INSTALLATION GUIDE

Insight

TREASURE TALENTS
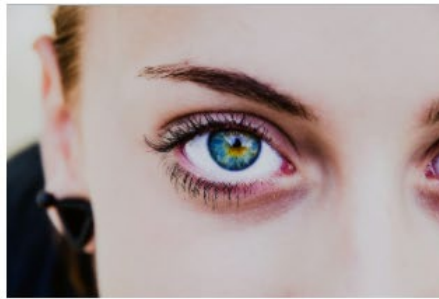
VALUE INSIGHT


ASK MORE

Contents

1 Before you get started

Before you begin make sure that you have the following prerequisites in place:

- A valid Subscription to SuperOffice Online

- A user with Administrator rights for your SuperOffice Online account

- Download and configure Power BI Desktop on you Windows Desktop PC
  https://powerbi.microsoft.com/desktop

- If you plan to publish and share the Dashboard, you need a PowerBI Pro license

- Create a Sales budget file in Excel format (or use the provided template you download together with the PBIX template as described in chapter 3.3), The file must consist of 3 columns with the following contents: userid, yearmonthnumber, budgetamount.
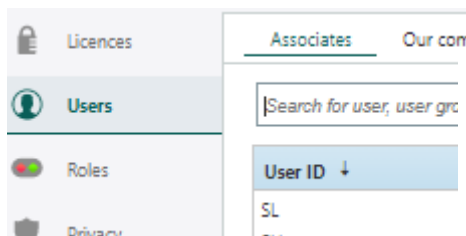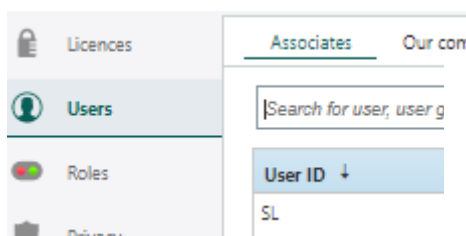

UserId is the "User ID" of a user in SuperOffice settings and maintenance.
yearmonthnumber is a dateformat like 2020/01
budgetamount is the sales budget for the given user pr. month.

Row 1 must be a header row; header names can be of your own choice.

The file must be in xlsx format.

- Create an Activity budget file in Excel format (or use the provided template you download together with the PBIX template as described in chapter 3.3), the file must consist of 3 columns with the following contents: userid, yearmonthnumber, activityamount,

UserId is the "User ID" of a user in SuperOffice settings and maintenance.
yearmonthnumber is a dateformat like 2020/01
activityamount is the agreed number of activities for the given user pr. month.

Row 1 must be a header row; header names can be of your own choice.

The file must be in xlsx format.

- We assume that you know about Power BI otherwise please contact us at sale@amestoapps.com for assistance.

2 Getting started

OBS: Before opening the PowerBI template (pbit)

To make sure you do not get prompted to allow access to every table, do the following in the Power BI desktop application.
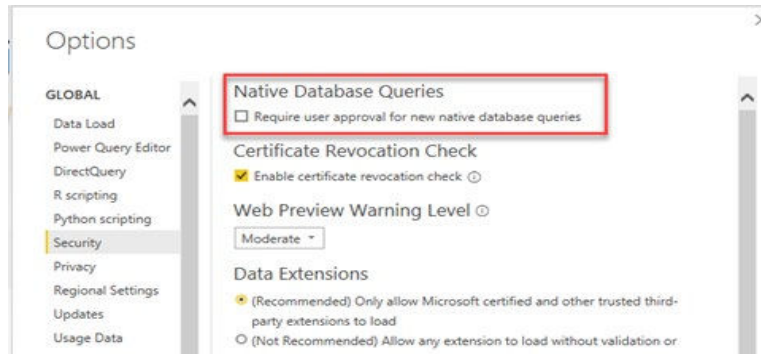
3 Setting up

1. Make sure that all prerequisites are met.

2. Get the Insight app from Amesto Appstore. https://online.amestoapps.com/App/AppDetailsIndex/15
   Provision will start, but can take some time, while a database is set up.

3. You will now be redirected to the PowerBI administrator page, here you must download the PBIX template file, and save it on your pc.
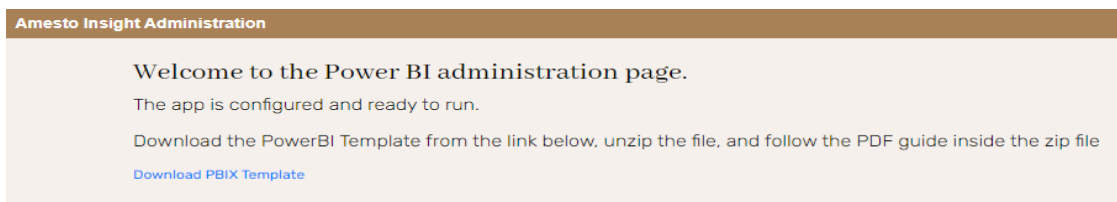
4. On the PowerBI administrator page, start by uploading a Sales budget file in Excel format (salesomething.xlsx), structured as described in chapter 1.

   The file content should look like this:

	A	B	C
1	userid	yearmonthnumber	budgetamount
2	SL	2020/01	100000
3	SL	2020/02	200000
4	SL	2020/03	400000
5	SL	2020/04	300000
6	SL	2020/05	250000

5. Now upload an Activity budget file in Excel format (activitysomething.xlsx), structured as described in chapter 1.

    The file content should look like this:

	A	B	C
1	userid	yearmonthnumber	activityamount
2	SL	2020/01	10
3	SL	2020/02	10
4	SL	2020/03	10
5	SL	2020/04	10
6	SL	2020/05	10

Upload budget files

Sales budget file:

Choose file	Browse

UPLOAD

Activity budget file:

Choose file	Browse

UPLOAD

6. From the zip file, run the file with the pbit extension, a Parameterized Power BI Template file. you can download the Zip file (installation files) on the Power Bi administrator page, The Amesto insight setup template will start in Power BI Desktop

7. From the Power BI administration page, copy the SQL Server name and SQL Database name to the Power BI Template just started in your Power BI Desktop. When filled in click the Load button.

Insight

Insight Report RC.1

SQL Server name

[   ]

SQL Database name

[   ]

Language

US	▼

Load ▼   Cancel

Simplifying business.

Amesto Insight Administration

Welcome to the Power BI administration page.

The app is configured and ready to run.

Download the PowerBI Template from the link below, unzip the file, and follow the PDF guide inside the zip file

Download PBIX Template

Database connect information

Use the data below as parameters in the PBIX Template.

SQL Server name : adwizastagingmirroring.database.windows.net   COPY

SQL Database name : MirrorDatabase_cust21110   COPY

SQL Username : cust21110_POWERBI   COPY

SQL Password :   COPY

Simplifying
business.

8. A new SQL server database UI will start, click on the Database menu at the left-hand side, From the Power BI administration page, copy the SQL Username and SQL Password, when filled in click the connect button. **Note**: This point 8 is only used the first time you setup Insight / Power Bi, as the information is cached

4 Debug

Support at support@amestoapps.com

If you think that the API-Key is compromised, then go to the AOS Admin page and press the 'Renew' button. This will trigger a new API-key value and a new SQL password.

Go to the Power BI administration page by clicking on the settings wheel icon and check if there is listed any errors.

Simplifying business.

amesto
Solutions