Power BI Configuration

Visualize your User Portal data with our custom-built Power BI template.

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 events. This manual provides a step-by-step guide on how to install and configure the template or the template app, 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

There are three ways in which you can use Admin By Request with Power BI:

- Download the template file to use with **Power BI Desktop** only
- Download the template file to use with Power BI Desktop *and* **Power BI Online**
- Install the Admin By Request Power BI template application via Microsoft **AppSource**

The various Tasks covered in this manual are specific to the method of Power BI you are using to access this template:

Power BI Desktop-Only Users	Power BI Online Users	AppSource Users
Task A: Download Template	Task A: Download Template	Task A: Install Application
Task B: Enter Parameters	Task B: Enter Parameters	Task B: Connect to Admin By Request
Task C: Update Parameters	Task C: Publish to Web	Task C: Using the Navigation
Task D: Refresh Data	Task D: Configure Scheduled Refresh	Task D: Edit Dashboard
	Task E: Adjust Parameters	Task E: Setup Email Subscription
	Task F: Refresh Dataset	
	Task G: Create Custom Dashboard	
	Task H: Setup Email Subscription	

Identify your organizations preferred method and navigate to the appropriate section of this document.

After completing the installation / configuration Tasks described above, see the last section of this document (applicable to all methods), **Using the Report**.

Power BI Desktop-Only Users

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:

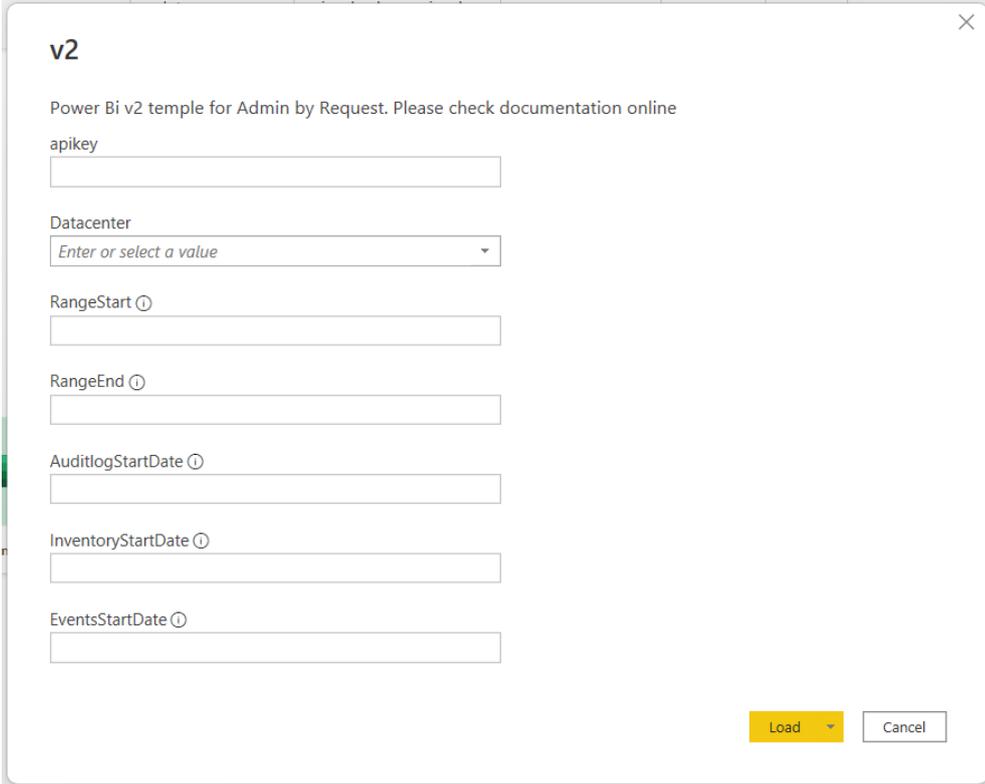<div align="center">

Download Template

</div>

> 📝 **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:

v2

Power Bi v2 temple for Admin by Request. Please check documentation online

apikey

Datacenter

Enter or select a value

RangeStart ⓘ

RangeEnd ⓘ

AuditlogStartDate ⓘ

InventoryStartDate ⓘ

EventsStartDate ⓘ

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.
- **EventsStartDate**: 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:

> ❗ **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:

3. Paste the API Key into the corresponding text box in Power BI:

apikey

📝 **NOTE:** The API Key is blurred out in the examples in this process manual.

4. From the **Datacenter** drop-down menu, select the appropriate Datacenter, defined by the rules below:

- **Based in Europe**: If your organization is based in Europe, select *dc1.api* – your data is stored in the European datacenters in the Netherlands and Ireland.
- **Based outside of Europe**: If based outside of Europe, select *dc2.api* – your data is stored in the US datacenters in Virginia and Washington.

Datacenter

dc1api

dc1api
dc2api

❗ **IMPORTANT:** If data fails to load and an error message appears after selecting the **Load** button (Step 7), re-open the template file and this time, select the opposite **Datacenter** from the drop-down menu.

5. Set the **RangeStart** value to *1/1/2000*, and the **RangeEnd** value to *1/1/2100*:

RangeStart ⓘ

1/1/2000

RangeEnd ⓘ

1/1/2100

📝 **NOTE:** These parameters can be set to any date far back enough in the past (**RangeStart**) and far enough forward into the future (**RangeEnd**); the values given here are our suggestions.

❗ **IMPORTANT:** Ensure you enter any dates in the parameter fields in the correct format. This could be D/M/YYYY or M/D/YYYY, depending on your location and settings. A yellow alert icon appears if you use the incorrect format:

RangeEnd ⓘ

1/18/2100   ⚠

Enter a DateTime value.

AuditlogStartDate ⓘ

6. Set the **AuditlogStartDate**, **InventoryStartDate**, and **EventsStartDate** values to approximately one week prior to the current date:

AuditlogStartDate ⓘ

7/7/2022

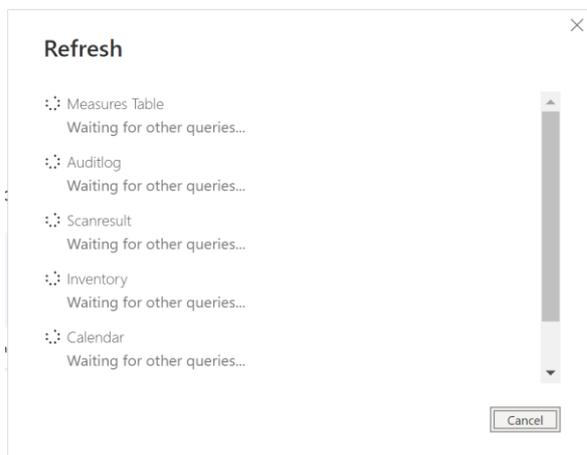InventoryStartDate ⓘ

7/7/2022

EventsStartDate ⓘ

7/7/2022

> **!** **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).

> **!** **IMPORTANT:** Note that in the Tool Tip for these three fields, the example uses the US Date order of M/D/Y, but your own Power BI app may be configured to require D/M/Y. An error message is displayed if you enter the Date in the incorrect order.

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

Load ▾   Cancel

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

Refresh   ✕

Measures Table
   Waiting for other queries...

Auditlog
   Waiting for other queries...

Scanresult
   Waiting for other queries...

Inventory
   Waiting for other queries...

Calendar
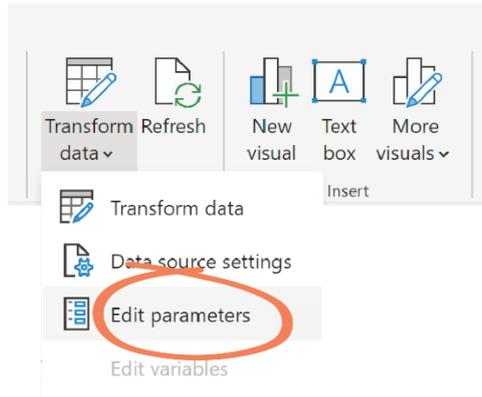   Waiting for other queries...

Cancel

Task C: Update Parameters

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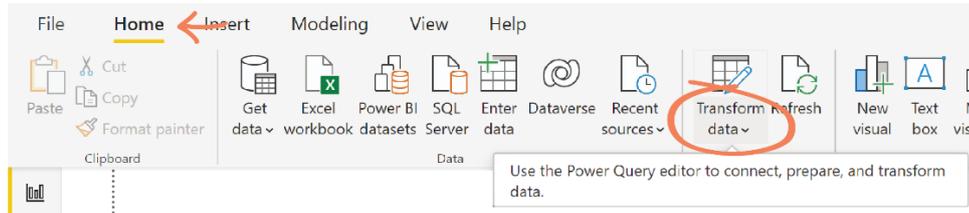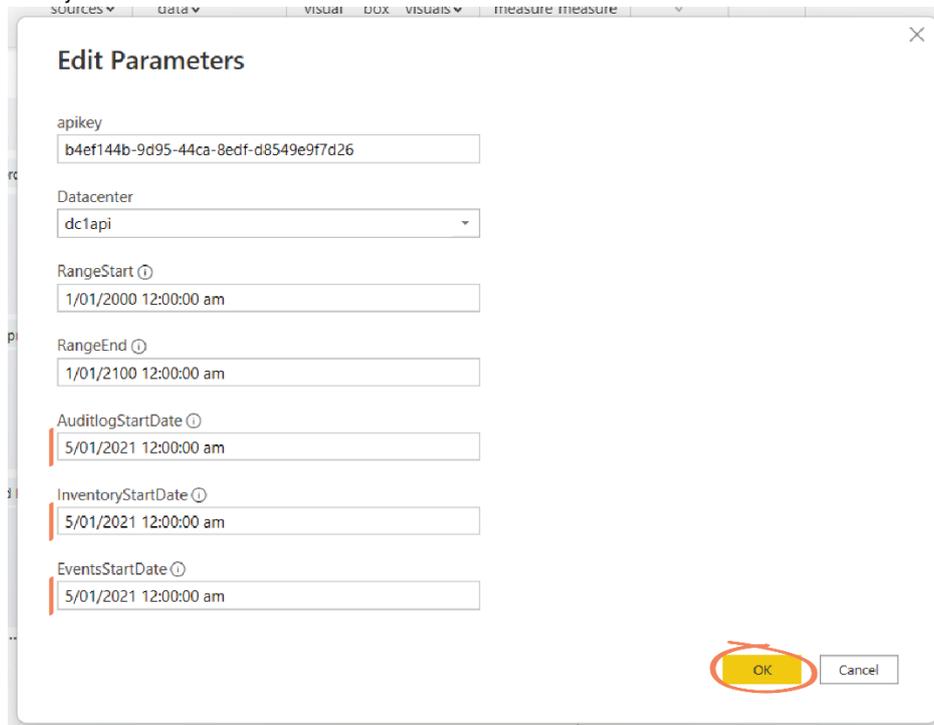

2. Click **Edit Parameters** from the drop-down menu:

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

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

Task D: Refresh Data

1. Select the **Refresh** button from the top tool bar:

Get the latest data by refreshing all visuals in this report.
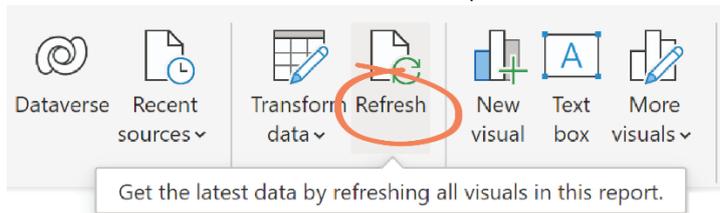
📝 **NOTE:** This action begins pulling data according to the new parameters and displays the loading window showing what is being updated. This process may take a while, depending on how far back you are pulling data from.

⚠ **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.

The Tasks described above are all that is required for users who only utilize Power BI Desktop. See the last section of this document, **Using the Report**, for further information on what the template has to offer and how to use it.

Power BI Online Users

Task A: Download Template

See Task A in the **Power BI Desktop-Only Users** section (above).

Task B: Enter Parameters

See Task B in the **Power BI Desktop-Only Users** section (above).

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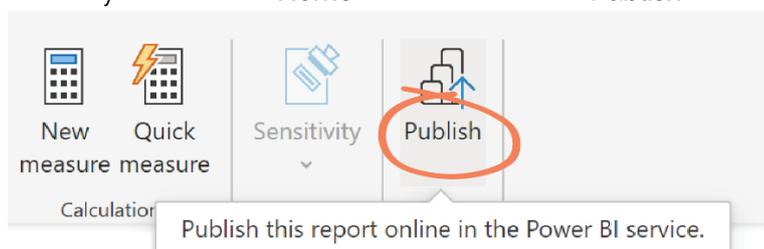
❗ **IMPORTANT:** If you have not yet saved the template file (.pbit) as a .pbix file, you will be prompted to do so at this point.

2. 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:
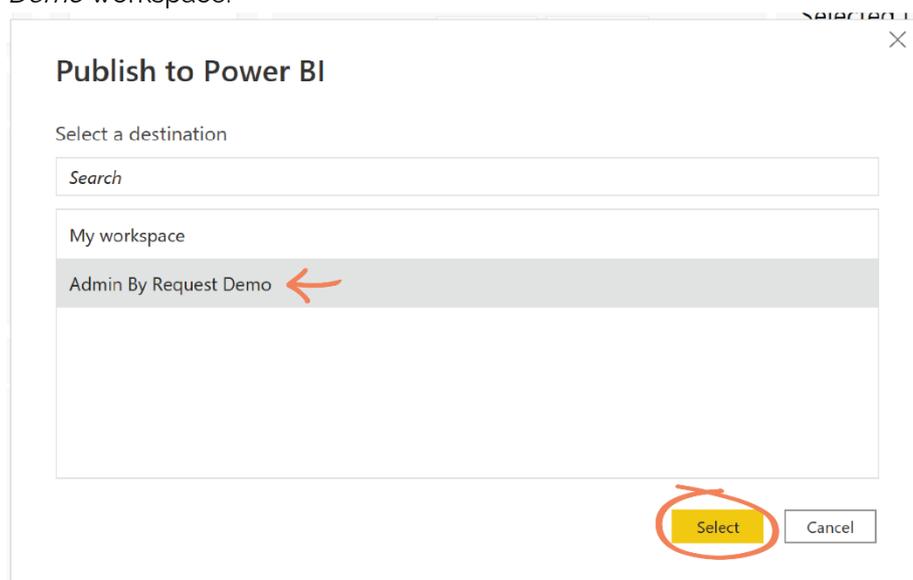
📝 **NOTE:** The desired workspace must already be created before this step. Clicking the **Select** button displays a progress window, "*Publishing '[name of report] to Power BI*".

3. Navigate to your Power BI online portal and select the **Workspace** icon from the left-hand tool bar:
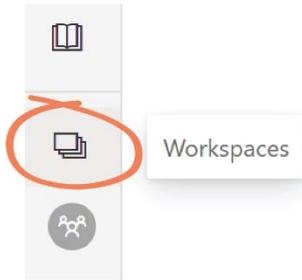
4. Locate and select the Workspace you published the Admin By Request report to from the Workspaces list:
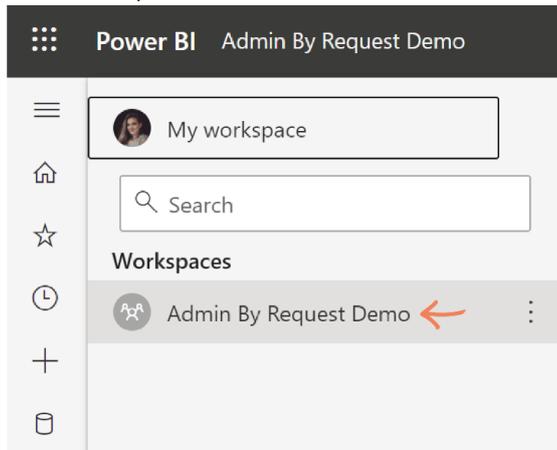
5. Locate the published report (in this example, the filename is *Demo*).

> 📝 **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):

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.

1. Select the menu icon (the three vertical dots) to the right of the Dataset, and select **Settings** from the menu that appears:
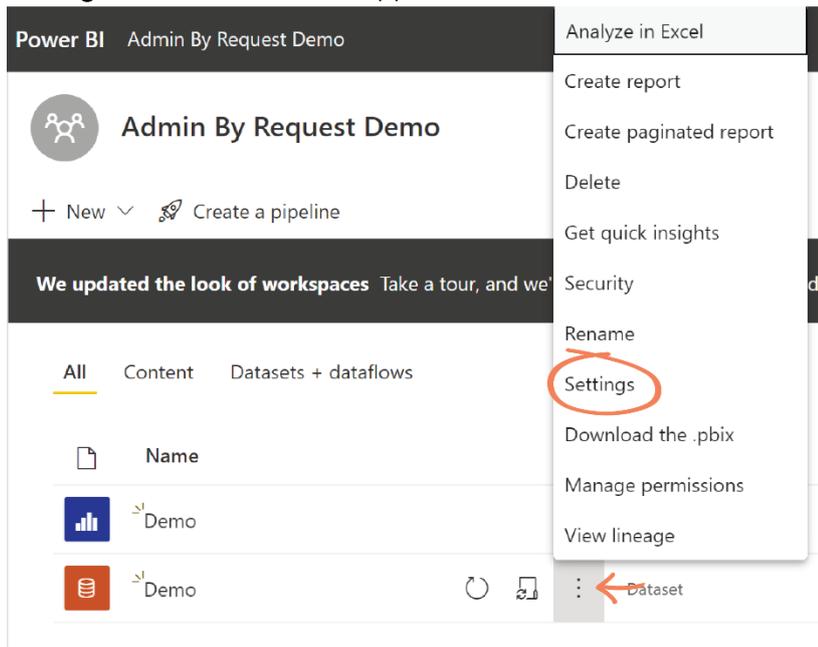
2. Expand the **Scheduled Refresh** item by clicking the drop-down arrow, and toggle the **Keep your data up to date** to **On**:
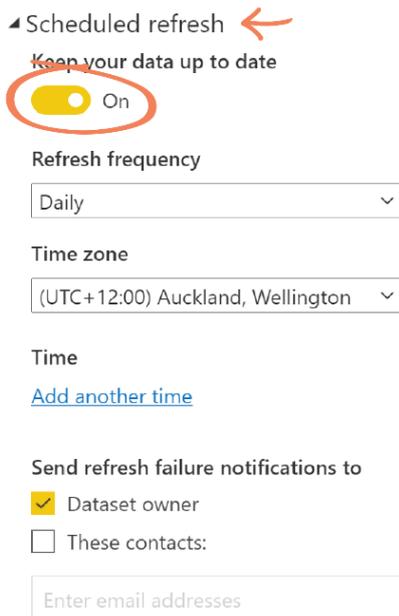
3. Use the drop-down menu to select the **Refresh frequency** and set any other parameters for the **Scheduled refresh** as desired (e.g., **Add another time** to run the refresh twice a day, etc).

4. When all parameters are set, click **Apply**:

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 entered 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
```
⟵

[Apply] Discard

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 now** 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. An in-progress animation displays to the right of the Dataset while the resfreh is running:

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: Create Custom Dashboard

Power BI online gives you the ability to create a custom Dashboard comprising your choice of visuals. This Task takes you through creating a custom Dashboard of Admin By Request visuals, which will be used to generate automatic email reports (Task H).

1. In Power BI web, navigate to your workspace and open your Admin By Request Report.

2. Determine which of the visuals (on any of the Report pages) you would like to add to your custom Dashboard (e.g., *CPU* from the Inventory – Hardware Overview page, and *By Hour* from the Load page).

3. For each of these visuals, select the **Pin visual** icon from the visual header:
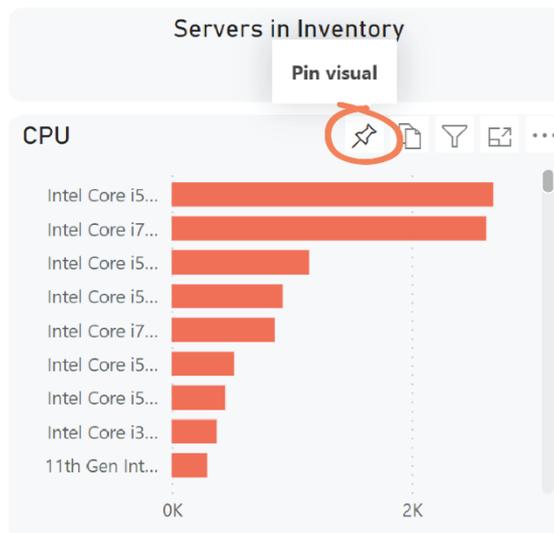
4. In the **Pin to Dashboard** window, under **Tile Theming**, select the **Keep current theme** radio button, under **Where would you like to pin to?** select the **New dashboard** radio button, and in the **Dashboard name** textbox, type *Admin By Request* (or as desired):
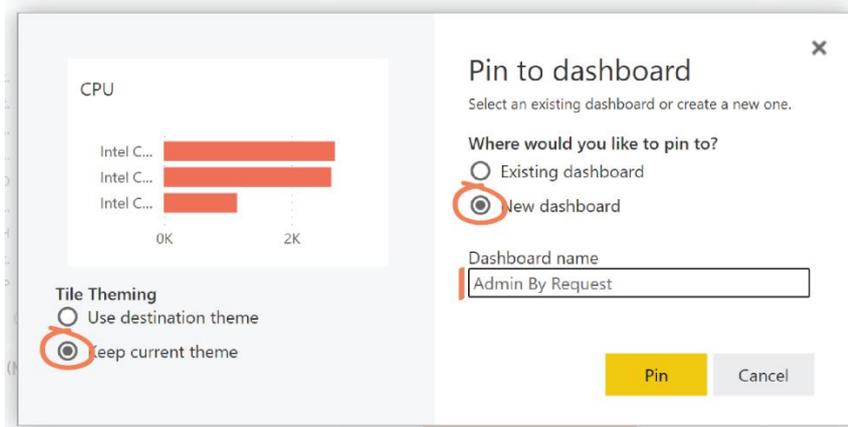
> 📝 **NOTE:** Selecting **Keep current theme** ensures the Admin By Request color scheme is carried over onto your custom Dashboard.

5. Click **Pin**:

6. Repeat steps 3 to 6 for each of the visuals you want to add to your custom Dashboard. When all of the desired visuals have been pinned, select **Go to dashboard** from the **Pinned to Dashboard** window in the top right-hand corner:
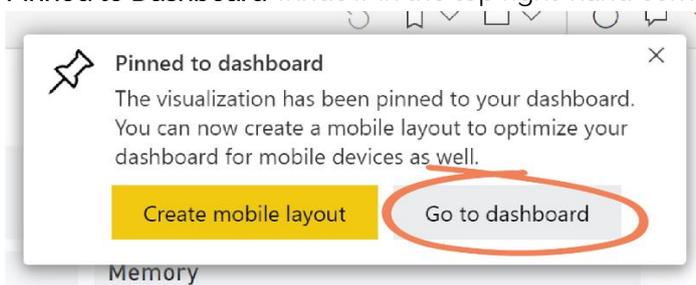
> 📝 **NOTE:** You can also locate the newly created Dashboard by navigating to your Admin By Request workspace and selecting the appropriate Dashboard from the list.

7. On the Dashboard are the all of the visuals that were added during this Task. In this example, *CPU* from the Inventory – Hardware Overview page and *By Hour* from the Load page:
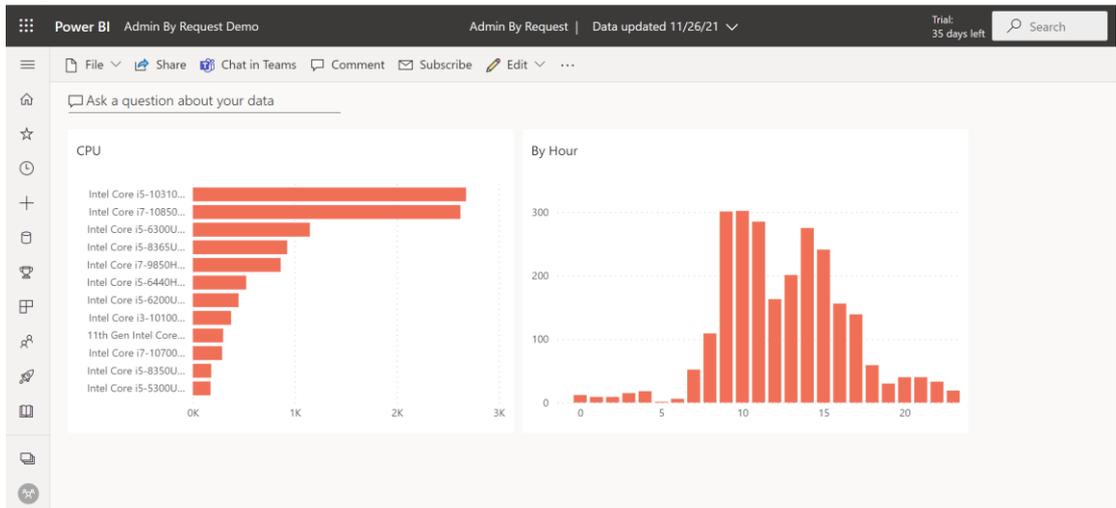
Task H: Setup Email Subscription

Power BI online provides functionality to generate regular reports out of your custom Dashboard, and automatically email them to a list of recipients.

1. In the custom Admin By Request Dashboard you created in Task G, select **Subscribe** from the top tool bar:

2. In the **Subscribe to emails** window, click the **Add new subscription** button:
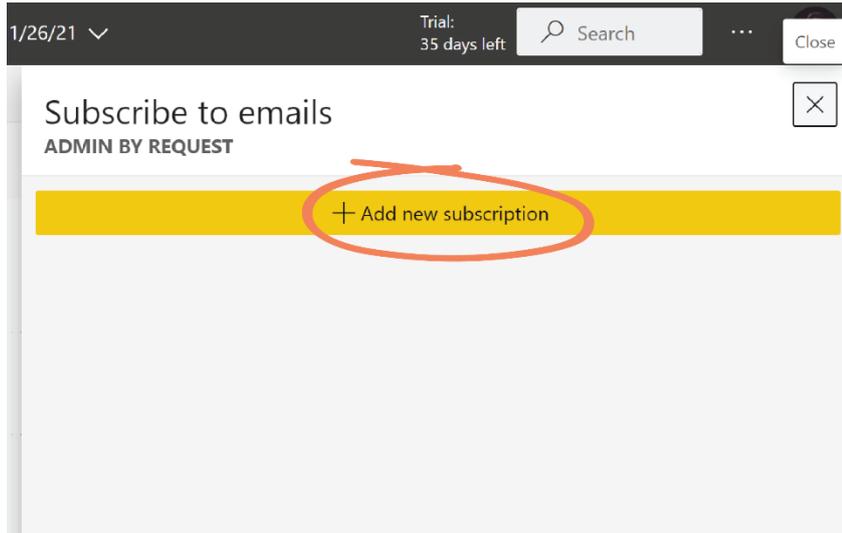
3. In the **Subscribe** field, locate and select the email addresses of the people you would like to send the custom Dashboard to. In this example, we are sending it to *sad@fasttracksoftware.com*:

4. Type an appropriate subject for the email in the **Subject** field and add an optional message. In this example, the **Subject** is *Admin By Request Weekly Report*:
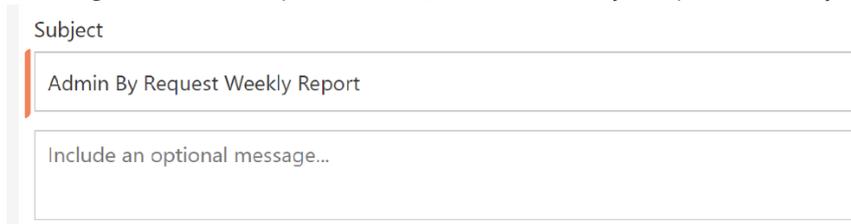
5. Set the **Frequency**, **Scheduled Time**, **Start date**, and **End date** as desired, and select what to include in the email:
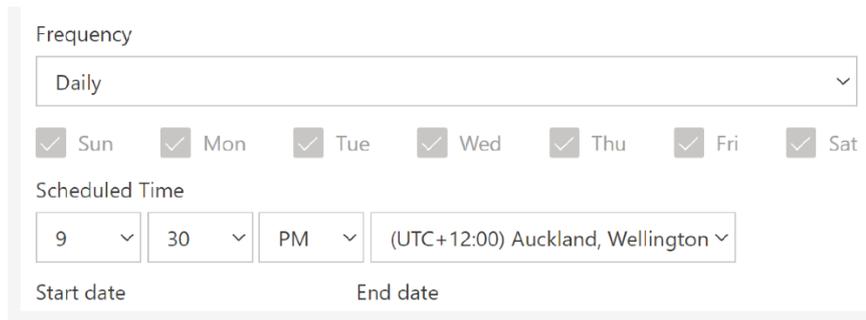
6. Click **Save and close** to set up the subscription:

> 📝 **NOTE:** You can also set up an email subscription for an existing page of the report. Go to the desired page, select the **Subscribe** button from the top tool bar, and follow the steps in this Task as normal.

For further information on what this template has to offer and how to use it, see section **Using the Report** (last section of the doc).

AppSource Users

Task A: Install Application

The Admin By Request Power BI app comes custom-built and ready to plug-in-and-go. The first step in this process is to install the template app from Microsoft AppSource.

1. In Microsoft AppSource, use the top search bar to locate the *Admin By Request* template app for Power BI.

2. Select the app and click the **Get it now** button.

   📝 **NOTE:** If you are not already signed in, you may be prompted to do so at this point. You may also be asked to input extra information before continuing to installation.

3. When installation is complete, open the app by selecting it from the list in the **Apps** page.

Task B: Connect to Admin By Request

For data to be loaded into the app, 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. Select **Connect your data** from the alert banner at the top of the page:
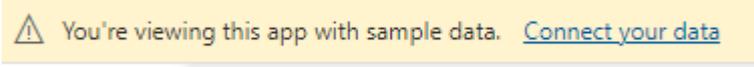
   ⚠ You're viewing this app with sample data. Connect your data

2. This action opens the **Connect to Admin By Request** window, which asks for the following parameters to be entered:

   Definitions
   a. **apikey**: Used to establish the connection to your Admin By Request tenant.
   b. **Datacenter**: The Datacenter in which your organization's data is stored.
   c. **AuditlogStartDate**: A date time field stipulating how far back you want to retrieve Auditlog data from.
   d. **InventoryStartDate**: A date time field stipulating how far back you want to retrieve Inventory data from.

3. You 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:

> ❗ **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:

4. Paste the API Key into the corresponding text box in Power BI.

apikey *

70a1-c034j9f-42808i05-b01b90-2c318a

> 📝 **NOTE:** The API Key in the above example is fake / inactive.

5. Set the **AuditlogStartDate** and the **InventoryStartDate** values as desired.

> ❗ **IMPORTANT:** The further back the start date, the more data that has to load into the app and the longer the loading time.

6. From the **Datacenter** drop-down menu, select the appropriate Datacenter, defined by the rules below:

   a. **Based in Europe**: If your organization is based in Europe, select *dc1api* – your data is stored in the European datacenters in the Netherlands and Ireland.
   b. **Based outside of Europe**: If based outside of Europe, select *dc2api* – your data is stored in the US datacenters in Virginia and Washington.

Datacenter *

dc1api ⌄

dc1api
dc2api

⚠ **IMPORTANT:** If data fails to load and an error message appears after selecting the **Load** button (Step 7), re-open the application and this time, select the opposite **Datacenter** from the drop-down menu.

7. Click the **Advanced** drop-down arrow and either leave the Scheduled Refresh toggle on (default), or toggle it off:

Advanced ∧

Automatically refresh my data daily (occurs at midnight)

🟡 On

8. Select the **Next** button, which begins populating the template with the specified data:

Next   Cancel

📋 **NOTE:** A loading window appears while the connection is established:

✕

✓ **Connect to Admin By Request**

⟲

Please hold on while we check for your credentials.

9. In the next window, leave the **Authentication method** drop-down set to **Anonymous**, and click the **Sign in and connect** button:

Task C: Using the Navigation

The seven+ pages of the template are all contained within *Report* in the Navigation menu. Once you've connected to your tenant, all pages can be accessed from within the **Report** page.

1. Click into the Report and navigate between pages from here, using the menu tiles on the left-hand side:

2. This menu stays constant throughout the report, appearing in the same location on every page.

3. There is one pre-built **Dashboard** page in this template application, located in the left-hand menu under **Report**. You can Pin your desired visuals to this Dashboard (covered in Task D).

Task D: Edit Dashboard

There is one Dashboard page that comes built into the app. You have the ability to Pin visuals to this Dashboard, or to create new Dashboards via the app workspace.

1. To Pin a visual to the existing Dashboard, locate the visual you want to Pin and select the **Pin visual** icon from the visual header:
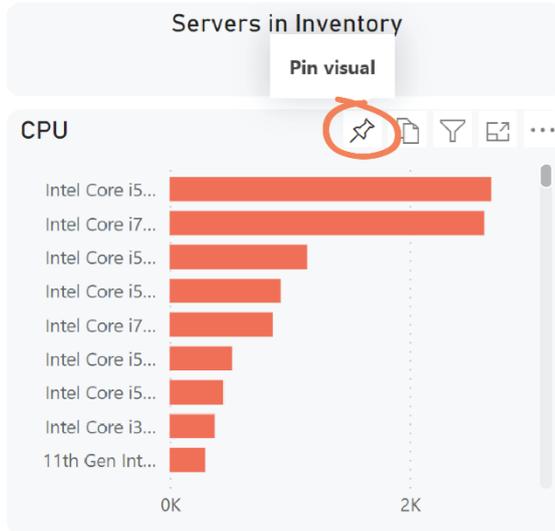
2. To create new Dashboards, select the **Edit app** icon from the top, right-hand menu:
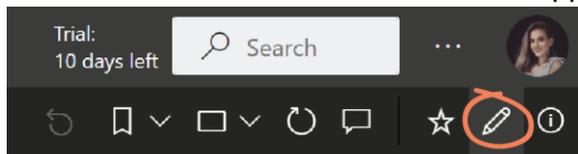
3. This action displays the following pop-up window. Select **Yes, go to workspace**:
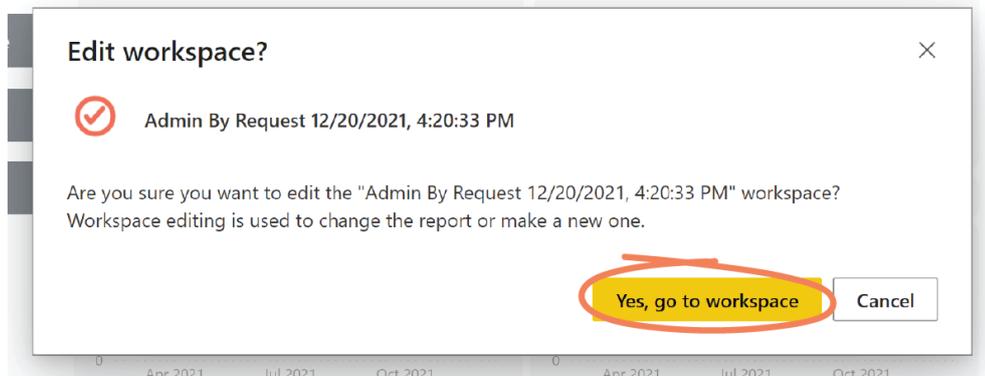
4. From here you have the option to delete the existing Dashboard, or click into the Report and add visuals to a new or existing Dashboard as described in Task G in the **Power BI Online Users** section (above).

> ⚠️ **IMPORTANT:** Any changes you make to the report, such as adding new Dashboards, will be wiped when you install a newer version of the Admin By Request application.

Task E: Setup Email Subscription

Power BI provides functionality to generate reports out of your custom Dashboard(s) and send them to users as regular, automatic emails.

1. In the app, navigate to the Dashboard that you want setup an email subscription for, and click the **Subscribe** button in the top menu:
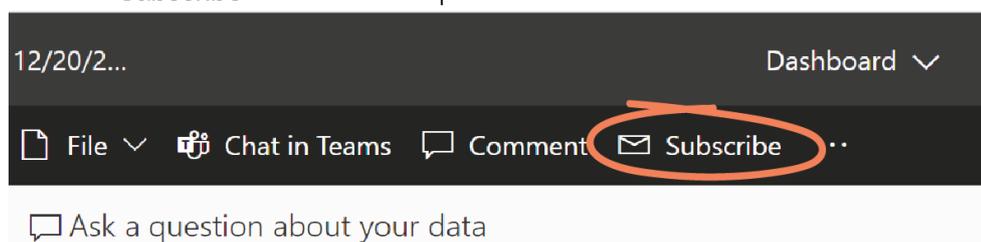
2. See Task H in the **Power BI Online Users** section (above) for subsequent steps on how to setup email subscriptions.

> **!** **IMPORTANT:** Any email subscriptions you set up for custom Dashboards will need to be reconfigured after installing a newer version of the Admin By Request app.

For further information on how to use template apps with Power BI, see the Microsoft documentation below:

https://docs.microsoft.com/en-us/power-bi/consumer/end-user-app-view

Using the Report

Understanding the Visuals

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:
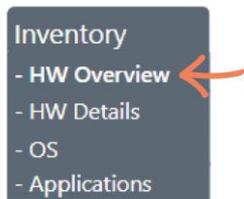
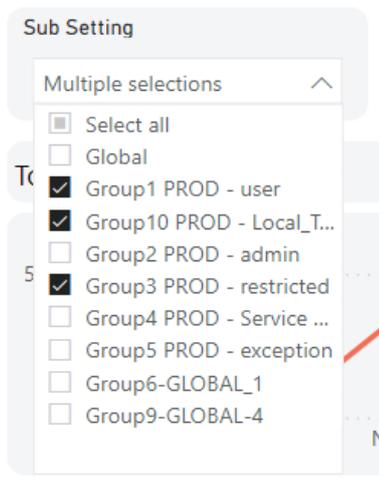- Hover over a data point to view its *Tool Tip*:
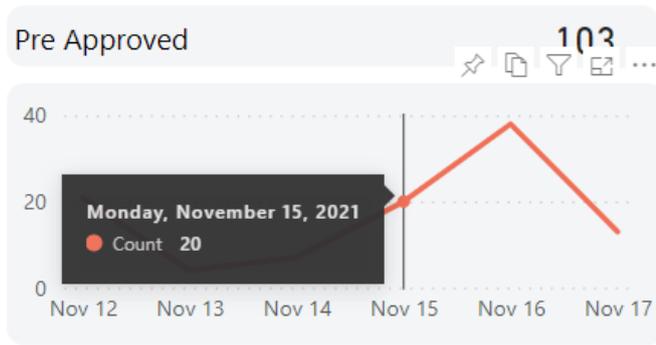
📝 **NOTE:** *Count* refers to the number.

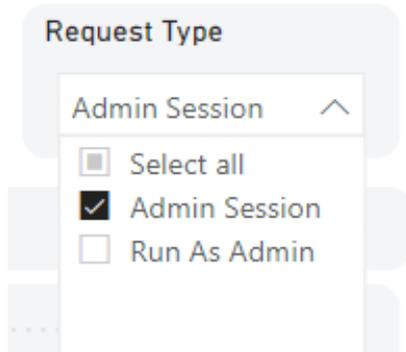- Click into a piece of data to filter out unrelated data:
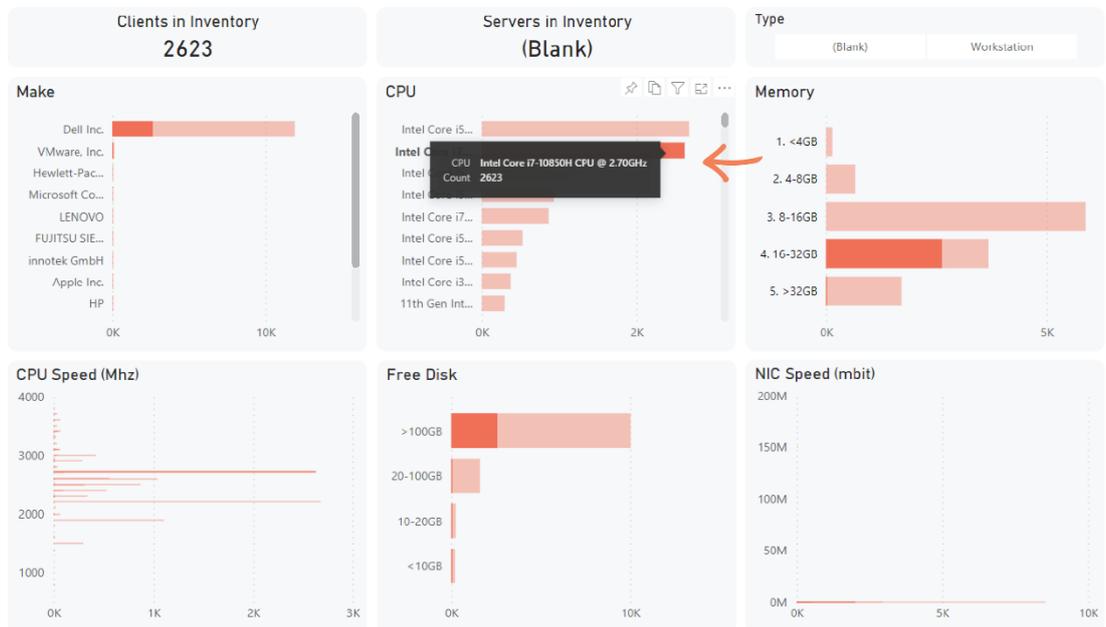
- The **Sub Settings** drop-down menu lets you filter by groups that you have defined in the Sub Settings page of your Admin By Request User Portal:

📝 **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 Function

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

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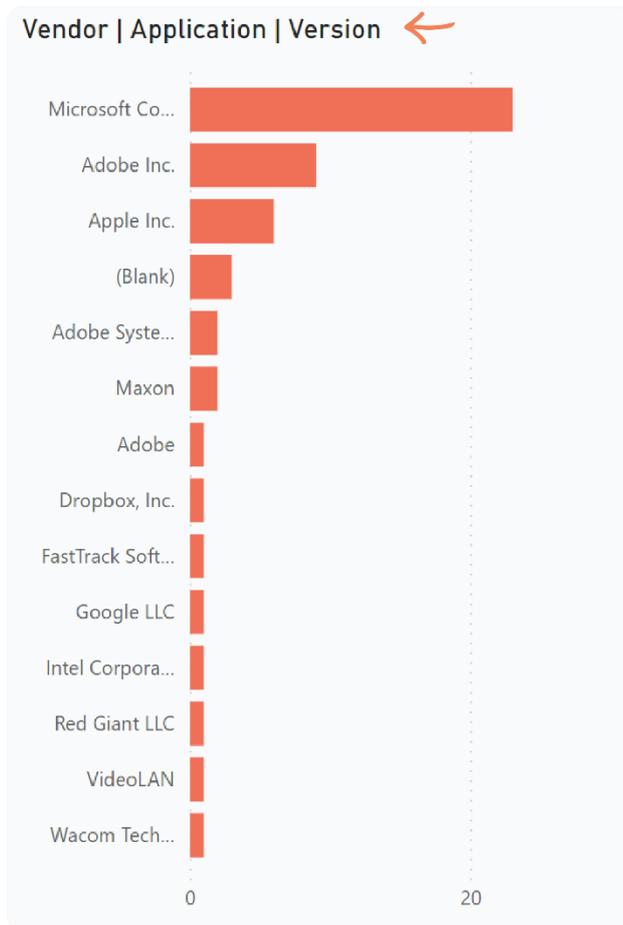
These three terms (separated by vertical dashes) refer to the three levels of data that can be expanded (i.e., drilled down) in the visual.

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 (the visual header) to turn on the **Drill Down** function:
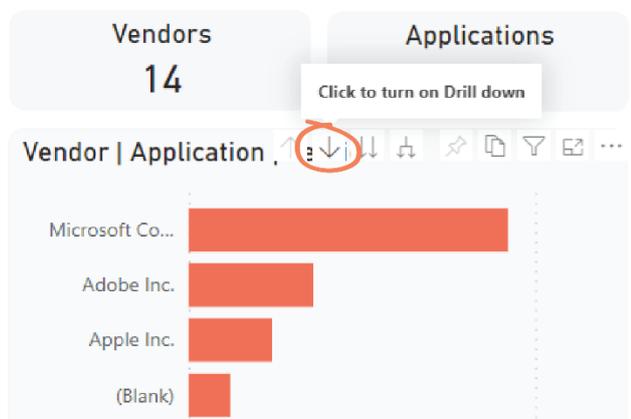
NOTE: Selection is indicated by the icon changing in appearance to the following:

Drill Mode is on: Click a data point to drill
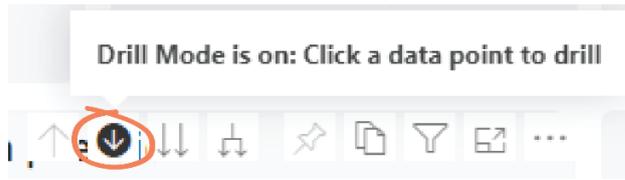
2. You now have the ability to drill down to the second level of data. Do this by clicking on the desired data segment – in this example, we have selected Adobe Inc.:
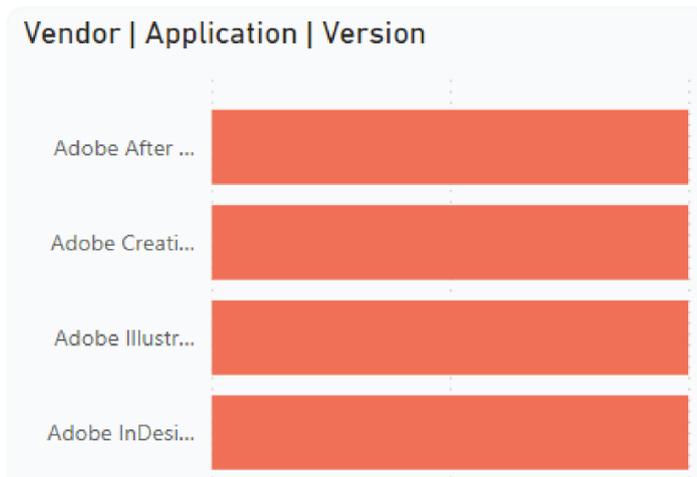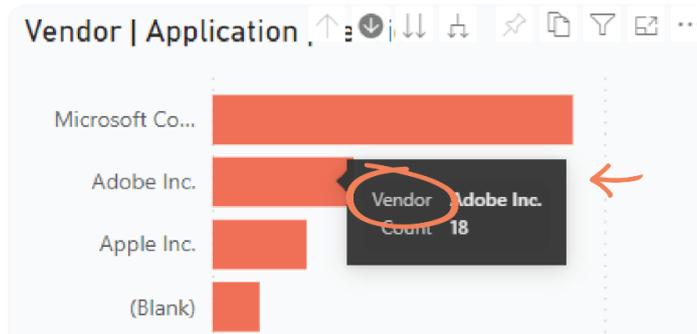
3. We are now at the second level of data: *Application*. To interact with this data while staying at the *Application* level, click the downward-facing arrow in the visual header (i.e., the **Drill Down** icon) to turn off drill down.

4. 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_.
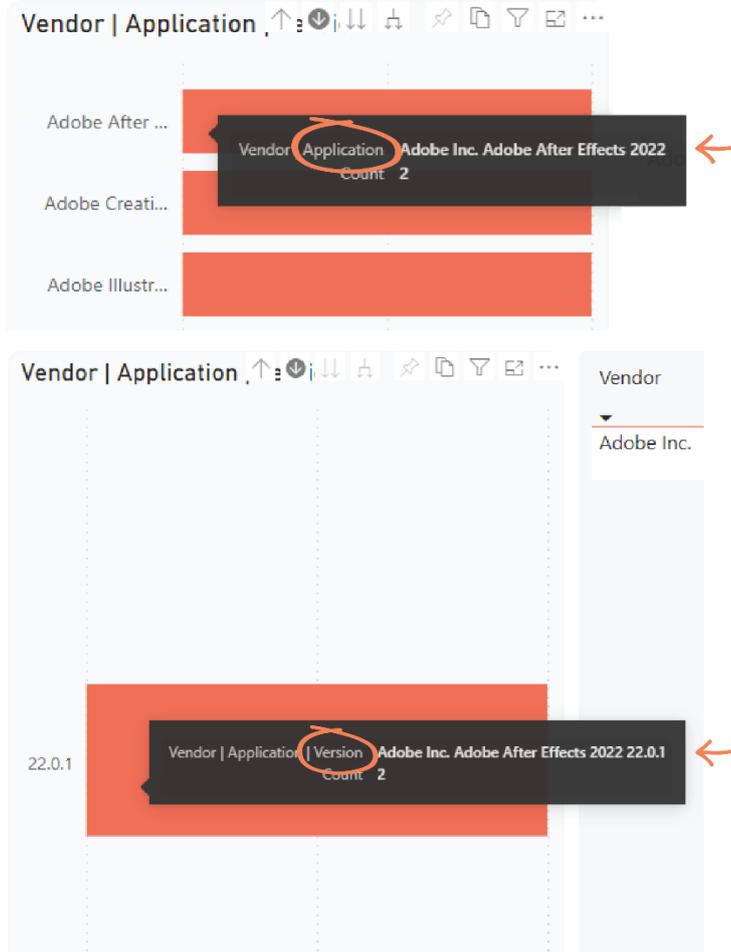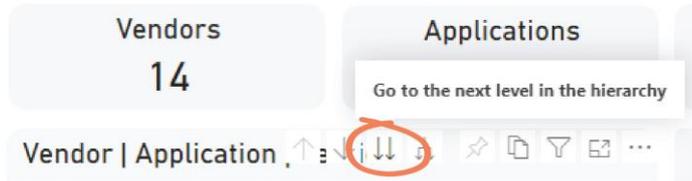

5. Drill back up by clicking the upward-facing arrow icon in the visual header to turn on the **Drill Up** function and navigate back up through the levels.
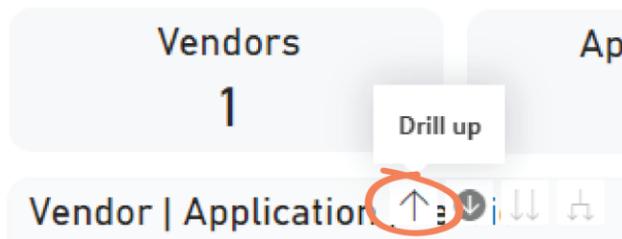
Other Functionality

In addition to **Drill Down**, the visual header of select visuals in the template provide the following functions:

- **Go to Next Level**:

- **Expand all down one level**: