Accessing Your Data in the Cloud

Version 3

See Your QuickBooks Data in the Cloud

QQube provides over 220 individual metrics in the form of desktop files (.pbix extension) which can also be sent to the cloud, and viewed using a browser, using a private microsoft e-mail account.
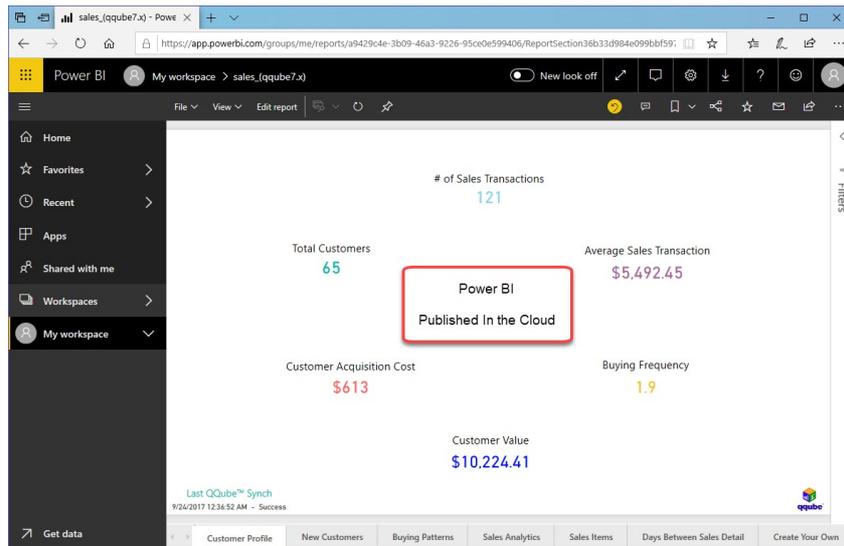

There are two ways to do this:

- **Manually** - from within the .pbix file
- **Automatically** - using the free MIcrosoft data gateway

Once logged in to your Microsoft Power BI cloud account (called Power BI Service), you will have access to the metrics you produced, OR you can create additional metrics using the cloud based Power BI building tools.

QQube is the first 3rd party application to provide out-of-the-box financial statements designed to be read on a mobile phone or other mobile device.
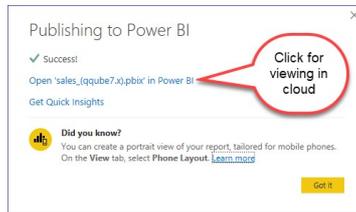
Manual Option

From within the Power BI Desktop Editor click on the Publish button:
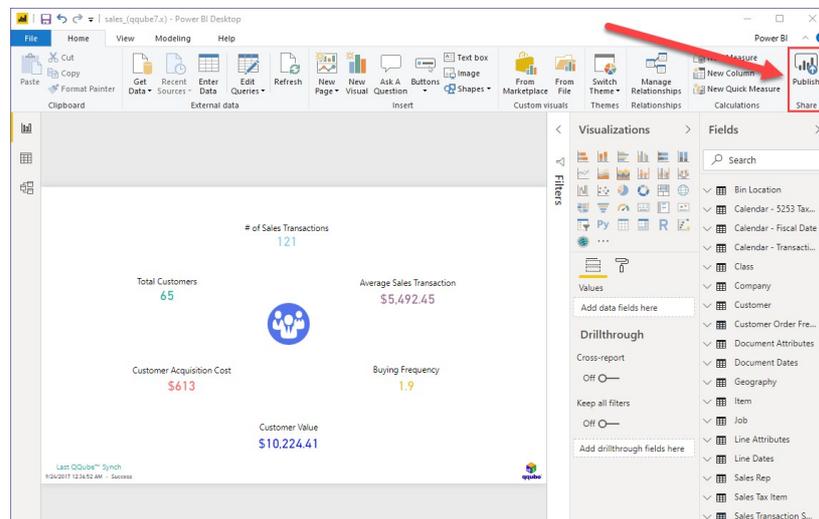
You may be prompted for your Power BI user name (onmicrosoft.com e-mail) and password, after which your information will be uploaded and ready for viewing.

Automatic Option

The concept is to have

a. QQube periodically refresh the data from QuickBooks
b. Power BI gateway automatically refresh the desktop .pbix analytic structures from QQube
c. Power BI gateway automatically push the .pbix files to the cloud.
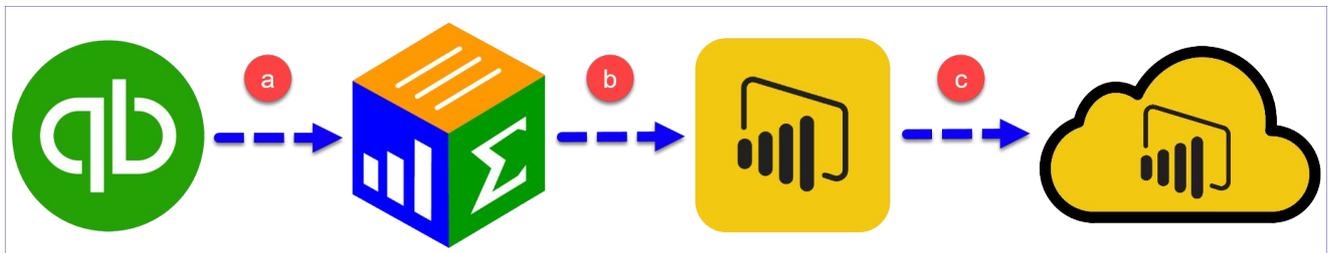
Installing Power BI Gateway (Personal Edition)

The gateway is the device that allows you to automatically publish your data from the desktop .pbix files to the cloud.

There are four main steps for using a gateway (taken from https://docs.microsoft.com).

1. Download and install the gateway on a local computer.
2. Configure the gateway based on your firewall and other network requirements.
3. Add gateway admins who can also manage and administer other network requirements.
4. Troubleshoot the gateway in case of errors.

NOTES:

If you are using the QQube Remote Desktop Installation, it is safe to install the personal gateway under the dedicated synch user.

If you are using the QQube Local Desktop Installation, you can install under the locked admin console.
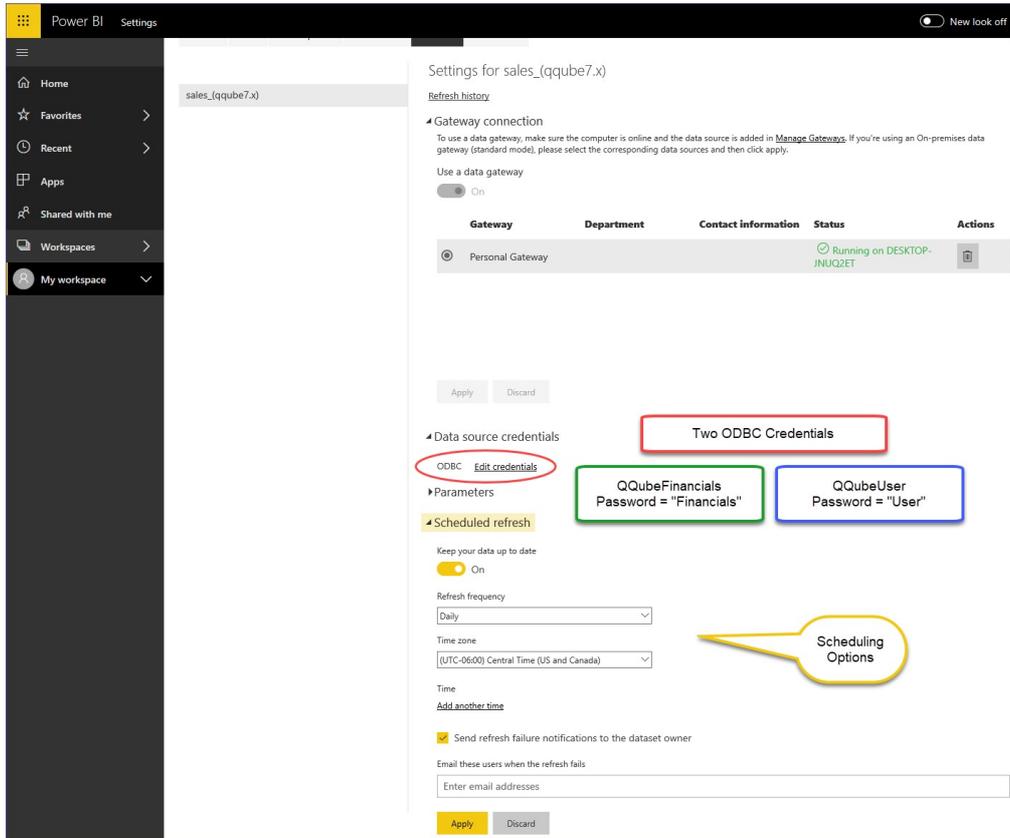
Gateway Credentials and Refresh Scheduling

We advocate uploading your files the first time from the desktop .pbix file to avoid any confusion. Once uploaded, you can login to your PowerB console via a browser, and check the credentials and refresh scheduling for each one.

From within your PowerBI console in your browser:
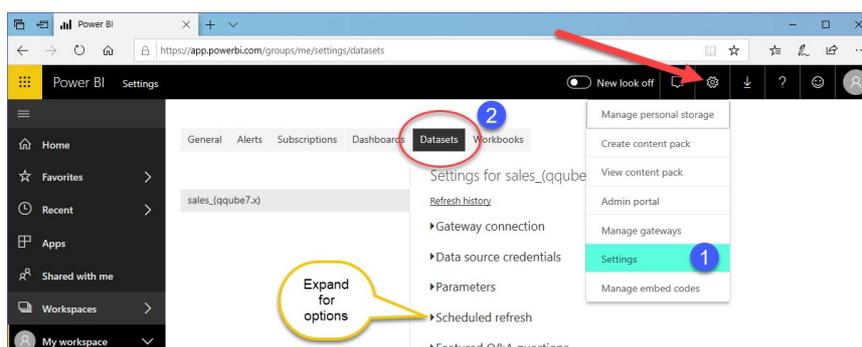
You can highlight each data set in the left hand column, then ensure that the credentials have been properly secured, and control how often you want the data to be refreshed from the QQube database on the server.

Once you have entered the credentials for the two DSN's that QQube installs, you shouldn't need to again - even if you have a different data set (analytic).

tags : powerbi, powerbi-gateway