



Add-On Products
Insights

Resource Central Insights App Installation Guide

Document Revision 06

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Introduction

This document provides a detailed guide to installing the app on **Power BI**, which will visualize your data for clearer, applicable reports.

Following diagrams describe 2 setup types for Insights.

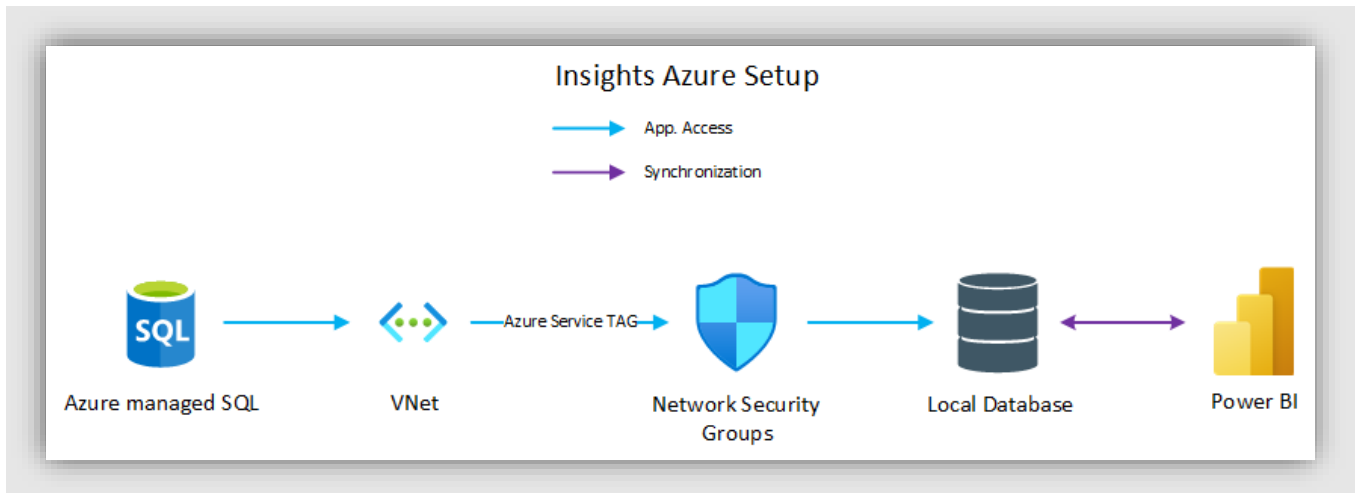


Figure 1. Notification Color configuration

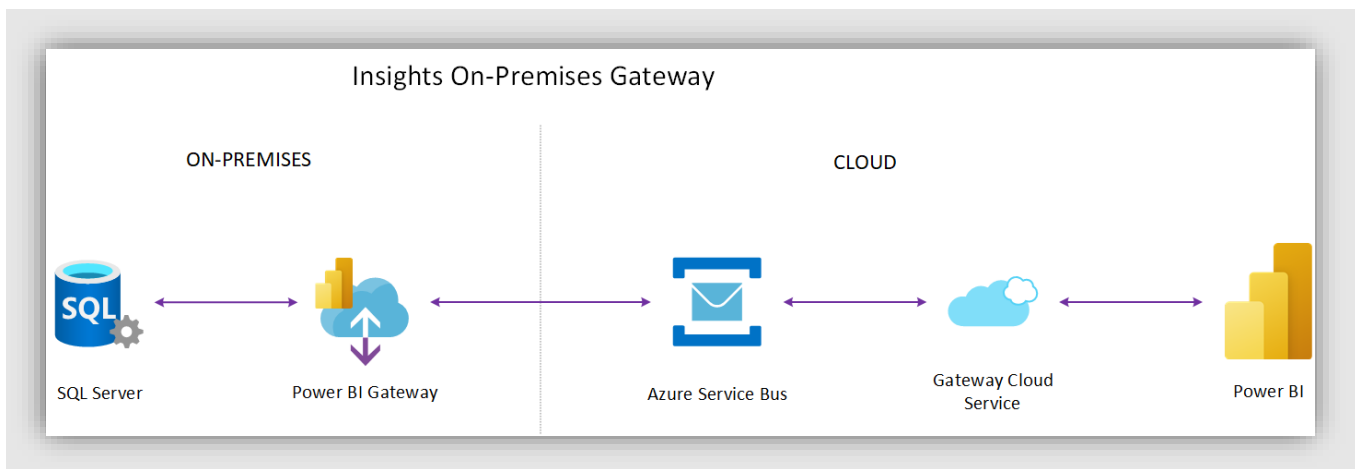


Figure 2. Insights Diagram (On-premises gateway setup)

NOTE: To know how to set up on-premises gateway for Insights, refer to this [Appendix](#) for more details.

Installation

Pre-requisite requirements

To install the app on **Power BI**, the following requirements must be met:

- Your Power BI account must have a PRO license.
- Your organization must allow installing template apps created outside the organization.

NOTE: To allow template apps created outside your organization, your tenant administrator needs to log into **Power BI**, then click [...] → **[Settings]** → **[Admin portal]** → **[Tenant Settings]**.

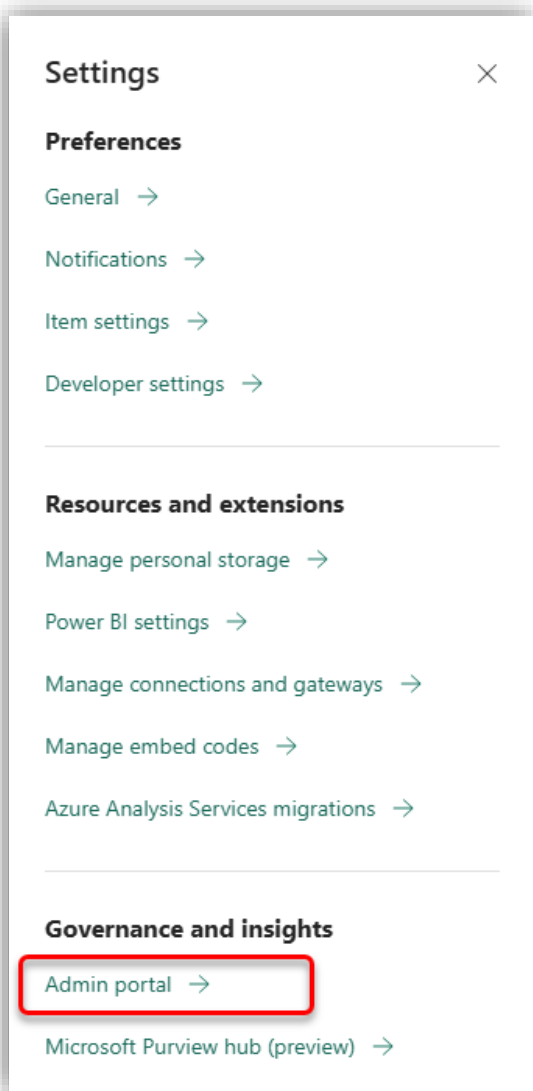


Figure 3. Go to Admin portal Settings

On the **Power BI Admin portal**, go to the **Tenant settings** section, then search for 'Install template apps'. Enable this option and select **[Apply] to the entire organization** and click **[Apply]**.

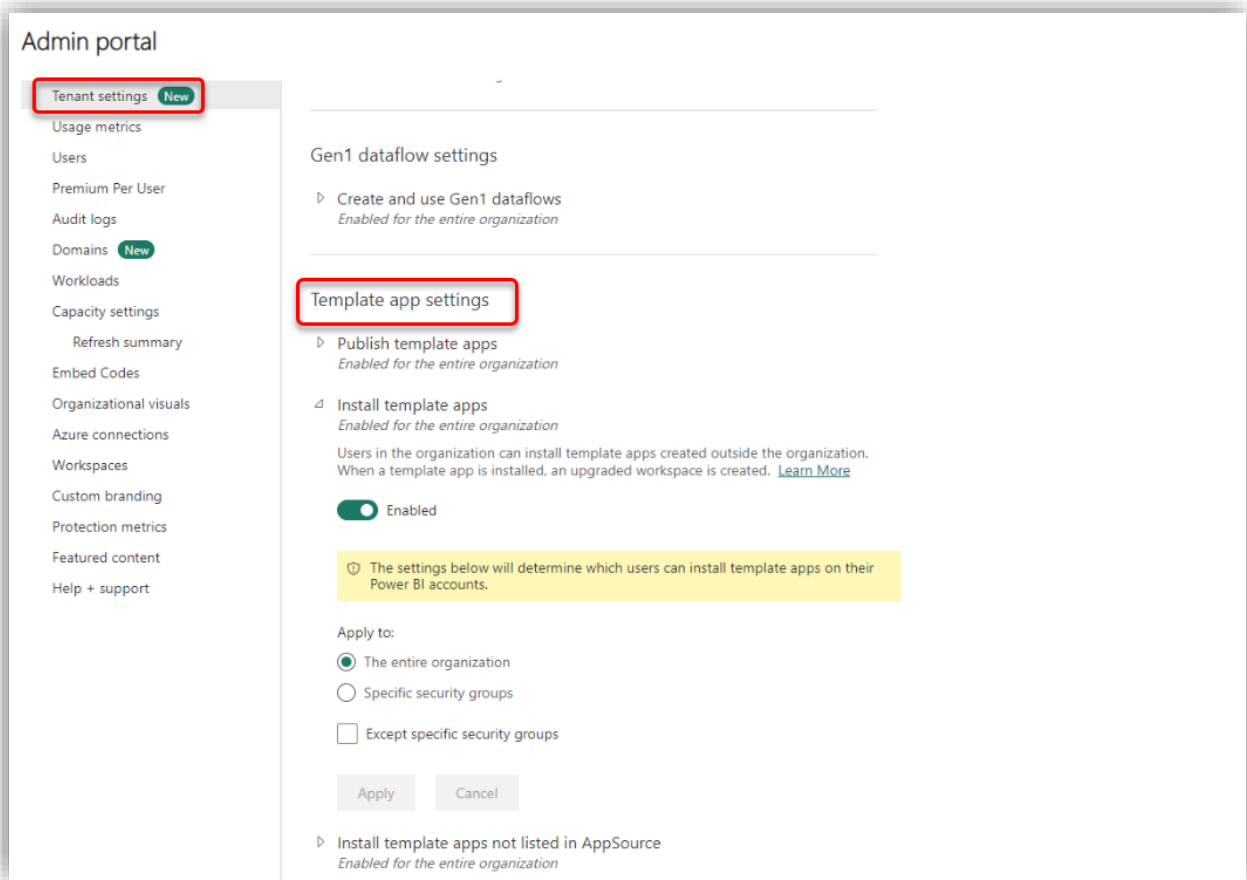


Figure 4. Apply template apps to the entire organization

Step-by-step installation

Method 1: Installation via app link

On your browser, open the **Power BI** app link that you received. It will ask for your confirmation, i.e.:

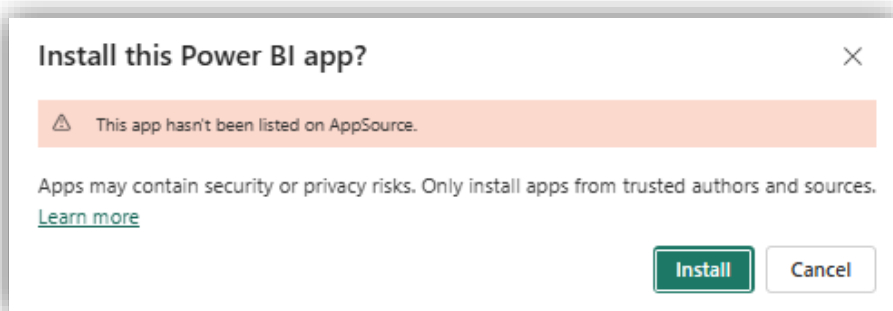
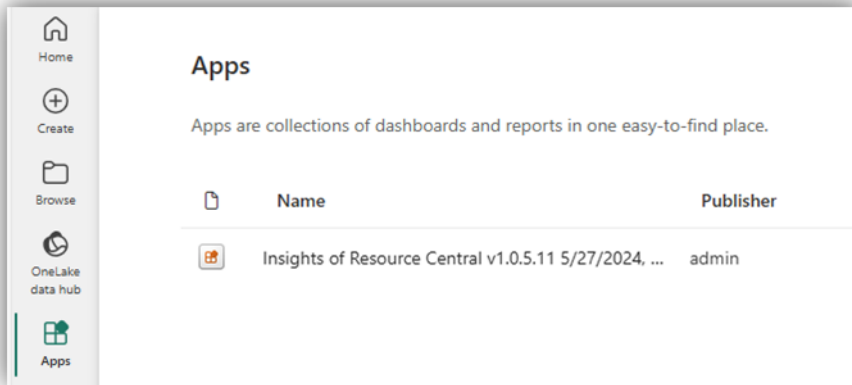


Figure 5. Confirm Power BI app installation

Click [**Install**] to confirm, then wait for a few seconds for the app to be installed. Once the installation is complete, you will see the new app listed. E.g.:



Data Connection

Click on the installed app. You will see a message requesting you to connect to your data.

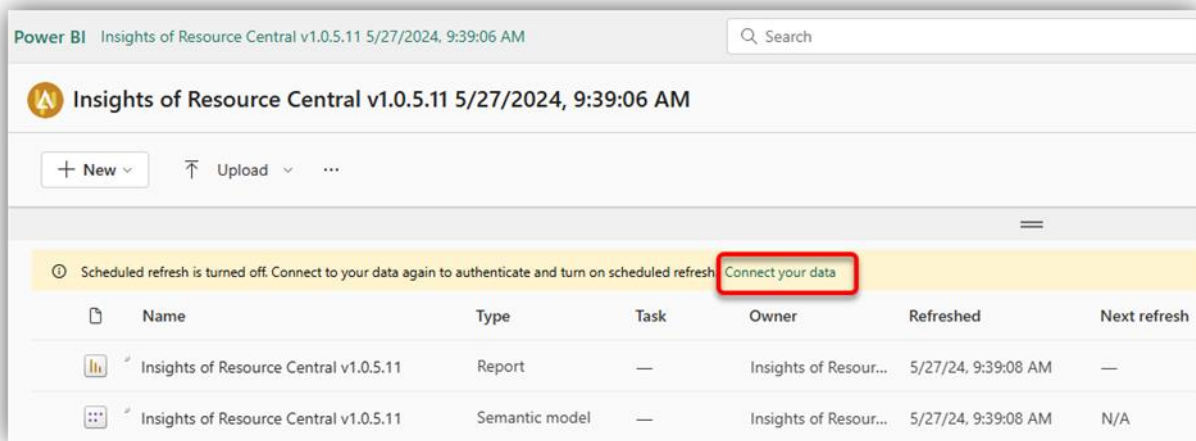




Figure 6. Connect to your data

Click [**Connect**] to proceed.

On the **Connect to [App Name]** screen, enter the provided database name and server name, then click [**Next**].



Connect to Insights of Resource Central v1.0.5.11

Get started setting up your app! Start by filling in the parameters. Then, you'll authenticate to all the data sources this app connects to.

Parameters

Make sure all required (*) parameters are filled in before connecting to your data.

DBname *
Database name

ServerName *
Server name

[Go to the app documentation ↗](#)

Figure 7. Enter database & server name

On the next screen, enter the provided username and password, then click [**Sign in and connect**].

Connect to Insights of Resource Central v1.0.5.11

You are connecting to

Server

Database

Authentication method

User name

Password

[Go to the app documentation](#) **Back** **Sign in and connect** **Cancel**

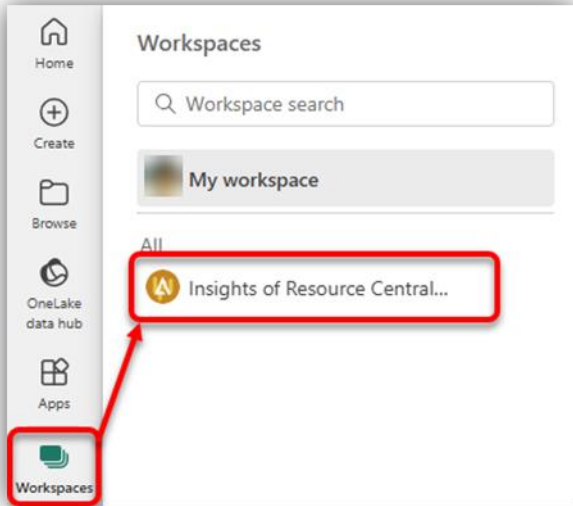
Figure 8. Enter provided username & password

After that, wait for a few seconds for the data to load. Once the process is complete, you will see the template data shown on the app.

Name	Type	Task	Owner	Refreshed	Next refresh
Insights of Resource Central v1.0.5.11	Report	—	Insights of Resour...	5/27/24, 9:28:07 AM	—
Insights of Resource Central v1.0.5.11	Semantic model	—	Insights of Resour...	5/27/24, 9:28:07 AM	5/28/24, 12:00:00 AM

NOTE: You will need to wait an additional period for the app to load your filtered data. The loading period depends on the size of your data.

You can check if your data is still loading by going to **Workspaces** → [your added workspace].



If the data is loading, you will see a loading icon near the Refreshed column of the Semantic model. E.g.:

Update the app to apply and share any changes to this workspace. Close						
Name	Type	Task	Owner	Refreshed	Next refresh	
Insights of Resource Central v1.0.5.11	Report	—	Insights of Resour...	5/27/24, 9:39:08 AM	—	
Insights of Resource Central v1.0.5.11	Semantic model	—	Insights of Resour...	5/27/24, 9:39:08 AM	5/28/24, 12:00:00 AM	🔄

Figure 9. Loading dataset

Once the loading is done, the time stamp in the **Refreshed** column will be updated.

You should see the **Report and Dataset** as the final result.

Method 2: Installation via Microsoft AppSource

Step 1: Go to [Microsoft AppSource](#)

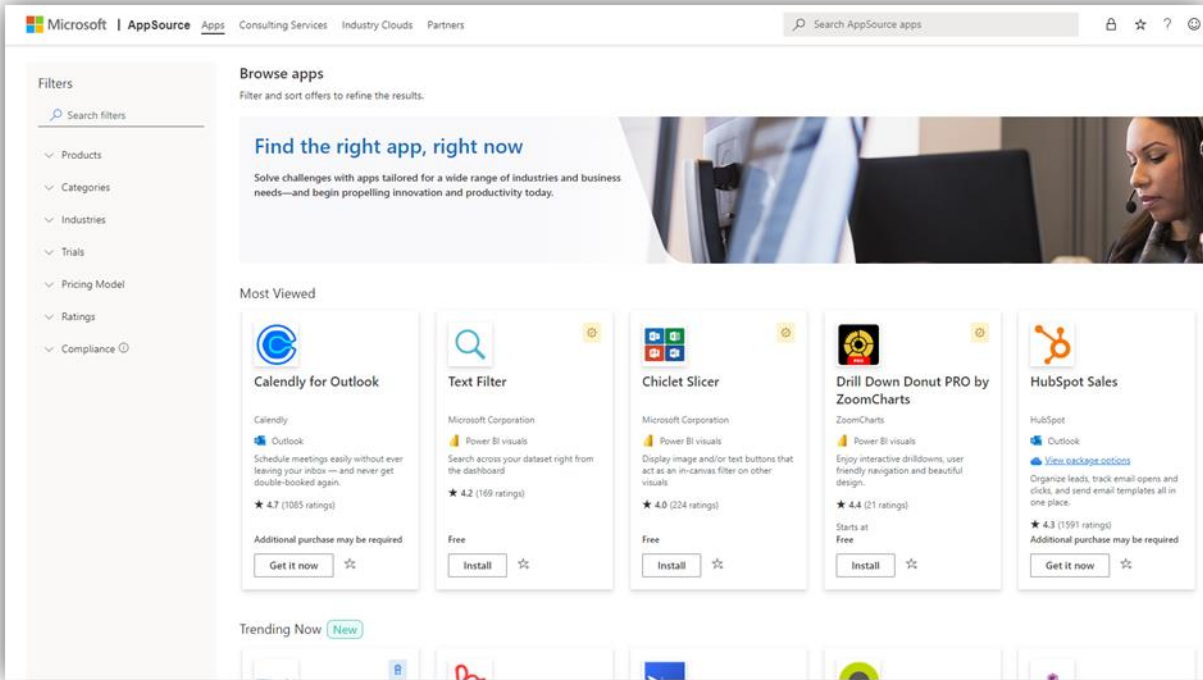


Figure 10. Microsoft AppSource

Step 2: Search the app Insights for Resource Central

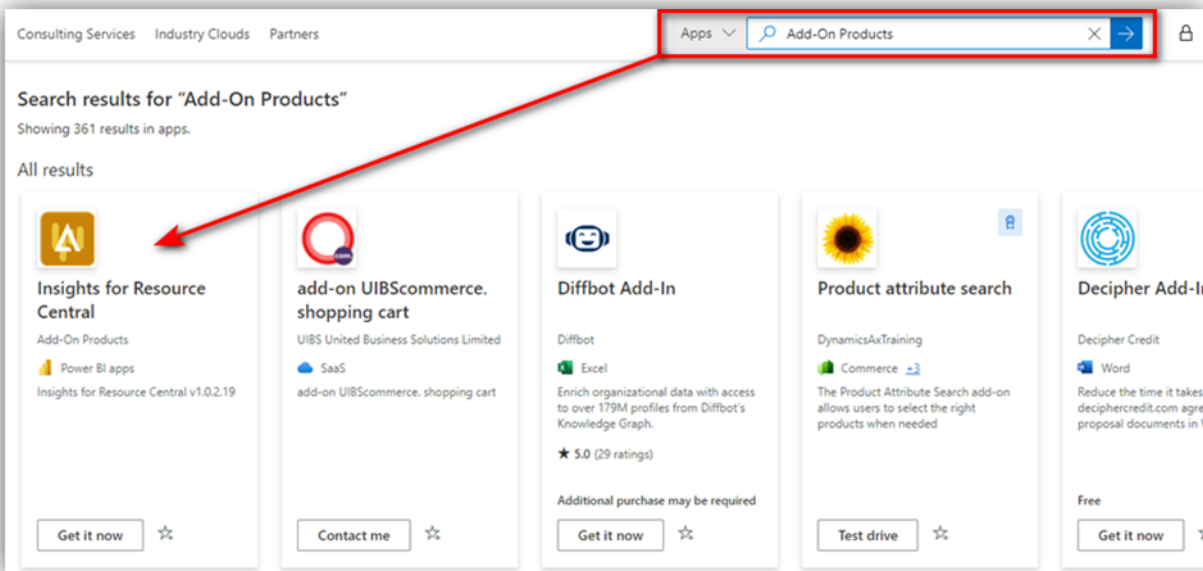


Figure 11. Search for 'Add-On Products'

You can search for **'Add-On Products'** on the the search bar. The app will be shown in the first place as in the figure above.

Step 3: Click on the app to see its details

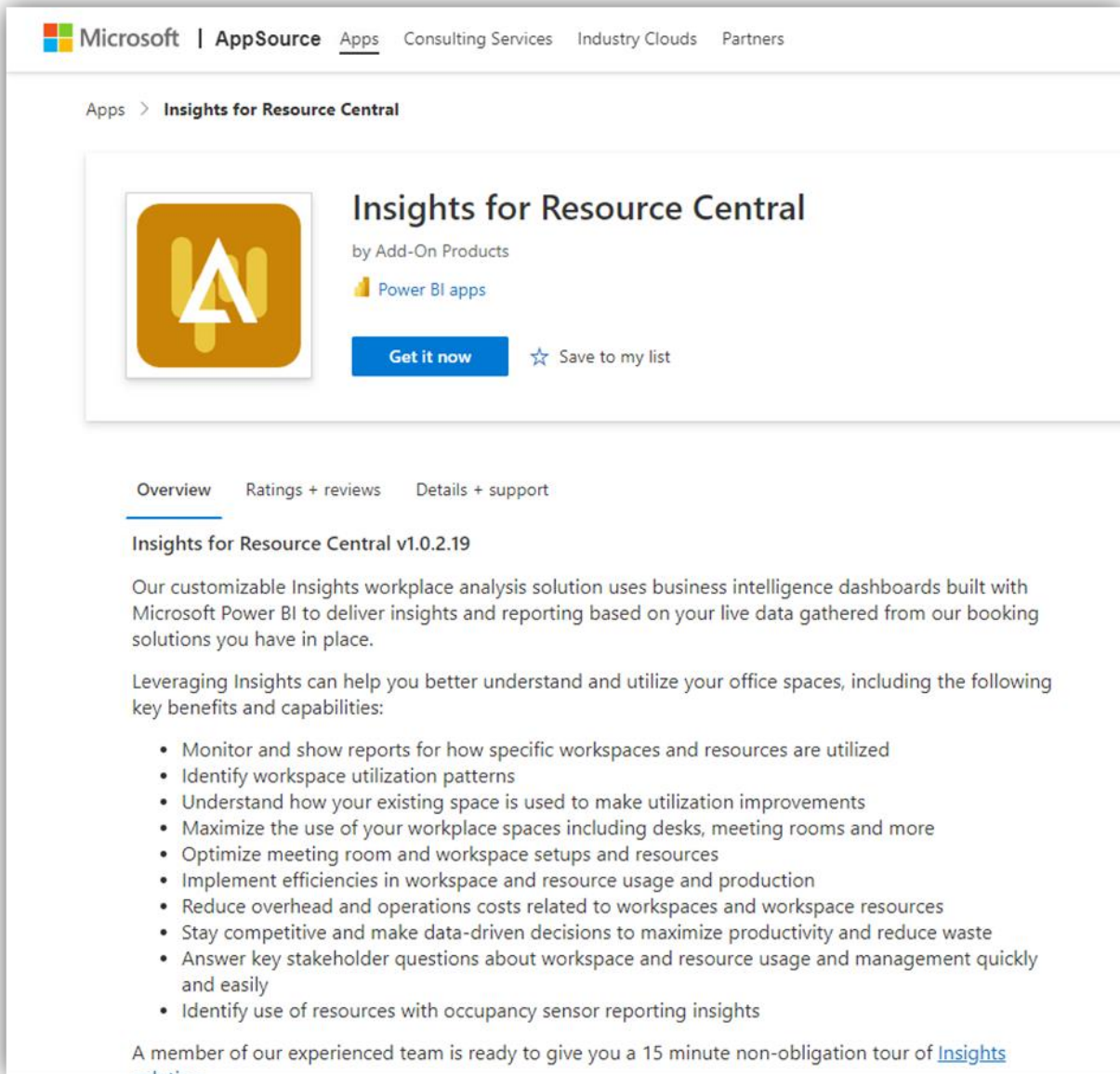


Figure 12. Details of Insights for Resource Central

NOTE: Make sure that you have already signed in the **AppSource** before clicking the button.

Step 4: Click on [Get it now] to start installation

After clicking the button, it will redirect you to **Power BI** service and ask if you want to install the new app

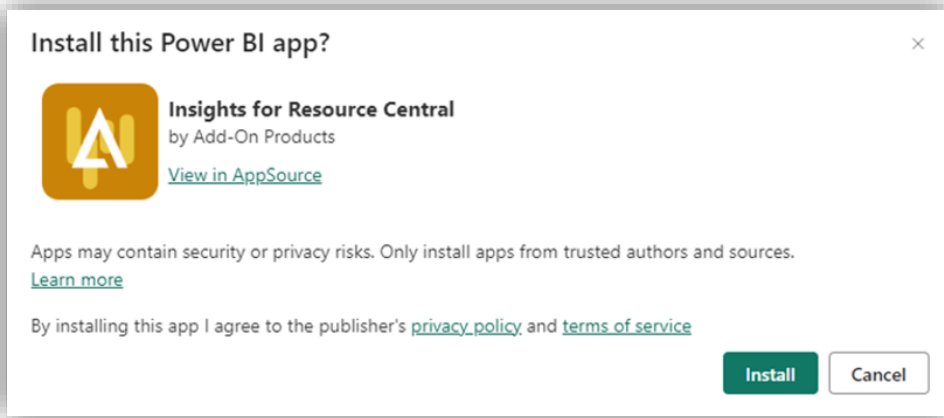


Figure 13. App installation message

Click [**Install**] to proceed. You will see the notification notifying the installation process. E.g.:

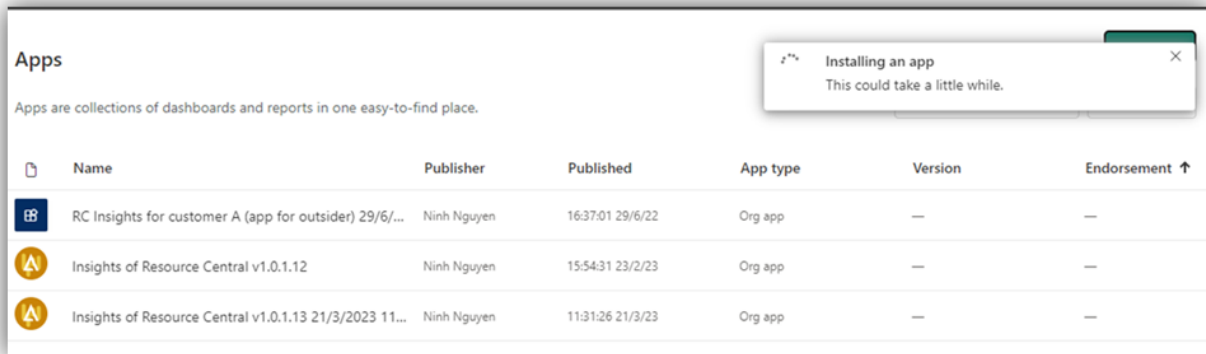


Figure 14. Installing app...

When the process is finished, a notification will appear informing you of the complete process. E.g.:

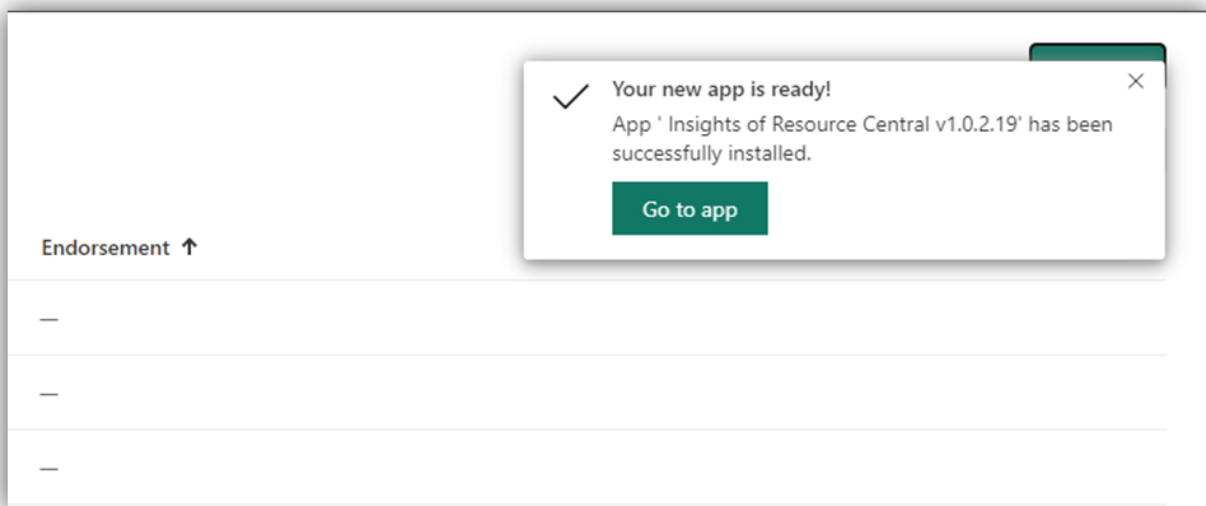


Figure 15. Successful app installation

After that, you will also see a new app installed on the app list, e.g.:

Apps

Apps are collections of dashboards and reports in one easy-to-find place.

Name	Publisher	Published	App type	Version
RC Insights for customer A (app for outsider) 29/6/...	Mark Olin	16:37:01 29/6/22	Template app	Version 4
Insights of Resource Central v1.0.1.12	Mark Olin	15:54:31 23/2/23	Template app	Version 18
Insights of Resource Central v1.0.1.13 21/3/2023 11...	Mark Olin	11:31:26 21/3/23	Template app	Version 4
Insights of Resource Central v1.0.2.19	Mark Olin	15:10:55 28/3/23	Template app	Version 1

Click on the name of the new app to see the result.

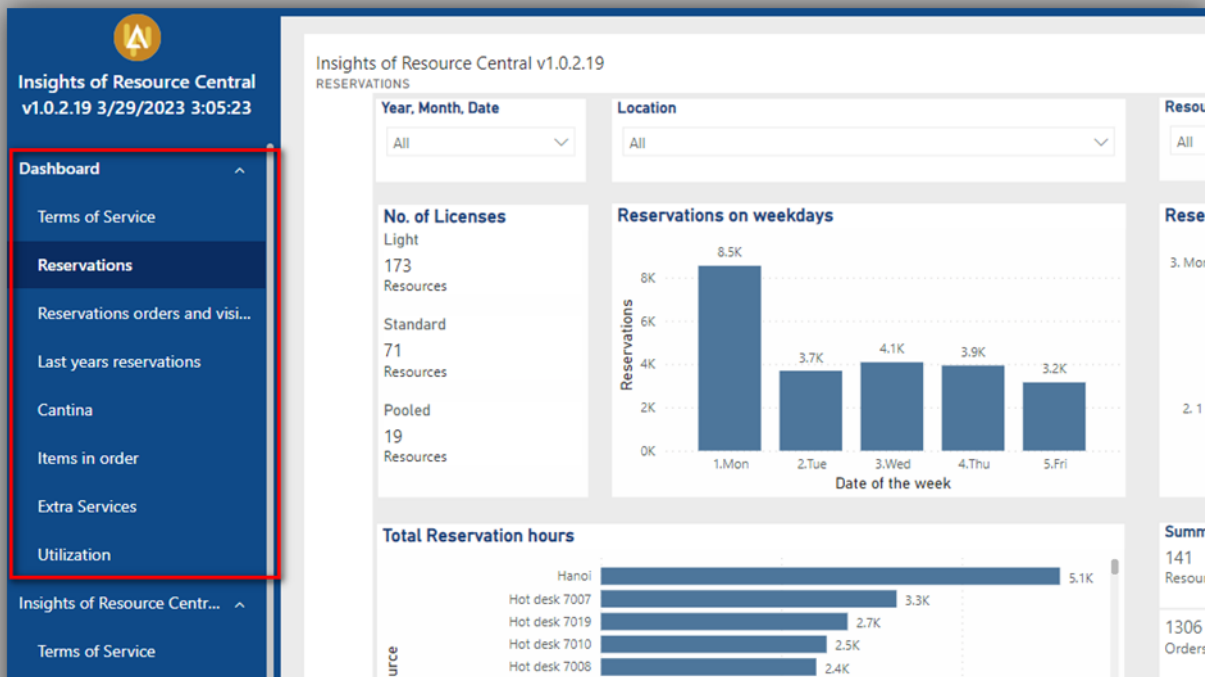
Step 5: Connect data

Refer to [data connection](#) in **Method 1** for more details.

With this step, the installation is now finished.

NOTE: With this method, the **Dashboard** will also be automatically created in the app. It is taken from the **Dataset** as snapshot, and it allows users to check the report without connecting to a database.

Simply open the installed app and you will see the **Dashboard** similar as follows:



Alternatively, you can avoid the **Dashboard** by download the **.pbix** file and open it with **Power BI** desktop app. There, you can enter your **DBname** and **ServerName** by editing parameters so that the app will display your own data. In this case, no **Dashboard** will be created.

Appendix

Appendix A – How to set up Standard Data Gateway to replicate data from on-premises environment to the Cloud

IMPORTANT: In order to take the following steps, make sure that the report is available on your WorkSpace (by [installing the app](#) or publishing from Power BI Desktop).

Step 1: Installing standard gateway

Download and install a standard gateway. The installer and installation guide can be found via this link: [Install an on-premises data gateway | Microsoft Docs](#).

NOTE:

1. The **email address to use with this gateway** must be the same as your **Power BI email address**.
2. The installation guide via the above link contains 3 main parts. While **Download and install a standard gateway** and **Add another gateway to create a cluster** are compulsory, **Download and install a personal mode gateway** could be left out.

Step 2: Connect the installed on-premises gateway with data source

1. On app.powerbi.com, click **[Settings]** button on navigation bar → **[Manage connections and gateways]**. You will see the list of your connected data source:

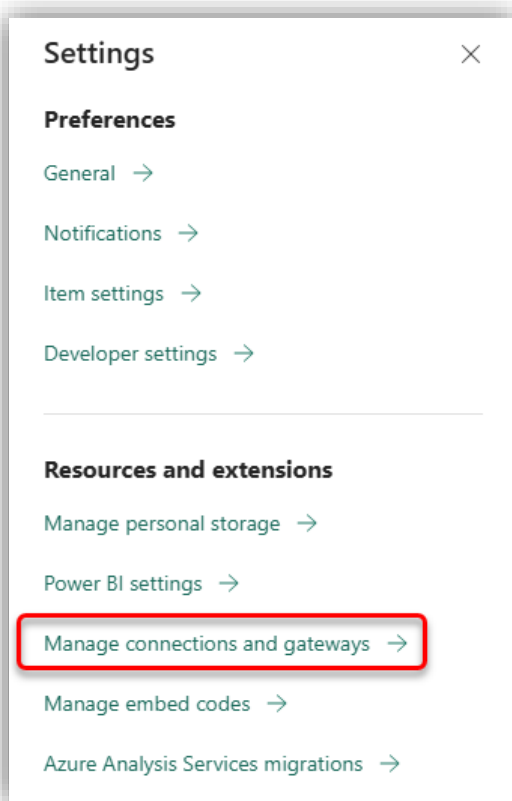


Figure 16. Go to Settings → Manage connections and gateways

If you do not have any data source connected to the gateway, continue with the following steps:

2. On **Connections** list, click [**New**] which open a screen on the right side to create new data source:

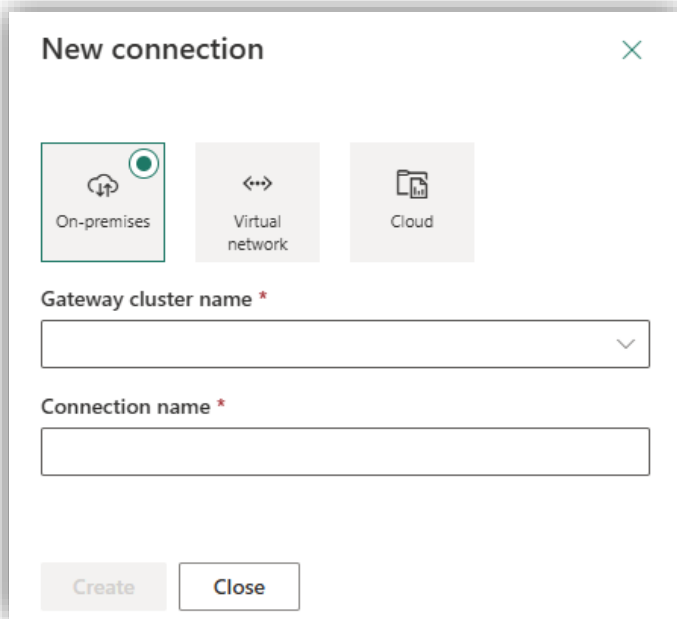


Figure 17. Create new connection

- For '**Gateway cluster name**': Select the gateway that you have installed from [Step 1](#).
- For '**Connection name**': Enter a name for your connection.

3. **Connection type** field will appear once you selected the gateway. Here you select [**SQL Server**] (you can either type the value or find it on the list).

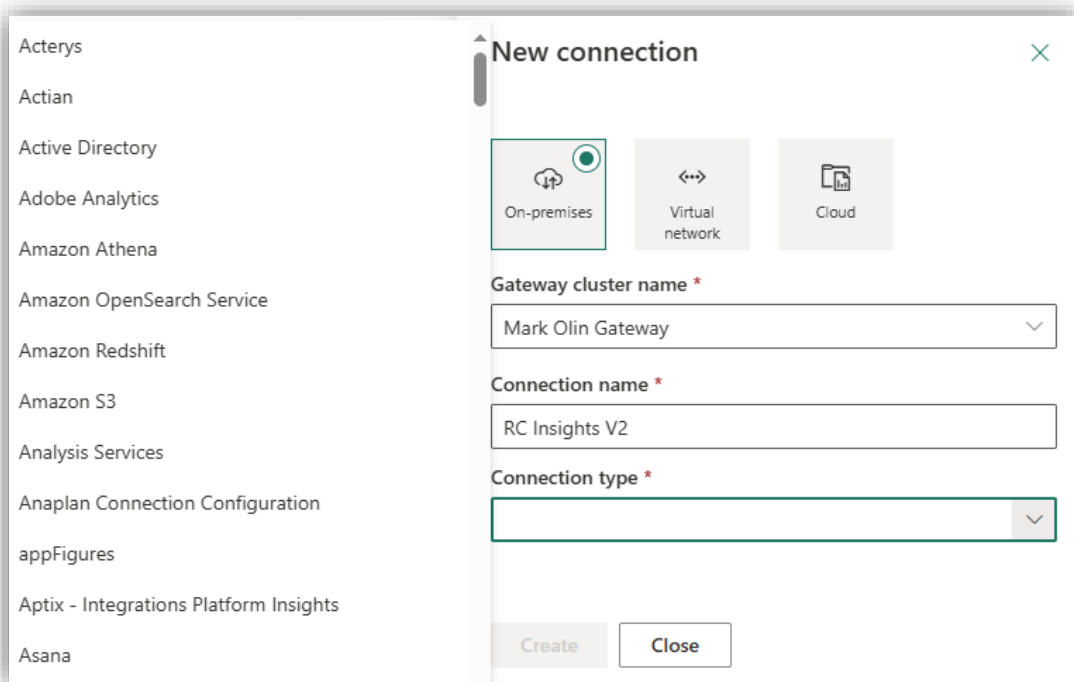


Figure 18. Select connection type

4. Fill in the data source information, e.g.:

The screenshot shows a 'New connection' dialog box with a close button (X) in the top right corner. It contains three required fields, each marked with an asterisk (*):
1. 'Connection type *': A dropdown menu with 'SQL Server' selected.
2. 'Server *': A text input field containing '192.168.2.119'.
3. 'Database *': A text input field containing 'RC-DSS'.

Figure 19. Enter Server & Database

NOTE: On-premises Gateway only supports the local server IP, public IP is invalid. Learn how to find your Local IP Address [here](#).

The screenshot shows an 'Authentication' dialog box with an information icon (i) in the top left. It contains the following fields and options:
1. 'Authentication method *': A dropdown menu with 'Basic' selected.
2. 'Username': A text input field containing 'sa'.
3. 'Password': A text input field filled with dots.
4. A checked checkbox labeled 'Skip test connection'.

Figure 20. Enter Authentication information

For 'Authentication method', select 'Basic' then enter Username and Password.

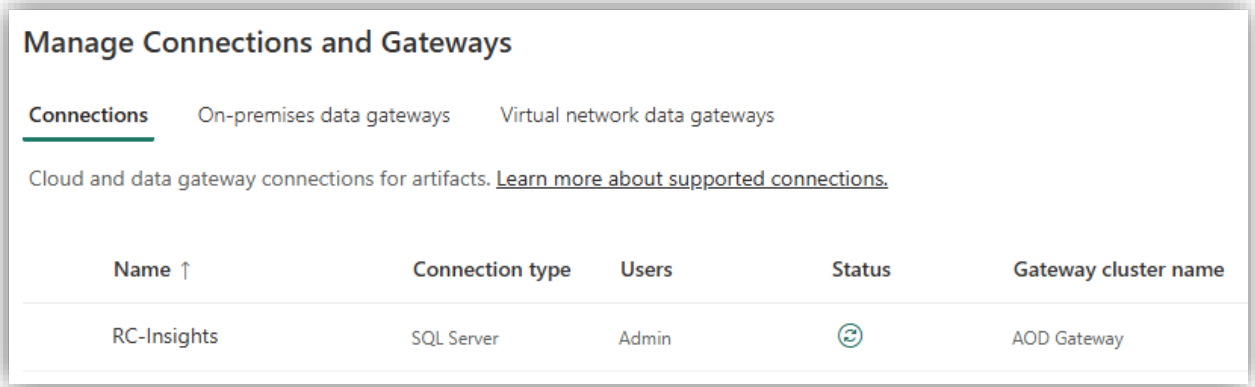
NOTE: It is highly recommended to check on 'Skip test connection' for faster data source creation process.

The screenshot shows a 'General' dialog box with a single dropdown menu:
1. 'Privacy level *': A dropdown menu with 'Public' selected.

Figure 21. Choose a Privacy level

For **Privacy level**, you can select either [**Private**], [**Organizational**], or [**Public**].

Once you are done, click [**Create**]. You will then see the new connection on this list:



Step 3: Connect installed dataset with the on-premises gateway

1. Go to your **Workspace** where you installed the app. Hover on the installed dataset then click [...] → [**Settings**]:

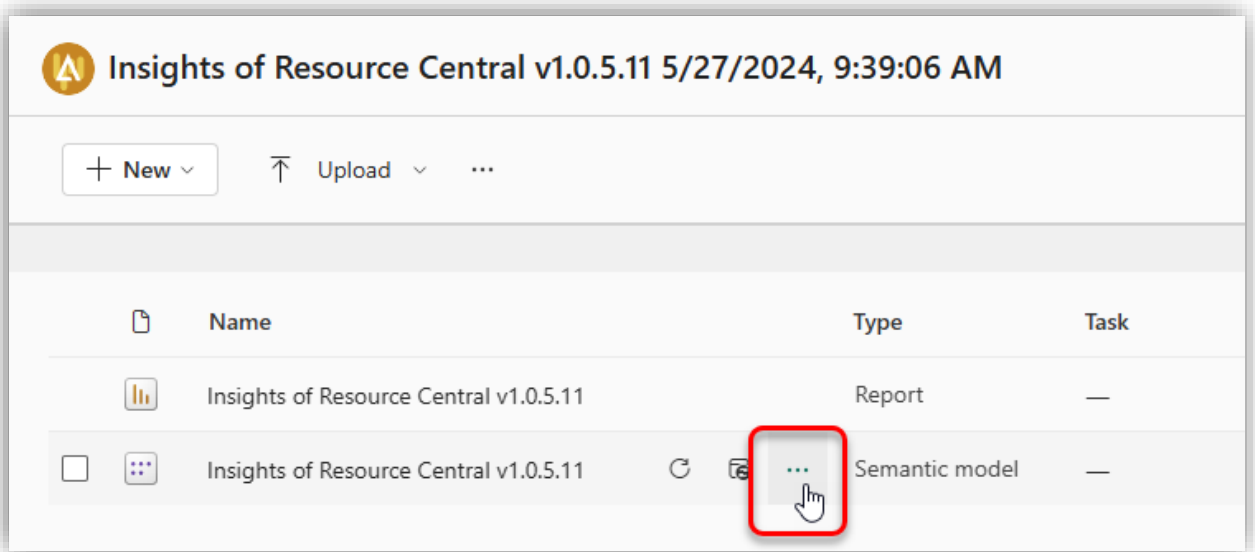


Figure 22. Go to Settings of the installed dataset

2. On the **Settings for Semantic model** screen, find and open '**Gateway and cloud connections**' section. You will be able to see which connection is mapped to the semantic model. E.g.:

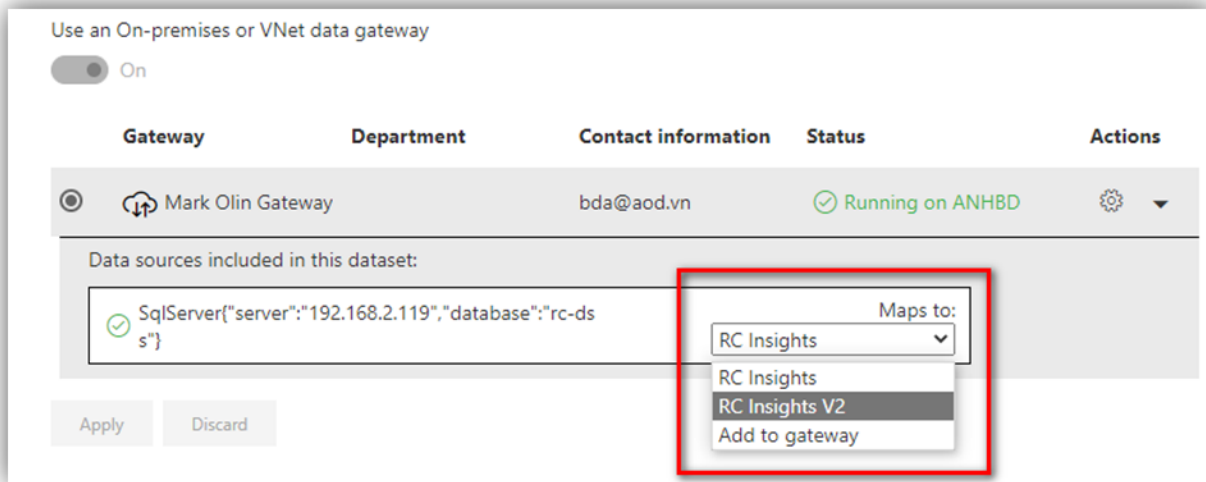


Figure 23. Go to Settings of the installed semantic model

Simply select the connection created from [Step 2](#) for **Maps to** field.

Click [**Apply**] to finish.

Appendix B – How to find your Local IP Address

Step 1: Go to the server where **SQL Management Studio** is installed.

Step 2: Find 'Command Prompt' in Windows Search Box

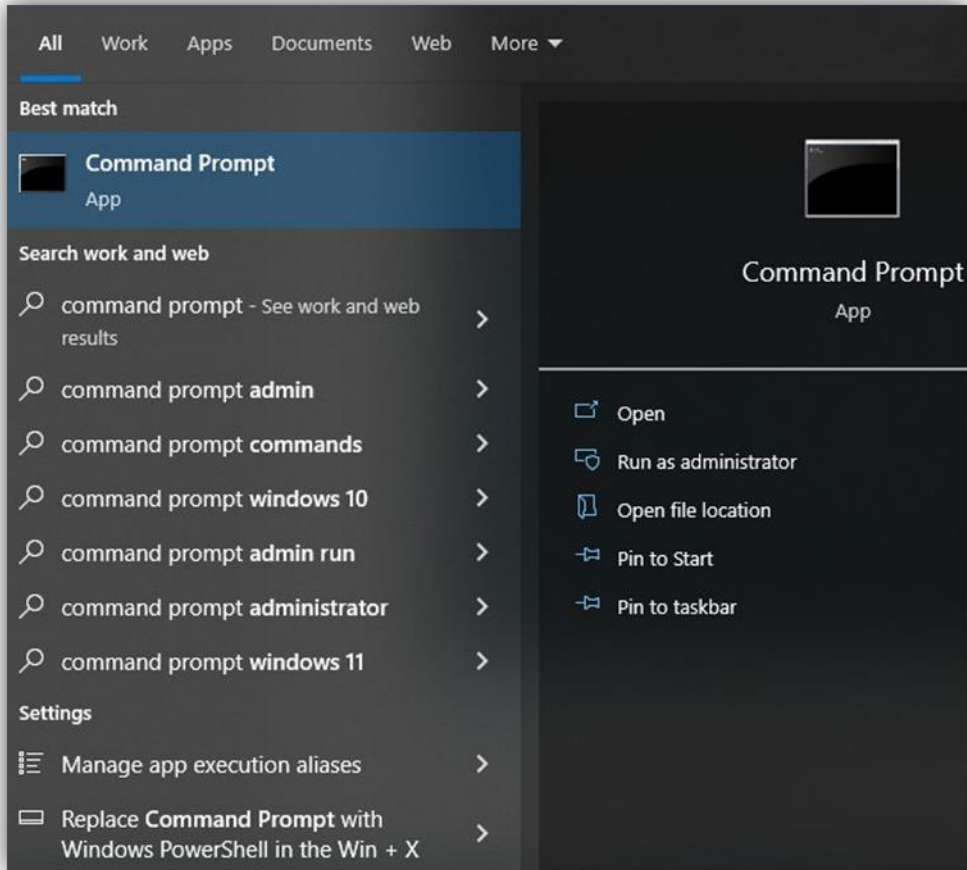


Figure 24. Find Command Prompt.

Step 3: Type 'ipconfig' and press [Enter]. IPv4 Address is your Local IP Address

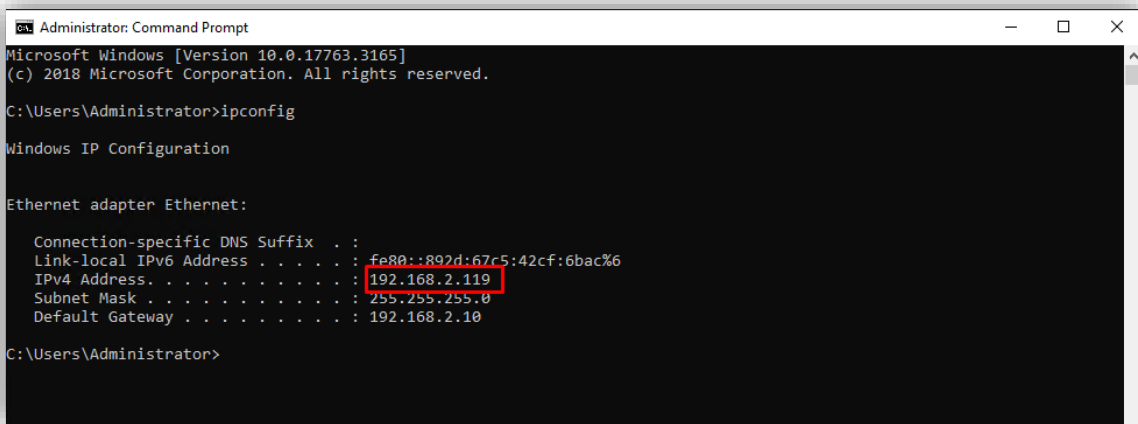


Figure 25. Find Local IP address

Appendix C – How to update app

NOTE: When you upgrade from an older version to the latest one, a new workspace will be automatically generated. In case you have installed the latest installation and made several modifications to it, and now want to reinstall it, the following section will guide you.

To reinstall app, open the Power BI app link that you received or search the app on Microsoft AppSource. The screen will appear as the figure below:

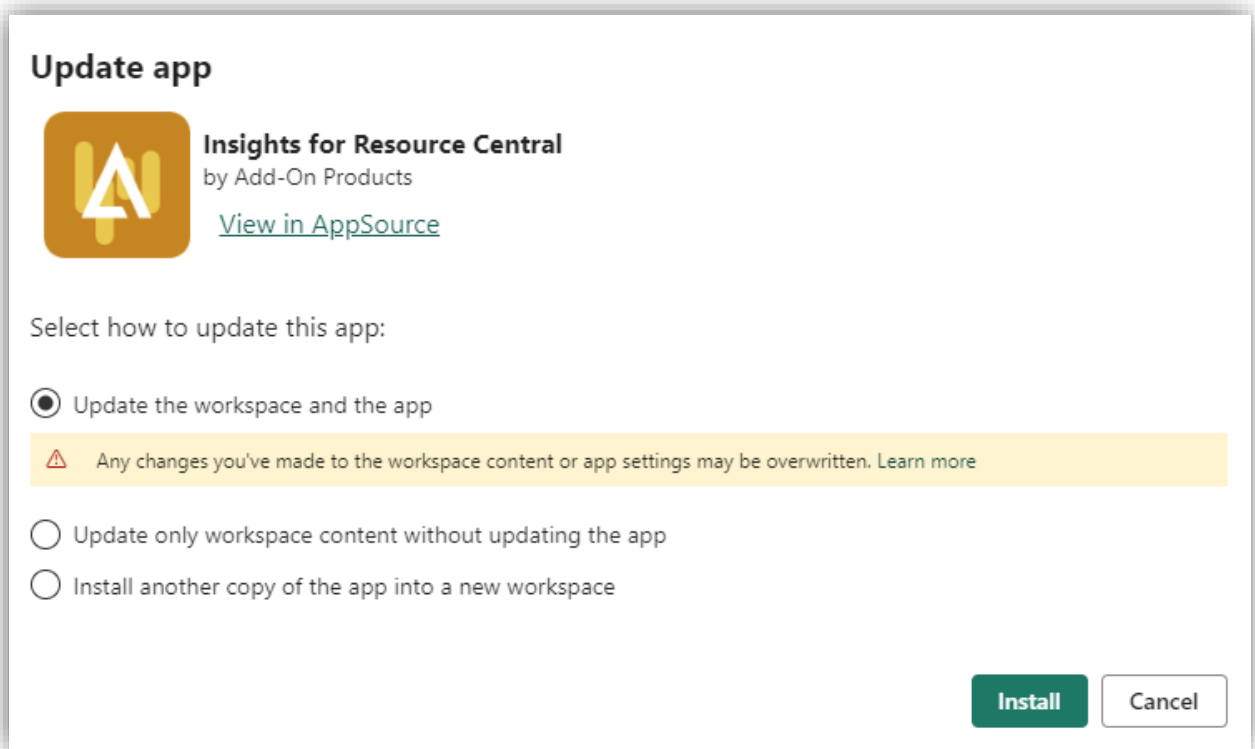


Figure 26. Update app

Option 1: Update the workspace and the app

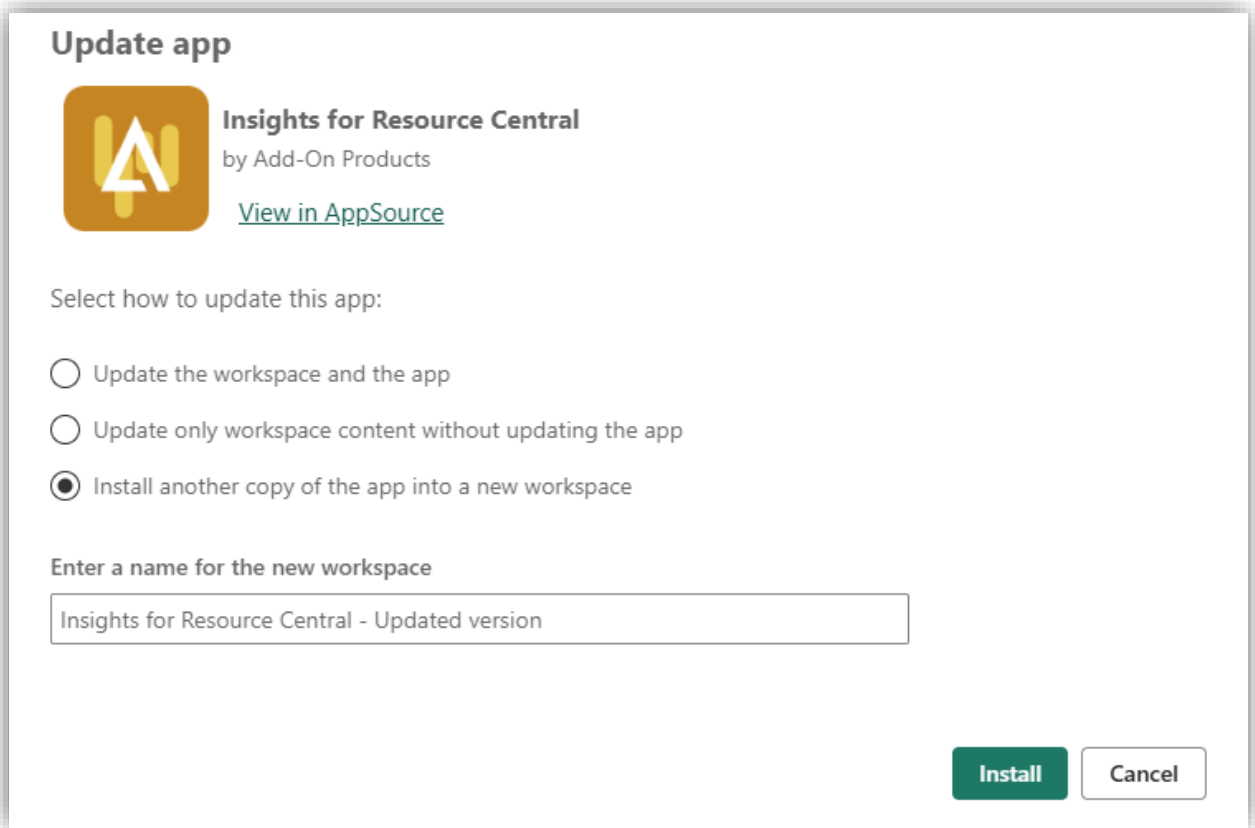
Once you click [**Install**] with the first option, all the modifications you have made before to the workspace content and app settings will be replaced with the default content and settings of the new installation.

Option 2: Update only workspace content without updating the app

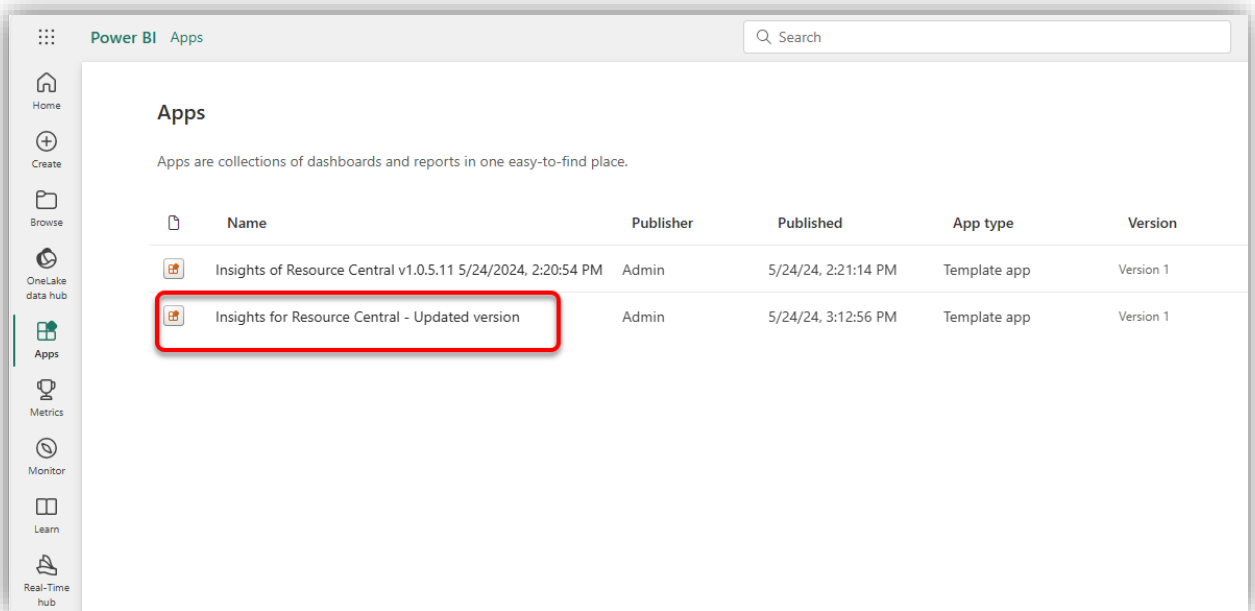
Choosing the second option will just replace any previous modifications to the workspace content with the default content of the new installation, leaving the app settings unaffected. Click [**Install**] to begin the update process.

Option 3: Install another copy of the app into a new workspace

If you want to maintain your old modifications to the workspace content and app settings from not being reconstituted, the last option will let you create an updated version of the app into a new workspace that exists in parallel to the old one.



Name the new workspace and click **[Install]**. The new version will be created and available in **Power BI Apps** section:



NOTE: After updating your app, remember to re-connect your data. For more details about this setup, refer to [this section](#).