



HOUSE OF
CONTROL



Business Analyze 6.4 Release Notes

20 October 2022

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Lillehammer, 20/10/2022

Contents

1. Introduction	2
2. Analysis module	2
2.1. Chart selector	2
3. Profile page	3
4. Integrations	3
4.1.1. Hubspot provider/connector.....	3
4.1.2. Microsoft GraphQL Calendar provider/connector	3
4.1.3. SuperOffice REST API.....	4
5. List of fixes	5
5.1. Appendix – Usage	6
5.1.1. Microsoft GraphQL Setup	6
5.1.2. HubSpot Relations for new endpoint data.....	8

1. Introduction

Business Analyze version 6.4, focus on improvements and integrations.

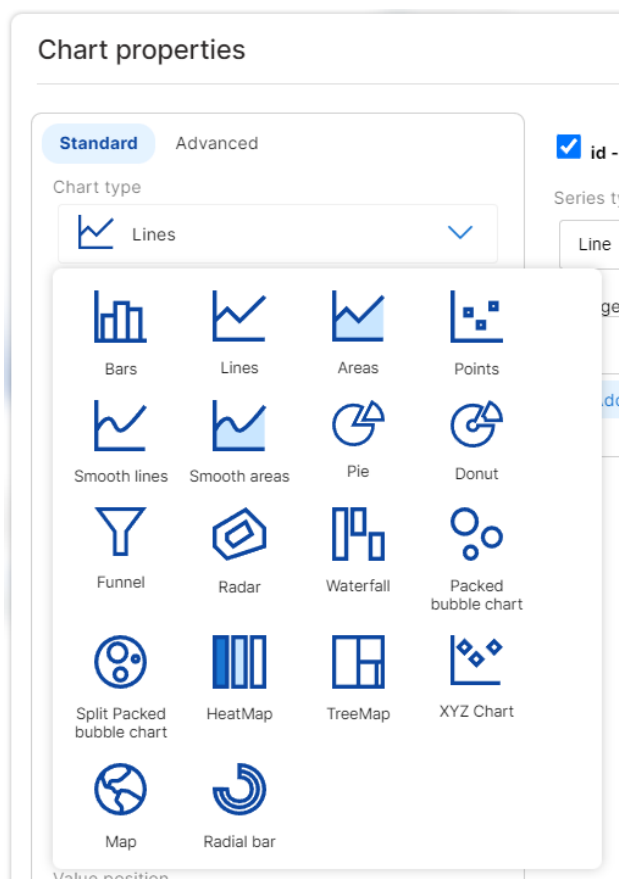
2. Analysis module

2.1. Chart selector

We have made improvement in the chart selector.

Now all available chart types are visualized by icons in the select list and selection area.

This works in the runtime and editor for a dashboard.



3. Profile page

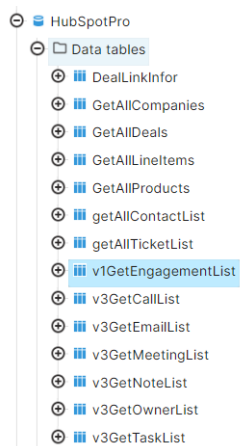
From the personal profile page, you can change the phone number (e.g. used with 2FA).

The screenshot shows the 'Profile' page in the Business Analyze application. On the left, there is a large blue logo consisting of a diamond shape with internal geometric patterns. Below the logo is a file upload area with a 'Choose File' button and the text 'No file chosen'. Below that is an 'Upload picture' button. On the right, there are several form fields: 'Name' (Frode Svensson), 'User name', 'Mobile' (Norway +47 and 19101010), and 'Language' (English). A 'Save' button is located below the form fields.

4. Integrations

4.1.1. Hubspot provider/connector

We have included more endpoints/api from HubSpot. Engagement data (Call, Email, Meeting, Note, GetOwner, Tasks).



4.1.2. Microsoft GraphQL Calendar provider/connector

Support for query the Microsoft GraphQL calendar when you want to visualize the bookings of meetings and status for meeting requests.

4.1.3. SuperOffice REST API

Our connector is now updated to include more data columns and also support new options for filtering, sorting, and limiting data query. With the usage of “Real-time cache” you now can build live dashboards that get data nearly instant from the SuperOffice Online.

Examples:

Data source

Query type
 •

Procedure does not return result set

Procedure

Filters

Name	Position	Data type	Value
filter	0	nvarchar(max)	date ge '2012-01-01' and associate/associateDbld in (5,710) and dateBetween(date,'2022-08-01 00:00:00','2022-09-30 23:59:59')
top	1	int	20
skip	2	int	
orderBy	3	nvarchar(max)	date Desc

You can also utilize parsing tags from a parameter list in dashboard like sales status, users, etc.. Then you input filters like SE-parsing tags see [parameter definition](#) from community.

Filters

Name	Position	Data type	Value
filter	0	nvarchar(max)	date ge '=sv(date_all_startperiod);' =param("id":"6f1cc1d4-cd2a-425f-b87b-77157a48a6c4","colref":"stage","output":"Total");
top	1	int	=param("id":"94d74d05-87b4-45a3-8197-dc2aa85ebaf3","quotes":"none","alloutput":"50","output":"proc");
skip	2	int	
orderBy	3	nvarchar(max)	=param("id":"1ce6cefd-4760-4572-8528-d713fbdfc046","output":"proc");

5. List of fixes

Module	Area	What's new
Analysis	Excel export	Show all data rows as default.
Analysis	SuperOffice Locale Parsing (Multi language strings)	Keep text outside parsed locale.
Analysis	Period calendar	Was hidden behind the action tab.
Analysis	Scrollbars in product	Increase size of the scrollbars
Analysis	Pie chart	Draws double
Analysis	Combo gauge	Fixed a bug causing Combo Gauge errors when period parameter was missing.
Analysis - Dashboard	Tooltip	Tooltip do not disappear outside dashboards.
Connectors / providers	Provider: Microsoft GraphQL Calendar	Support for query calendar data for API.
Connectors / providers	Provider: SuperOffice REST API	Extended sales information and support for parameter filtering.
Connectors / providers	Hubspot provider	Updated with engagement data.
DataCentral	Live user cache	Fix issue with live user cache.
DataCentral	Weekly schedule	Fix issued with weekly schedule going outside range.
DataCentral	Complete Control light provider	Support for DML for contracts (create/update)
DataCentral	Data Central – data source	New datasource always available.
DataCentral	SE-scripting tester	Fixe issue with buttons.
Desktop	Profile page	Support for setting your phone number used during 2FA in your personal profile page.

5.1. Appendix – Usage

5.1.1. Microsoft GraphQL Setup

DataSource Setting

Provider : MicrosoftGraph REST API

SO Api URL : <https://graph.microsoft.com/v1.0/>

Necessary Input Information : Tenant, client_id, and client_secret

How to get ClientID, ClientSecret, and TentantID on Azure Potal

Url : <https://portal.azure.com/>

Step 1. Go to "App registrations"

The screenshot shows the Microsoft Azure portal interface. At the top, there is a search bar and a navigation menu. Under 'Azure services', the 'App registrations' icon is highlighted with a red box. Below this, the 'App registrations' page is displayed, showing a search bar and a table of applications. A red arrow points to the 'Business Analyze GraphQL Provider' application, and a red box highlights the 'Application (client) ID' field.

Display name	Application (client) ID
BA Business Analyze GraphQL Provider	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Step 2. How to get Client_ID and Tentant ID

Delete Endpoints Preview features

Essentials

Display name : [Business Analyze GraphQL Provider](#)

Application (client) ID : xxxxxxxxxxxxxxxxxxxxxxxxxxxx

Object ID :

Directory (tenant) ID : Tenant Tenant Tenant Tenant **Tenant ID**

Supported account types : [My organization only](#)

Client credentials : 0 certificate_1 secret **Click**

Redirect URIs : [0 web_1 spa_0 public client](#)

Application ID URI :

Managed application in I... : [Business Analyze GraphQL Provider](#)

Step 3. How to get Client_Scret

Business Analyze GraphQL Provider | Certificates & secrets

Search (Ctrl+/) << Got feedback?

Overview: Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (1)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	Secret ID
Access MSGraph by BA	12/22/2022	xxxxxxxxxxxxxxxxxxxxxxxxxxxx Client Secret Value	xxxxxxxxxxxxxxxxxxxxxxxxxxxx

Datatables : Columns setting of “GetAllCalendar”

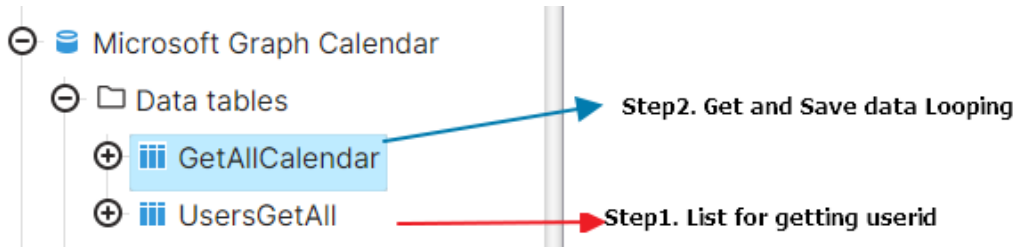
- weblink and body.content **must change type to nvarchar(max)**

<input checked="" type="checkbox"/>	weblink	weblink	weblink	0	<input checked="" type="checkbox"/>	nvarchar(max)
<input checked="" type="checkbox"/>	body.content	body.content	body.content	0	<input checked="" type="checkbox"/>	nvarchar(max)

Datatables : “UsersGetAll” and “GetAllCalendar”

- In order to import “GetAllCalendar” datatable, “UsersGetAll” datatable must be preceded.

- "GetAllCalendar" datatable is called with unique Id (userid) of UsersGetAll" datatable. (call Api looping)



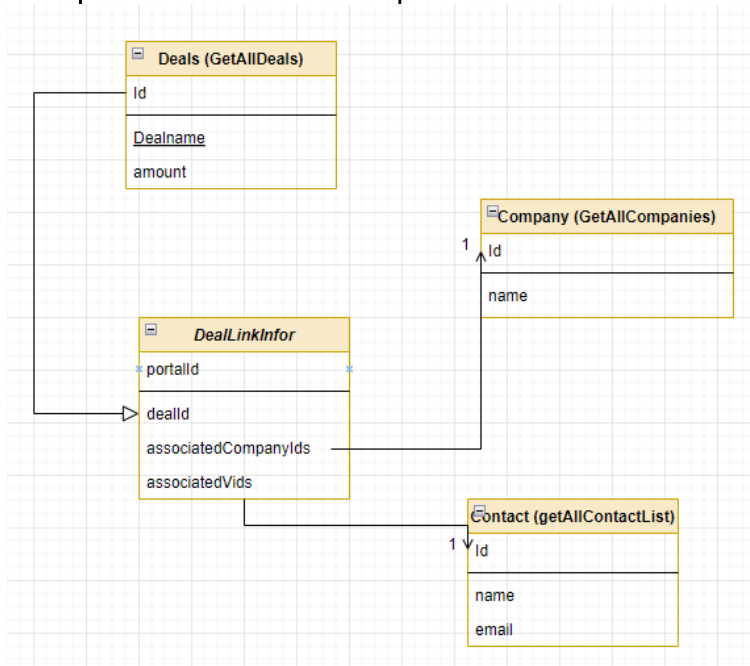
Filters

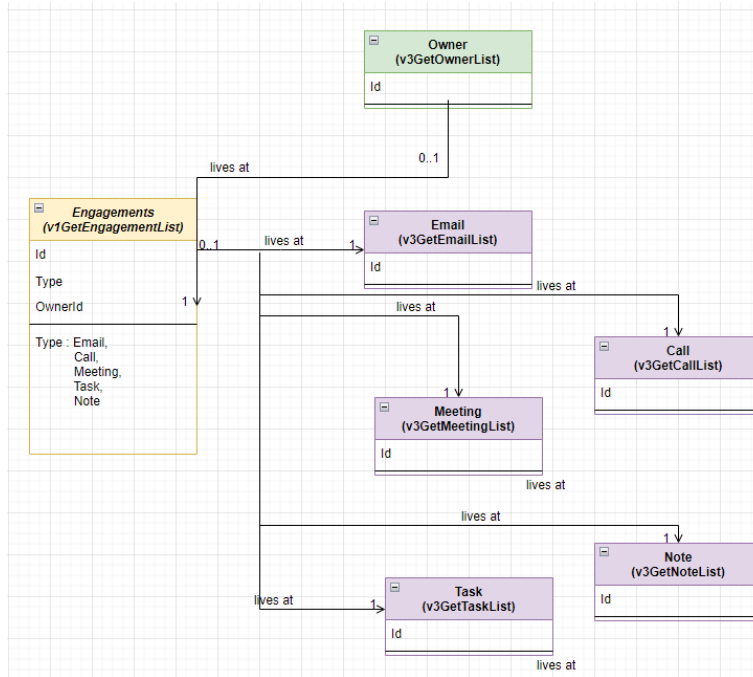
- When **startdate** and **enddate** is check to "Use default value", **startdate** will have a value of 6 months ago from today and **enddate** will be setting by today.

- userid should be checked to "Use default value".

Parameter	Type	Description
startDateTime	String	The start date and time of the time range, represented in ISO 8601 format. For example, "2019-11-08T19:00:00-08:00".
endDateTime	String	The end date and time of the time range, represented in ISO 8601 format. For example, "2019-11-08T20:00:00-08:00".

5.1.2. HubSpot Relations for new endpoint data





Understanding the CRM : 6 Objects for CRM

<https://developers.hubspot.com/docs/api/crm/understanding-the-crm>

- Deals
- Companies
- Contacts
- Products
- Line items
- Tickets

Engagements

To Add Engagements and Activities (Email, Call, Meeting, Note, Task)

- Filter Option : "Limit" should be max 100.

Reference URL:

Use Activity filters : <https://knowledge.hubspot.com/lists/use-the-activity-filter-in-lists>

Engagements API: <https://legacydocs.hubspot.com/docs/methods/engagements/engagements-overview>

How to get apikey :

<https://knowledge.hubspot.com/integrations/how-do-i-get-my-hubspot-api-key>