



PROCESS MANUAL

Document Code: PM-PWRB

# Power BI Configuration

Version 1

 **FastTrack** Software

 **Admin** By Request

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# Introduction

Admin By Request offers a comprehensive Power BI template for customers who want in-depth insights into data relating to all areas of our Privileges Access Management solution, including requests, inventory, malware, and load. This manual provides a step-by-step guide on how to install and configure the template and get the most out of Admin By Request with Power BI's data modelling and reporting capabilities.

## Assumptions

The tasks described in this manual assume that the user has access to their Admin By Request User Portal, Power BI Desktop (access to the web portal is optional, but highly recommended), and is familiar with the Power BI application and environment.

## Breakdown of Tasks

Seven tasks are covered in this manual:

1. Task A: Download Template
2. Task B: Enter Parameters
3. Task C: Publish to Web
4. Task D: Configure Scheduled Refresh
5. Task E: Adjust Parameters
6. Task F: Refresh Dataset
7. Task G: Use Report


# Configuration Tasks

## Task A: Download Template

The Admin By Request Power BI template comes custom-built and ready to plug-in-and-go. The first step in this process is to download and open the template in Power BI Desktop.

1. From the Power BI page on the Admin By Request website (**Docs > Integrations > Power BI**), select the **Download Template** button:

A rectangular button with rounded corners, colored in a light orange shade, with the text "Download Template" in white.

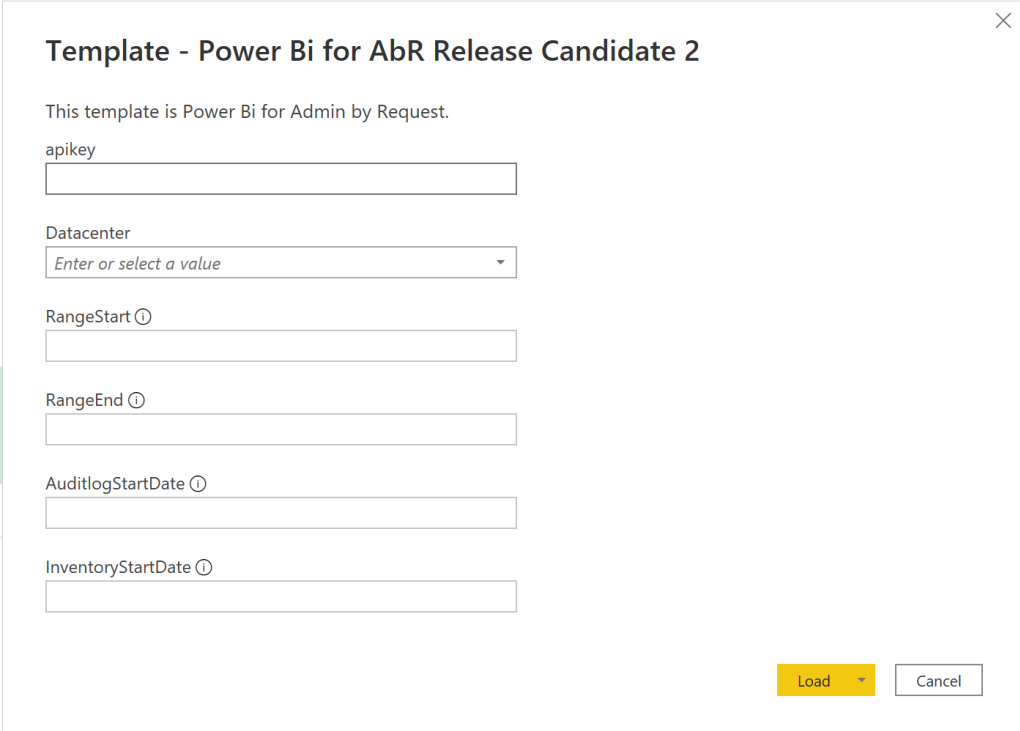
 **NOTE:** The file downloaded is a Power BI template file (.pbit).

2. Once the download is complete, open the file in Power BI Desktop.

## Task B: Enter Parameters

For data to be loaded into the template, a connection needs to be established between Power BI and your Admin By Request User Portal. This task details the parameters to enter so that the application can begin pulling the appropriate data.

1. When the Admin By request template file opens for the first time in Power BI Desktop, the parameter window appears requiring the following fields:

A screenshot of a parameter configuration window titled "Template - Power Bi for AbR Release Candidate 2". The window contains several input fields: "apikey" (text box), "Datacenter" (dropdown menu with "Enter or select a value" selected), "RangeStart" (text box with a help icon), "RangeEnd" (text box with a help icon), "AuditlogStartDate" (text box with a help icon), and "InventoryStartDate" (text box with a help icon). At the bottom right, there are "Load" and "Cancel" buttons.

**Template - Power Bi for AbR Release Candidate 2**

This template is Power Bi for Admin by Request.

apikey

Datacenter

RangeStart ⓘ

RangeEnd ⓘ

AuditlogStartDate ⓘ

InventoryStartDate ⓘ

Load Cancel

## Definitions

- **apikey:** Used to establish the connection to your Admin By Request tenant.
  - **Datacenter:** The Datacenter in which your organization's data is stored.
  - **RangeStart:** A date time field of which the value needs to be long *before* actual dates that you want to pull data from. This parameter is required due to the incremental update function used in this template. The Scheduled Refresh (covered in Task D of this manual) only refreshes from the previous date, instead of refreshing from the start date.
  - **RangeEnd:** A date time field of which the value needs to be long *after* any actual dates that you may end up pulling data for. The RangeEnd is required so that the Scheduled Refresh continues to increment (seeing as the RangeEnd date will likely never be met).
  - **AuditlogStartDate:** A date time field stipulating how far back you want to retrieve Auditlog data from.
  - **InventoryStartDate:** A date time field stipulating how far back you want to retrieve Inventory data from.
2. Your API Key is self-generated through your Admin By Request User Portal. Navigate to **Settings > [OS] Settings > Data > API**, toggle API access to **ON**, and copy the API Key that is generated:

The screenshot shows the Admin By Request user portal. At the top, there is a navigation bar with 'Admin By Request' and several menu items: Summary, Auditlog, Requests, Reports, Inventory, Settings (highlighted with a red arrow), Load, Logins, Docs, and Contact. Below the navigation bar, there is a section for 'Windows Workstation Global Settings'. On the left, there is a sidebar with various settings categories: Authorization, Endpoint, Lockdown, Malware, Applications, Data (highlighted with a red arrow), and Emails. The main content area shows the 'API Access' settings page. The 'API Access' toggle is set to 'ON' and is circled in red. Below the toggle, there is an 'API Key' field and a 'Save' button. To the right of the 'API Access' form, there is an 'About API Access' section with explanatory text and a 'Regenerate' button.

- IMPORTANT:** You may need to Regenerate an API Key. If this is the case, ensure you click the **Save** button after Regenerating, to ensure this is the key used to establish the connection to Power BI. A green tick icon will appear next to the **Save** button when the action is complete:





- Set the **AuditlogStartDate** and the **InventoryStartDate** values to approximately one week prior to the current date:

AuditlogStartDate ⓘ

InventoryStartDate ⓘ

**IMPORTANT:** The reason for the short time-period is for testing purposes: the further back the start date, the more data that has to load into the report and the longer the loading time. Setting a more recent start date ensures a shorter loading time, and the ability to confirm that all data is pulling into Power BI correctly, before setting the actual dates that you want to retrieve data from (covered in subsequent Tasks).

- Click the **Load** button, which begins populating the template with the specified data:

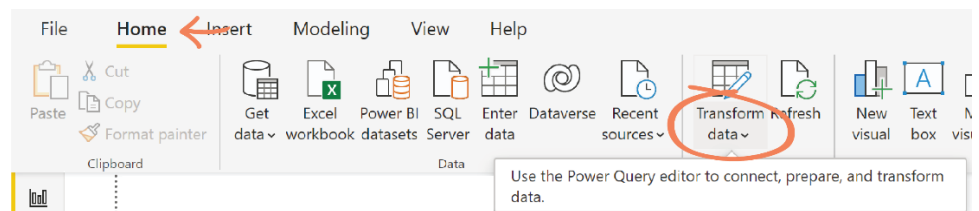


**NOTE:** A loading window appears while the connection is established and data retrieved.

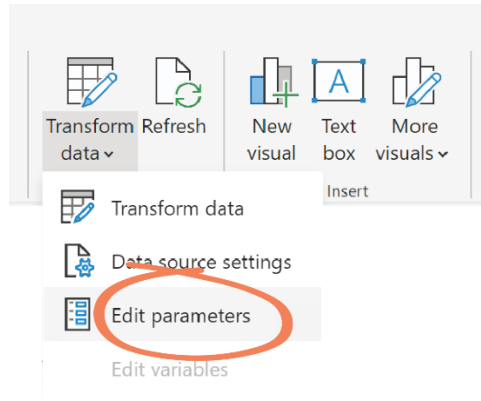
**IMPORTANT:** The following Tasks in this manual differ slightly depending on your organization and how you use Power BI. If you solely utilize Power BI Desktop (i.e., do not use the online web portal), see the section below: *Update Parameters | Desktop-Only Users*. Otherwise, if your organization makes use of the Power BI web application, skip to *Task C: Publish to Web*.

### Update Parameters | Desktop-Only Users

- Ensure you are in the **Home** tab, and select the **Transform Data** drop-down from the tool bar:



- Click **Edit Parameters** from the drop-down menu:

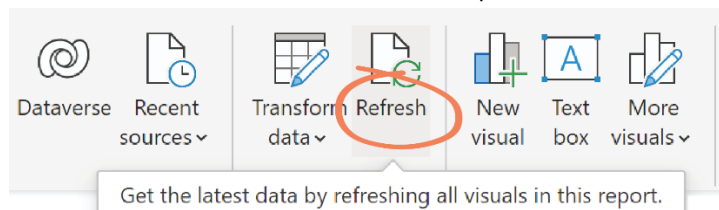


**NOTE:** This action opens the **Edit Parameters** window which contains the same parameter fields that we entered values into during Task B.


- Set the **AuditlogStartDate** and **InventoryStartDate** to the actual dates that you want to retrieve data from, and click **OK**:


 A screenshot of the 'Edit Parameters' dialog box. It contains several input fields: 'apikey' (with a masked value), 'Datacenter' (set to 'dc1api'), 'RangeStart' (set to '1/01/2000 12:00:00 AM'), 'RangeEnd' (set to '1/01/2100 12:00:00 AM'), 'AuditlogStartDate' (set to '2/5/2021 12:00:00 AM'), and 'InventoryStartDate' (set to '2/5/2021 12:00:00 AM'). At the bottom right, there are two buttons: 'OK' (circled in red) and 'Cancel'.

- Select the **Refresh** button from the top tool bar:





 **NOTE:** This action begins pulling data according to the new parameters and displays the loading window showing what is being updated. This process may take a while, depending on how far back you are pulling data from.

 **IMPORTANT:** Desktop-only users will have to click the **Refresh** button and wait for the data to load every time the data needs to be updated. We recommend obtaining a Power BI subscription and using the online portal in order to get the most out of this report, as the desktop version alone is not optimized for a production environment.

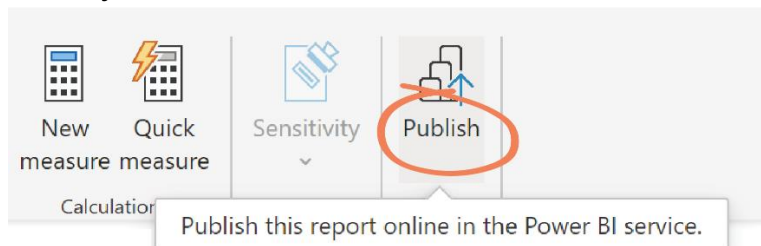
5. Skip to *Task G: Use Report* for the next step (Tasks C to F are applicable to web application-users only).


### Task C: Publish to Web

This Task covers the process of publishing the template to the Power BI web application.

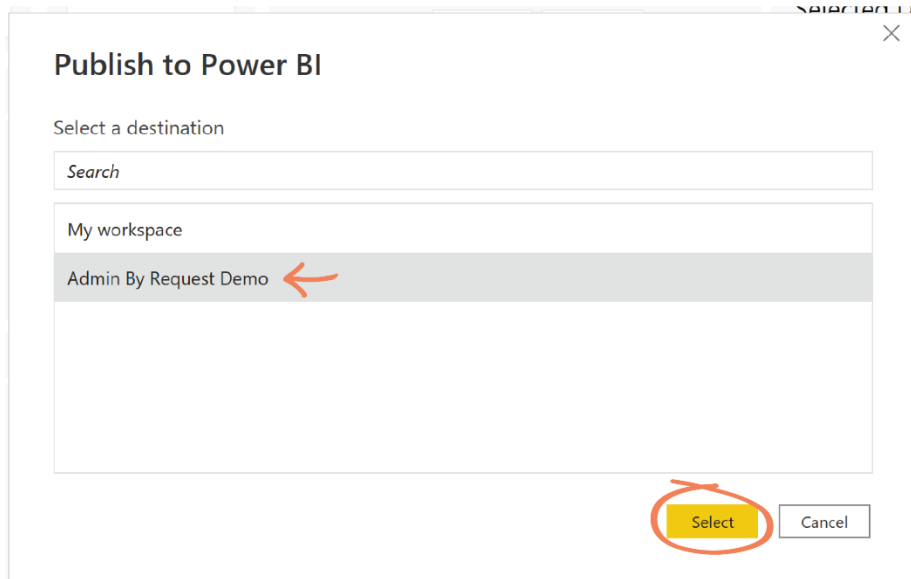
 **NOTE:** We recommend signing in to Power BI Desktop before beginning this Task.


1. Ensure you are in the **Home** tab and select the **Publish** button from the tool bar:



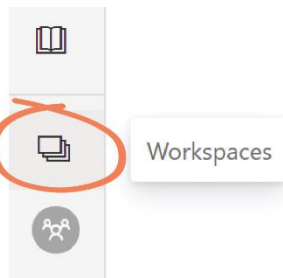
 **IMPORTANT:** If you have not yet saved the template file (.pbit) as a .pbix file, you will be prompted to do so at this point.

- In the **Publish to Power BI** pop-up window, select the workspace you want to publish the report to, and click **Select**. In this example, we are publishing to the *Admin By Request Demo* workspace:

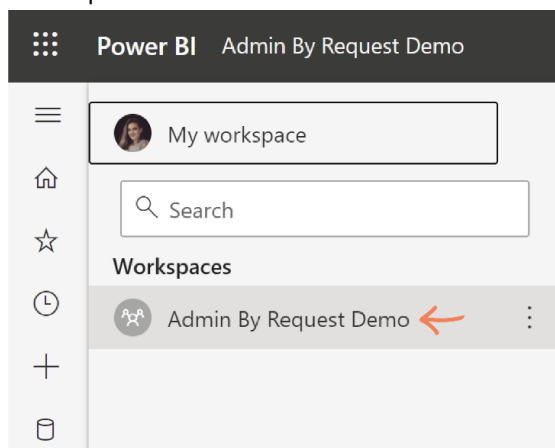


 **NOTE:** The desired workspace must already be created before this step. Clicking the **Select** button displays a progress window, "Publishing [name of report] to Power BI".


- Navigate to your Power BI online portal and select the **Workspace** icon from the left-hand tool bar:







- Locate and select the Workspace you published the Admin By Request report to from the Workspaces list:



- Locate the published report (in this example, the filename is *Demo*).

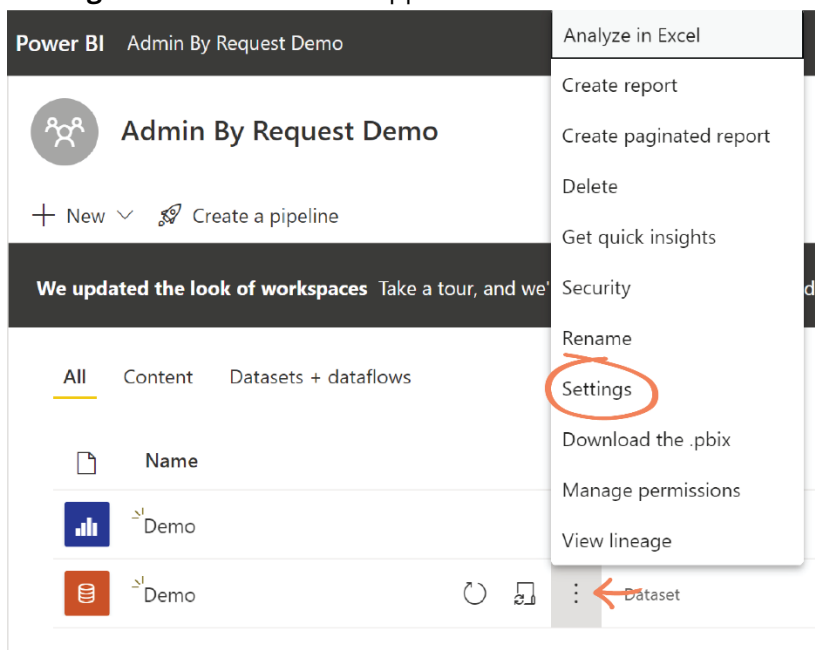
 **NOTE:** Two files with the same name should exist in the workspace for the published report: the *Report* file (blue bars icon) and the *Dataset* file (orange data icon):

	All	Content	Datasets + dataflows
	Name	Type	
	Demo	Report	
	Demo	Dataset	

### Task D: Configure Scheduled Refresh

Scheduled Refresh uses an incremental update function to retrieve data only from the previous date / time to the current. This Task covers configuring the Scheduled Refresh.

- Select the menu icon (the three vertical dots) to the right of the Dataset, and select **Settings** from the menu that appears:



- Expand the **Scheduled Refresh** item by clicking the drop-down arrow, and toggle the **Keep your data up to date** to **On**:

Scheduled refresh ←

Keep your data up to date

On

Refresh frequency

Daily

Time zone

(UTC+12:00) Auckland, Wellington

Time

[Add another time](#)

Send refresh failure notifications to

Dataset owner

These contacts:

Enter email addresses

- Use the drop-down menu to select the desired **Refresh frequency** and set any other parameters for the **Scheduled refresh** as desired (e.g., **Add another time** to run the refresh twice a day, etc).
- When all parameters are set, click **Apply**:


Apply

Discard

## Task E: Adjust Parameters

This task covers adjusting the parameters set in Task B to the actual values that you want to retrieve data from, following a successful initial load.

1. Ensure you are in the **Datasets Settings** page (from previous Task). Expand the **Parameters** item by clicking the drop-down arrow:

Parameters 

apikey  
637a7162-dd4e-449a-841c-d724372ae71d


AuditlogStartDate  
First date you want to get Auditlog data from, in the format: Date/Time. E.g., 11/18/2021  
11/10/2021 12:00:00 AM

Datacenter  
dc1api


InventoryStartDate  
First date you want to get Inventory data from, in the format: Date/Time. E.g., 11/18/2021  
11/10/2021 12:00:00 AM

RangeEnd  
Please Enter "1/1/2100". Format is Date/Time.  
1/1/2100 12:00:00 AM


RangeStart  
Please Enter "1/1/2000". Format is Date/Time.  
1/1/2000 12:00:00 AM


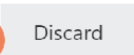
 **NOTE:** These parameters are dictated by the Admin By Request template, so are the same parameters used in Task B.

2. Set the **AuditlogStartDate** and **InventoryStartDate** to the actual dates that you want to pull data from, and click **Apply**:

AuditlogStartDate  
First you want to get data from in Auditlog Format is Date/Time Example 11/18/2021  
1/1/2021 12:00:00 AM 

Datacenter  
dc1api

InventoryStartDate  
First date you want to get data from. Format is Date/Time Exampe 11/16/2021  
1/1/2021 12:00:00 AM 

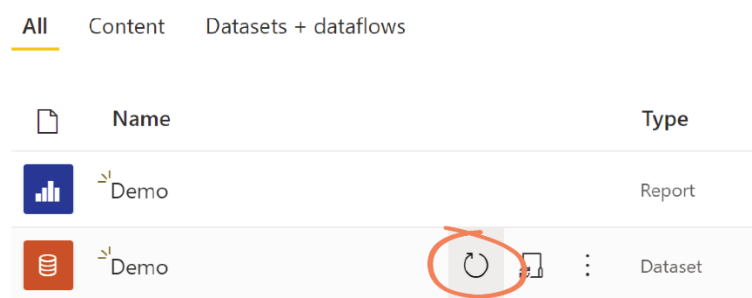
 

**IMPORTANT:** Note that the date is in the American format of M/D/YYYY (i.e., month before day).

## Task F: Refresh Dataset

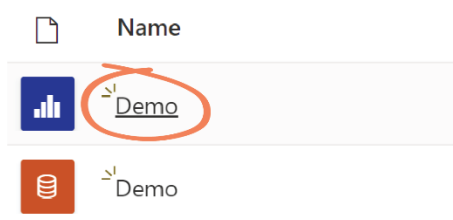
Data for the new parameters set in Task E requires a manual refresh in order to be displayed in the report immediately (i.e., without waiting for the Scheduled Refresh to run). This Task covers how to manually refresh the dataset.

1. Navigate back to the **Workspace** page and select the **Refresh** icon to the right of the appropriate Dataset:



**NOTE:** The refresh may take an extended period of time depending on how far back you have set the dates in the parameters (Task E), however, you are able to use your computer for other activities while the refresh runs in the background.

2. Navigate to the Report by clicking on the report file from the Workspace list:



**NOTE:** This action opens the report, displaying the *Last updated* date in the top right-hand corner. This read-only value reflects the date of the last manual or scheduled refresh (shown in Task G). If you are not seeing the updated data, that may mean the **Refresh** is still running.

## Task G: Use Report

Installation and configuration of the template is now complete. Task G describes aspects of the report, terminology, layout, and other functions.

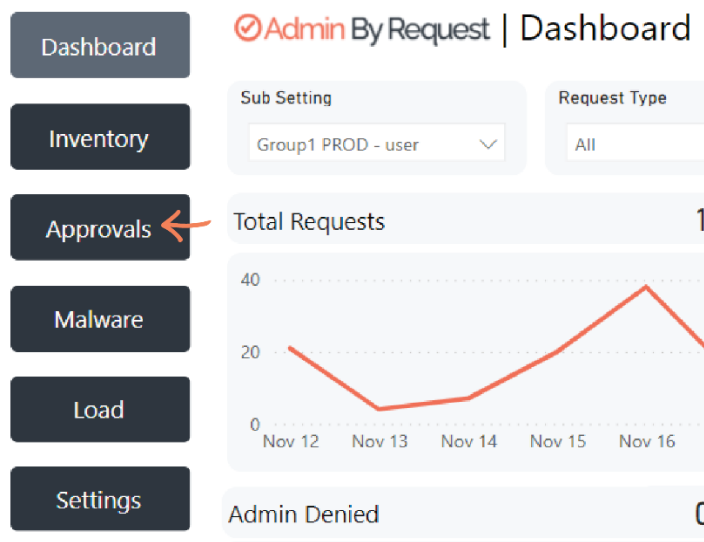
- The read-only text to the right of the Admin By Request logo indicates the current page:


 Admin By Request | Dashboard

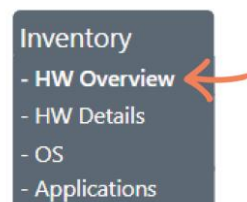
- Your company name is listed as a read-only field in the top right-hand corner of every page, next to the *Last Updated* field:

Last Updated 11/3/2021 | Admin By Request

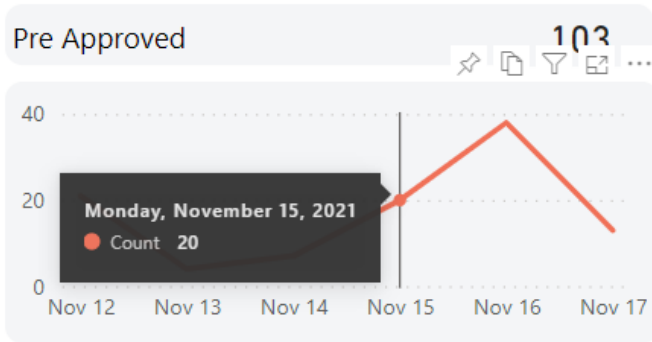
- Use the left-hand menu to navigate between pages of the report:



-  **NOTE:** The *Inventory* and *Malware* menu items have drop-down menus. These pages open on the first page in the list:

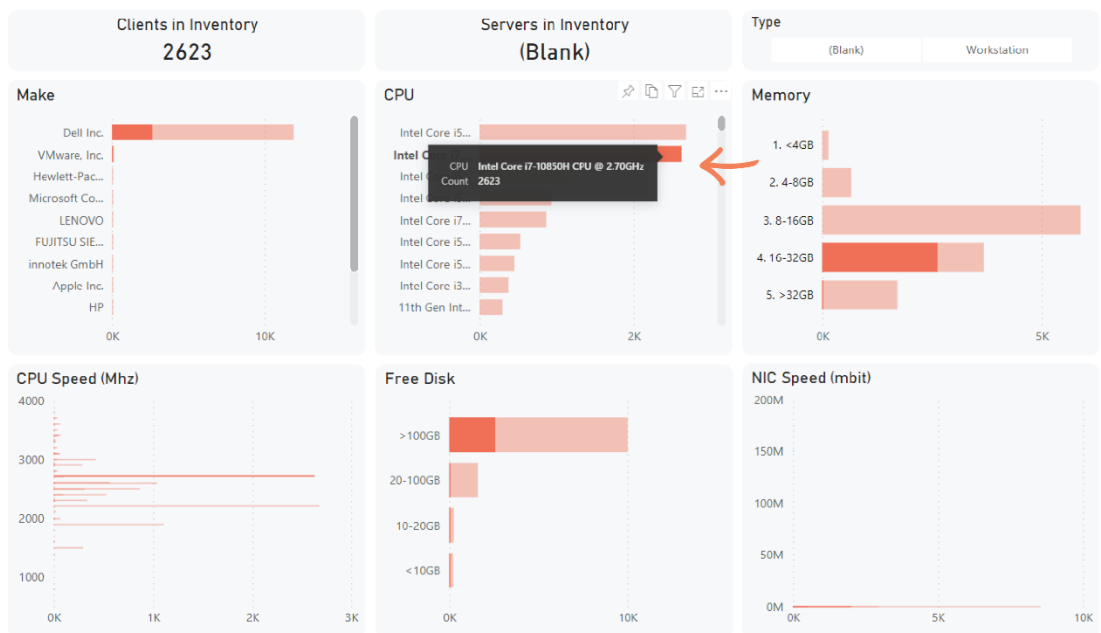


- Hover over a data point to view its *Tool Tip*:

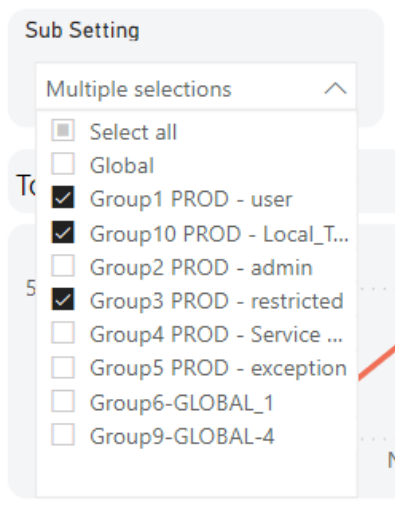


**NOTE:** *Count* refers to the number.


- Click into a piece of data to filter out unrelated data:




- The **Sub Settings** drop-down menu lets you filter by groups that you have defined in the Sub Settings page of your Admin By Request User Portal:

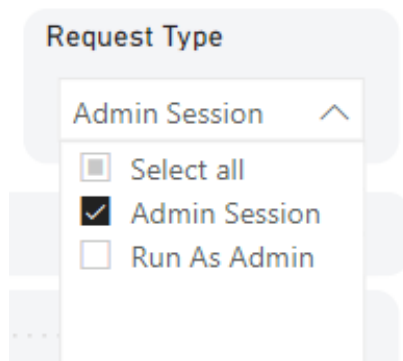




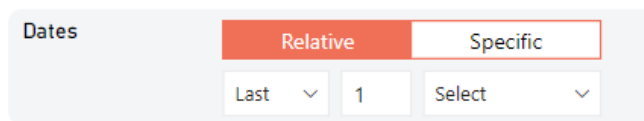


 **NOTE:** Multiple selections can be made in this menu.

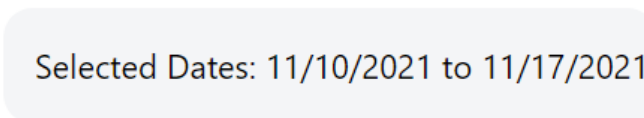
- Use the **Type** buttons and drop-down menus to filter data accordingly:



- The **Date** selector allows you to view data from either a date **Relative** to the current date, or from a **Specific** period:



- The **Selected Dates** read-only field displays the dates that you are viewing data from / for:



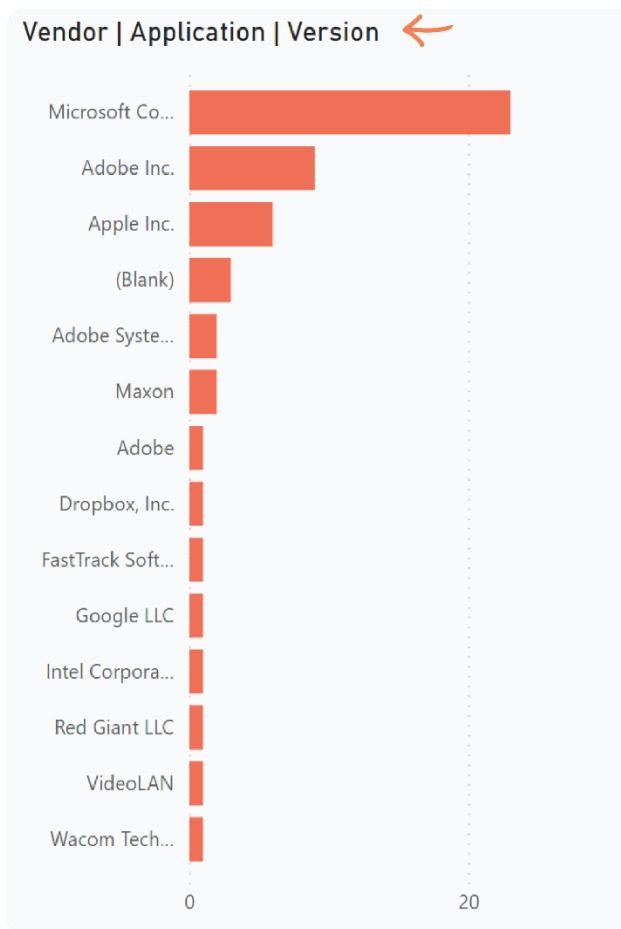
**!** **IMPORTANT:** Wherever (*Blank*) is displayed, this indicates that no data exists for this option.

### Drill Down

Some pages in the report contain data visuals that allow the user to drill down to get more of an insight into the data.

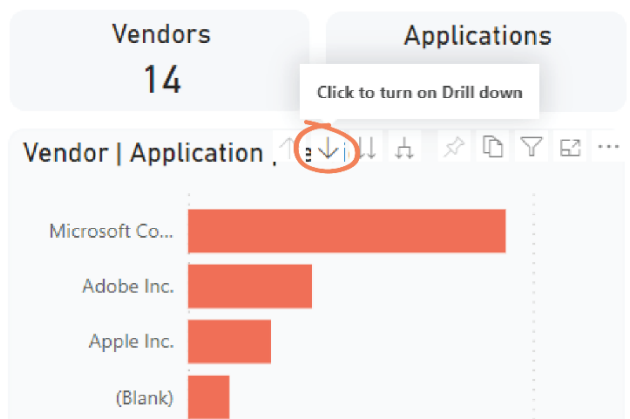
For example, the *Inventory – Applications* page contains a visual titled:


- Vendor | Applications | Version

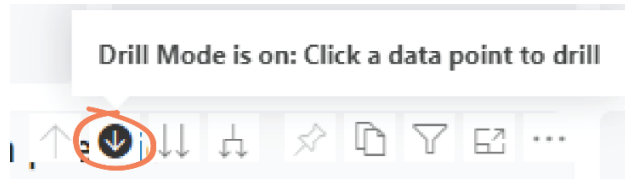


These three terms (separated by vertical dashes) refer to the three levels of data that can be expanded (i.e., drilled down) in the visual.

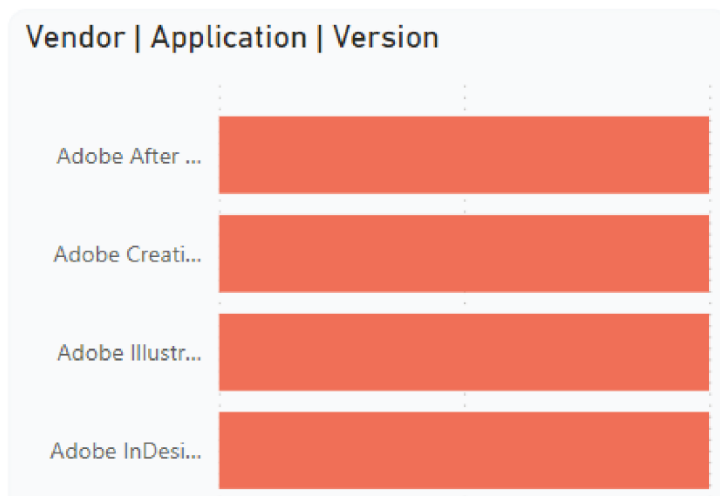
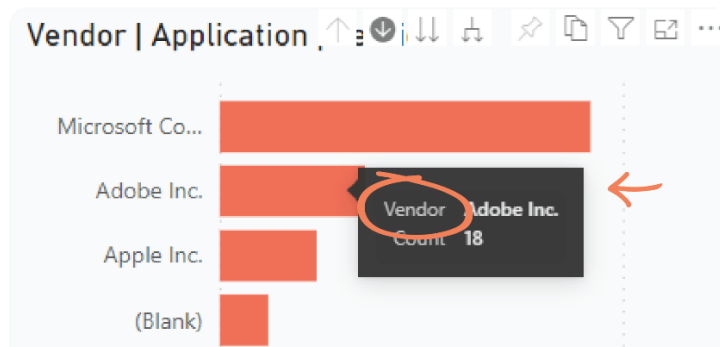
1. The first / highest level is the first item in the table title. In this example, the *Vendor*. Click the downward-facing arrow icon along the top of the visual to turn on the **Drill Down** function:



 **NOTE:** Selection is indicated by the icon changing in appearance to the following:

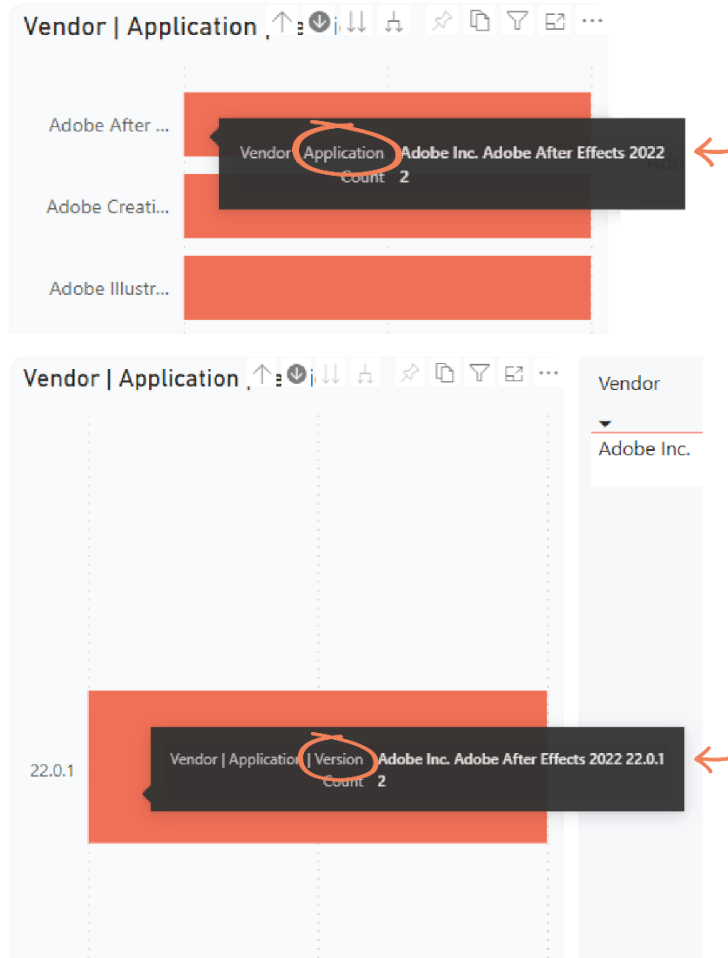


2. You now have the ability to drill down to the second level of data. Do this by clicking on the desired data segment – in this example, we have selected Adobe Inc.:

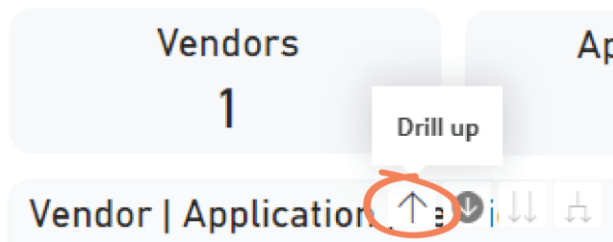


3. We are now at the second level of data: *Application*. To interact with this data while staying at the *Application* level, click the downward-facing arrow (i.e., the **Drill Down** icon) to turn off drill down.

- Otherwise, leave the **Drill Down** function on and drill down to the third data level: the application *Version*. In this example, we have selected *Adobe After Effects*:



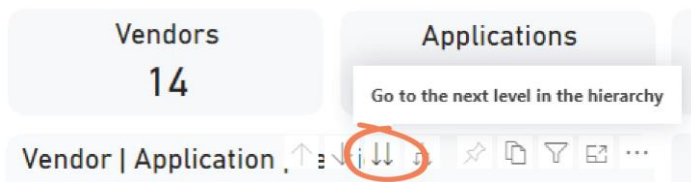
- Drill back up by clicking the upward-facing arrow icon to turn on the **Drill Up** function and navigate back up through the levels.



## Other Functionality

In addition to **Drill Down**, the top menu of select visuals provide the following functions:

- **Go to Next Level:**



- **Expand all down one level:**

