



Power BI Analytics by ZAP

Configuration and Support policy

28 August 2019

Overview

This article covers the following:

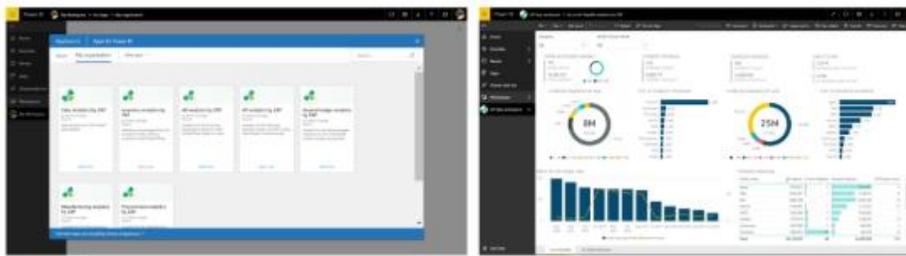
- Power BI Apps Overview
- Downloading and configuring Apps
- Support policy for deployment types and connectivity options
- Support policy for customizations

ZAP has packaged a set of Power BI analytics for Unified data models. That is, data models that are Unified Layer-enabled (created from ZAP Data Hub SaaS or on-premises v9 and later).

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



Power BI - Deployment and customisation experience



There are several pathways for deploying the ZAP 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 the Apps, the below configuration step-by-step guide for Apps applies both the **Trial**

and **Config** pathways. The **Customize** pathway involves sourcing the PBIX files from ZAP HelpDesk and doesn't require installing the Apps.

Power BI App Configuration - Step by Step

1. Click any of the Power BI App **links** above to deploy them, you will need to **sign-in** to your organization's Power BI;
2. Click **Install** to deploy the App

Note: You may alternatively deploy the ZAP Apps from AppSource and then click **Get it now** to install them (refer to Microsoft's documentation for more help).

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 Unified Data Model, click the **Connect** button

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

Get started with your new app

Explore your app with sample data, go to the workspace to customize as needed and share with your organization, or connect your data to get up and running.

Connect your data

Connect to a data source to view your new app with your own data.



Connect

Explore with sample data

Open your new app to start exploring with sample data.



Explore app

Customize and share

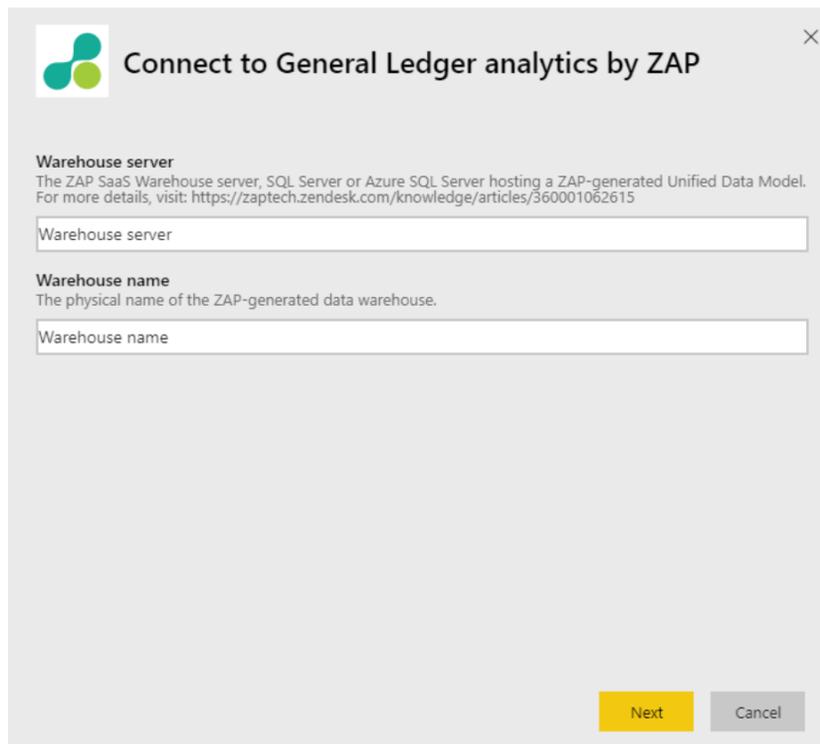
Your app comes with a workspace, so you can customize and share it, just like an app you built yourself.



Edit workspace

4. The following screen will pop-up:

- Replace the value of the **Warehouse server** to the appropriate Server name (found in the Model Server resource in ZAP);
- Update the value of the **Warehouse name** to the physical database name (found in the Properties pane of your ZAP Data Model - this value usually matches the Model name);
- Then click the **Next** button.



Connect to General Ledger analytics by ZAP

Warehouse server
The ZAP SaaS Warehouse server, SQL Server or Azure SQL Server hosting a ZAP-generated Unified Data Model.
For more details, visit: <https://zaptech.zendesk.com/knowledge/articles/360001062615>

Warehouse server

Warehouse name
The physical name of the ZAP-generated data warehouse.

Warehouse name

Next Cancel

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

- Select the **Basic** authentication method;
- Enter a valid **User name** and **password**. This can be found in the Warehouse section of a ZAP Data Model's Role;
- Then click **Sign in** to apply.

The screenshot shows a dialog box titled "Connect to General Ledger analytics by ZAP". It has a close button (X) in the top right corner. The dialog contains the following fields and controls:

- server:** A text input field with a blurred value.
- database:** A text input field with a blurred value.
- Authentication method:** A dropdown menu currently set to "Basic".
- User name:** A text input field with a blurred value.
- Password:** A password input field with masked characters (dots).
- Privacy level setting for this data source:** A dropdown menu.
- Buttons:** "Sign in" (yellow) and "Cancel" (grey) buttons at the bottom right.

Note: The dataset will then automatically refresh. Depending on the volume of data in your ZAP Unified Data Model, this might take some time.

6. Navigate to the **Reports** tab, and open the report to browse ZAP's dashboards;

Note: If the Report was open prior to processing the data set; you may have to click the Refresh button to see your new data.

7. Review User Access to the App workspace;

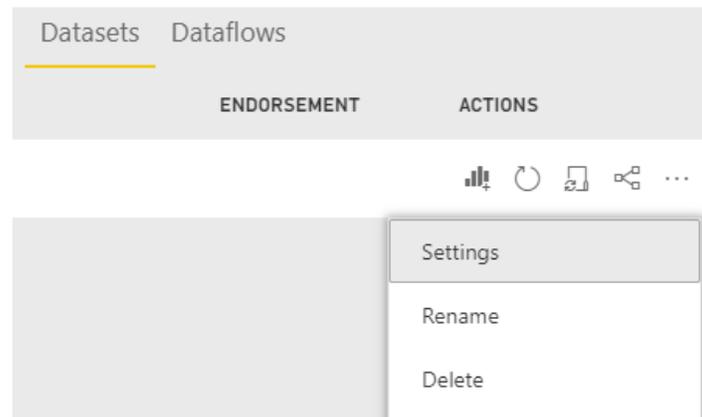
8. Repeat Steps 1 to 11 for every other App.

Notes:

- Consider creating Scheduled refreshes for your Apps,
- ZAP also makes the PBIX files of those Power BI Apps available for customizing data sets. Please contact ZAP Support through the HelpDesk to request access.
- Every App and PBIX file includes sample data by default.
- Reports can be edited directly in the Power BI service workspace.

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

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



3. Locate and expand the **Parameters** section,
 - Update the value of the **Warehouse server** to the appropriate Server name (found in the Model Server resource in ZAP)
 - Update the value of the **Warehouse name** to the physical database name (found in the Properties pane of your ZAP Data Model - this value usually matches the Model name);

The screenshot shows the 'Settings for General Ledger analytics by ZAP' configuration page. The navigation tabs at the top are General, Dashboards, Datasets (selected), Workbooks, Dataflows, Alerts, and Subscriptions. The left sidebar shows 'General Ledger analytics by ZAP'. The main content area includes:

- 'This dataset has been configured by' followed by a redacted name.
- A link for 'Refresh history'.
- 'Gateway connection' (expanded).
- 'Data source credentials' (expanded).
- 'Parameters' section with two fields:
 - 'Warehouse name': The physical name of the ZAP-generated data warehouse. Value: myAzureSqlServer.database.windows.net
 - 'Warehouse server': The ZAP SaaS Warehouse server, SQL Server or Azure SQL Server hosting a ZAP-generated Unified Data Model. Value: myZAPDataWarehouse
- 'Apply' and 'Discard' buttons.
- 'Scheduled refresh' (expanded).
- 'Featured Q&A questions' (expanded).
- 'Endorsement' (expanded).

4. Click **Apply**

5. In the **Data source credentials** section, configure the connection to the ZAP Unified Data Model

- Select **Basic** authentication
- Enter the **username** and **password** of a Warehouse SQL User (as created in your ZAP Model Role)
- Then click **Sign in** to apply.



Settings for General Ledger analytics by ZAP

Configure General Ledger an... ✕

server

database

Authentication method

User name

Password

Privacy level setting for this data source

End users use their own OAuth2 credentials when accessing this data source via DirectQuery. [Learn more](#)

6. Go back to the App workspace, then navigate to the **Datasets** tab and click the **Refresh** icon to refresh the data;

7. Navigate to the **Reports** tab, and open the report to browse ZAP's dashboards;

Note: If the Report was open prior to processing the data set; you may have to click the Refresh button to see your new data.

8. Review User Access to the App workspace;

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

Support policy for deployment types and connectivity options

Data warehouse

Template Apps published to Power BI Service only support connections to:

- ZAP data warehouses generated as an Azure SQL database
- ZAP SaaS data warehouses v2 (*Provisioned Azure SQL* environment type)
- Any ZAP-generated data warehouses as Azure SQL Databases

As of today, Template Apps **do not** support:

- local SQL Server databases, accessed via a Power BI Enterprise or Personal Data Gateway
- ZAP SaaS data warehouse v1 (*Provisioned SQL Server* environment type).

Customers with On-premises data warehouses or wanting to customize their Power BI datasets can request access to download the Power BI Analytics by ZAP for their Unified Data Model directly from the ZAP HelpDesk.

Publishing the downloaded PBIX files from Power BI Desktop is supported for the following deployment types:

- To a Power BI Service workspace
 - local SQL Server data warehouses, accessed via a Power BI Enterprise or Personal Data Gateway
 - ZAP SaaS data warehouses v2 (*Provisioned Azure SQL* environment type)
 - Any ZAP-generated data warehouses as Azure SQL Databases
- To a Power BI Report Server workspace
 - local SQL Server data warehouses
 - ZAP SaaS data warehouses v2 (*Provisioned Azure SQL* environment type)
 - ZAP SaaS data warehouse v1 (*Provisioned SQL Server* environment type), accessed via a Power BI Enterprise or Personal Data Gateway
 - Any ZAP-generated data warehouses as Azure SQL Databases

Authentication

Windows Active Directory authentication can be used with on-premises datawarehouses.

To connect to a ZAP SaaS or Azure SQL data warehouse, Basic authentication must be used. This can be configured in ZAP in a Model Role as a Warehouse user.

Support policy for customizations

ZAP's Power BI Apps on AppSource as well as the PBIX files that ZAP makes available for download rely on a given set of pipelines and a given structure of columns defined by our Unified Layers and Unified Data Models.

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

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

- Unified Layer resources are edited and standard columns are modified or removed.
- Unified Layer Steps are removed from pipelines.

If you require customizing your ZAP data model, then the ZAP Power BI Apps may only continue to function if your changes do not impact the structure of the PBIX files, i.e. the default set of Unified Layer columns.

You may however customize Steps in your pipelines to modify the data mapped to Unified layer columns or bring more columns in the Unified Layer Step of your pipelines. ZAP cannot guarantee that a customized Unified layer-pipeline and Power BI dataset will continue to return correct data for a given Unified Data Model. Once customized, it becomes your sole responsibility.

In the event that ZAP must introduce any kind of breaking change, you will be notified and more information will be provided in this following Knowledge Base Article which covers [Unified Layer and Solution versions support](#).

If you require customizing the PBIX files, you may request access directly to ZAP Support via the ZAP HelpDesk.

Whilst this path allows full control and flexibility for modifying and extending the Power BI data sets and reports, also establishing a good starting point for your Power BI analytics journey, you acknowledge that, unlike Apps, the PBIX files don't auto-update. Maintaining those files becomes your sole responsibility.

In this case, you will only receive limited support from ZAP, as ZAP cannot be responsible for your customized design.

More Help

Customers with an active license of ZAP Data Hub may find more help online at:

- ZAP HelpDesk: <https://zendesk.zapbi.com>
- ZAP Online Help: <https://help.zapbi.com>

