

# Monarch Server Automation Edition

**Version 14.1**



**[Client API Settings for IBM Watson  
Analytics and Power BI]**



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## **DATAWATCH CORPORATION**

### **CORPORATE HEADQUARTERS**

4 Crosby Drive  
Bedford, MA 01730, USA

Tel.: +1 800.445.3311 / +1 978.441.2200  
Investor Relations: +1 978.441.2200 ext. 8323  
Fax: 978.441.1114

Sales: [sales@datawatch.com](mailto:sales@datawatch.com)

Support: [support@datawatch.com](mailto:support@datawatch.com)

### **GREENSBORO, NC**

101 S Elm #225  
Greensboro, NC 27401  
Tel: +1 800.445.3311

### **NEW YORK**

415 Madison Avenue, Suite 1421  
New York, NY 10017  
Tel.: +1 800.445.3311

## **UNITED KINGDOM**

### **DATAWATCH INTERNATIONAL LIMITED.**

Siena Court, Broadway  
Maidenhead, Berkshire SL6 1NJ  
Tel: +44 845 362 3270

Floor 42 Level 39  
One Canada Square  
Canary Wharf  
London E14 5AB  
Tel: +44 845 362 3270

## **SWEDEN**

### **DATAWATCH AB**

Eriksbergsgatan 10  
Stockholm, Sweden SE-114 30  
Tel: +46 853 480 483

## **ASIA PACIFIC**

### **MANILA**

U2011 20th Flr Jollibee Plaza Condominium  
F. Ortigas Jr. Rd., Ortigas Center  
Pasig City 1605  
PH  
Phone +63 2 633 5583

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# Overview

The DataPrep Export element in Automator's Visual Process Designer allows data to be exported in various formats. Before exporting IBM Watson Analytics or Power BI file types, the API settings of these connectors need to be modified. Use the Client API Settings page to configure the settings for the IBM Watson API and Power BI API.

## To access the Client API Settings page

1. On the Navigation Tree, click **System Settings**, and then select **System Preferences**.
2. At the top of the page under Automator Settings, select the **Client API Settings** tab.

For the settings of both IBM Watson and Power BI, the following details should be provided:

- ❑ **Client ID:** It is a string that carries user information as provided during registration in IBM Watson Analytics and Power BI. It is used by these connectors to identify Automator once it is registered. The Client ID is public information that goes hand in hand with the Client Secret Key.
- ❑ **Client Secret Key:** It is used to authenticate Automator when it requests access to user accounts in IBM Watson Analytics and Power BI. It goes hand in hand with the Client ID and should be kept private.



## NOTES

To get the Client ID and Client Secret Key for IBM Watson Analytics, click [here](#).

To get the Client ID and Client Secret Key for Power BI, click [here](#).

- ❑ **Host Name:** It is the full name of the machine on which Automator is installed.
- ❑ **Port:** It is the value of the port on which Automator is installed.
- ❑ **Redirect URI:** It is the URI to which IBM Watson Analytics and Power BI direct after authenticating the user. The field is automatically filled after supplying the Client ID, Client Secret Key, and host name.

## Other settings:

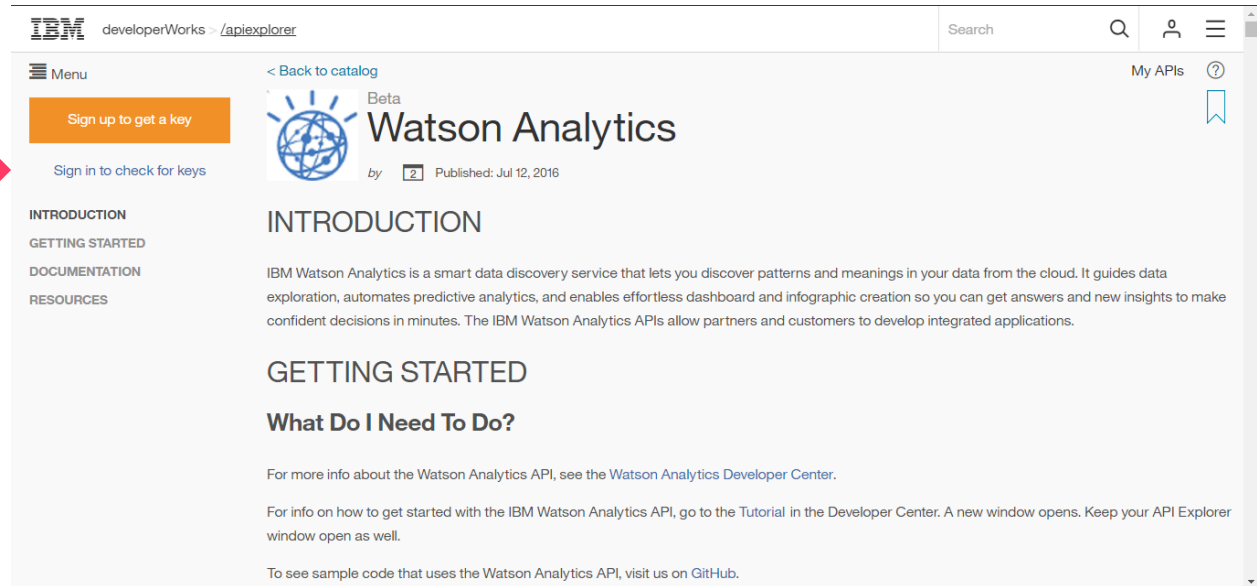
- ❑ **Update Api Config on Saving (IBM Watson Analytics API Settings):** Select this check box to add the redirect URI to the config file of the Watson server.
- ❑ **Save:** Click this button to save the application settings.
- ❑ **Clear:** Click this button to remove the information in the fields.



# IBM Watson API Keys

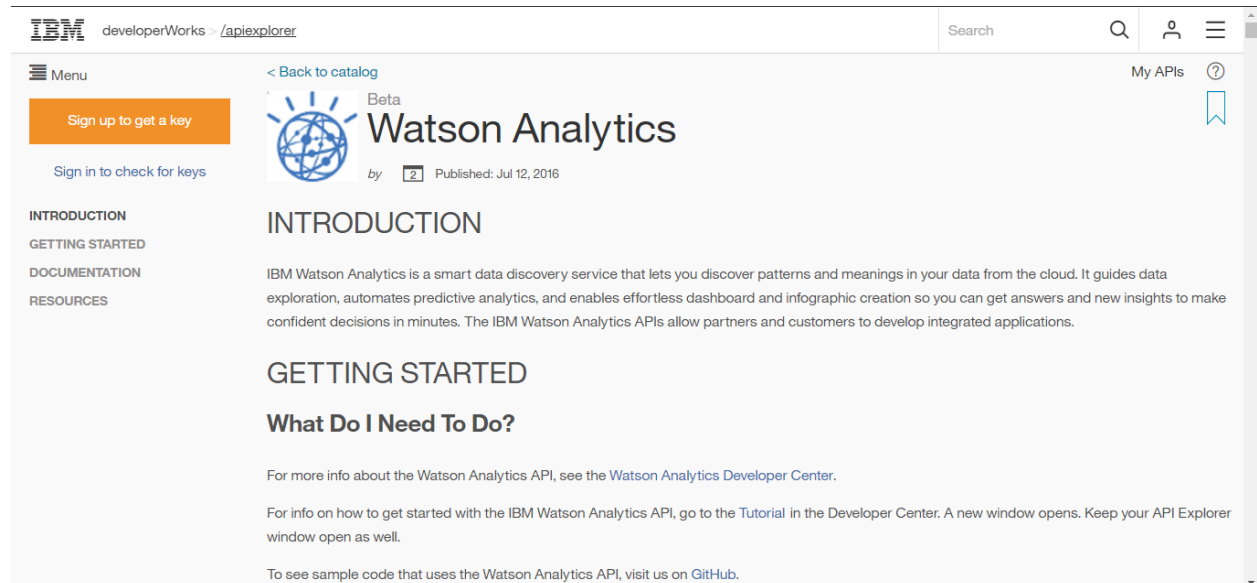
## To get a Client ID and Client Secret Key for IBM Watson Analytics

1. Go to the [API Explorer](#), and click **Sign in to check for keys**.



The screenshot shows the IBM Watson Analytics API Explorer interface. At the top, there's a search bar and a 'My APIs' link. The main content area features a 'Sign up to get a key' button and a 'Sign in to check for keys' button, with a red arrow pointing to the latter. Below this, there's an 'INTRODUCTION' section and a 'GETTING STARTED' section with the heading 'What Do I Need To Do?'. The 'What Do I Need To Do?' section contains three paragraphs of text providing information about the API and how to get started.

2. Click the [My APIs](#) link to view all your APIs and create a set of Client ID and Client Secret Key.

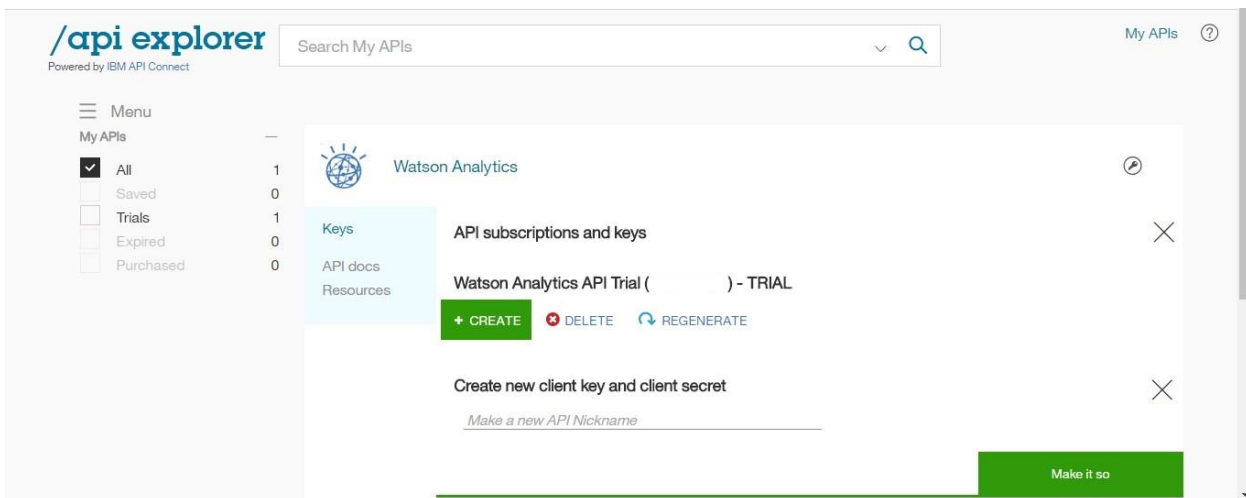


This screenshot is identical to the one above, but with a red arrow pointing to the 'My APIs' link in the top right corner of the page.

To create a new set of Client ID and Client Secret Key, perform the following:

- a. Click **Create**.
- b. Enter a new API nickname.

- c. Click **Make it so**.
- d. On the next page, click **Manage your keys** to view your newly generated Client ID and Client Secret Key.



3. Register the API Client ID and application information using one of two methods.

#### Method 1.

- a. Execute the /oauth2/v1/config operation in a server component. Note that this operation is called only once, except for cases involving changes in the Client ID.

```
curl -v -X PUT -H "X-IBM-Client-Secret:YOUR_CLIENT_SECRET" -H "X-IBM-Client-Id:YOUR_CLIENT_ID" -H "Content-Type: application/json" -d '{"clientName": "The Sample Outdoors Company", "redirectURIs": "https://example.com:5443", "ownerName": "John Smith", "ownerEmail": "John.Smith@example.com", "ownerCompany": "example.com", "ownerPhone": "555-123-4567"}' https://api.ibm.com/watsonanalytics/run/oauth2/v1/config
```

- b. Specify the redirect URI for the application that you want the Watson Analytics API to redirect to (i.e., http://<hostname>/MSAdmin/ProcessDesignerEditor/Redirect, where "hostname" is the full name of the machine on which Automator is installed).



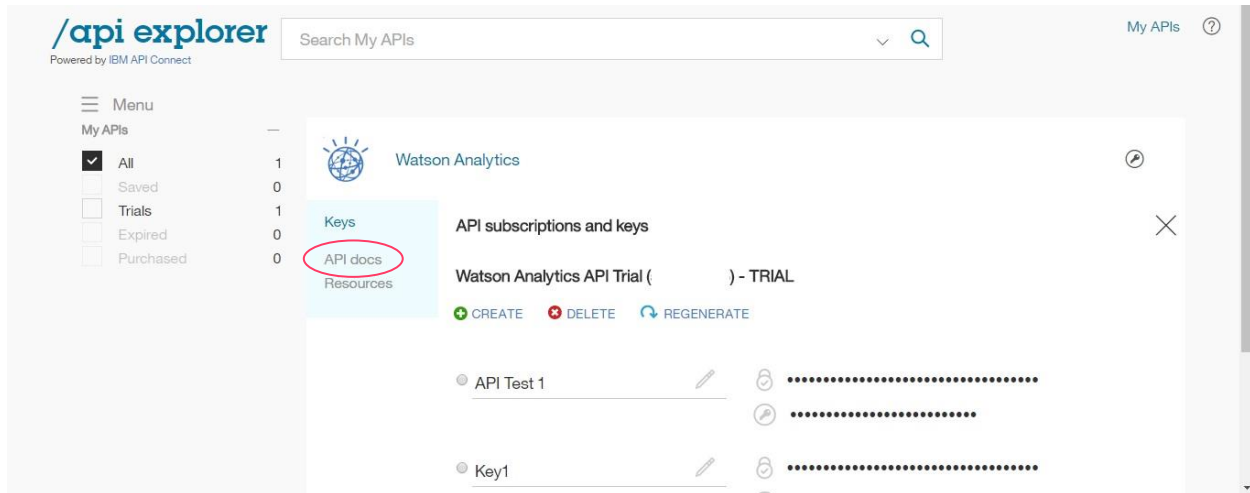
#### NOTES

In Monarch Server v14.1 that is upgraded from previous versions (e.g., v13.2), the virtual folders could still be labeled as "DSAdmin" (or "DSClient"). In this case, use "DSAdmin" (or "DSClient") instead of "MSAdmin" (or "MSClient") to open the Admin (or Client) page.

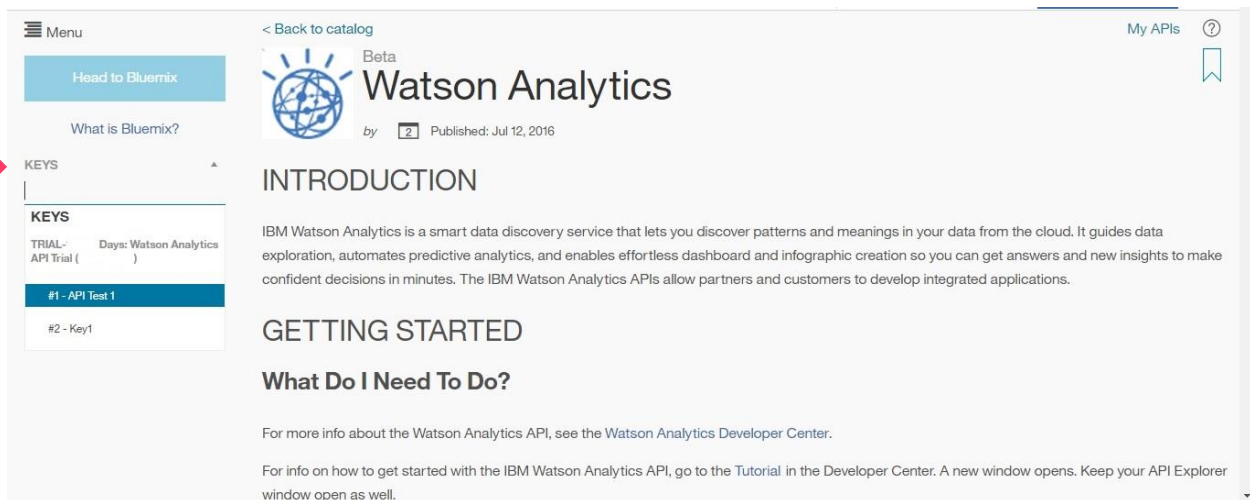
#### Method 2.

- a. On the [My APIs](#) page, Click **Manage your keys**.
- b. On the blue pane, click **API docs** to return to the [API Explorer](#).





- c. On the left panel of the [API Explorer](#) page, click **KEYS**, and then select the API nickname you used for your Client ID and Client Secret Key.



- d. On the same panel, click **Documentation**, and then select **Register the client ID in...** under **Security**.



- e. Scroll down to find the **Body** field under **Path and Query parameters**. The **Body** field contains the following:

```
{ "ownerName":"John Smith", "clientName":"The Sample Outdoors Company", "redirectURIs":"https://localhost:5443", "ownerPhone":"555-123-4567", "ownerCompany":"The Sample Outdoors Company", "ownerEmail":"John.Smith@example.com" }
```

Supply the necessary information by replacing the bold text in the code with the correct data. Specifically, you need to provide the following:

```
ownerName(string): The name of the owner.
clientName(string): The name of the client. If a clientName is already in use by another application, a 409 response is returned and you must select another clientName.
redirectURIs(string): The redirect URI is the callback entry point of the application. This parameter specifies a URI or list of URIs separated by spaces for each application that you want the Watson Analytics API to redirect to.
ownerPhone(string): The phone number of the owner.
ownerCompany(string): The name of the company.
ownerEmail(string): The owner's email address.
```

Note that the Client ID and Client Secret Key you selected are already supplied in the **X-IBM-Client-Id** and **X-IBM-Client-Secret** fields under the **Header parameters**.

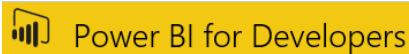
- f. Click **TEST** to initialize the selected Client ID and Client Secret Key.



# Power BI API Keys

## To get a Client ID and Client Secret Key for Power BI

1. Access Power BI's Registration Tool at <https://dev.powerbi.com/apps>.



## Register an Application for Power BI

Register a new application that can be used to call Power BI APIs

### Step 1 Login to your Power BI account

Create a new application with just a few simple steps. Once created, you can make any subsequent changes to your app details via the [Azure Management Portal](#).

[Sign in with your existing account](#)

[Don't have an account? Get one for free.](#)



### NOTES

The registration process in Power BI requires an Azure Active directory, an organizational user, and a Power BI service account. To sign up for an Azure subscription or to log in using an account with such subscription, click [here](#).

To learn how set up your Azure Active Directory and organizational user, click [here](#).




2. Sign in using your Power BI account in Step 1 of the Registration Tool.
3. Provide the following details:
  - a. **App Name** – The name of your app, i.e., Automator.
  - b. **App Type** – Choose “Server-side Web app.”
  - c. **Redirect URL** – This provides Power BI with more details about the app requesting the authentication. An example of a redirect URL is <http://<hostname>/MSAdmin/ProcessDesignerEditor/PowerBIRedirect>.
  - d. **Home Page URL** – Use the sign in page of Automator, i.e., <http://<hostname>/MSAdmin>.



#### NOTES

In Monarch Server v14.1 that is upgraded from previous versions (e.g., v13.2), the virtual folders could still be labeled as “DSAdmin” (or “DSClient”). In this case, use “DSAdmin” (or “DSClient”) instead of “MSAdmin” (or “MSClient”) to open the Admin (or Client) page.

 **Power BI for Developers**

Step 2 Tell us about your app

Let's start with some basic details.

App Name:

App Type:  
Specify the type of app. Use 'Server-side Web app' for web apps or Web APIs, or 'Native app' for apps that run on client devices (Android, iOS, Windows, etc.).

Redirect URL:  
A URL within your web application that will be redirected to when user login completes in order for your app to receive an authorization code for that user.

Home Page URL:  
The URL for the home page of your application.

4. Select the APIs you need as well as the level of access required. For details about permissions in Power BI, click [here](#).





## Power BI for Developers

### Step 3 Choose APIs to access

Select the APIs and the level of access your app needs.

#### Dataset APIs

- Read All Datasets
- Read and Write All Datasets

#### Report and Dashboard APIs

- Read All Dashboards
- Read All Reports

#### Other APIs

- Read All Groups

### 5. Click **Register App**.

The Registration Tool generates a Client ID and a Client Secret Key. Use these keys to configure the API settings for Power BI in Automator.



## Power BI for Developers

### Step 4 Register your app

Once you've set everything the way you want it, click the button below and we'll register your app. Your client ID and secret (for web apps only) will appear below. Be sure to copy the values into your app. By clicking the Register App button, you have accepted the [terms of use](#).



Register App



Client ID:



Client Secret: