

#### DAT225x

# Developing an Analysis Services Tabular Model

Lab 01 | Getting Started

Estimated time to complete this lab is 60 minutes

#### Overview

In this lab, you will provision a Microsoft Azure Virtual Machine (VM) that will be used by all labs in this course. Once the VM is provisioned, you will complete the setup required to support the labs.

The labs in this course are accumulative. You cannot complete the following labs if this lab has not been successfully completed.

#### What You'll Need

To complete this lab, you will need the following:

- High-speed and reliable internet connectivity (for remote connections to the VM)
- A second monitor is recommended (for the Remote Desktop connection)
- A Microsoft account (such as one used for outlook.com, Hotmail, or other Microsoft services)
- A Microsoft Azure subscription
- The lab files for this course (available for download from GitHub, as described in this lab)

#### Creating a Free Trial Azure Subscription

If you already have an Azure subscription, you can skip this section. Otherwise, follow these steps to create a free trial subscription. You will need to provide a valid credit card number for verification, but you will not be charged for Azure services—for more information, refer to <a href="https://aka.ms/dat225xaz">https://aka.ms/dat225xaz</a>. Note that the free trial is not available in all regions.

If you already have a Microsoft account that has <u>not</u> already been used to sign up for a free Microsoft Azure trial subscription, you're ready to get started. If not, don't worry—just create a new Microsoft account at <a href="https://signup.live.com">https://signup.live.com</a>.

After you've created a Microsoft account, browse to <a href="https://aka.ms/dat225xaz">https://aka.ms/dat225xaz</a> and then click the **Start Free** link. Then follow the instructions to sign up for a free trial subscription to

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Microsoft Azure. You'll need to sign in with your Microsoft account if you're not already signed in. Then you'll need to:

- Enter your cellphone number and have Microsoft send you a text message to verify your identity
- Enter the verification code sent to you
- Provide valid payment details—don't worry, your credit card won't be charged for any services you use during the trial period, and the account is automatically deactivated at the end of the trial period, unless you expressly decide to keep it active.

# Exercise 1: Provisioning an Azure VM

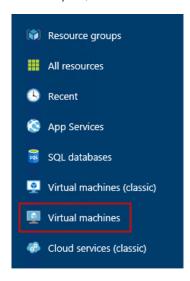
In this exercise, having signed in to the Azure Portal by using your Azure subscription, you will provision an Azure VM to support all labs for this course.

The Azure VM should be stopped when you have completed a lab so that your subscription is not charged (for free trial subscriptions, this will ensure you will have sufficient credits left to complete the labs over the duration of the course).

### Provisioning an Azure VM

In this task, you will sign in to the Azure Portal, and then provision an Azure VM.

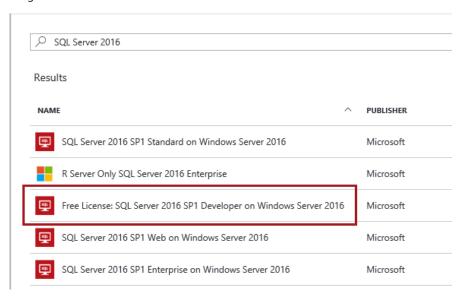
- 1. Sign in to the **Azure Portal** by using your subscription.
- 2. In the left pane, select Virtual Machines—do not select Virtual Machines (Classic).



3. In the Virtual Machines blade, click Add.



 In the Virtual Machines blade, in the search box, enter SQL Server 2016, and then press Enter. Select the Free License: SQL Server <u>2016</u> SP1 <u>Developer</u> on Windows Server <u>2016</u> image.



- 6. In the image blade, review the text that describes the virtual machine setup.
- In the lower section of the blade, in the Select a Deployment Model dropdown list, ensure that Resource Manager is selected.



8. To provision the virtual machine, click Create.



- 9. Notice that the **Create Virtual Machine** blade opens, and that also the **Basics** blade (step 1) opens.
- 10. In the **Name** box, enter a name for the virtual machine (this will become the name of the machine).
- 11. In the VM Disk Type dropdown list, select HDD.

12. In the **User Name** box and **Password** boxes, enter appropriate values (this will become the machine administrator account).

The password must be at least 12 characters in length, and must have three of the following: one lower case character, one upper case character, one number, or one special character.

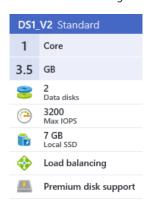
Be sure to securely record these credentials, as you will be required to use them to sign in every time you will connect to the VM.

- 13. In the **Resource Group** box, enter **Lab**.
- 14. In the **Location** box, select a data center that is near you.
- 15. Click **OK**.



16. In the Choose a Size blade, scroll down to locate and select the DS1\_V2 size.

The labs in this course will not require excessive storage, memory or processing. Also, you will be prompted to deallocate your VM between labs, and so the monthly cost will only apply when the VM is running.



17. Click **Select**.



18. In the **Settings** blade, to accept the default settings, click **OK**.



19. In the **SQL Server Settings** blade, to accept the default settings, click **OK**.



20. In the **Summary** blade, click **OK**.



21. On the **Azure Portal** dashboard, notice the tile displaying the status of the deployment process.



The deployment usually takes 15-20 minutes to complete, and this time depends largely on the VM size selected. The VM blade will open when the deployment completes.

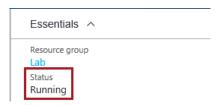
You cannot proceed to the next task until the deployment completes.

22. Leave the **Azure Portal** dashboard page open.

### Connecting to the VM

In this task, once the VM has successfully deployed, you will connect to the VM.

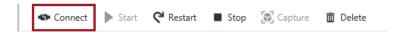
 In the VM blade, notice that the VM blade automatically opens, and that the VM status is Running.



You are charged when the VM status is **Running**, but you are not charged—except for a relatively smaller storage cost—when the VM status is **Stopped (Deallocated)**.

Each lab will include steps to remind you to stop and optionally deallocate the VM between labs. You should consider doing this if you choose to commence the next lab at a much later time.

2. To connect to the VM, click **Connect**.



A Remote Desktop File (.rdp) file is downloaded to the desktop.

This file can be used to reconnect to the remote desktop session, but note that if you deallocate the VM and later re-start the VM, it will be likely that a different IP address will be assigned.

3. When prompted by the web browser to open the Remote Desktop File, click **Open**.



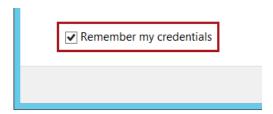
4. If prompted to connect to the unknown publisher, click **Connect**.



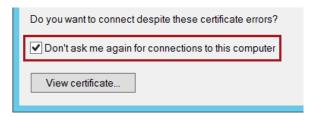
To enter your credentials, you may need to select **More Choices**, and then select **Use a Different Account**.



- 5. In the **Windows Security** window, enter the credentials you created for your VM.
- 6. Check the **Remember My Credentials** checkbox.



- 7. Click **OK**.
- In the Remote Desktop Connection window, check the Don't Ask Me Again for Connections to This Computer checkbox.



- 9. Click **Yes**.
- If you have a second monitor, maximize the Remote Desktop window inside a single monitor.

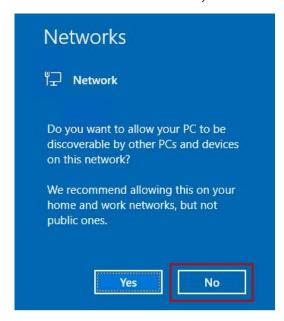
# Exercise 2: Setting Up the Azure VM

In this exercise, you will complete several VM setup tasks.

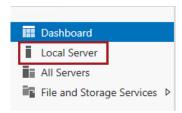
### Configuring the Server

In this task, you will configure the server to support the lab experience.

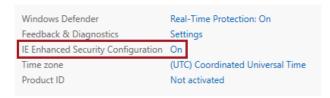
1. In the Remote Desktop window, when the **Networks** panel opens at the right, to ensure that the machine is not discoverable by other machines, click **No**.



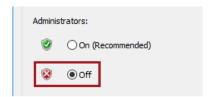
- 2. Wait until **Server Manager** opens (it is set to open automatically).
- 3. In Server Manager, in the left pane, select Local Server.



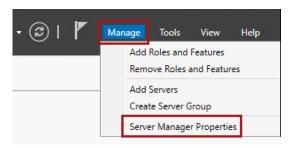
4. In the **Properties** pane, notice that **IE Enhanced Security Configuration** is set to **On**.



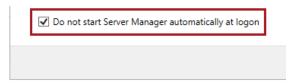
- 5. Click the **On** link.
- 6. In the window, for **Administrators**, select the **Off** option.



- 7. Click **OK**.
- Located at the top-right corner, select Manage, and then select Server Manager Properties.

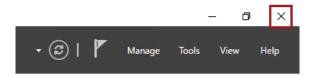


9. In the window, check the **Do Not Start Server Manager Automatically at Logon**.



10. Click **OK**.

11. To close Server Manager, located at the top-right corner, click X.



### **Installing Analysis Services**

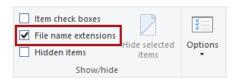
In this task, you will install a Tabular instance of Analysis Services.

The Azure VM has Analysis Services already installed, however it is a Multidimensional mode instance.

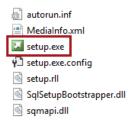
1. To open File Explorer, on the taskbar, click the **File Explorer** shortcut.



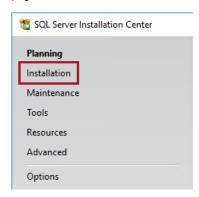
2. In the File Explorer window, on the View ribbon, check File Name Extensions.



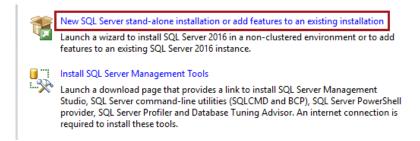
- 3. Navigate to C:\SQLServer\_13.0\_Full.
- 4. To launch SQL Server 2016 Setup, double-click the **setup.exe** file.



 In the SQL Server Installation Center window, in the left pane, select the Installation page.

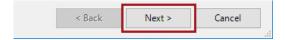


6. In the right pane, click the first link.



7. In the **SQL Server 2016 Setup** window, once the scanning process completes, click **Next**.

The Windows Firewall warning can be ignored.



At the Installation Type step, notice that the
 Performance a New Installation of SQL Server 2016 option is selected.



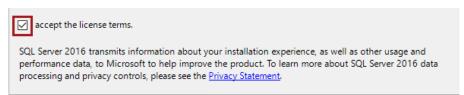
Click Next.



10. At the **Product Key** step, to accept the use of the **Developer** edition, click **Next**.



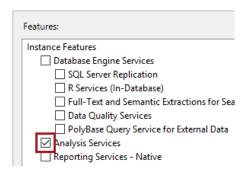
11. At the License Terms step, if you agree, check the I Accept the License Terms checkbox.



12. Click Next.



13. At the **Feature Selection** step, check the **Analysis Services** checkbox.

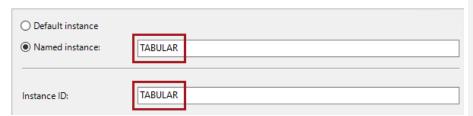


14. Click Next.



- 15. At the Instance Configuration step, in the Named Instance box, enter TABULAR.
- 16. In the Instance ID box, ensure that the text TABULAR has been added.

As a setup script will be used to deploy a database to the Analysis Services instance, it is critical that you name the instance as follows.



17. Click Next.



18. At the Server Configuration step, to accept the default service accounts, click Next.

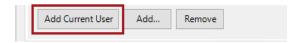


 At the Analysis Services Configuration step, in the Server Mode group, select the Tabular Mode option.

It is important the you configure the server mode correctly, as it is not possible to change the mode once installed.



20. To add your account as a server administrator, click **Add Current User**.



21. Wait until the account has been added to the list, and then click **Next**.

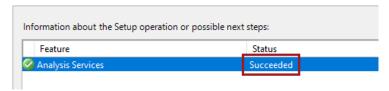


22. At the **Ready to Install** step, click **Install**.



The installation takes approximate 3-4 minutes to complete. You cannot proceed to the next task until the deployment completes.

23. Verify that the installation succeeded.



24. Click Close.



25. Close the **SQL Server Installation Center** window.



### Installing the Lab Resources

In this task, you will download and extract the lab resources that support the labs.

1. To open Internet Explorer, on the taskbar, click the Internet Explorer shortcut.



2. In the Internet Explorer 11 window, to accept the recommended settings, click OK.



- 3. Maximize the Internet Explorer window.
- 4. In the Internet Explorer **URL** box, enter https://github.com/MicrosoftLearning/DAT225x-SSAS\_Tabular
- 5. Click on the file **DAT225x-Analysis-Services-Tabular.zip**



6. To download the lab resources, click **Download**.

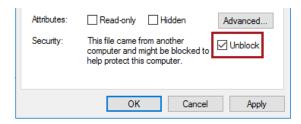


7. Download the file (Save As) to F:\.

8. When downloaded, open File Explorer.



- 9. Navigate to F:\.
- 10. Right-click the DAT225x-Analysis-Services-Tabular.zip file, and then select Properties.
- 11. In the window, check **Unblock**.



- 12. Click **OK**.
- 13. To extract the file content, right-click the **DAT225x-Analysis-Services-Tabular.zip** file, and then select **Extract All**.
- 14. In the window, replace the folder path with F:\.

Be sure to extract the files to F:\, otherwise later steps in this lab will fail.



- 15. Click Extract.
- 16. Optionally, delete the **DAT225x-Analysis-Services-Tabular.zip** file.
- 17. Verify that you have the F:\Labs folder.

### Installing the Sample Database

In this task, you will run a script to install a sample database and configure database permissions.

- 1. In File Explorer, navigate to the **F:\Labs\Lab01\Assets** folder.
- 2. Double-click the **Setup-Database.cmd** file.

The setup will restore the **AdventureWorksDW2016** database. The database has been modified from the original sample for the purposes of this course.

3. When the script execution completes, press any key to close the console window.

#### Installing the Model

In this task, you will run a script to install the model preview.

- 1. In File Explorer, navigate to the **F:\Labs\Lab01\Assets** folder.
- 2. Right-click the Setup-Model.ps1 file, and then select Run with PowerShell.

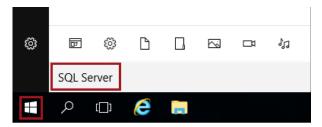
The setup will restore the **Reseller Sales** database. The database represents the final solution produced by the lab, and you will preview the model in this lab.

3. When the script execution completes, press any key to close the PowerShell window.

#### Configuring SQL Server Management Studio

In this task, you will configure SQL Server Management Studio (SSMS). This tool will be required to explore database, and to also execute scripts.

1. To add a shortcut to the taskbar, at the bottom-left corner, click the **Windows** icon, and then commence typing **SQL Server**.



In the Apps section, when the search result appears, right-click
 Microsoft SQL Server Management Studio, and then select Pin to Taskbar.

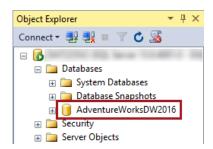


3. Return to the desktop, and then click the **SQL Server Management Studio** shortcut.



It may take 1-2 minutes for SSMS to setup.

- 4. In the Connect to Server window, click Connect.
- To verify that the AdventureWorksDW2016 database was restored, in Object Explorer (located at the left), expand the Databases folder.
- 6. Verify that the **AdventureWorksDW2016** database is listed.



7. To close SQL Server Management Studio, on the File menu, select Exit.

You may receive a popup notification from SSMS that a later version is available for download. There is no need to install a later version to complete the labs.

### Installing SQL Server Data Tools

In this task, you will install SQL Server Data Tools (SSDT). This tool is required to develop an Analysis Services Tabular project.

1. In Internet Explorer, navigate to https://aka.ms/dat225x-sql.

Tip: You can copy-and-paste the URL into the Remote Desktop window.

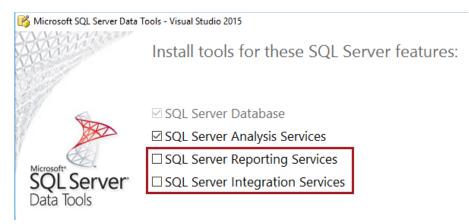
2. Click the **Download SQL Server Data Tools** link.

# **Download SQL Server Data Tools**

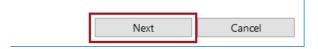
3. When prompted by Internet Explorer to run the **SSDTSetup.exe** file, click **Run**.



 In the installation window, uncheck the SQL Server Reporting Services and SQL Server Integration Services checkboxes.



Click Next.



6. Read the license terms, and if you accept them, check the checkbox.

#### 7. Click **Install**.



The installation usually takes 5-10 minutes to complete.

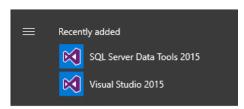
8. When the installation completes, click **Close**.



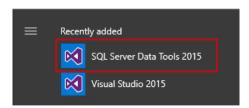
# Configuring SQL Server Data Tools

In this task, you will configure SSDT.

1. To launch SSDT, at the bottom-left corner, click the **Windows** icon, and notice the items in the **Recently Added** section.



2. Select SQL Server Data Tools 2015.



3. In the Visual Studio getting started window, in the **Development Settings** dropdown list, select **Business Intelligence Settings**.

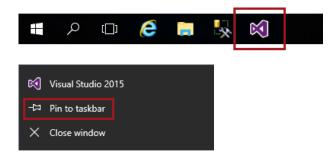


4. Click Start Visual Studio.



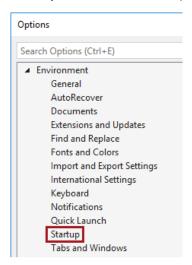
It may take 1-2 minutes for SSDT to setup.

To create a shortcut, on the taskbar, right-click the Visual Studio 2015 icon, and then select Pin to Taskbar.



6. To configure the SSDT environment, on the **Tools** menu, select **Options**.

7. In the **Options** window, in the left pane, select the **Startup** page.



8. In the At Startup dropdown list, select Show Empty Environment.



- 9. Click OK.
- 10. To close SSDT, on the File menu, select Exit.

You will work with SSDT to create an Analysis Services Tabular Project in Lab 02.

### Installing Microsoft Office

In this task, you will install Microsoft Office. This tool is required to create PivotTable reports to help test the design of your Analysis Services tabular model.

1. In Internet Explorer, navigate to http://aka.ms/dat225x-xls.

Tip: You can copy-and-paste the URL into the Remote Desktop window.

2. When prompted by Internet Explorer to run the setup file, click **Run**.

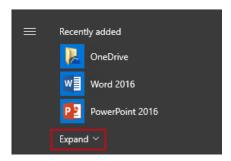
The installation usually takes 10-15 minutes to complete.

3. When the installation completes, click **Close**.

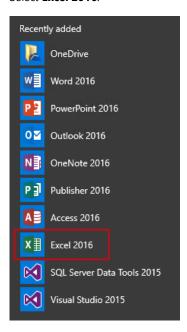
You're all set! Office is installed now Click Start > All Apps.



4. To launch Excel, at the bottom-left corner, click the **Windows** icon, and expand the items in the **Recently Added** section.



5. Select **Excel 2016**.



6. When Excel launches, to close the **Activate Office** window, click **X**.



A trial period is available for up to 30 days, during which you will have ample time to complete the labs for this course. Once the trial period expires, you will have the option to purchase an Office 365 subscription.

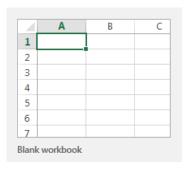
 In the First Things First window, if you agree to the Microsoft Office License Agreement, click Accept.



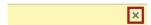
8. In the Microsoft Office Activation Wizard window, click Cancel.



9. To create a blank workbook, select the **Blank Workbook** template.



- 10. Notice the yellow warning banner.
- 11. To hide the banner, at the far right, click X.



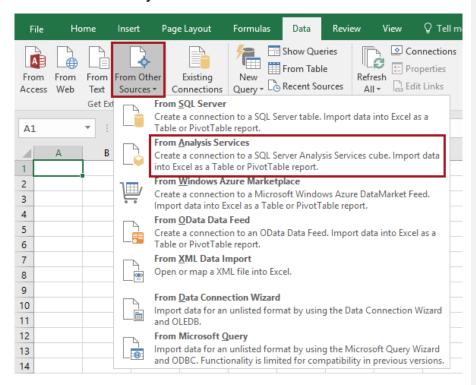
# Exercise 3: Exploring the Lab Solution

In this exercise, you will explore the lab solution by connecting to the data model in Excel, and creating a PivotTable report.

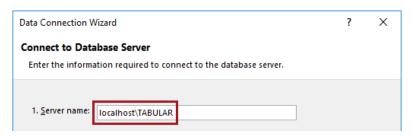
## Exploring the Lab Solution

In this task, you will explore the lab solution by connecting to the data model in Excel, and creating a PivotTable report.

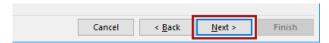
 In Excel, on the Data ribbon, in the Get External Data group, click From Other Sources, and then select From Analysis Services.



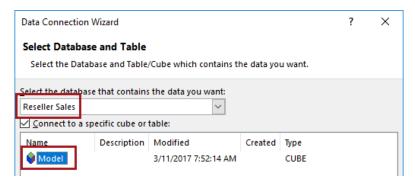
 In the Data Connection Wizard window, in the Server Name box, enter localhost\TABULAR.



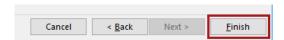
3. Click **Next**.



 At the Select Database and Table step, in the dropdown list, notice that the Reseller Sales database is selected, as is the model named Model.



- Click Next.
- 6. At the Save Data Connection File and Finish step, to connect to the model, click Finish.



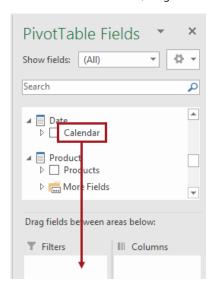
In the Import Data window, notice that the PivotTable Report option is selected, and then click OK.



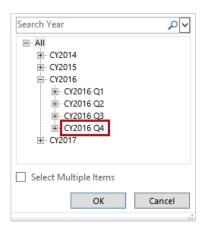
8. Notice the **PivotTable Fields** pane at the right.

This pane surfaces the interface of the model.

- 9. In the **PivotTable Fields** pane, scroll down to locate the **Date** table.
- 10. From inside the **Date** table, drag the **Calendar** hierarchy to the **Filters** drop zone.



11. In the **Calendar** PivotTable filter (cell **B1**), click the down-arrow, expand the **All | CY2016** members, and then select the **CY2016 Q4** member.



12. Click **OK**.

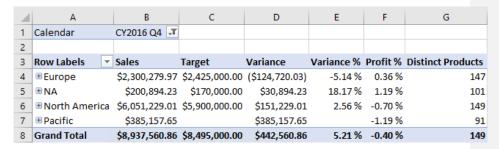
13. In the **PivotTable Fields** pane, from inside the **Region** table, check the **Regions** hierarchy to add it to the **Rows** drop zone.



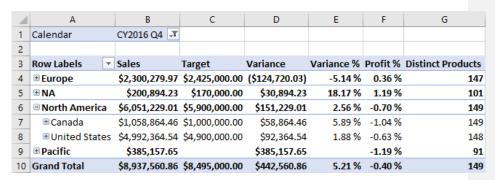
14. In the **PivotTable Fields** pane, in this order, select the following fields.

Table	Field
Sales	Sales
Target	Target
Target	Variance
Target	Variance %
Sales	Profit %
Sales	Distinct Products

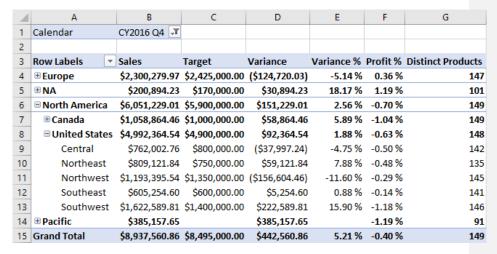
15. Verify that the PivotTable report looks like the following.



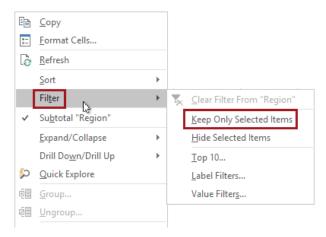
16. In cell A6, expand the North America member to reveal the countries.



17. In cell A8, expand the United States member to reveal the regions.

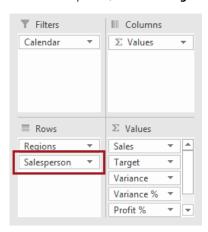


18. To focus on one region, in cell **A11**, right-click the **Northwest** member, and then select **Filter | Keep Only Selected Items**.

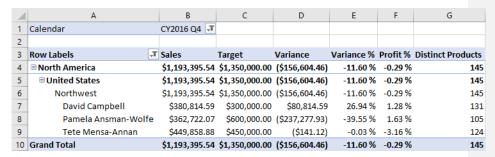


19. Ensure that the PivotTable report is still in focus (i.e. at least one cell of the PivotTable is selected).

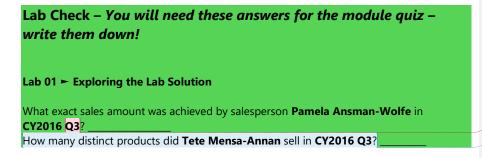
20. In the **PivotTable Fields** pane, from the **Salesperson** table, drag the **Salesperson** field into the **Rows** drop zone, below the **Regions** hierarchy.



21. Verify that the PivotTable report now displays salespeople within the **Northwest** region.



22. In cell **B1**, filter by **CY2016 Q3**.



Commented [CR1]: \$287,360.76

Commented [PM2]: 93

23. To close Excel, at the top-right corner, click  $\mathbf{X}$ .



You have now completed the lab. In the next lab you will commence the development of a Tabular Project.

If you are not immediately continuing with the next lab, you should complete the **Finishing Up** exercise to shut down and stop the VM.

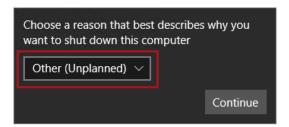
# Finishing Up

In this exercise, you will shut down and stop the VM.

- 1. Close all open applications.
- Press the Windows key, and then in the Start page, located at the bottom-left, click the Power button, and then select Shut Down.



3. When prompted to choose a reason, to accept the default.



- 4. Click Continue.
- In the Azure Portal Web browser page, wait until the status of the VM updates to Stopped.



In this state, however, the VM is still billable.

6. Optionally, to deallocate the VM, click **Stop**.

Deallocation will take some minutes to complete, and also extends the time required to restart the VM. Consider deallocating the VM if you want to reduce costs, or if you choose to complete the next lab after an extended period.

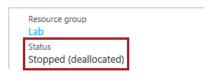


7. When prompted to stop the VM, click Yes.



The deallocation can take several minutes to complete.

8. Verify that the VM status updates to **Stopped (Deallocated)**.



In this state, the VM is now not billable—except for a relatively smaller storage cost.

Note that a deallocated VM will likely acquire a different IP address the next time it is started.

9. Sign out of the **Azure Portal**.