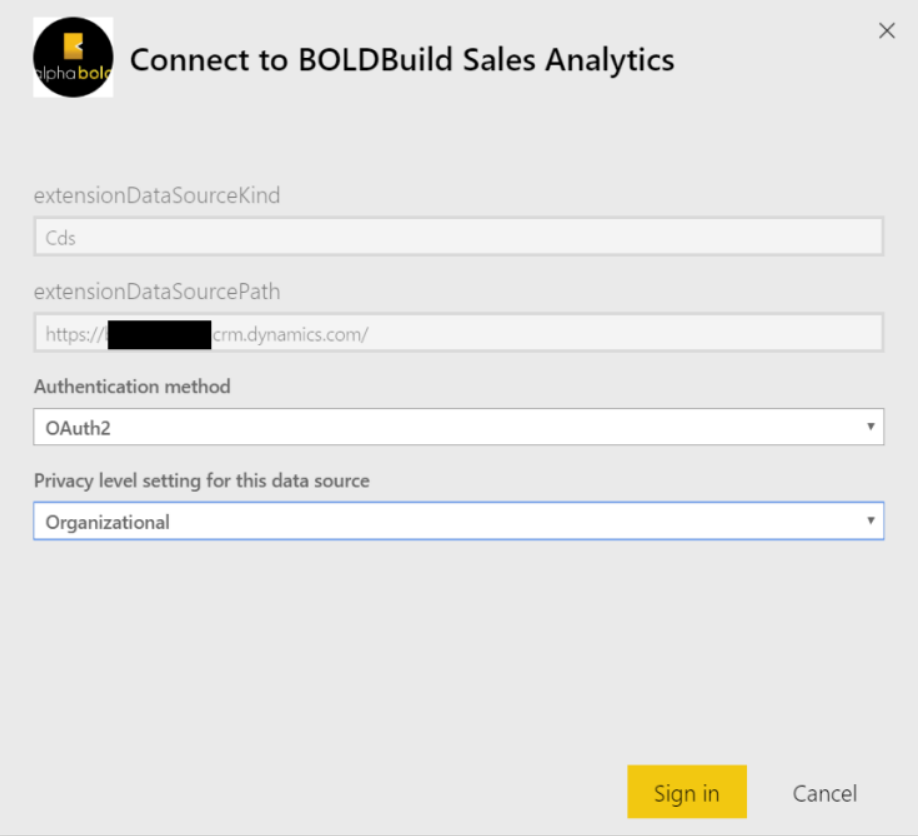
- Then click the **Next** button.



5. The following screen will then pop-up asking you to specify how to authenticate to the data source

- Select the **OAuth2** authentication method (will be enabled by default)
- Select **Organizational** for Privacy level setting
- Then click **Sign in**

- A pop-up will ask to enter credentials for access to the Dynamics data source you've provided in the previous steps. Enter **Username** and **Password** accordingly.



Note: After a successful connection, the dataset will then automatically refresh. Depending on the volume of data in your Dynamics 365 CRM, this might take some time. Also, an associated workspace is automatically created with the app.

6. Navigate to the workspace (by the same name as the app), and navigate to **Dataset** section

    - You will see a **refresh circle** in front of the dataset if the report has not finished refreshing. If not, rest assured the dataset has been refreshed. You should wait for the data to be refreshed.
    - When complete, navigate to **Reports** section and open the reports
    - Make sure you reload the report pages after opening to see the refreshed data. If not, it will keep displaying sample data that came with the app.

7. Review User Access to the App workspace by configuring Workspace settings

    - By clicking on the 3-dot menu in the Workspace name tab

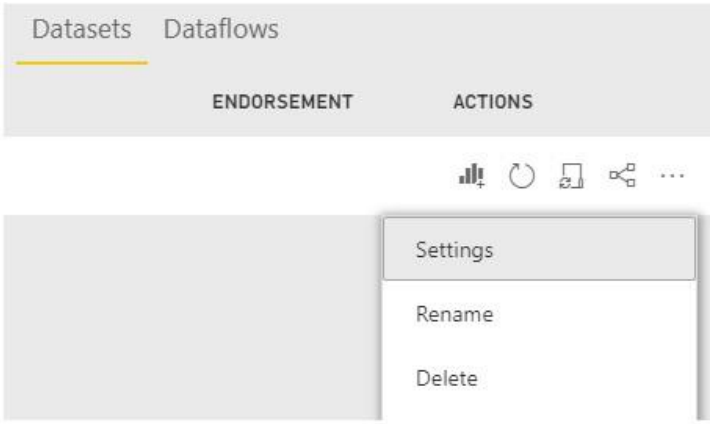
8. Configure **Scheduled Refresh** (option visible in **Datasets** section of app workspace) to keep consuming updated data

9. You can also share this app to your whole organization or specific individuals by **Updating app** (Option visible in the top right corner of your app workspace).

10. Repeat Steps 1 to 11 for every other App.

If you ever require to edit or re-configure a Dataset's connection, please follow the below steps:

- Navigate to the App workspace and click the **Datasets** tab.
- Edit the dataset, by clicking the **3-dot menu** and selecting the **Settings** option.



- Locate and expand the **Parameters** section
- Update the value of the **Dynamics 365 URL**
- Update the value of the **Starting Year** and in some reports, **Ending Year** as well.

Note: The process of updating or re-entering the data source is the same as you did initially. Likewise, you will have to update the credentials to that data source as well. The only difference is that for updating any of these options, you will have to navigate to **Dataset** settings and then perform these changes as described. After these changes, you should double-check Scheduled refresh and other settings.

Support Policy for Customizations

AlphaBOLD's Power BI Apps on AppSource as well as the PBIX files that AlphaBOLD makes available for use rely on a given set of pipelines and a given structure of columns defined by backend data logic.

By using our Power BI Apps, you are agreeing to enter into a Support understanding with AlphaBOLD. Providing that you keep working within the structure of the pre-built data pipeline, AlphaBOLD warrants that every new Power BI App version will be supported.

We're going to list two different kinds of customizations that can take place at our users' end.

1. You can edit the Power BI reports on Power BI service which lets the end users add/remove report pages, add/remove/edit visualizations, etc. These kinds of customizations are not going to affect the data model AlphaBOLD has configured. These changes do not interfere with the support policy.
2. You might want to add new columns or perform custom analysis by editing the existing data model. These customizations result in acquiring Power BI files from AlphaBOLD by going through AlphaBOLD Support and then changing the data pipeline, which ensures data consistency and performance optimization. This also results in breaching the support policy as you're responsible for your customizations and data consistency. Unlike apps, the PBIX files don't auto-update. Maintaining those files becomes your sole responsibility.

Note: This Support agreement will be broken under the following scenario:

- Data pipeline logic is edited and standard columns are modified or removed.

Final Remarks:

- Consider creating Scheduled refreshes for your apps
- Implement the sharing strategy of your apps
- Every app and PBIX file includes sample data by default.
- Reports can be edited directly in the Power BI service workspace.

- You cannot download Power BI files directly from the workspace as this is disabled by default by Microsoft.

- In case you want to customize the dataset and make your own version of the reports, AlphaBOLD makes the PBIX files of those Power BI Apps available. Please contact AlphaBOLD Support through to request access. Remember, in that case, you will have to manage any new changes accordingly and that may or may not interfere with the existing data model.

More Help

End users can contact us through our support site

- AlphaBOLD Support