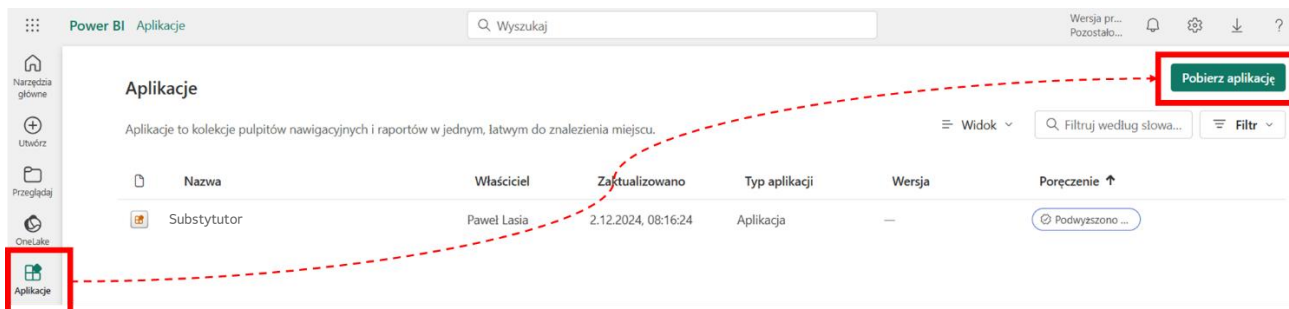


INSTRUCTIONS FOR INSTALLING THE SUBSTITUTOR APPLICATION IN POWER BI

Please note! To install the application from Microsoft AppSource, you must have the appropriate permissions for your user within your company's Microsoft lease and Power BI service. Please contact the appropriate Administrator/IT Department in your company for assistance in this regard. We recommend that the installation and sharing of the application within your organisation be coordinated by one person with the appropriate permissions.

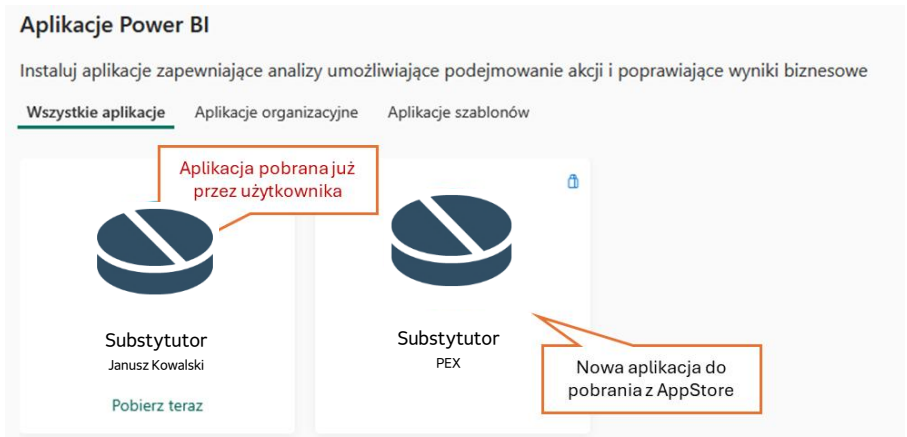
1. DOWNLOADING THE SUBSTITUTOR APPLICATION FROM APPSOURCE

The **Substytutor** application can be downloaded from Microsoft AppSource within the Power BI service in the "Applications" section, where you should select the "Download application" button.

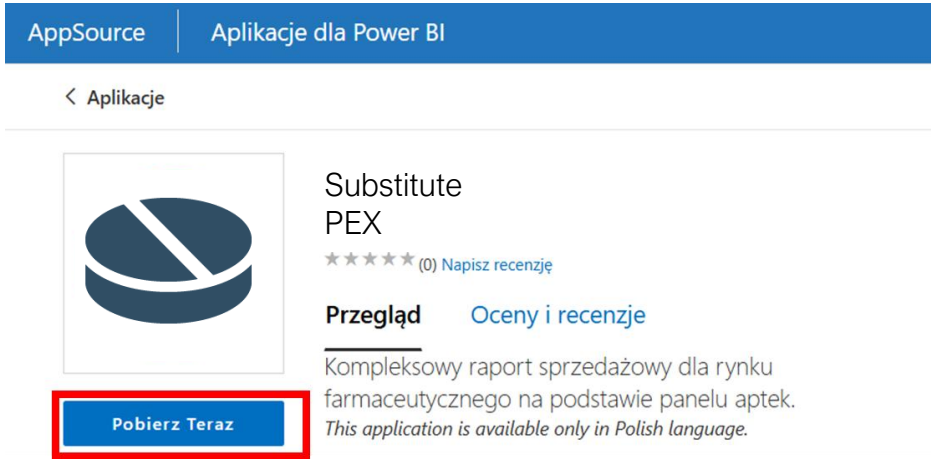


Search for the **Substytutor** application from PEX, e.g. by entering the keyword "substytutor" in the search engine.

Please note that if different Substytutor applications appear in the search results, it means that the application has already been downloaded by the same or another user. Do not install multiple versions of the same application. In this case, you can install the one that already exists in your organisation (the name indicates who downloaded and shared the application internally) or contact your service administrator.

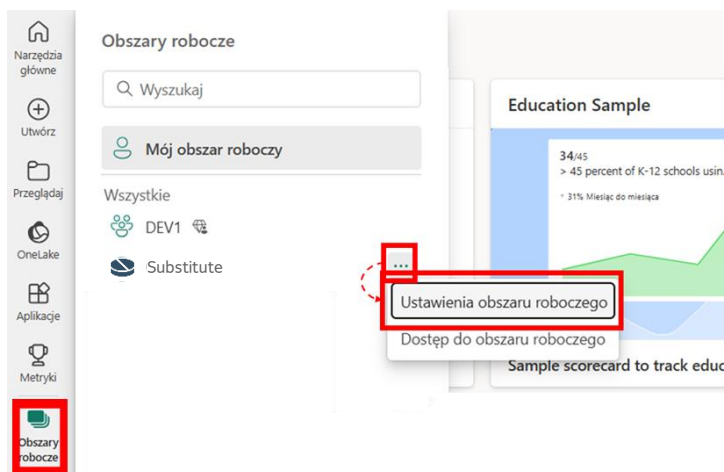


When downloading from AppSource for the first time, a page with a description of the application will be displayed.



2. CONFIGURING A NEW APPLICATION AND ITS WORKSPACE

After installing the application from AppSource, the **Substitute** workspace will appear in PowerBI. Before refreshing the data, ensure that the workspace has a **Premium Per User licence** assigned to it (this is indicated by a diamond icon next to the workspace name). If the workspace is not assigned to a Premium licence, go to the workspace settings (hover over its name and click on the dots – "Workspace settings").



In the workspace settings, go to the second tab – Licence information. In the licence configuration window, click Edit and select "Premium – per user" (or "Premium capacity"/"Backbone capacity" for organisations using a Power BI capacity licence). Confirm with the green "Select licence" button.

Ustawienia obszaru roboczego ×

Ogólne

Informacje o licencji Wybierz licencję dla tego obszaru roboczego.

Informacje o licencji

Połączenia platformy Azure

Magazyn systemowy

Integracja z usługą GIT

OneLake

Tożsamość obszaru roboczego

Zabezpieczenia dotyczące sieci

Power BI ▼

Delegated Settings ▼

Konfiguracja licencji

Tryb licencji

Wybierz licencję, aby określić możliwości tego obszaru roboczego. Niektóre tryby licencji mogą być niedostępne, ponieważ nie masz uprawnień niezbędnych do ich zmiany lub administrator nie utworzył lub nie zakupił wymaganej pojemności.

Pro

Select Pro to use basic Power BI features and collaborate on reports, dashboards, and scorecards. To access a Pro workspace, users need Pro per-user licenses. [Dowiedz się więcej](#)

Premium — na użytkownika

Select Premium per-user to collaborate using Power BI Premium features, including paginated reports, dataflows, and datamarts. To collaborate and share content in a Premium per-user workspace, users need Premium per-user licenses. [Dowiedz się więcej](#)

Pojemność Premium

Select premium capacity if the workspace will be hosted in a premium capacity. When you share, collaborate on, and distribute Power BI and Microsoft Fabric content, users in the viewer role can access this content without needing a Pro or Premium per-user license. [Dowiedz się więcej](#)

Osadzony

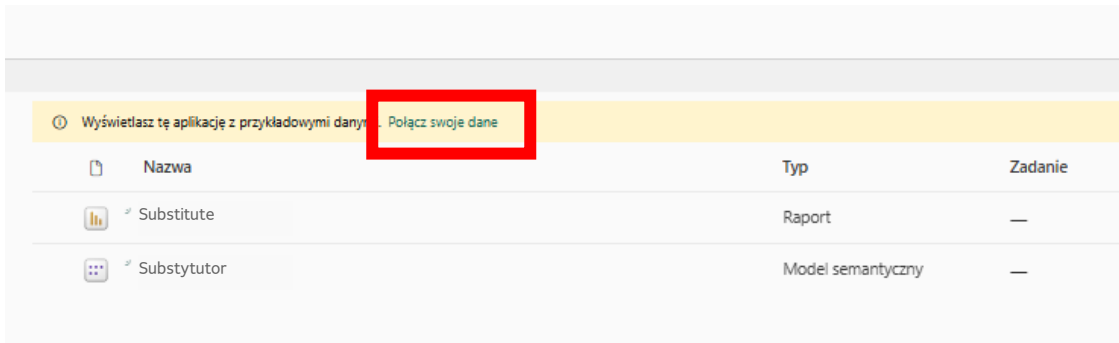
Select embedded if the workspace will be hosted in an Azure embedded capacity. ISVs

In the list of workspaces, the installed workspace should have a diamond icon next to its name.



3. CONNECTION TO THE DATABASE (DATA UPDATE)

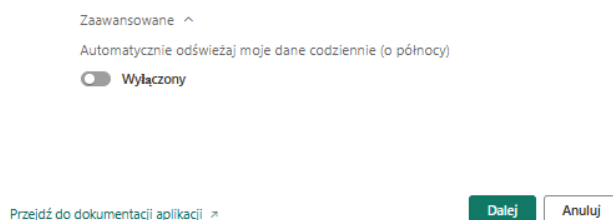
Before you start working, you will need to connect your data to the application. To do this, go to the workspace and click the "Connect your data" button on the yellow bar. The bar will remain visible until the data connection process is complete, which must be done once after installing the application.



In the pop-up window, enter the following parameters:

- Server: *[address provided by PEX when purchasing data]*
- Database: *[name provided by PEX when purchasing data]*

Then expand the Advanced option and disable the "Automatically refresh my data every day at midnight" option. The Substytutor system database is refreshed once a month, in non-standard cycles. PEX informs about the database update in a separate communication – in this situation, the administrator responsible for the application in the customer's environment manually triggers the refresh to obtain the data as soon as possible. If a daily update is necessary, it should be set between 2:00 and 21:00 to avoid server maintenance downtime. Otherwise, the refresh process may report a data retrieval error (which does not prevent the use of already loaded data). For more information, please contact PEX.

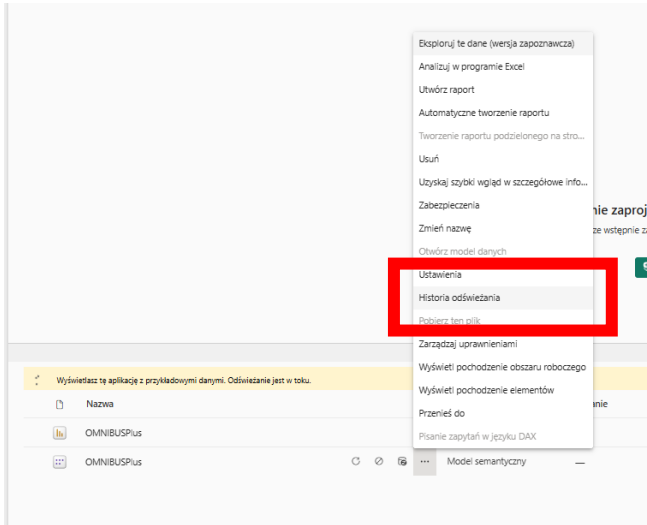


Then click Next and enter your username and password for the database server. **The login and password are provided by PEX.** Fill in the form below and click "Log in and connect".

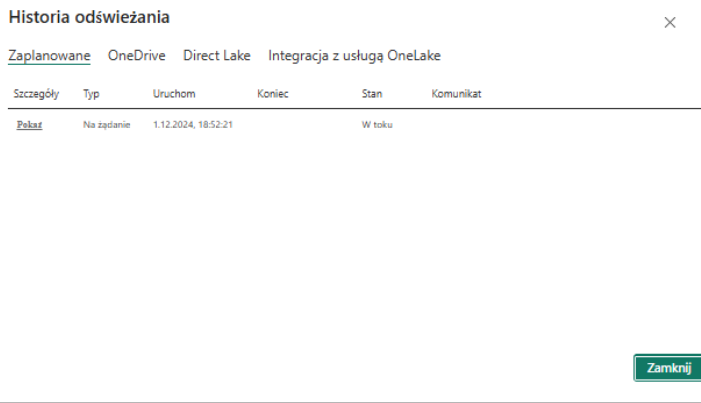
The semantic model of the application will be refreshed. The process takes approximately 20-60 minutes, depending on the scope of the data. A spinning circle in the "Refreshed workspace" column indicates that the refresh process is in progress.

Substitute	aplikacja w ...	1.12.2024, 18:35:43
Substitute	aplikacja w ...	1.12.2024, 18:35:43

You can also open the refresh history. To do this, hover your mouse over the semantic model, click on the dots and select "Refresh history".



A window will appear with information about the model refresh history. Unfinished refresh processes have the status "In progress".

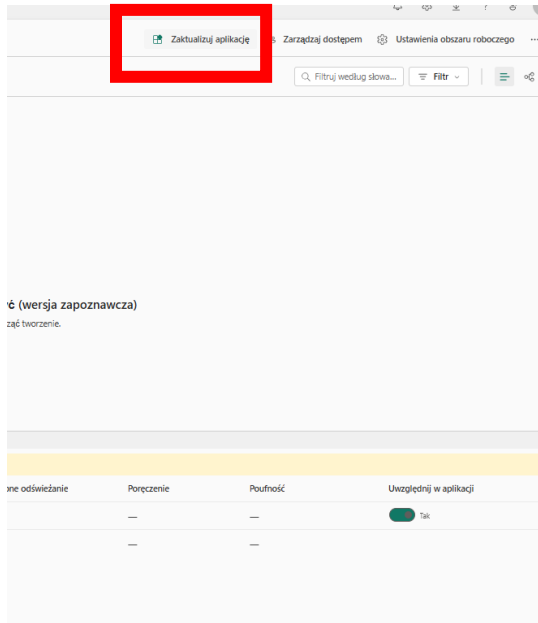


Note: If you encounter a refresh error indicating insufficient memory, go back to the step in the instructions where you assign a Premium licence to the installed workspace. The insufficient memory message appears if the workspace licence settings are not changed from Pro to Premium.

4. GRANTING PERMISSIONS/SHARING WITHIN THE ORGANISATION

After the authorised person (e.g. service administrator) has completed the steps described above, they will have access to both the application and its content in the workspace. To allow other people in the organisation to access the application, you must grant them the appropriate permissions.

To do this, while in the installed **Substytutor** application workspace, find the Update application button in the upper right corner.



Next, go to the Permissions tab. In this tab, select whether access is granted to the entire organisation or to selected users or groups (in the example below, access is only granted to members of the PEXPS group). It is also recommended to select the "Install this application automatically" option – then the application will automatically install for all users with access. NOTE! This option is only available if you specify specific users or groups to whom access is granted (it is not available when selecting access for the entire organisation).

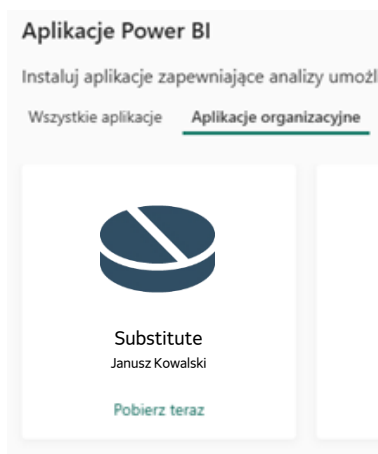
Confirm the settings with the green "Update application" button.



If the "Install this application automatically" option is not selected, each interested user will have to install it themselves. The user clicks the Download application button in the upper right corner of the application list.



The application will be available in the "Organisational applications" tab.



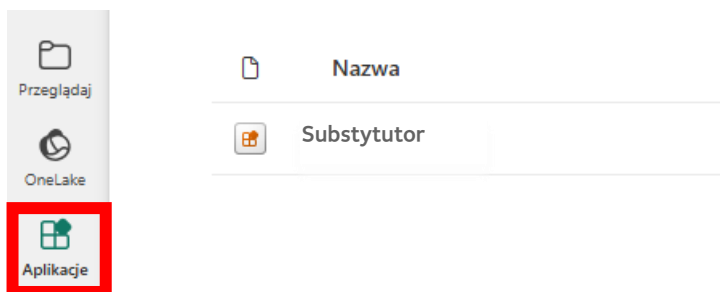
To avoid confusion, we recommend using the "Install this application automatically" option so that users do not have to perform any additional steps.

5. APPLICATION AVAILABLE TO USERS/COMMENTS

According to Microsoft, it may take several minutes for the application to be visible to all users (after selecting the "Install this application automatically" option).

Depending on the company's service and user settings, the **Substitute** application may be visible:

- a. In the application list



- b. On the home screen (the "Main Tools" tab) → in the "My Applications" section

