

Protean Software

Protean Intelligence – Quick Start Users
Guide

Version 1.0

Contents

1	What is Protean Intelligence?.....	4
1.1	How do I gain access to it?	4
1.1.1	Accessing via your browser	4
1.1.1	Accessing via the Protean front end.....	4
1.1.2	Accessing via a mobile device	4
2	Basic Navigation	6
2.1	The Home Screen.....	6
2.2	Accessing & Interrogating your report data	6
2.2.1	Applying Filters	8
2.2.2	Using the Drill Down options	9
2.2.3	Extracting Data from your Protean Intelligence Report.....	10
3	Customising 'My Protean Intelligence'	12
3.1	Creating your own dashboards	12
3.1.1	Viewing your dashboard information	14
3.2	Importing Excel Workbook Data.....	15
4	Creating your own reports.....	17
4.1	Overview, help and support	17
4.2	Adding a new report.....	17
5	FAQ's.....	20

Version Control

Version	Comments	Name	Date	Approver
0.1	First draft	Richard Barron	10/06/2020	BM
1.0	Final amendments	Richard Barron	27/07/2020	DC

1 What is Protean Intelligence?

Protean intelligence is a graphical dashboard tool, giving you access to charts and KPI's to help you manage your business more effectively.

It is powered by Microsoft Power BI, where your data is securely channeled to the Microsoft cloud making this data available across a multitude of platforms.

1.1 How do I gain access to it?

In the first instance you should initially check with the support team as this enhancement may need to be installed onto your server where you will also be supplied with log in details.

Email: support@proteansoftware.co.uk

If you already have this functionality including the user account details, then the system can be accessed via several methods.

Note: In all cases ensure that are signing into the Microsoft Power BI service using the account details supplied by Protean, not your normal work account.

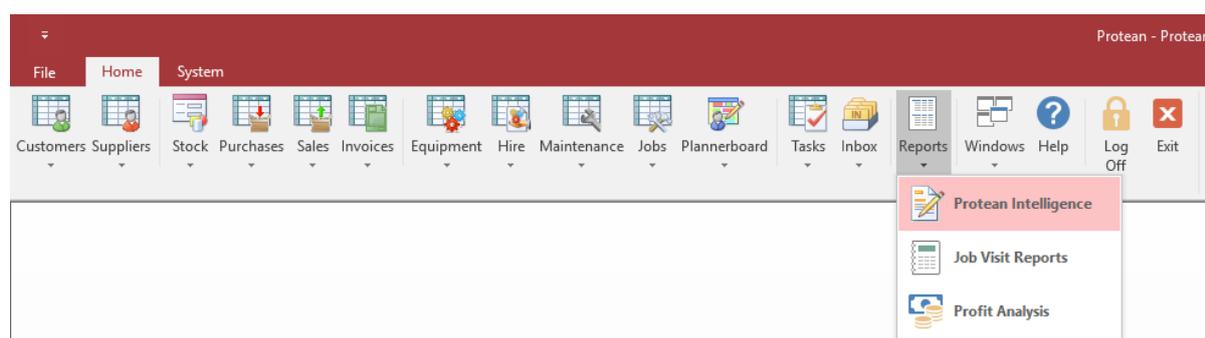
1.1.1 Accessing via your browser

Any modern web browser will support access to Protean Intelligence, to do this browse to

app.powerbi.com

1.1.1 Accessing via the Protean front end

From the office system, there is a shortcut to the web browser version. To access this, click onto the reports drop down and select **Protean Intelligence**.



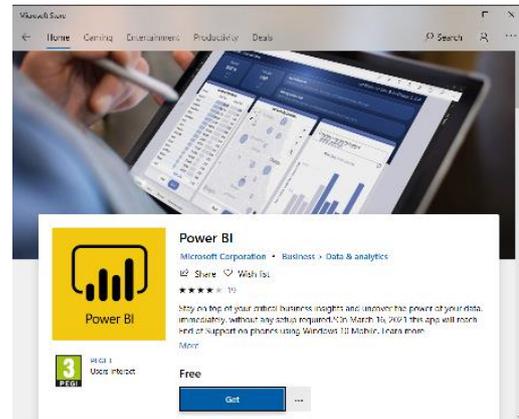
You will then be directed to the Power BI website.

1.1.2 Accessing via a mobile device

Any modern mobile device will be able to access the Power BI service using its web browser but for the best experience it would be recommended to access the data using the Power BI app found on the Google Play Store, Apple App Store or Microsoft Store.

From within the relevant app store, search for **Microsoft Power BI**

Once the app is installed, simply sign in using the account details supplied by Protean.



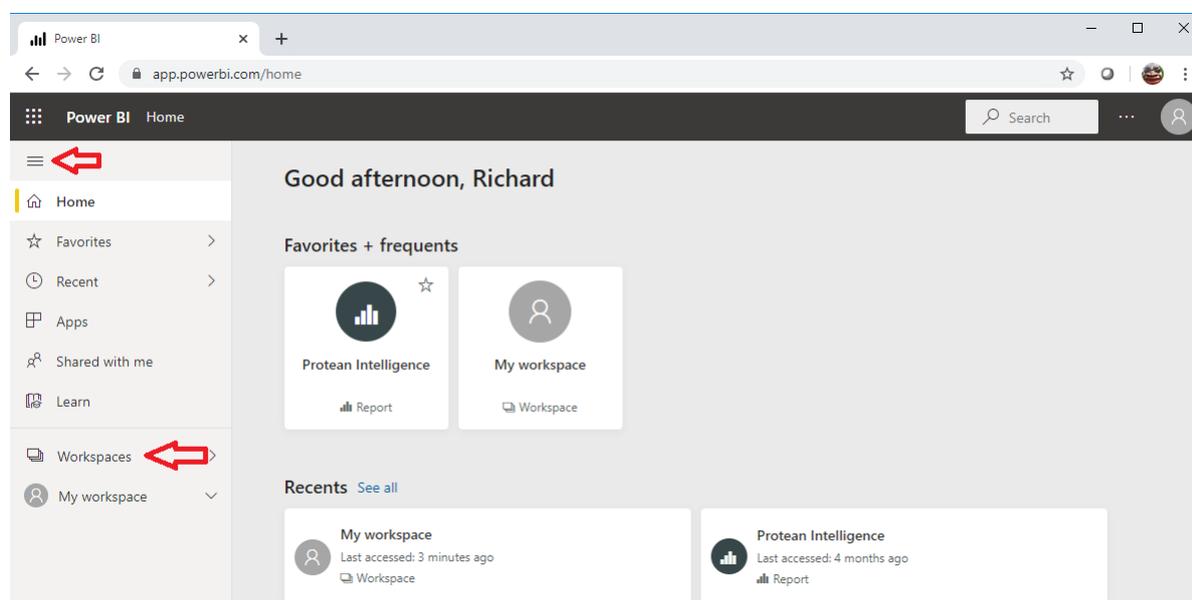
2 Basic Navigation

2.1 The Home Screen

When you access Protean Intelligence for the first time, you will find the home screen to be rather blank. You will have not set favourite reports or accessed any recent items, so the central section of the screen may not display a great deal of content.

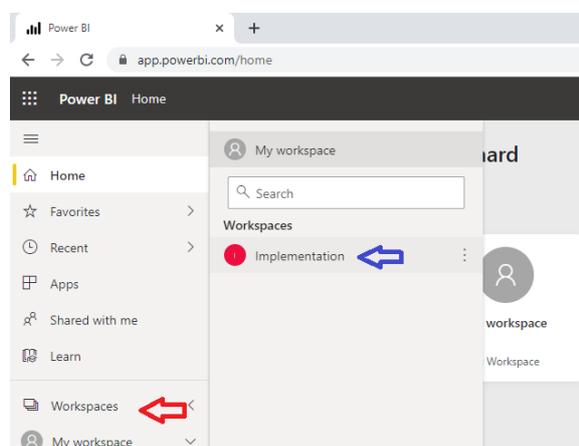
Note: As you start to use the system and build content, the central area of the screen will adapt to display items you use most often. Notice that the full menu options can be accessed by clicking onto the three bars below the **Power BI** wording.

Each customer is issued with their own **Workspace**, it is here that you are able to access report data and go onto customize your own dashboards.



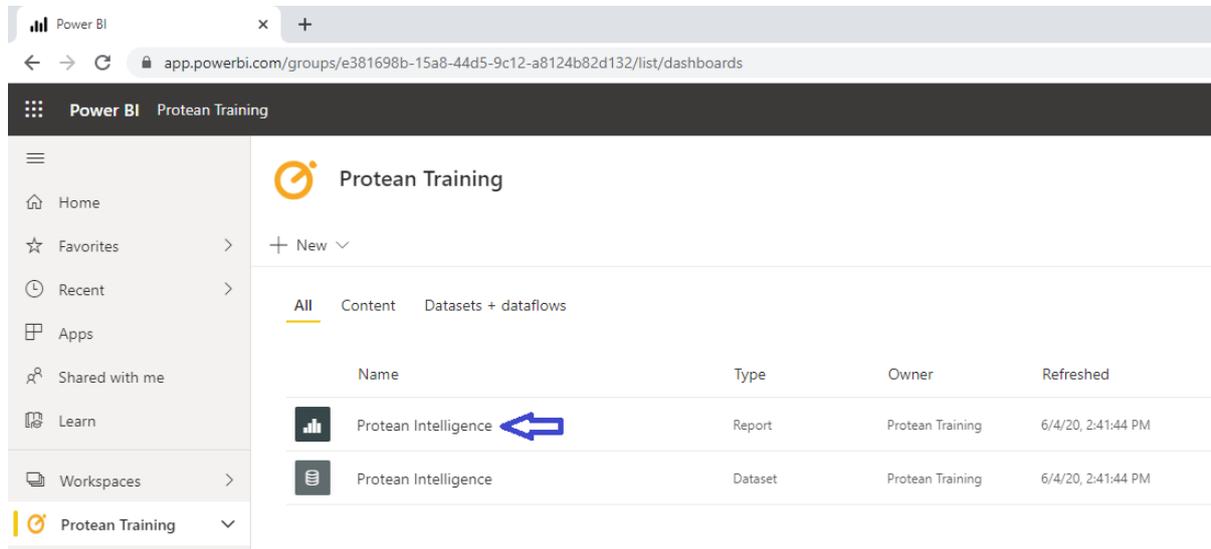
2.2 Accessing & Interrogating your report data

To access the Protean Intelligence report, go into your **Workspace**



The **Workspace** will be named after your company, this is the area where you can draw data, design your own custom dashboards and even create your own reports!

Initially, there will be two entries within here, however this will build depending on your use of the system, to access the report click on **Protean Intelligence** where the type is **Report**.



At this point the **Report** will load drawing live data from your Protean database.

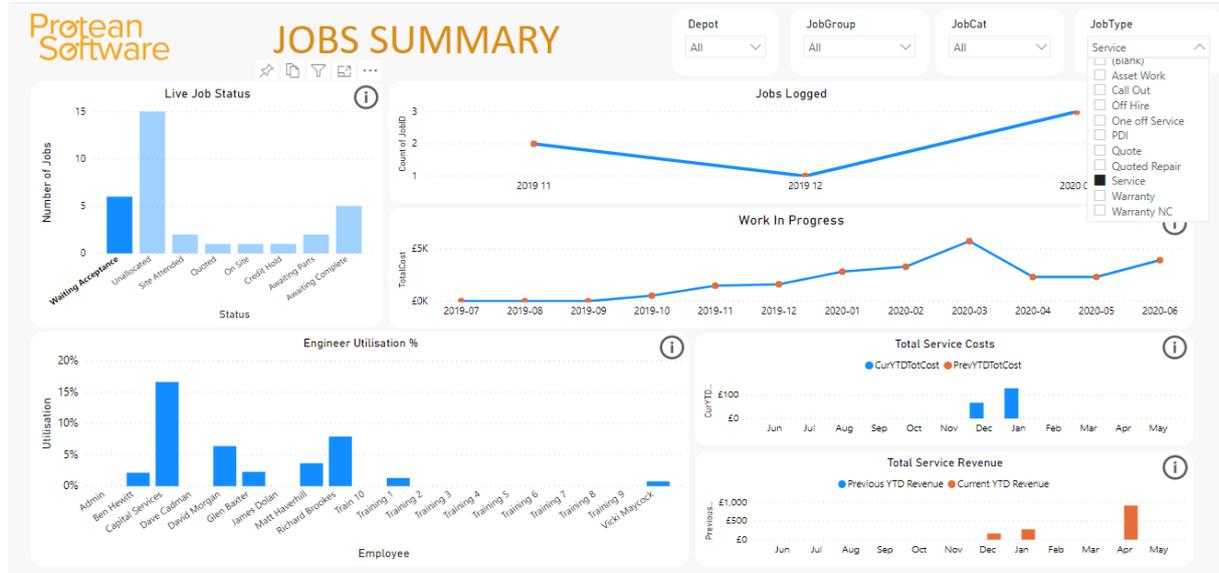


From the left hand side, you should notice a series of pages that you can browse through which cover the main revenue streams seen in the Protean system, with a few extras, for example there's customer location mapping and an equipment location hear map too!

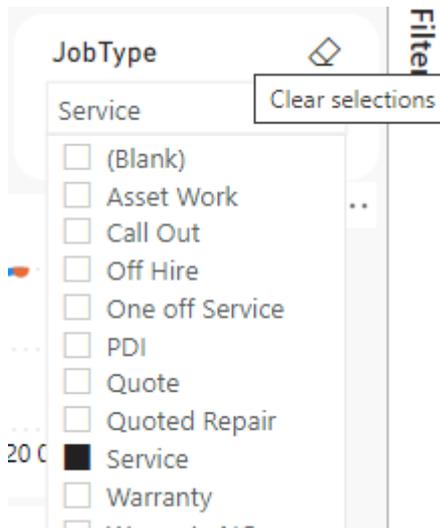
2.2.1 Applying Filters

As you click through the various pages of the report you will notice how the **Visuals** are interactive. For example, if you were to click onto a Job Type on the Jobs Summary page, it will filter the other charts seen within the same screen.

You can also apply filters to the data by using the options that are present in the top right of the screen. These values are straight from your Protean database.



To remove these filters and effectively reset the display, simply use the Eraser icon



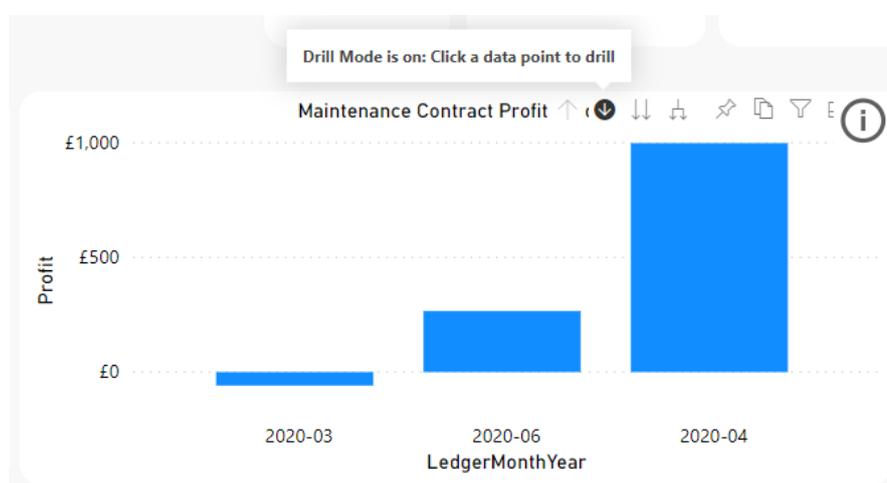
Note: Applying filters does not affect the data or system experience for users in any way, the changes you are applying here only apply to your Protean Intelligence user account.

2.2.2 Using the Drill Down options

Certain charts allow you to use what is known as the **Drill Down** options. The idea here is that you can select an item of data in a chart then look further into what makes up the summary content seen at the highest level.

This can be demonstrated on the **Maintenance** page on the **Maintenance Contract Profit & Loss** visual.

By hovering over the visual and if drill mode is enabled for that chart, you will be presented with a series of options to drill further into the data. Without drilling in, we can here that the values are simply summarised by month.



If you then click onto a month in this chart, it will automatically drill down into the types of maintenance contracts that make up the summarised total.



You can then return to the higher level by using the **Up** arrow to return.

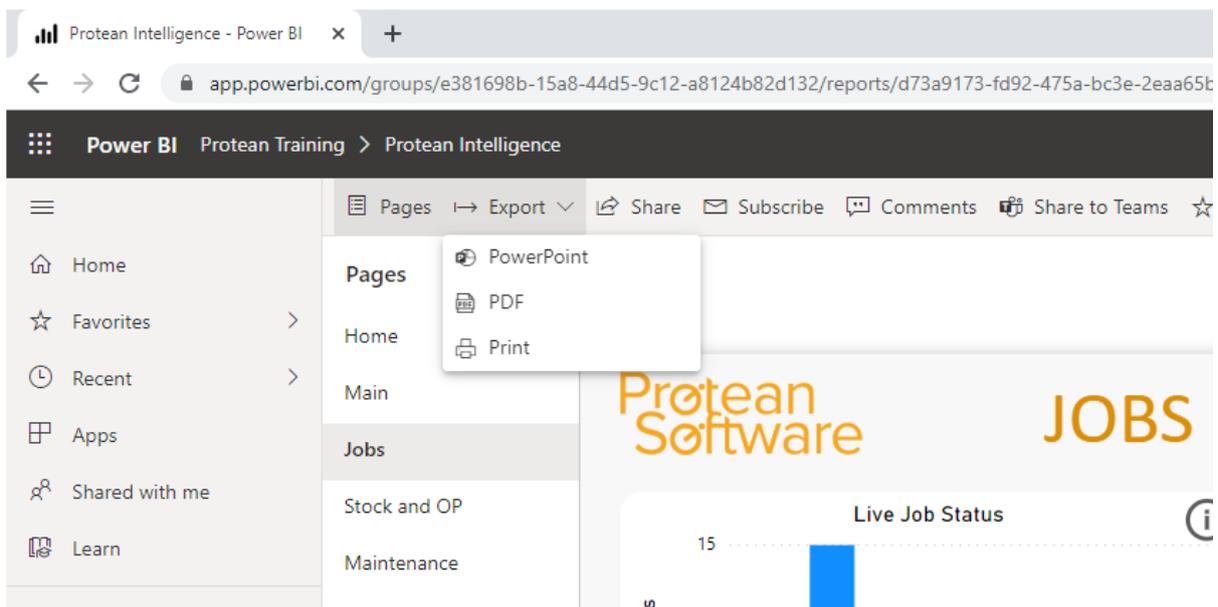
2.2.3 Extracting Data from your Protean Intelligence Report

There are various output options for retrieving data from your Protean Intelligence reports, ranging from simply taking copies of the visuals to looking into the raw data 'behind the scenes'.

2.2.3.1 Print output options

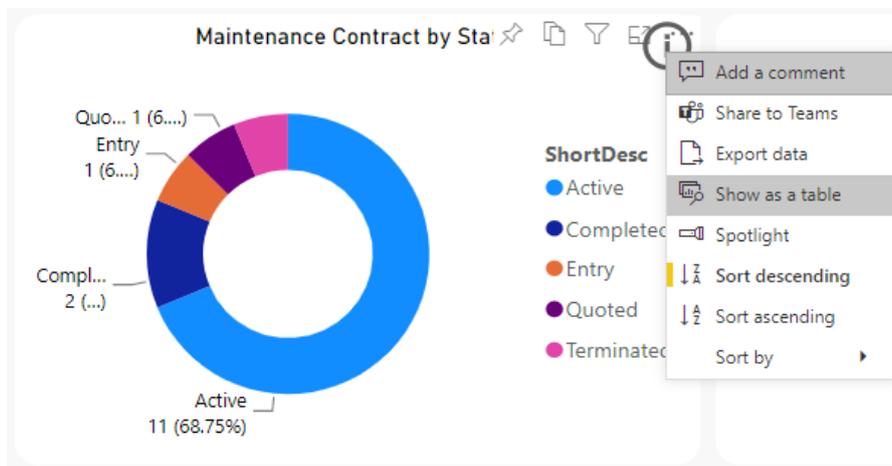
Within the top section of the report, there is an option to **Export**, by clicking here you are presented with a series of further output options.

Note: By selecting one of the Export options from this menu, the system will generate content for all pages in this report not just the current one selected.



2.2.3.2 Viewing the data behind a Visual

If you wish to see the raw data behind a visualisation, you can do this by clicking onto the three dots.



You will then be presented with the original visualisation in the top half of the screen but the bottom will display the actual values.

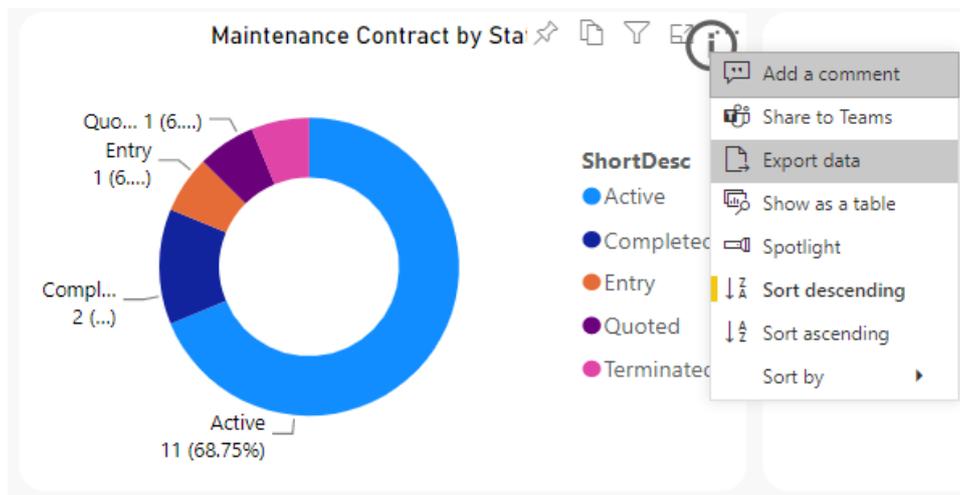
ShortDesc	No of Contracts
Active	11
Completed	2
Entry	1
Quoted	1
Terminated	1

To return to the original screen, use the **Back to Report** option.



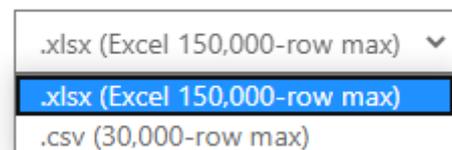
2.2.3.3 Exporting the data behind a Visual

As well as viewing the raw data behind a visualisation, you can also export this data.



When selecting this function you will then be given the option to download a file using Excel or CSV.

File format:



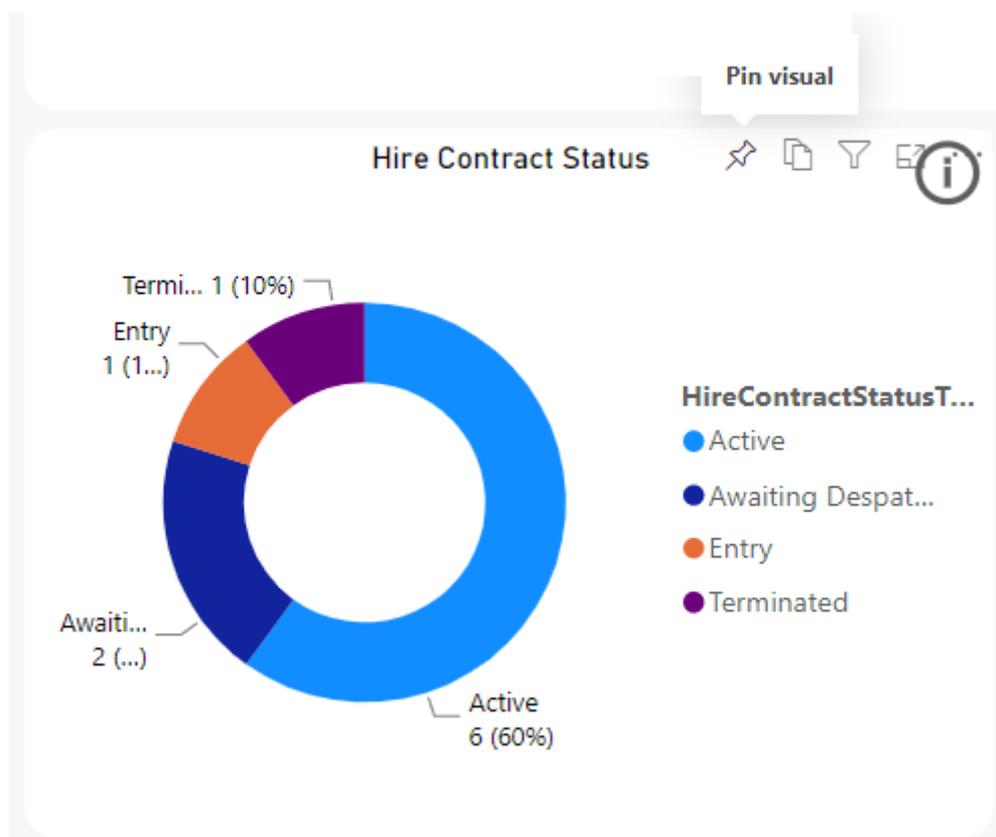
3 Customising ‘My Protean Intelligence’

Whilst it is possible to make use of the data in its standard form using the report pre-configured by Protean, Microsoft Power BI comes with a whole host of features to make your data even more relevant and accessible. This can be achieved by configuring **dashboards** and setting up **alerts**.

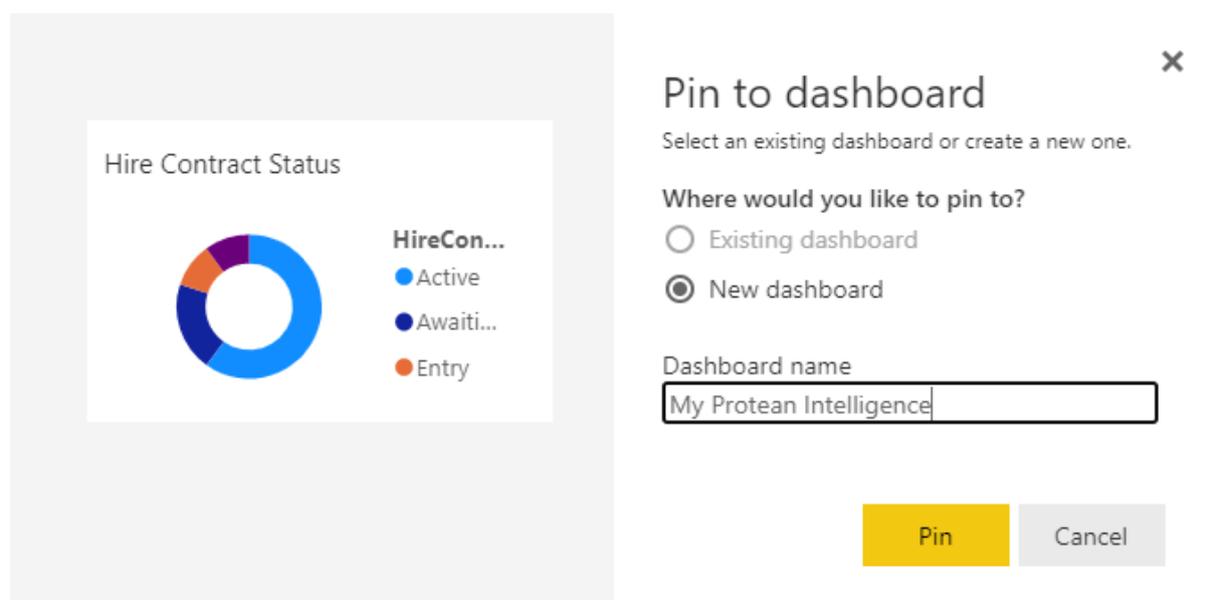
3.1 Creating your own dashboards

You can create your own dashboards to make your data more relevant to the various teams across your business or to simply tailor the system to the areas that you are most interested in. Dashboards are configurable areas which draw content from the reports present in your **workspace**.

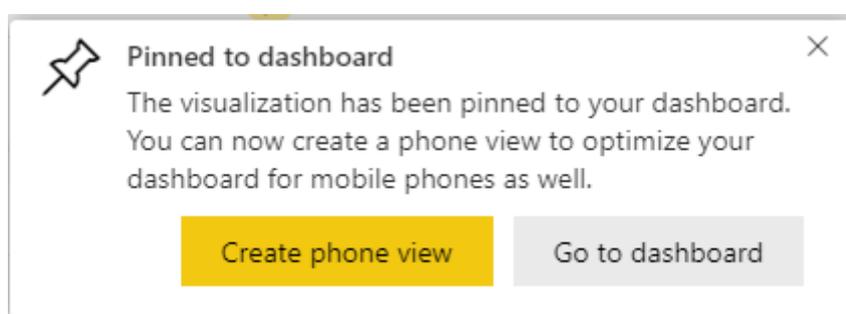
A new **dashboard** can be created from a **report**. To do this, simply click the Pin icon found in the top right-hand corner of a Visual.



When you select this option, you will then be asked to specify whether this should be added to an existing dashboard or if you wish to create a new one. In the example below a new dashboard is being created called ‘My Protean Intelligence’



After pinning this visual, the window will disappear but it has been saved! It is possible to edit this new dashboard further and it can be accessed via two methods. It is possible to jump to the new dashboard by using the pop-up message that appears in the top right of the screen



Alternatively, you can access the dashboard by heading back in to your workspace area, where a new item will have appeared.

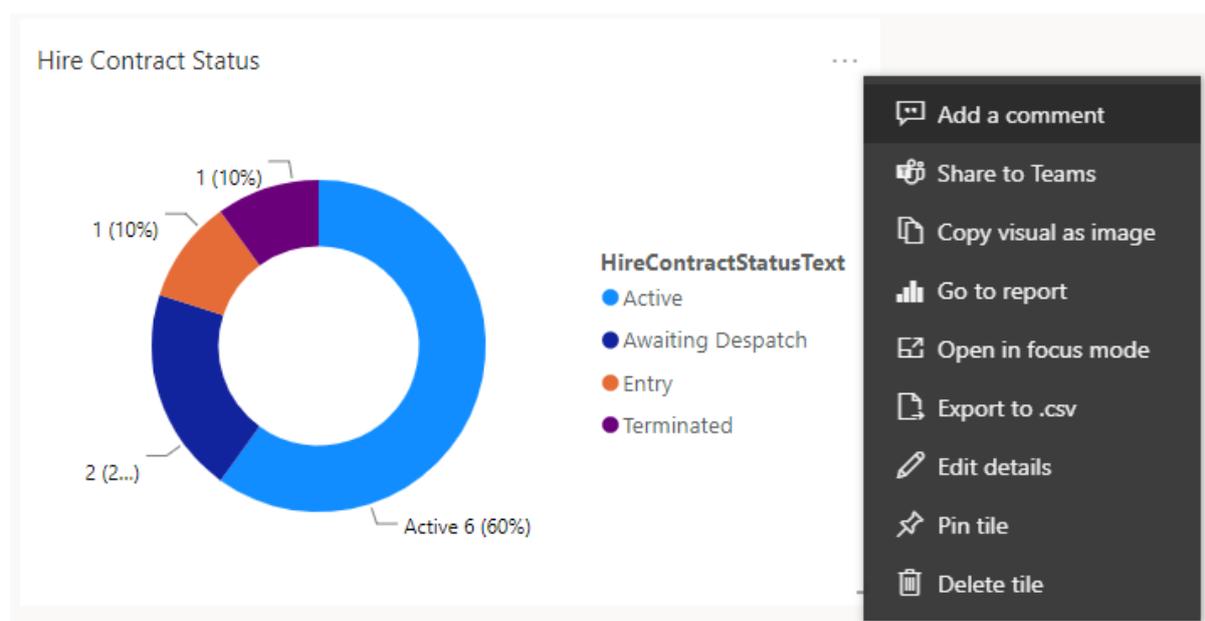
Name	Type	Owner	Refreshed
 My Protean Intelligence	Dashboard	Protean Training	—
 Protean Intelligence	Report	Protean Training	6/4/20, 2:41:44 PM
 Protean Intelligence	Dataset	Protean Training	6/4/20, 2:41:44 PM

Simply, click onto the new Dashboard and you should be presented with any charts that you have pinned to this dashboard.

It should be noted that the dashboards do in fact look very similar to the reports, but dashboards are generally the area where users should be consuming data that is relevant to them.

The tiles shown in the dashboard can be easily moved around and positioned on screen, including edits to the size, which is similar to editing an image. This is achieved by pulling the arrow down from the bottom right hand corner of the visual.

Basis edits to the tiles can be made by hovering the mouse over it, where three dots should appear in the top right hand corner, presenting you with the following options.



If you choose to add further visuals to your dashboard, the tiles will automatically place themselves alongside each other. They can of course then be edited by going into the dashboard itself.

There is no limit to the number of dashboards you can create, so by using this method, the content of the Protean Intelligence report can be made more accessible and relevant to various users across your business.

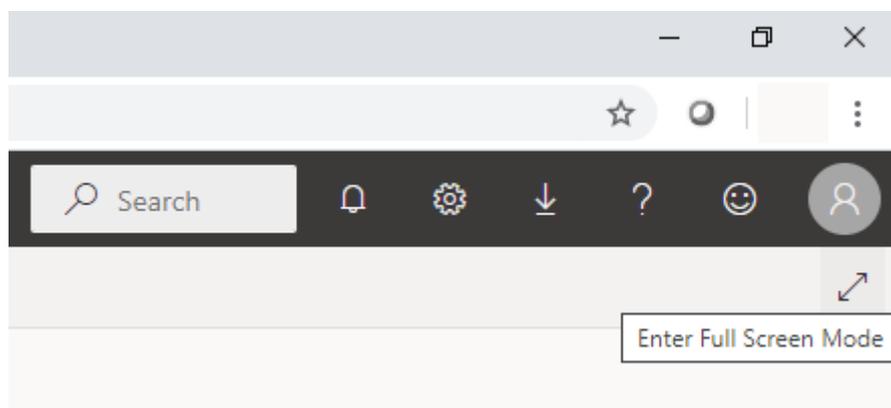
Note: Dashboard phone views do not differ from what is displayed on a PC, the view is just a tool to give you an idea of what it would look like but bear in mind that Power BI is a cross platform system.

3.1.1 Viewing your dashboard information

If you regularly use the same dashboards, you can speed up access to these by using the Favourite option – your dashboard will then display on the home screen when you first login in.



You may also wish to create a specific dashboard that may be useful to be displayed on a large screen monitor. To do this, go into your dashboard and use the Full Screen buttons to maximise the display. This can be closed by using Esc.



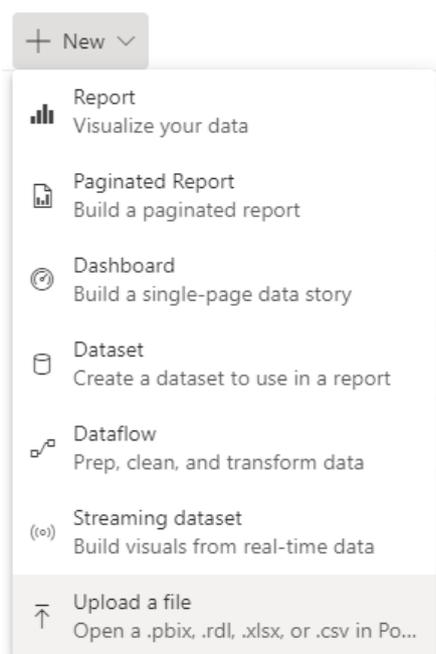
Note: It is not possible to use Full Screen mode in a report – this option is only available within the dashboard screens

3.2 Importing Excel Workbook Data

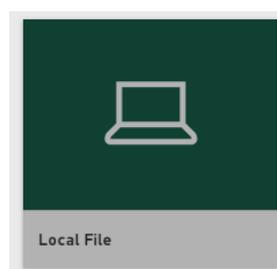
Simple workbook data can be imported into Protean Intelligence, the benefit here is that you can then combine data from another source into your existing dashboards.

To do this, head into your workspace and select the **+New** menu button.

Select **Upload a File**



Click on **Local File**



Browse your PC for the file you wish to upload

At this point, select to Upload your Excel File to Power BI

Upload your Excel file to Power BI

Bring your Excel file into Power BI to view and interact with it just as you would in Excel Online. Pin ranges to dashboards.

Upload

Once uploaded, you will be returned to your workspace with a new item in the list. The new item will be categorised with a type of **Workbook**.

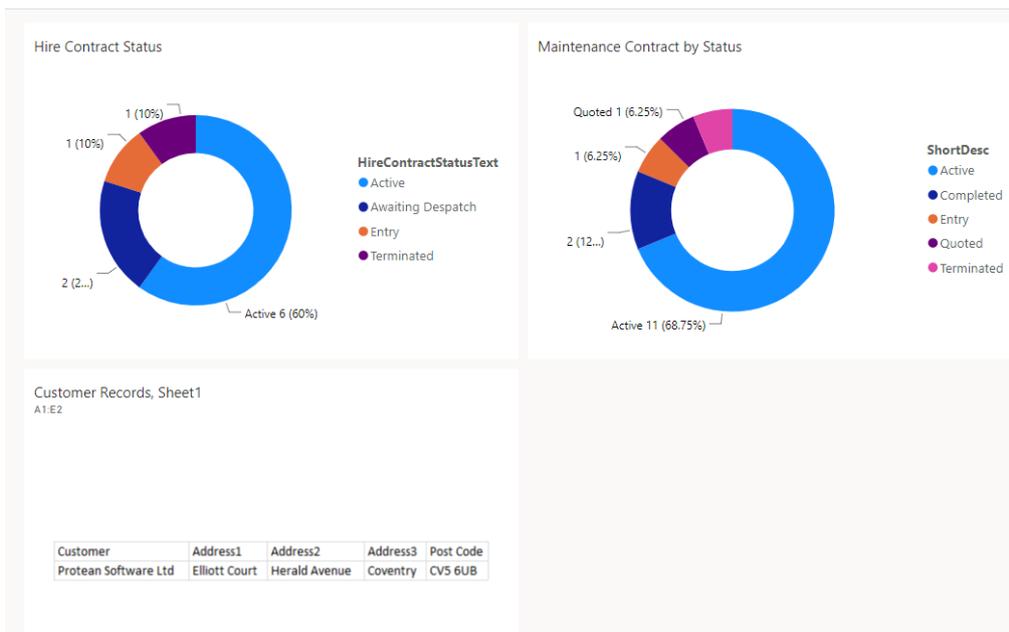
The content of this workbook can now be used in the various dashboards that you may have already configured. To add the Workbook to one of your dashboards, open it by clicking onto its name in the workspace area.

Highlight the content that you wish to **Pin**, then click the **Pin** button in the top right hand corner.

Excel Online		Edit										DATA REFRESH NOT SUPPORTED										Reload		Data		Pin	
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X			
1	Customer	Address1	Address2	Address3	Post Code																						
2	Protean Software Ltd	Elliott Court	Herald Avenue	Coventry	CV5 6UB																						
3																											

You will then need to specify which dashboard this should be added to

The custom file can then be seen within the selected dashboard.



4 Creating your own reports

4.1 Overview, help and support

As part your Protean Intelligence log in, you have the flexibility to create your own reports to draw data from your own Protean system.

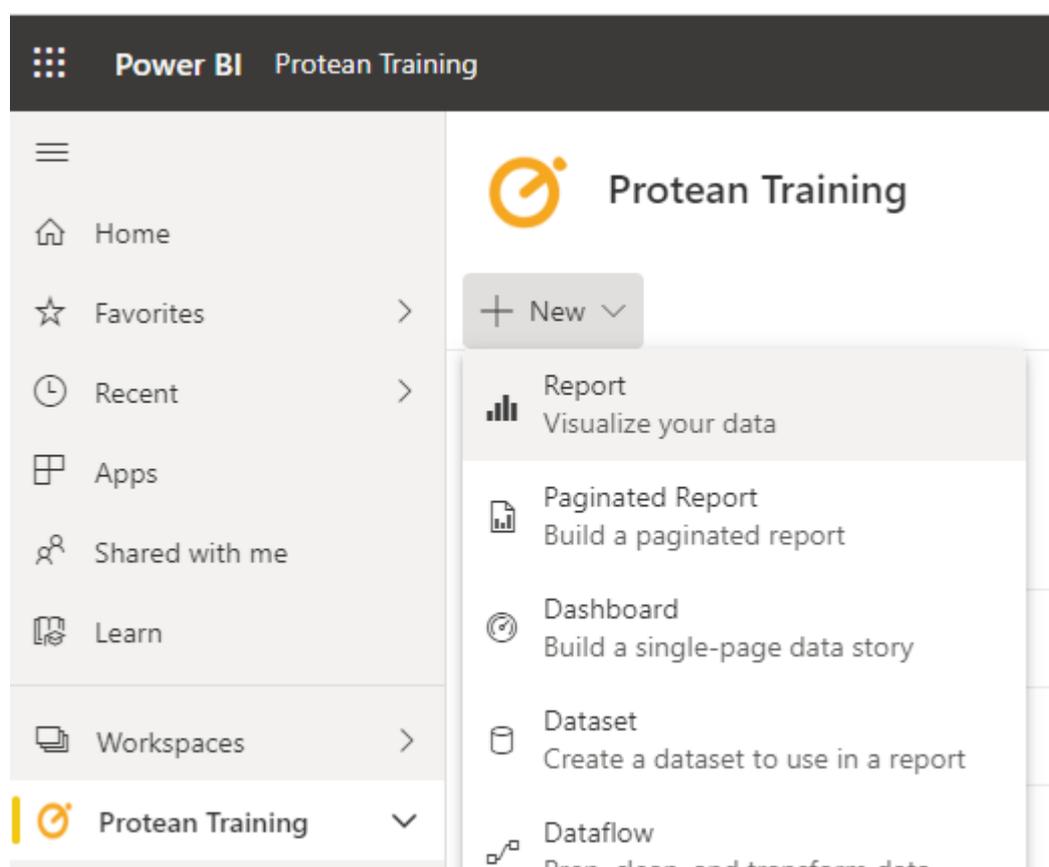
This guide aims to provide a basic introduction to this area but please note that Power BI is a very complex and powerful system. It is well supported with many help guides found online, the majority of which can be found here:

<https://docs.microsoft.com/en-us/power-bi/>

4.2 Adding a new report

To create a new report, first enter your workspace and select the **+New** menu

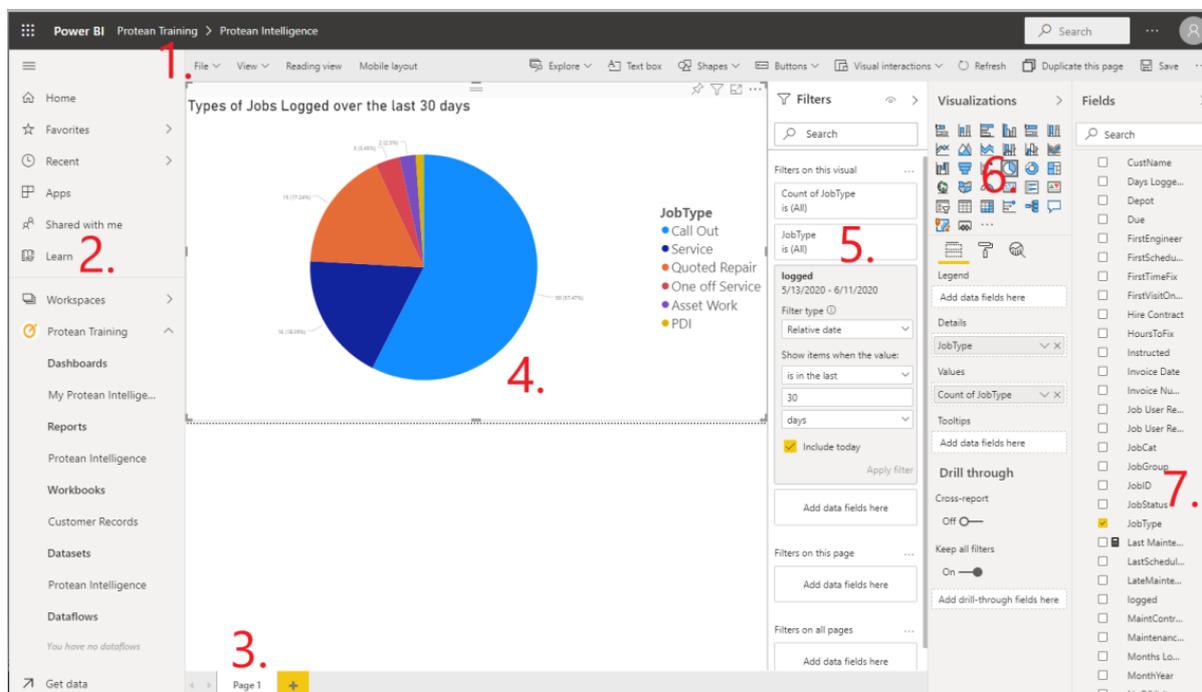
Next select **Report**



You will then be asked to specify the dataset that you wish to use, select the entry called **Protean Intelligence** then **Create**

This presents you with a blank page, from which you can start to build in various visualisations.

Below is an overview of the commonly used features.



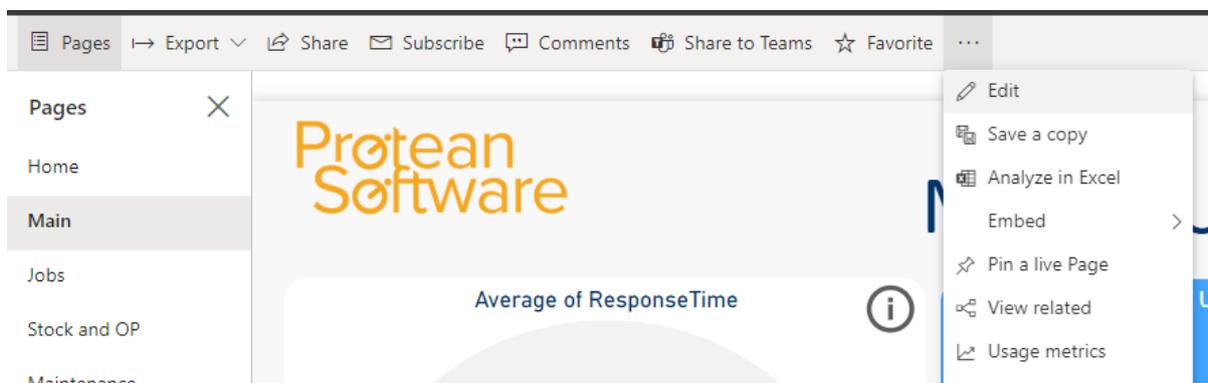
- 1) The **File** menu – used to save the report
- 2) **Learn** – There is a whole host of learning material that will find useful for getting to grips with Power BI
- 3) **Page Name** – Right click here to edit the name of the page or click the + button to add a new one.
- 4) **Visualisation** – An example visualisation, it is currently selected meaning the options on the right-hand side are affecting it.
- 5) **Filters** – This section controls the filters active on the selected visualisation, but can also be used to control filters on the entire page
- 6) **Visualisation** settings – The top section denotes the type of visualisation to use, below that you have options to control the **Fields** in use and the **Format**
- 7) **Fields** – these fields are drawn from your Protean data source, the various areas should look familiar.

For further help on report writing – please visit <https://docs.microsoft.com/en-us/power-bi/>

Once a report is created it will be saved in your workspace. You are then free to pin content from your report into your dashboards which of course may combine content from the Protean Intelligence standard offering.



If you wish to make further changes to this report once it has been saved, you can do so by clicking onto it from within your workspace. Once you have entered your new report, use the three dots at the top of the screen and use the **Edit** button.



5 FAQ's

The Home Screen is blank – note that Power BI automatically configures the home screen to show you areas that you use most, use the menu button in the top left to access your work space

No Content in my workspace – Check the account details that you have used to sign in, if you already have a Microsoft 365 account you may not be using your @proteanintelligence.co.uk user

Visuals are Showing Blank – You may not use this area of Protean meaning there is no data to return

Unable to show this visual – If the visualisations are unable to display values, then the Power BI Gateway is not able to access your Protean database, this should be reported to IT in the first instance.

Revenue streams on Home Page – If the values are on the home screen do not appear correct or a blank, check that you period settings are correct in Protean

Some options differ from this document – Ensure that the New look on settings are enabled at the top of the screen