Microsoft Power BI Template for CAST Highlight

The CAST Highlight Marketplace extension offers a Microsoft Power BI template designed to integrate CAST Highlight insights into custom Power BI dashboards. This enables users to create executive-level dashboards and organizational application portfolio overview dashboards.

The Power BI template pulls data from your organization's Highlight SaaS instance using the CAST Highlight REST API (<https://rpa.casthighlight.com/api-doc/index.html>)

# Installation and configuration Instructions

1. **Download Power BI Desktop**
   * Get the latest version of Microsoft Power BI Desktop from [this link.](https://powerbi.microsoft.com/en-us/desktop/)
2. **Check Power BI License Requirements**
   * Ensure your organization has the appropriate licenses for Microsoft Power BI Desktop. Confirm with your IT or licensing department to meet compliance.
   * Microsoft Power BI Desktop version is free to view and build reports
3. **Install Power BI Desktop**
   * After downloading, follow the installation instructions to set up Power BI Desktop on your computer.
4. **Access Your CAST Highlight Instance**
   * Ensure that you have access to the CAST Highlight instance licensed to your organization. If not, contact your CAST Highlight Portfolio Manager for assistance.
5. **Collect Required Information from CAST Highlight**
   * **API Endpoint**: The URL to access the CAST Highlight REST API (*Select from the dropdown menu on Template*)
   * **Highlight Company ID:**
     + Login to Highlight Portal and click on user icon  on top right and click on My Account.
     + Highlight Company ID is listed under “My Company Identifier”.

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* + **Authentication Details (Access Token)**
    - Login to Highlight Portal and click on user icon  on top right and click on ‘Generate Access Token’ 
    - If Generate Access Token option is not available, please coordinate with Highlight portfolio manager in your organization or contact CAST support at <https://help.castsoftware.com/>
    - API Access token will be displayed, Copy and save to use later for the connecting template to authenticate.

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# How to Populate the Power BI Template with CAST Highlight Data

1. **Download the Highlight Extension from Marketplace**
   * Ensure you have downloaded the Highlight extension onto your laptop or workstation.
2. **Open the Template File**
   * Double-click on the “Highlight-Template-For-Extension-1.0.0.pbit” file. It should automatically open in Microsoft Power BI Desktopthe file.
3. **Initial Template Screen**
   * Once the template is open, you should see the main configuration screen where you can input necessary information.

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1. **Enter Required Details and Load Data**
   * **URL** – Either select from the dropdown or manually enter the base URL for your Highlight instance for REST API.
   * **CompanyID** – Input the ‘My Company Identifier’ collected earlier in above steps.
   * **Token** – Use token information collected earlier in above steps.
2. **Access Web Content**
   * If you get access web content alert similar to below, select ‘Anonymous’ and then click on ‘Connect’ button.

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1. **Privacy Levels (Optional)** 
   * If prompted for privacy levels setting, choose “Organizational” from the dropdown menu and click “Save”.

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1. **Fetching Data**
   * Power BI Desktop template will now use the Highlight using REST API to fetch data from your organization’s Highlight instance.

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1. **Navigating the Power BI Report**
   * To navigate between different views in Power BI Desktop, use ‘**CTRL + Click’** on the buttons on Homepage view or Click on TABS at the bottom on the report. If you’re publishing the report to Power BI Services (<https://app.powerbi.com/>), you can simply click on the buttons without the need for ‘**CTRL**’

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With these steps, your Power BI template should be populated with data from your CAST Highlight instance, ready for insight consumption and reporting.