



Fusion5 Well-being Check-in App

Installation & Set-up Guide

22 May 2020

FUSION5
Business Solutions

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Notes:

- These instructions are provided for version 1 of the app
- This app is provided free of charge for use of your own volition
- No warranty is provided with this app template
- Feel free to change this app with your own branding and imagery and add further functionality if desired. And feel free to get in touch and share with us how you've gotten creative with this template.

App Template Contents

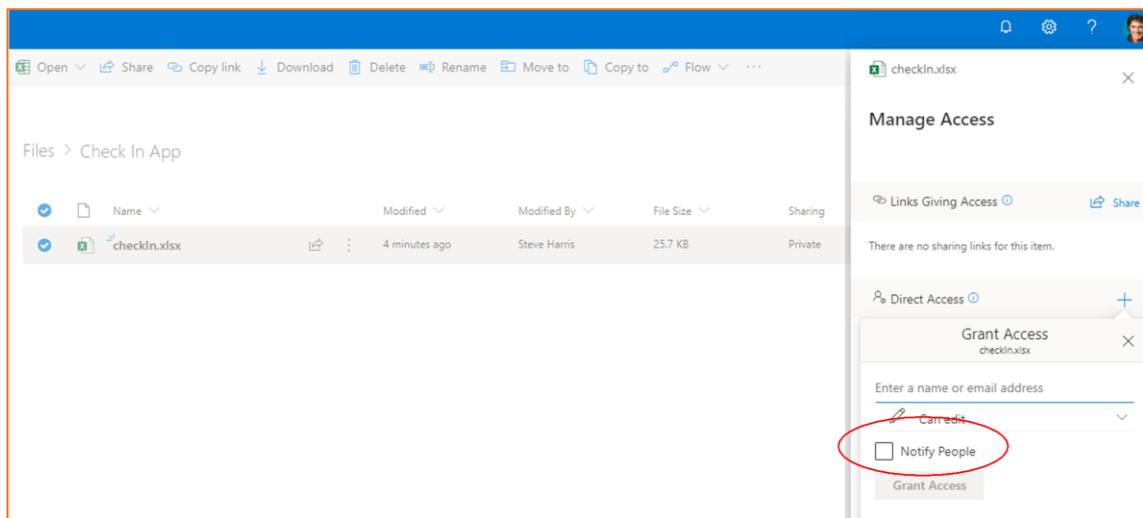
The downloadable zip file for this app contains:

- An Excel file that is the data storage for all check-ins your team members submit
- A Power App that you can connect to this Excel file in OneDrive for Business (or SharePoint)
- A Power BI report template that provides a "get started" report that you can tweak and add to as desired.

1 Instructions for users familiar with PowerApps

1.1 Import the Excel File in OneDrive for Business

- Uploaded the provided 'checkIn.xlsx' Excel file into a OneDrive for Business folder of your choice first, e.g. create a folder called Check-In App.
- Share this file with all the users who you intend to use the Power App (*select file >> click*  *A few sec* >> **Manage Access**); Be careful to **Uncheck** the Notify People via email option prior to sharing:



1.2 Import the Power App solution

- Import the Power App zip file into your preferred instance (*Import Canvas App* button)
- Open the App in edit mode
- Delete the two existing connections to OneDrive for Business
- Create a new connection with OneDrive for Business, pointing to the location where you saved the Excel file 'checkIn.xlsx'. Select 'Checkin' and 'Table3'
- Save and Publish the App
- Test the App (make sure the Excel file is closed to avoid record locks)
- Open the Excel file via OneDrive and see the recently created record

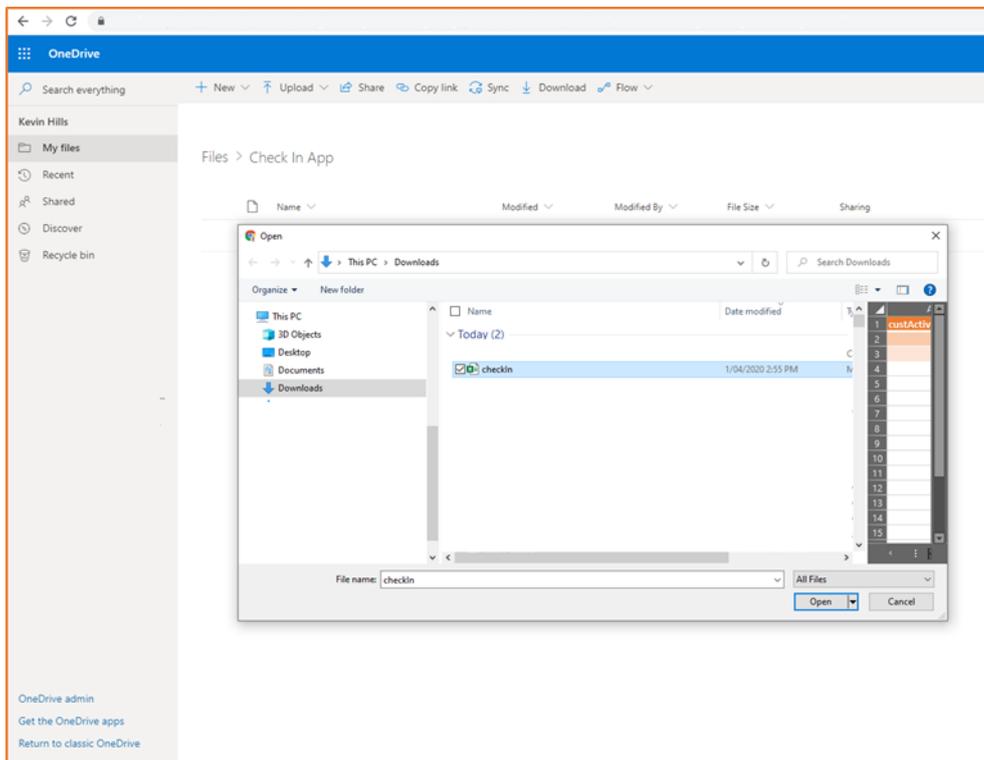
1.3 Import the Power BI Report

- From Power BI online create a new dataset from OneDrive for Business
- Make sure the file selected is the 'checkIn.xlsx' Excel
- Go to Power BI Desktop
- Change the data source setting to the 'checkIn.xlsx' file, by clicking on Home > Transform Data > Data Source Setting > (select the 'checkIn.xlsx' file)
- Check and validate your Power BI report is working (note that you can also add more report pages and visualisations as you wish to)
- The Power BI can be Published to a Workspace. Note that sharing reports requires those with whom it is shared to hold a Power BI Pro license (or they can use Power BI Desktop).

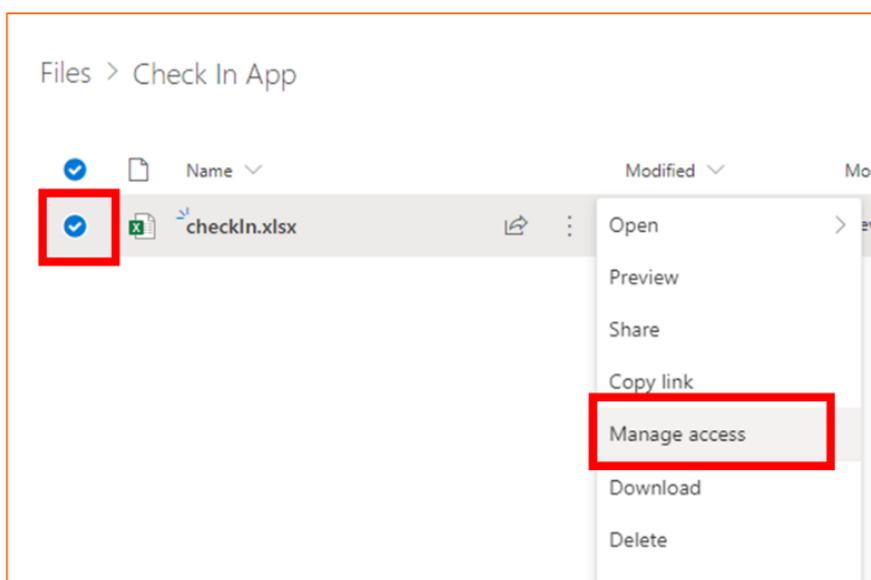
2 Detailed Instructions

2.1 Importing the Excel file in One Drive for Business

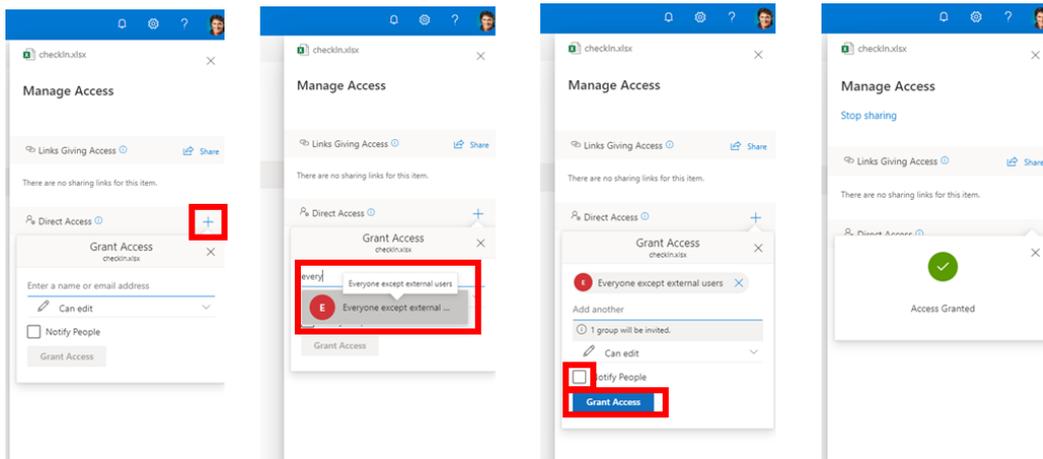
- Uploaded the provided Excel file into a OneDrive for Business folder of your choice first:



- Share the file with users; select the file and click on 'Manage Access'



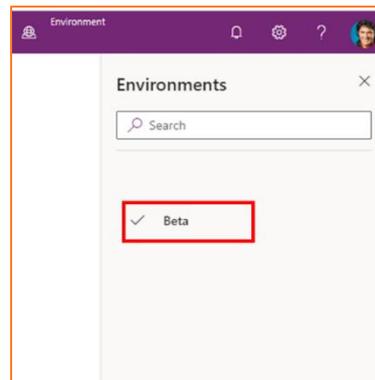
- A new window will open at the right side of the screen. Share the file with the desired users (in this example the file is being share with all users - 'Everyone' - in the environment):



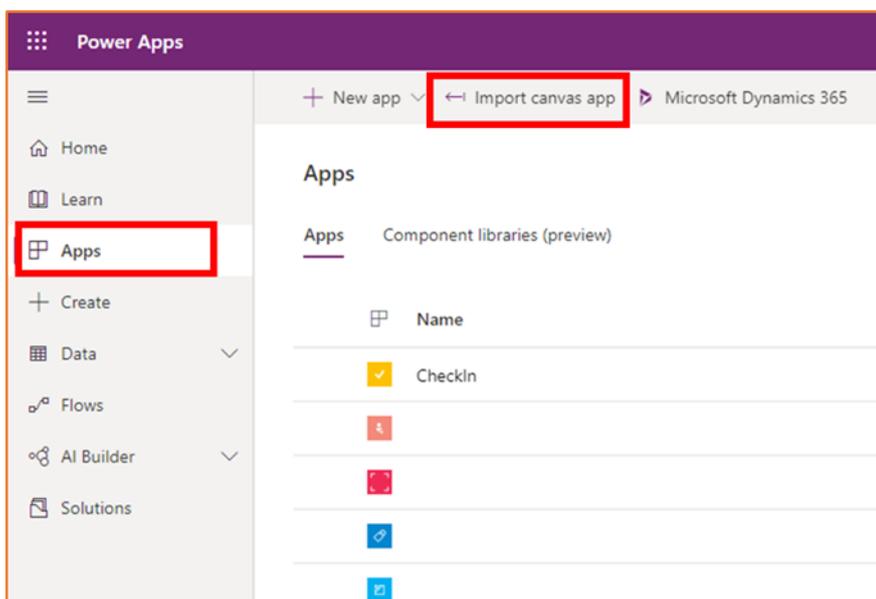
Caution: Untick “Notify People” or this will email everyone to inform them the file has been shared with them.

2.2 Import the Power App Solution

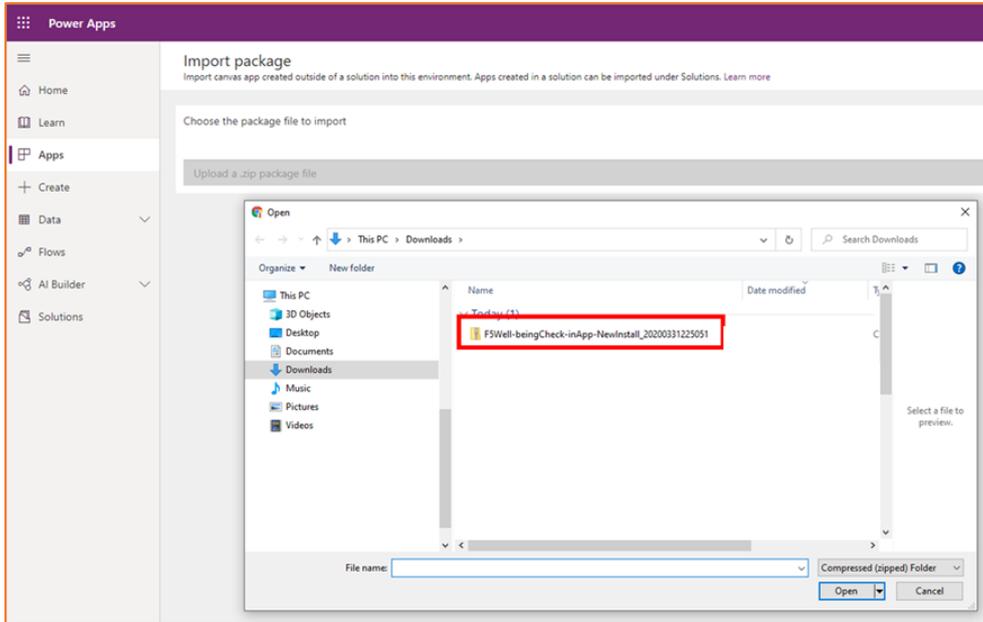
- Go to <https://make.powerapps.com/>
- Selected your specific instance:



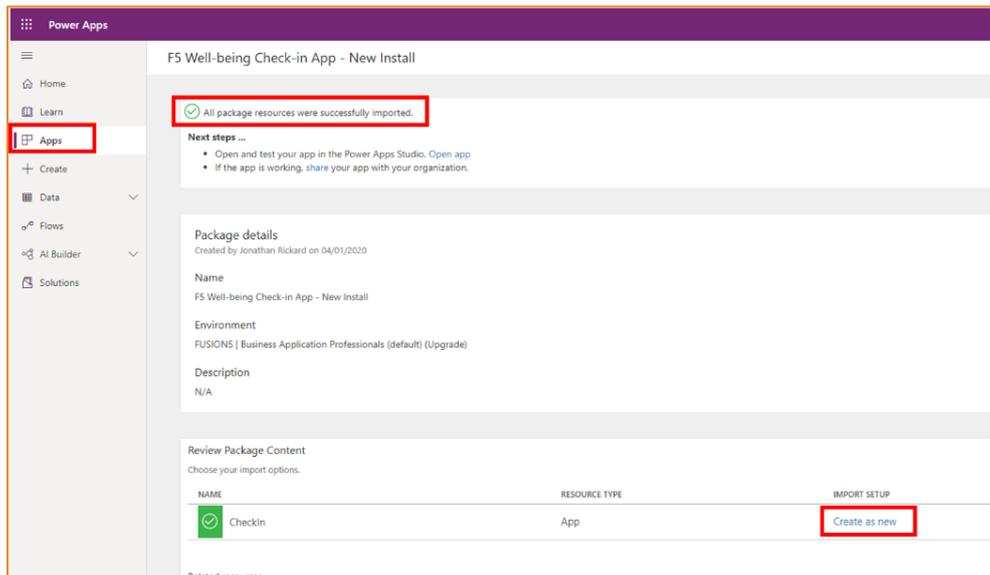
- Click on ‘Apps’ and then ‘Import canvas app’:



- Chose the zip file downloaded from the Fusion5 website:

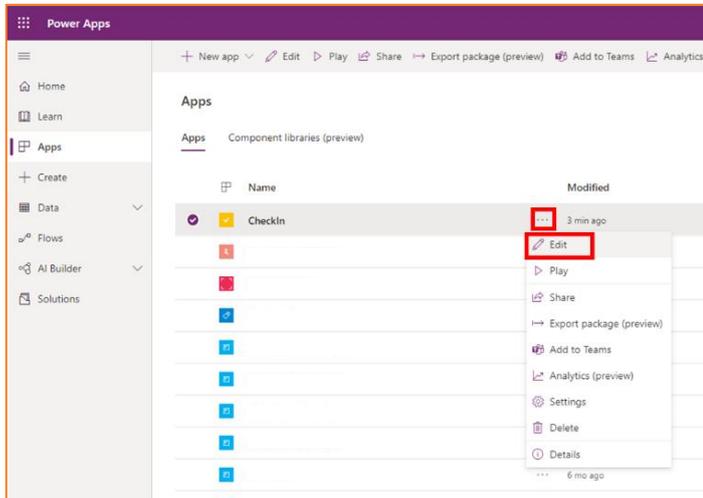


- Make sure the App is imported as “Create as new” and it was successfully imported
- Click on “Apps”

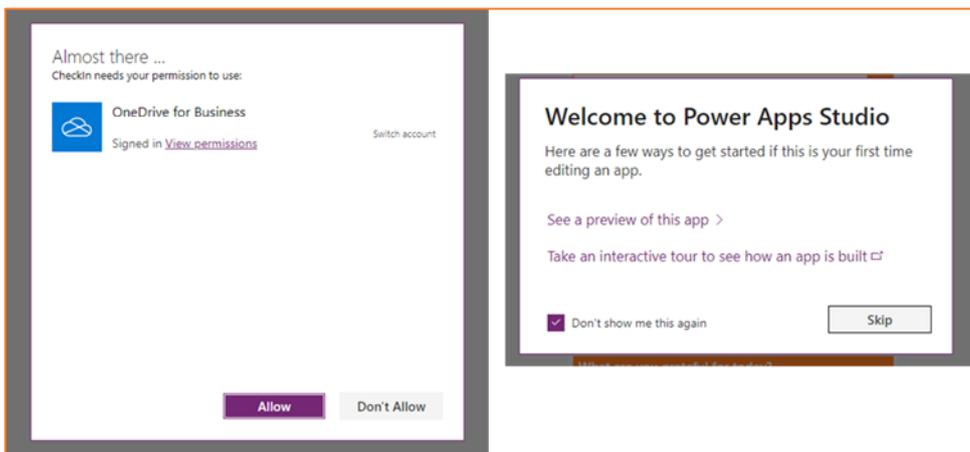


2.3 Connect the App to the Excel file in OneDrive for Business

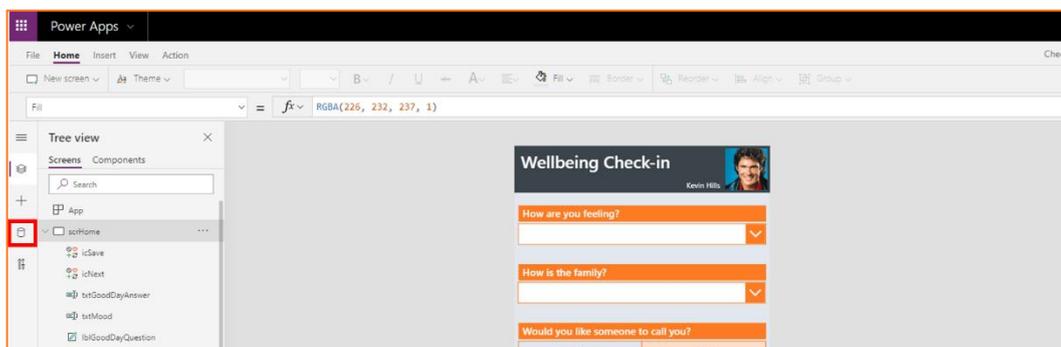
- Open the App in ‘edit’ mode”



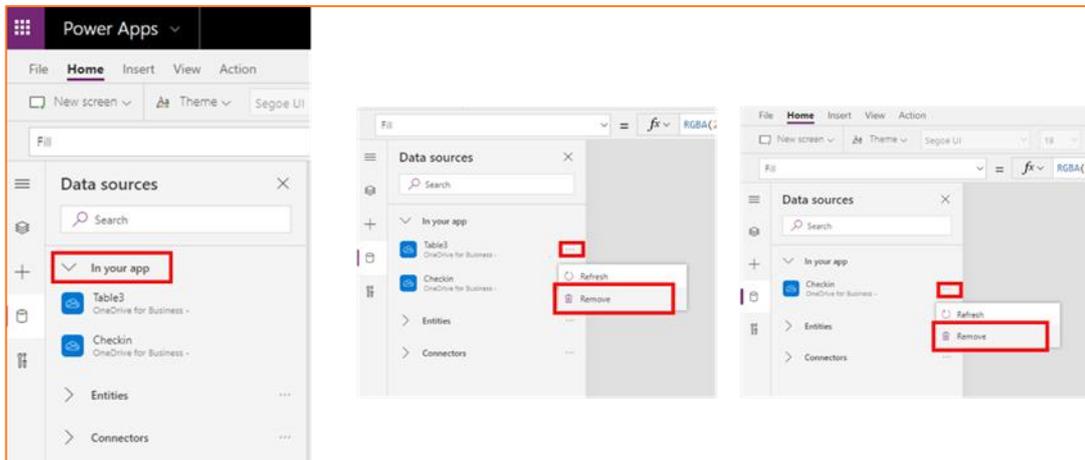
- Allow access to OneDrive for Business and skip the ‘get started’ pop-up”



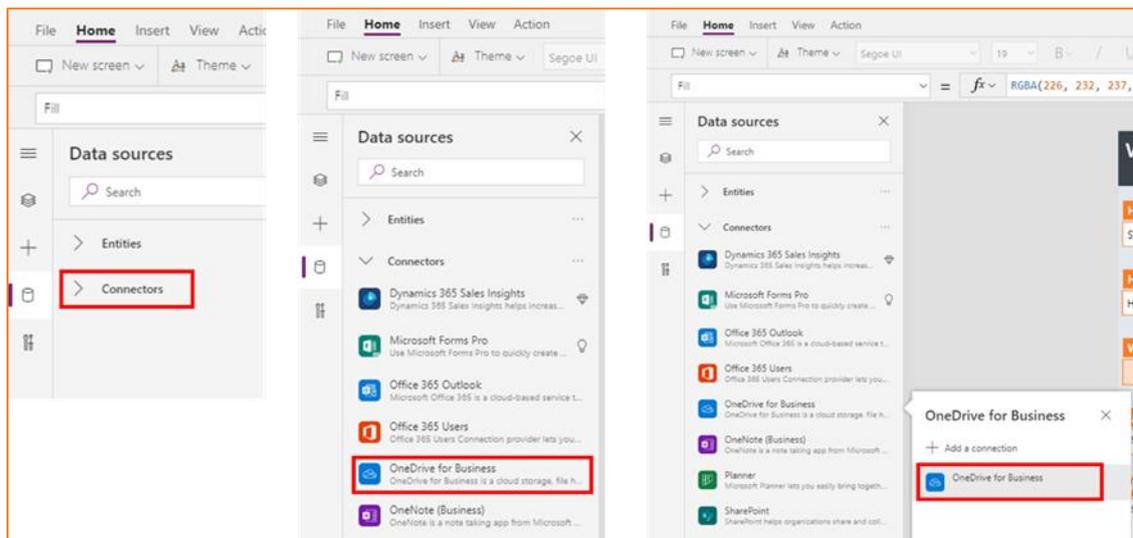
- Click on the data source menu at the left side:



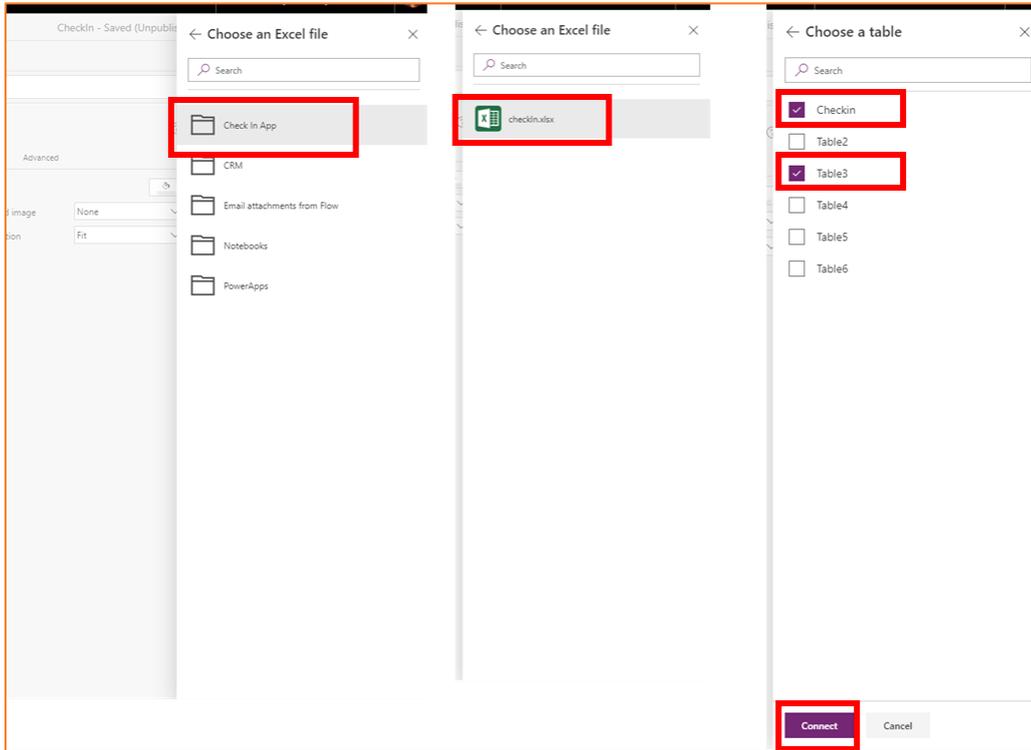
- Remove the existing connections. Make sure to delete the two items underneath 'In your app' section by clicking in the '...' and then 'Remove':



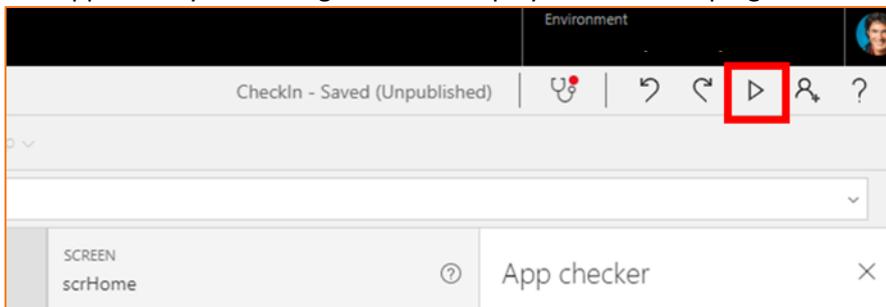
- Create a new connection with your OneDrive for Business. Click on 'Connectors', then 'OneDrive for Business' and select your OneDrive for Business account:



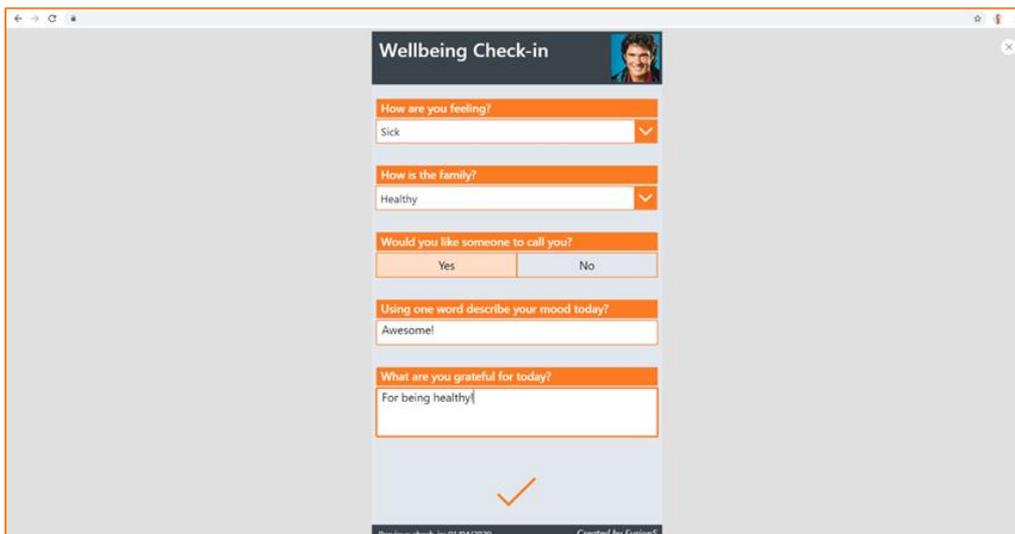
- At the right side of the screen, select the folder in OneDrive where the file is located; the file itself and the tables 'Checkin' and 'Table3' and then 'Connect':

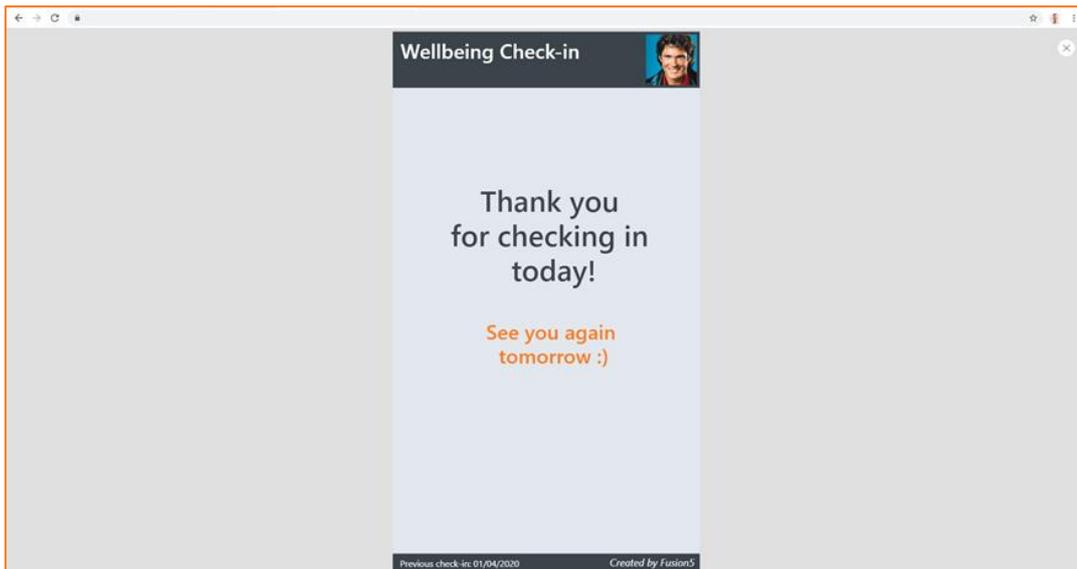


- The App is ready for testing. Click on the play icon at the top right side of the screen:

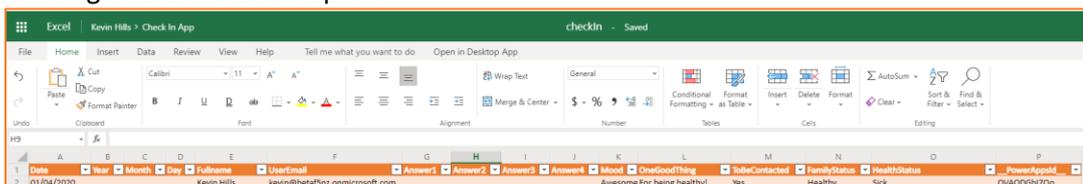


- Fill the form and submit it:

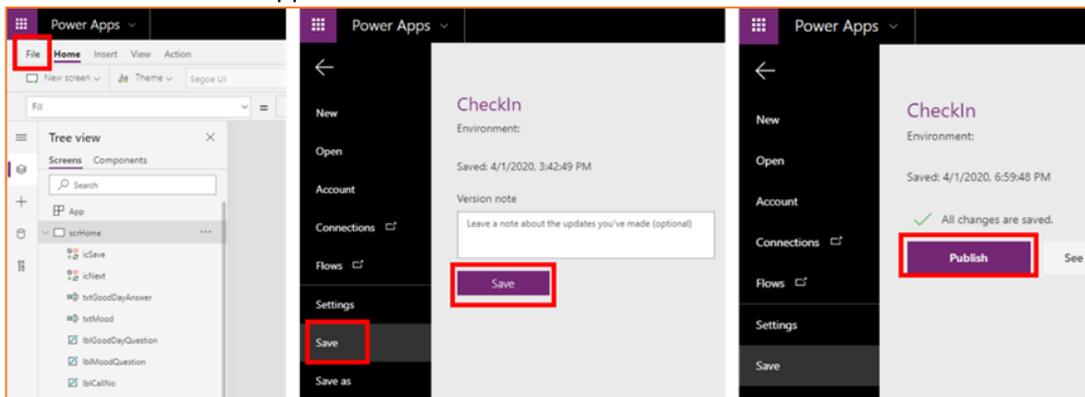




- The Excel file is the data source for the app, therefore, all data will be found there
- Open the Excel file in OneDrive for Business and find the record that was just created (Ctrl + F could help). Note that there will be sample that in the file. This can be excluded after the creating of the Power BI report:

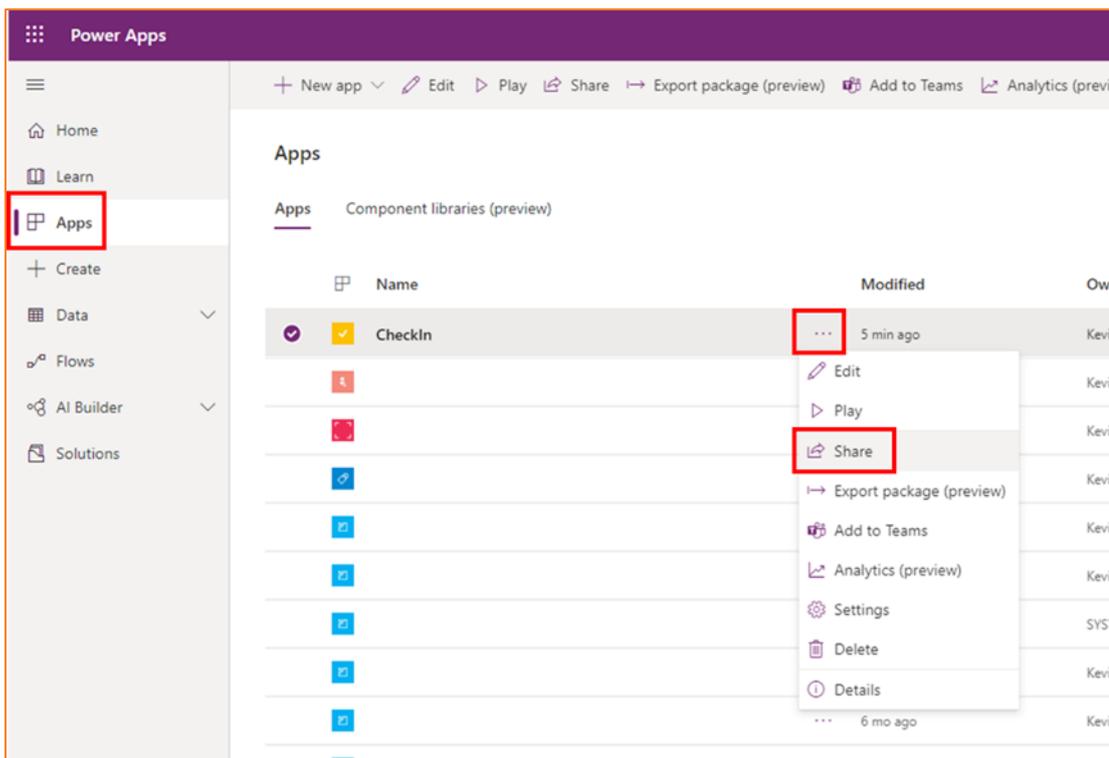


- Save and Publish the App. Click on File > Save > Publish:

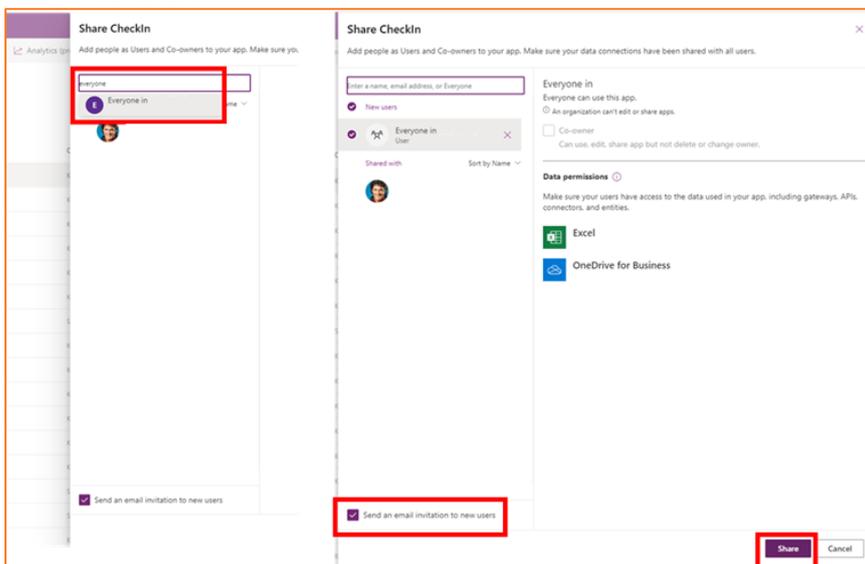


2.4 Sharing the App with users

- Go back to <https://make.powerapps.com/>
- Click on 'Apps'
- Click on the '...' and select 'Share'



- At the right side of the page select the users the App will be shared with. Typing 'everyone' will share the app with all users with access to the environment
- Select whether you wish users to be notified of the app via email when shared
- Click on 'Share':

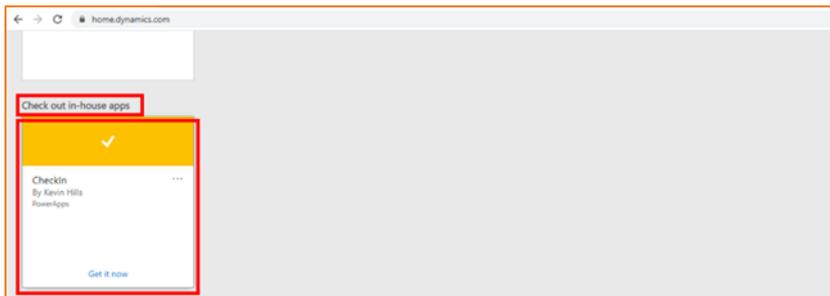
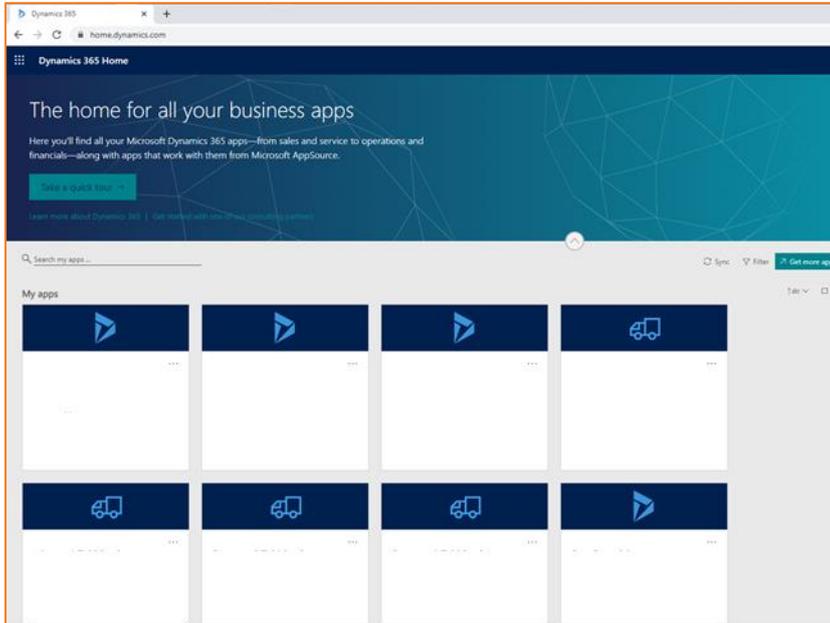


2.5 End User Access to the App

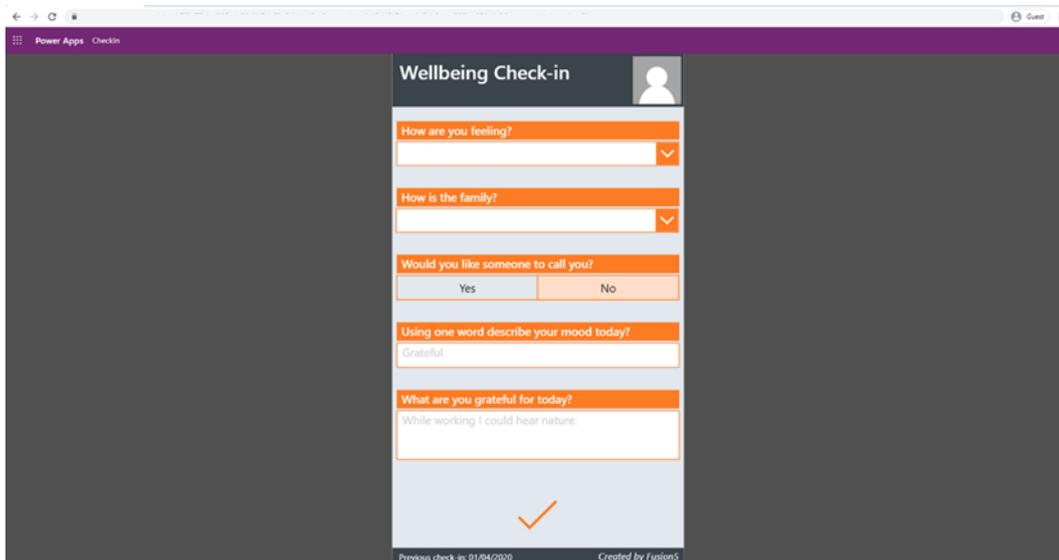
VIA BROWSER

- End users will access the App by going to <https://home.dynamics.com/>
- Entering their credentials (Office 365 email and password)

- They will be prompted to the Dynamics 365 Home
- The App will be found under “Check out in-house apps”:

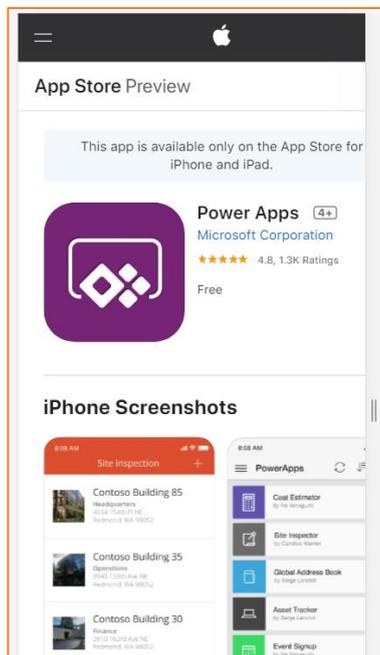
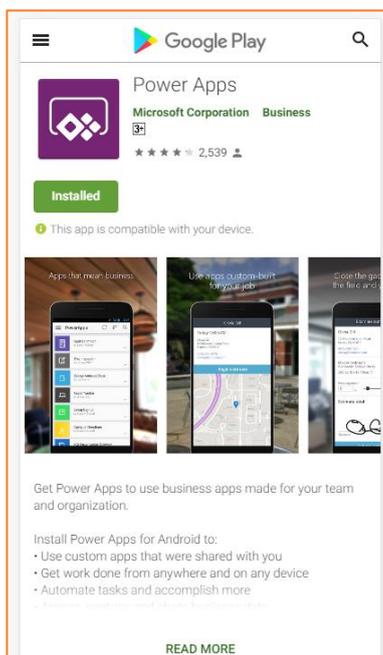


- Once clicked on the 'CheckIn' App, users will be able to use it straight away:



VIA MOBILE DEVICE

- End users will need to download the Power Apps mobile client on their iPhone or Android app store

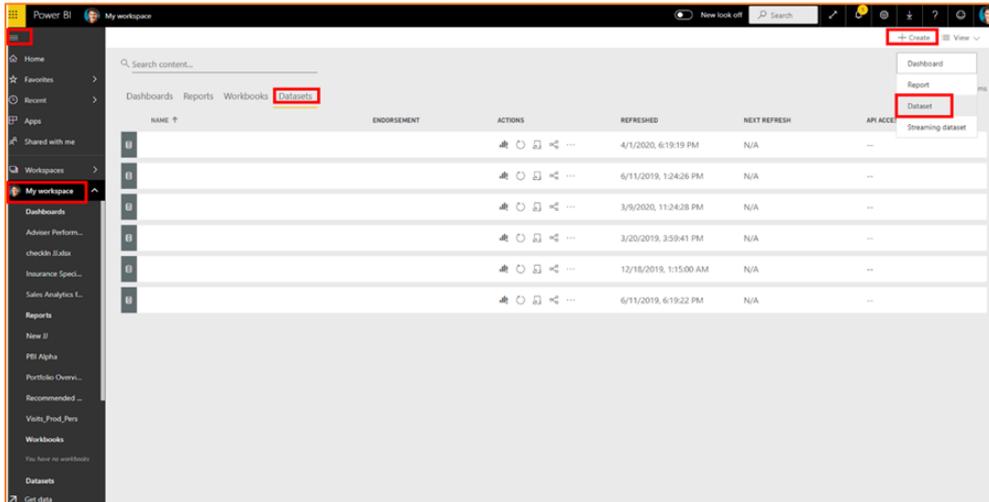


- After installing Power Apps the user can login using their standard Active Directory / Office 365 user email and password. The Check-in app will then appear in their list of available Power Apps.

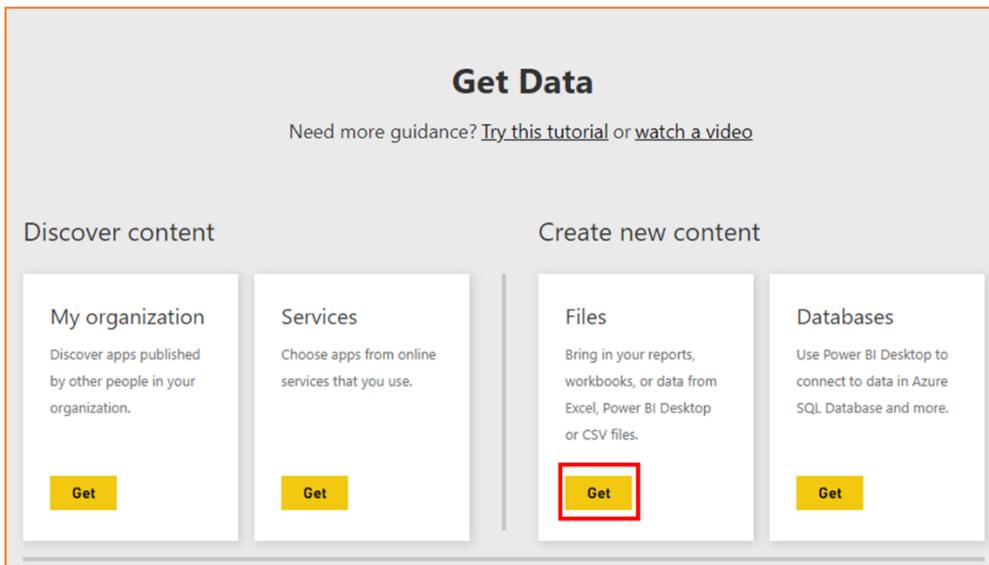
3 Installing your Power BI report (optional)

3.1 Create a new dataset from the Excel file in OneDrive

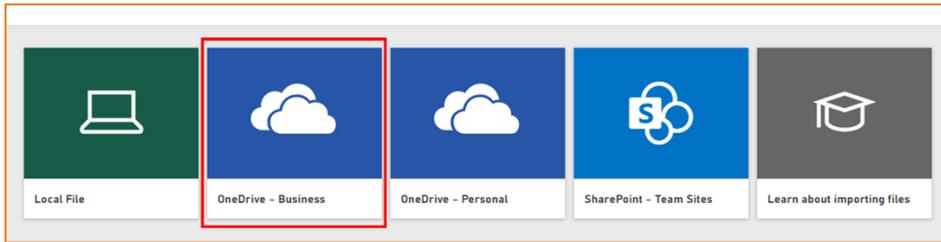
- Go to <https://app.powerbi.com/home>
- If you don't have an account, you can create one for free
- Log in, expand the menu, click on 'My Workspace', 'Datasets', 'Create' and 'Dataset':



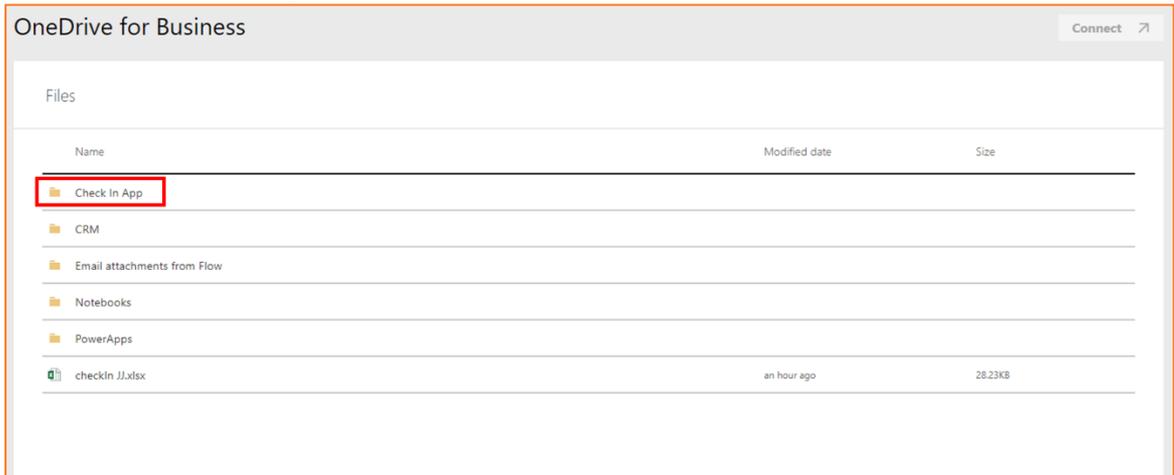
- Select 'Get' under 'Files':



- Click on 'OneDrive for Business':



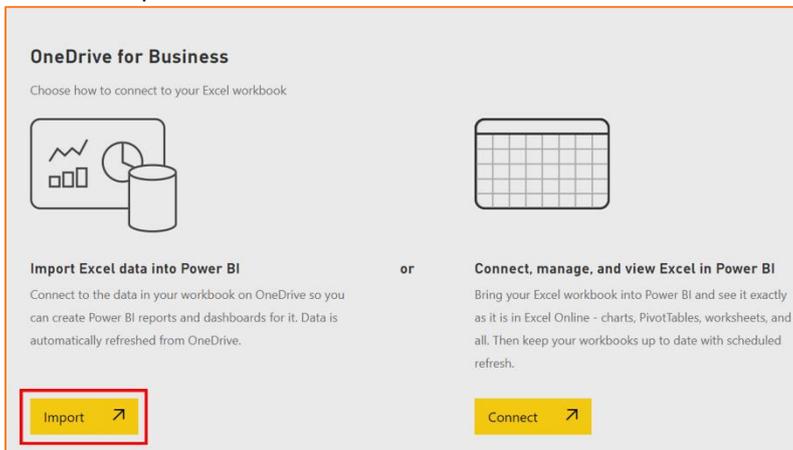
- Select the folder where you put the 'checkIn.xlsx':



- Select the file and click 'Connect':



- Click on 'Import':



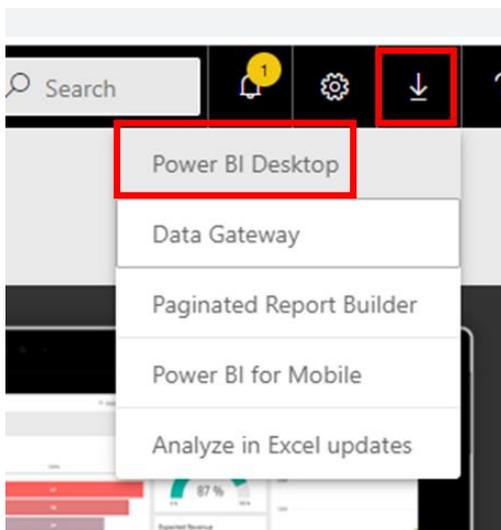
- The new dataset will be quickly created and made available in the datasets list:



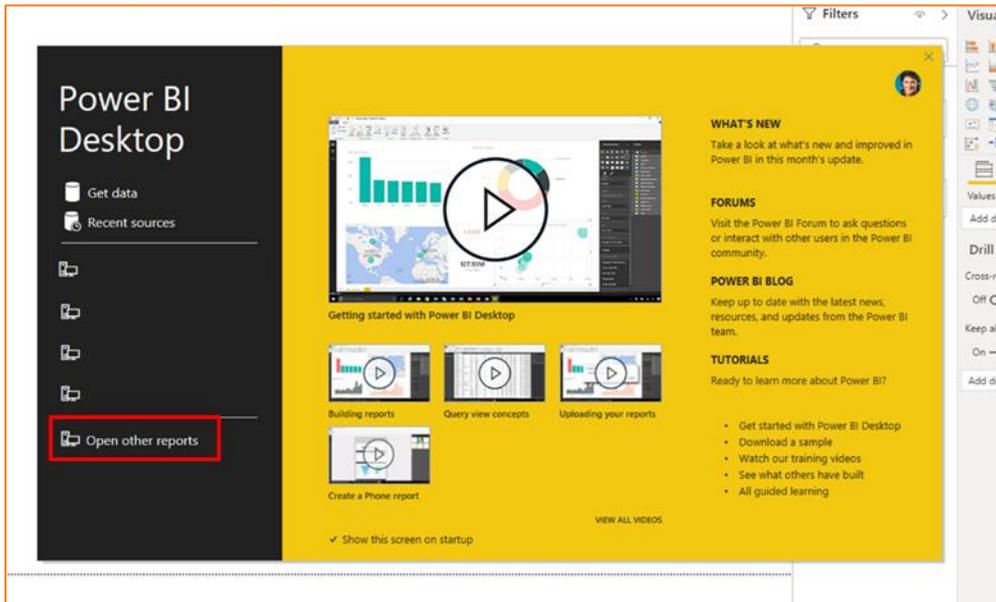
3.2 Reconnecting the Power BI report to your new dataset

The Excel file is the data source of the app and it's constantly refresh into the newly created dataset (it can be manually refreshed too). The next steps show you how to reconnect the Power BI sample report to your own version of the 'checkIn.xlsx' file.

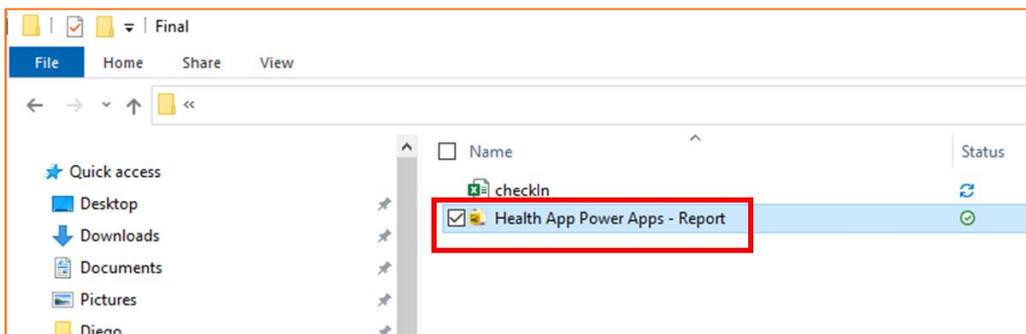
- Open Power BI Desktop
- If you do not have it installed, it can be downloaded from <https://app.powerbi.com/home> by clicking on:



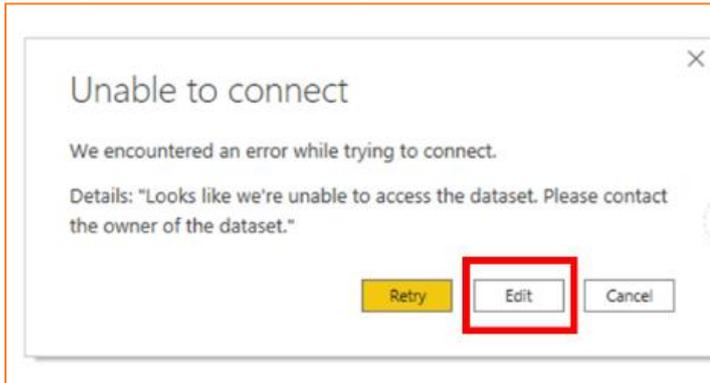
- Once installed and once your credentials are entered (your Office 365 user and password), click on 'Open other reports':



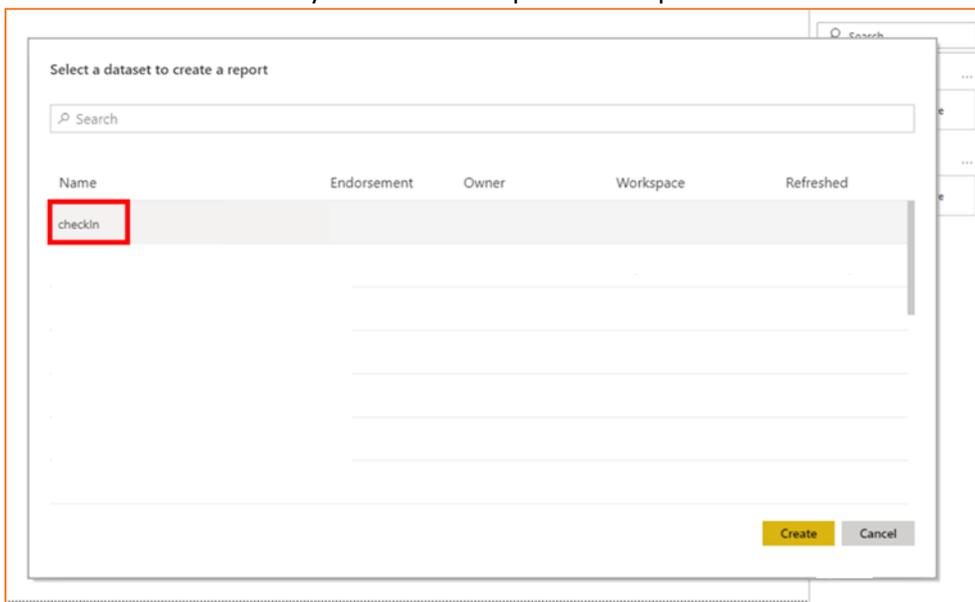
- Open the Fusion5 Power BI sample:



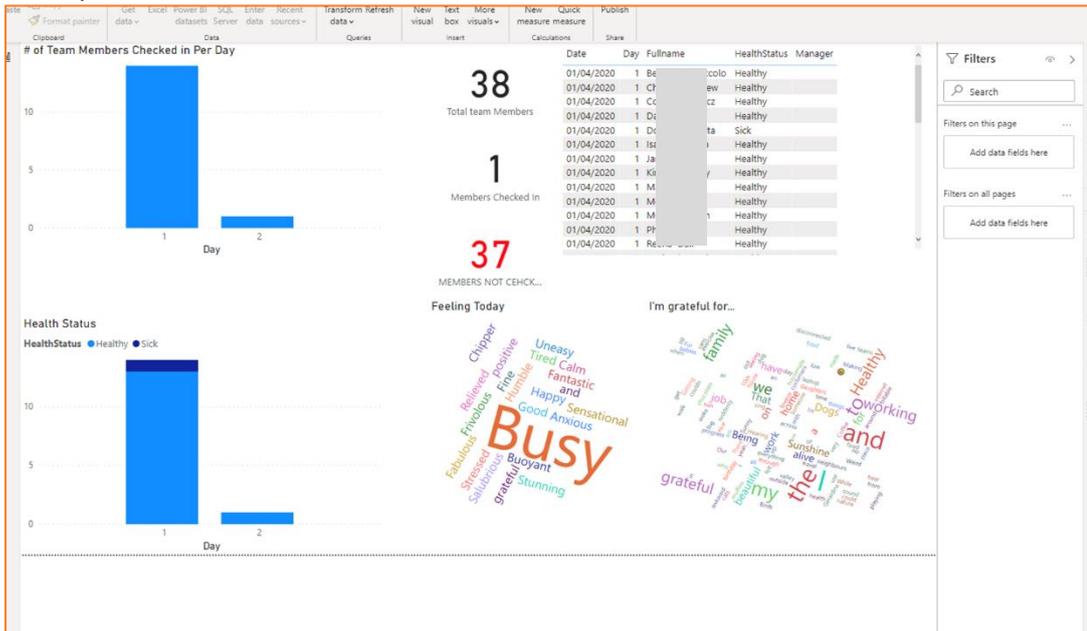
- The report will be unable to open. Click on 'Edit':



- Select the dataset recently created into the previous steps and click on 'Create':



- The report will reflect all the data in the Excel file 'checkIn.xlsx':

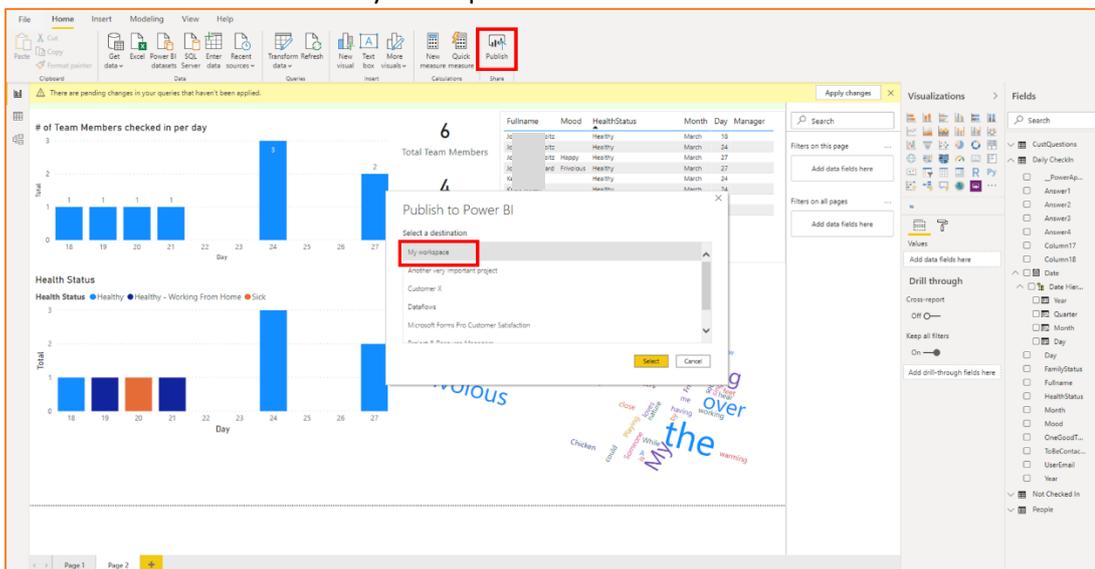


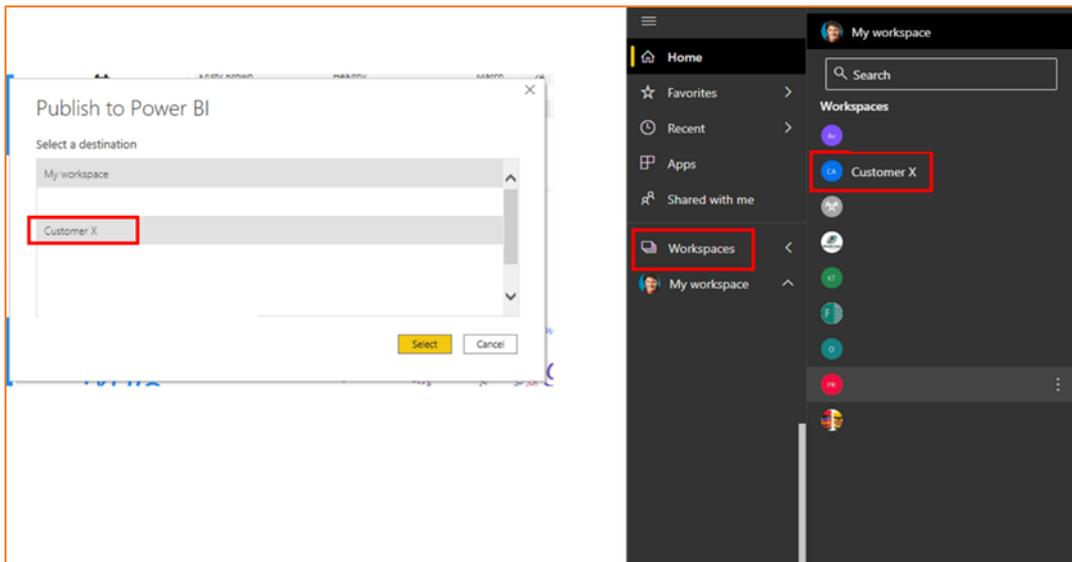
- The sample data in the Excel file can be deleted. If there is not enough data available, some of the visualisations will be empty.
- Save the report clicking on the top left side of the screen on 'File', then 'Save as'.

3.3 Publish the report and share

3.3.1 Publishing the report

- Click on 'Publish' and select 'My Workspace':





Users with a Power BI Free subscription:

- If you would like to share this report but have no Power BI Pro license, the report file saved in the previous step must be shared with other users.
- They will need to download Power BI Desktop and open the same report file you provide
- They will not have any other tasks to complete on the report; it will work normally.