

POWER BI TEMPLATE APP USER SUPPORT GUIDELINES

Contents

Introduction	3
1. Power BI apps get started.....	4
1.1. Power BI Apps installation.....	4
1.2. Power BI Apps configuration	5
1.3. Data refresh considerations.....	7
2. Report content overview	9
2.1. Report pages and structure	9
3. Frequently Asked Questions (FAQ)	12
3.1. Short summary	12

Introduction

This document describes the user guidelines for of ELVA Tasker tools analytics application. The following topics are covered:

- > Power BI Apps installation and configuration steps.
- > Solution content overview and description.
- > Frequently asked questions (FAQs).

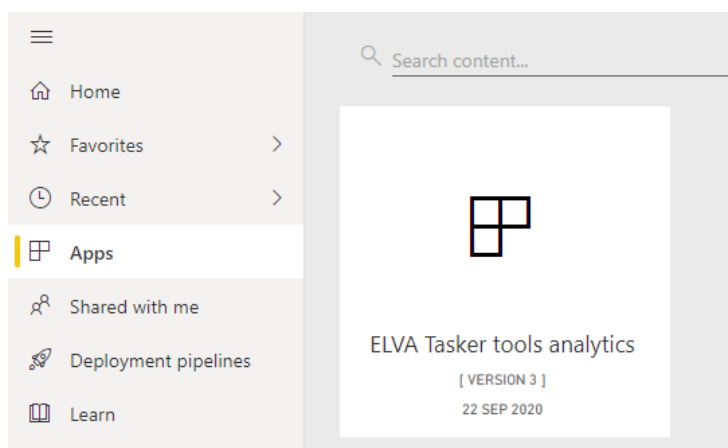
1. Power BI apps get started

1.1. Power BI Apps installation

ELVA Tasker tools analytics is free to use application that can be installed from Microsoft Appsource. To do that please use below provided step-by-step guide.

1. Sign-in to Power BI Service with your credentials, using powerbi.com link.
2. Go to **Apps** section from the right menu bar of Power BI service page.
3. Click on **Get apps** section in the right part of Power service page.
4. Search for ELVA Tasker tools analytics in the search field.
5. Click on **get it now** option in application window.

Please be aware that if the application is already installed, you do not have to install it again. In this case just click on the application in your list (please, refer to att.1.1 below).



Att.1.1 Installed application in Apps list

After application installed you may connect to data choosing a couple of options that will be covered in the next section 1.2.

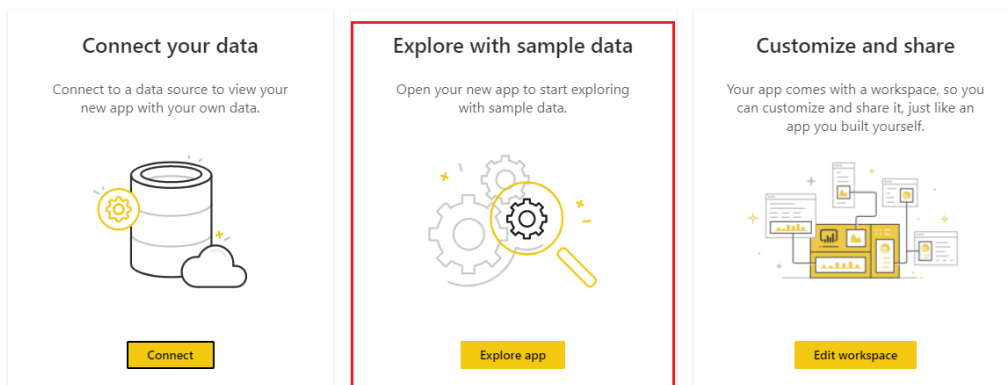
1.2. Power BI Apps configuration

To start using the application you must choose one of the options:

1. To use demo data, please, click on the button **Explore app (att. 1.2)**. In the first scenario no additional information required. The application report will be prepared.

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.



Att.1.2 How to connect data

2. To use your own organizational data, please, use the **Connect** button.
 - 2a. Then you must provide two authorization parameters to successfully load your data: *domain name* and *authorization token key* (please, view the description of parameters in table 1.1). The example of requested parameters is provided in att. 1.3.
 - 2b. Click next and data should be successfully loaded and prepared.



Connect to ELVA Tasker tools analytics



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

Before connecting to your data, you must update the required parameters (*).

Token *

Authorization Token Key

Domain *

Your personal domain name

Advanced 

Next

Cancel

Att.1.3 Required parameters

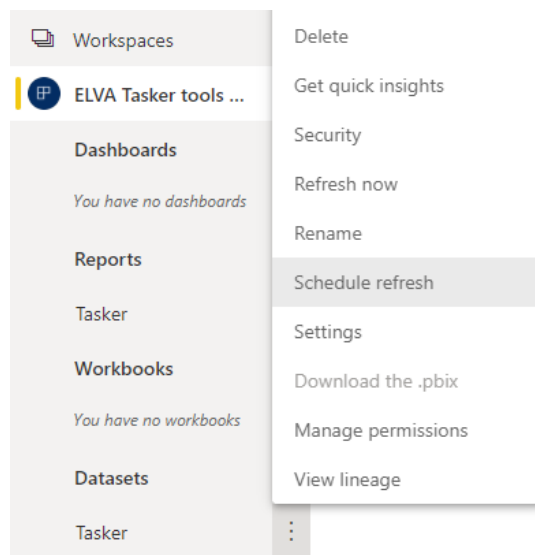
Table 1.1 Parameters specification

#	Parameter name	Data type	Description
1	Authorization token key	text	Encrypted string value given by Tasker
2	Domain name	text	Domain is a part of your personal link in Tasker system: https://domainname.taskertools.com/

1.3. Data refresh considerations

Consider that Power BI dataset must be configured to use automatic refresh. Power BI service provides a scheduled refresh functionality for automatic data updates. Please, use the described steps below.

1. Go to the application workspace.
2. From left menu bar click on your dataset in **datasets** section and take scheduled refresh option (att. 1.4).



Att.1.4 Dataset Schedule refresh option

3. Check **Data source credentials** section to be sure that everything is configured and connected as required (please, see att. 1.5 as example). Please, check the correctness of URL link, authentication method and privacy level. It is highly recommended to check **Parameters** section as well.

Configure Tasker

url
https://demo.taskertools.com/

Authentication method
Anonymous

Privacy level setting for this data source
None

Skip test connection

Sign in Cancel

Att.1.5 Data Source configuration

4. With configured **Data Source** connection and **Parameters** set the right time for your daily updates using **Scheduled refresh** option:

Scheduled refresh

Keep your data up to date
 On

Refresh frequency Daily

Time zone (UTC+02:00) Athens, Bucharest

Time
[] [] [] X

[Add another time](#)

Send refresh failure notifications to the dataset owner

Email these users when the refresh fails
Enter email addresses

Apply Discard

Att.1.6 Data Refresh configuration

2. Report content overview

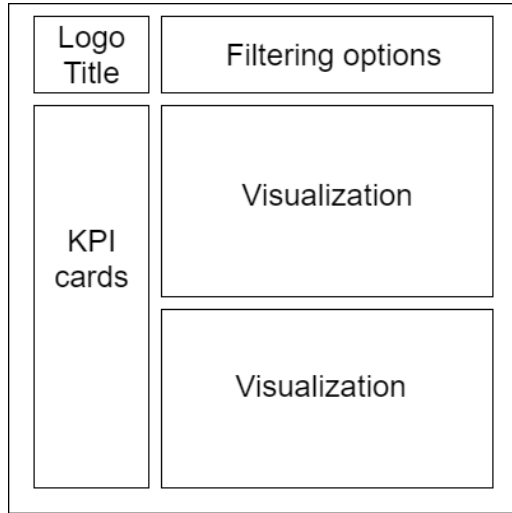
2.1. Report pages and structure

ELVA Tasker tools analytics consists of six report pages. Every single page covers a specific section of analysis. The short summary about pages is shown in table 1.2.

Table 1.2 Application report pages

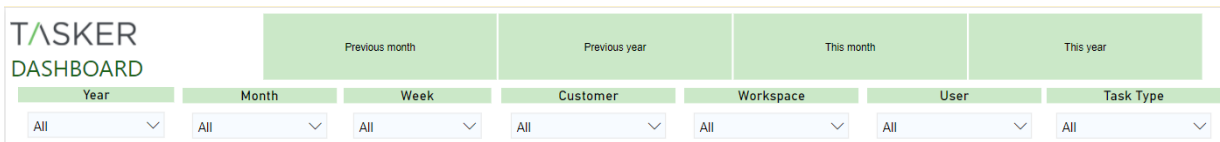
#	Page	Short description
1	Dashboard	The main page is called Dashboard and it is a common page that covers all the critical aspects of task management performance like task totals, priorities, statuses and analysis of tasks by different time periods
2	Performance overview	The second page is meant to be an overview that shows the situation between the delayed tasks and tasks that are in considered time frame. The detailed results by workspaces are provided.
3	Task Time Duration / Days	The third page is about time expenses – how many days are spent on tasks. For instance, total and average working and full days calculation. The data is grouped by task types
4	Task Time Duration / Hours	The fourth page shows the task time duration in hours and the goal is to see the time performance across different dimensions like users, workspaces and task types as well
5	Task Activity	The last two pages demonstrate task activity analysis, investigating how many tasks are opened or already completed. This fifth page is meant for task types and workspaces, but the last one (the sixth page) is covering results from user perspective with provided information about task priorities
6	User Task Activity	

The concept of the page structure is shown below (att. 1.7). Every page has a title/logo, filtering options, KPI cards and additional visualizations.



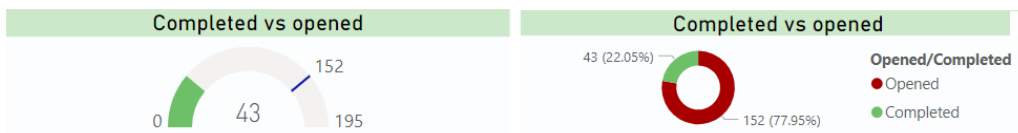
Att.1.7 Report page structure

In the header part of the page the title and filtering options are displayed (please, refer to att. 1.8).



Att.1.8 Page header part

In the right side of the page the visual elements are shown (att. 1.9).



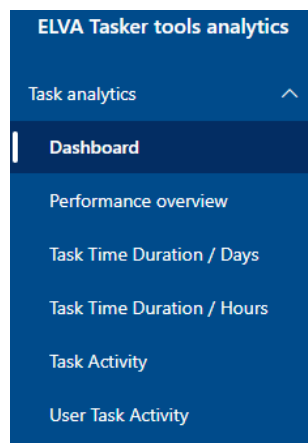
Att.1.9 Visuals in the page right side

The left side of the page displays visual KPI cards (att. 1.10):

195 Count of Tasks	07.09.2020 Last Task Created
43 Tasks completed	6 Opened High Priority
152 Tasks opened	13.7 Full Days Avg per Task
168 Tasks On Time	9.8 Work Days Avg per task
27 Tasks Delayed	42.48 Average duration (h)

Att.1.10 Visual cards (page left side)

To switch between pages, you must use the application navigation bar in the left panel:



Att.1.11 Report content panel

3. Frequently Asked Questions (FAQ)

3.1. Short summary

What kind of data is used in ELVA Tasker tools analytics? Data model and structure is build based on TASKER management tool and it is core entities (tasks, workspaces, customers, users).

Is this application free? This application is totally free, no payments required.

What are the limitations? It is a trial demo version for evaluation purposes with no possibility to build your own content or download the report.

Do I need to be a TASKER customer to try it? Not necessary, you can use the demo data as a potential customer or to be a simple viewer.

Is it hard to configure application for my own data? It an easy process, you must provide authorization token key and domain name, and data will be automatically loaded.

What are the basic benefits of this application? It provides a possibility to see task management performance by various indicators and visualizations, analyzing the current trends and past activity.

How can I become a Tasker customer? Please, contact Tasker team directly on a website <https://taskertools.com/>

How may I request an additional change to application for my purposes? you may use a standard-based functionality or request an additional feature individually by contacting ELVA via support page.

Is this the final version of the application? The current solution is the beta version, and the new releases are planned for improvement and potential fixes.