# Setup Guide for Creating Test Environment for Power BI Projects

**Setup Time**: 1 to 2 hours

**Overview**: This guide walks you through the steps of creating a new Office 365 tenant which has trial subscriptions to Office 365 and Power BI Pro. The main purpose of creating this new Office 365 tenant is that it will provide a new and isolated testing environment which will allow you to begin working directly with the Power BI service. This, in turn, will allow you to begin kicking the tires of the Power BI platform and to get experience working with BI authoring tools such as Power BI Desktop and Microsoft Excel 2016. One important aspect of creating a new Office 365 tenant with trial subscriptions is that you will have full administrative permissions at the tenant levels and you will be able to perform tenant-level configurations with the Power BI service in isolation from any existing Office 365 tenancy.

**Prerequisites**:

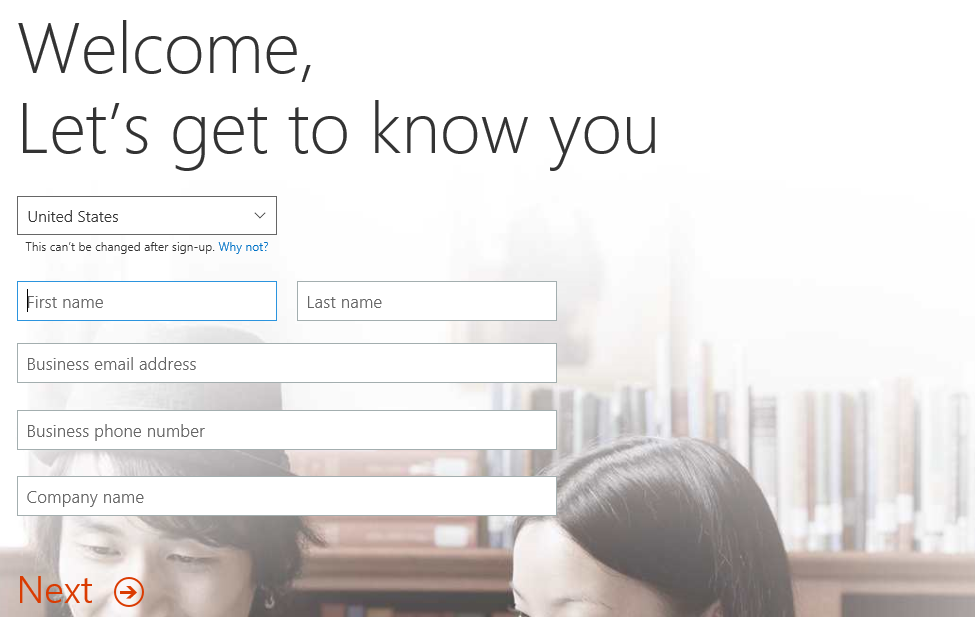
### Setup Task 1: Create a new Office 365 Trial Tenant

In this step you will create a trial tenant in the Office 365 environment in which you can create up to 25 user accounts with Enterprise E3.trial subscriptions. Being able to create multiple Office 365 user accounts in your Power BI testing environment will be important so that you can test the effects of sharing Power BI dashboards between users.

1. Navigate to the following URL:

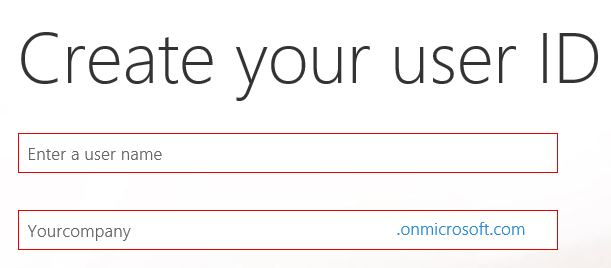
<https://go.microsoft.com/fwlink/p/?LinkID=403802&culture=en-US&country=US>

1. Fill out the form with your personal information and click **Next**.



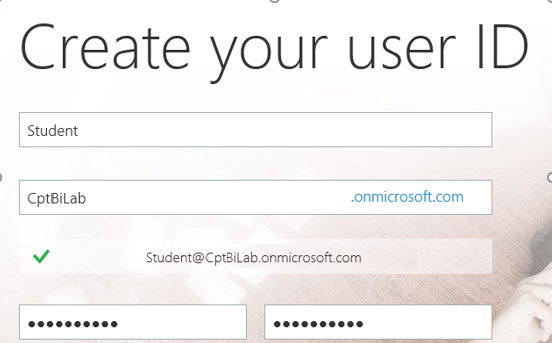
The information you provide here will be used throughout your tenant so if you do not wish to use your actual company name then provide humorous and fictitious company name.

1. On the next page, you are prompted to provide a user ID, company name and password.



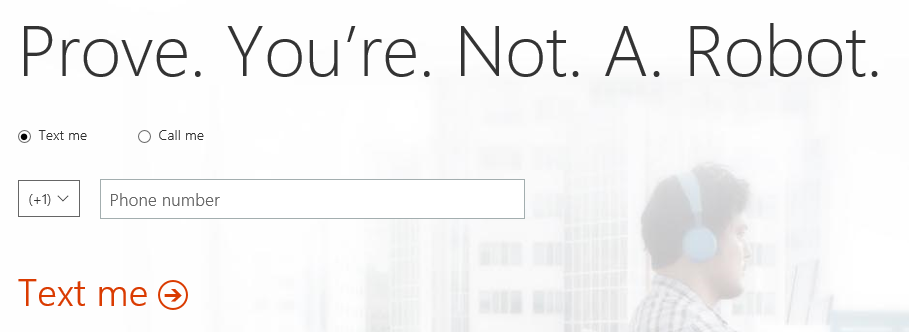
Note that the company name you enter on this page will be used to create the domain name for your new Office 365 trial tenant. For example, if you were to enter a company name of **CptBiLabs**, it would result in the creation of a new Office 365 tenant within a domain of **CptBiLabs.onMicrosoft.com**. The user name you enter will be used to create the first user account which will be given administrative rights within the trial tenant. If you enter a user name of **Student**, then the email address as well as user principal name for this account will be **Student@CptBiLabs.onMicrosoft.com**.

1. Enter a user name and a company name for your new Office 365 trial tenant. For the company name, you may wish to simply use your first and/or last name with a number which you can increment each time you have to create a new trial account (e.g. EricClapton1.onmicrosoft.com).

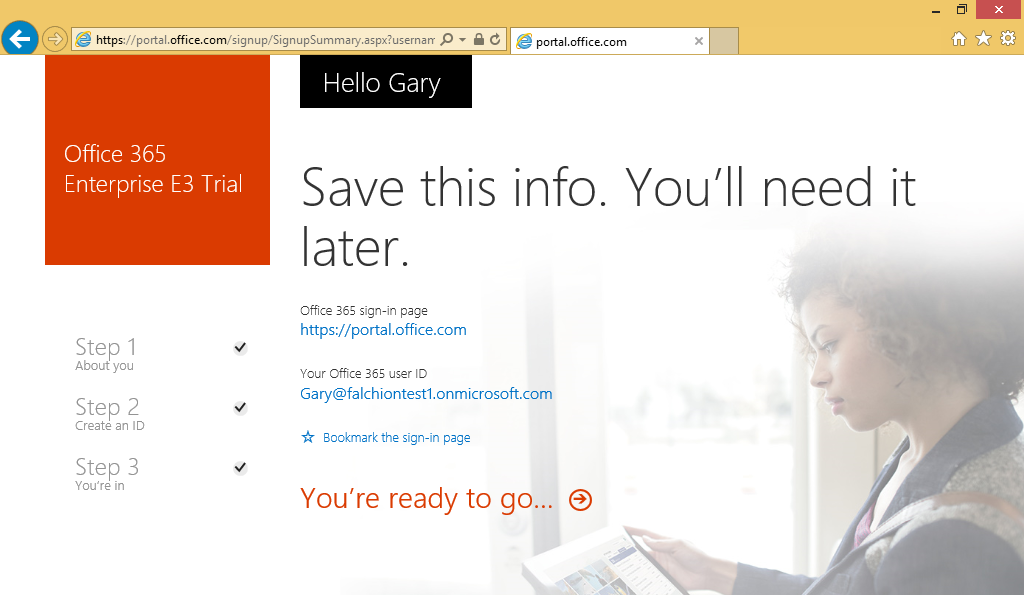


Don’t use your actual company name as that may cause some conflict when your company decides to create their own official tenant. Throughout the remainder of this guide you will see a company domain name of **CptBiLab** which you should replace with the value specified for your company name.

1. Click **Next** to continue to step 3.
2. Complete the validation form in step 3 by proving you are not a robot.
   1. Select the **Text me** option and provide the number of your mobile phone.
   2. When you go through this process, a Microsoft service will send you a text message that contains an access code.
   3. You retrieve the access code form your mobile device and use it to complete the validation process.

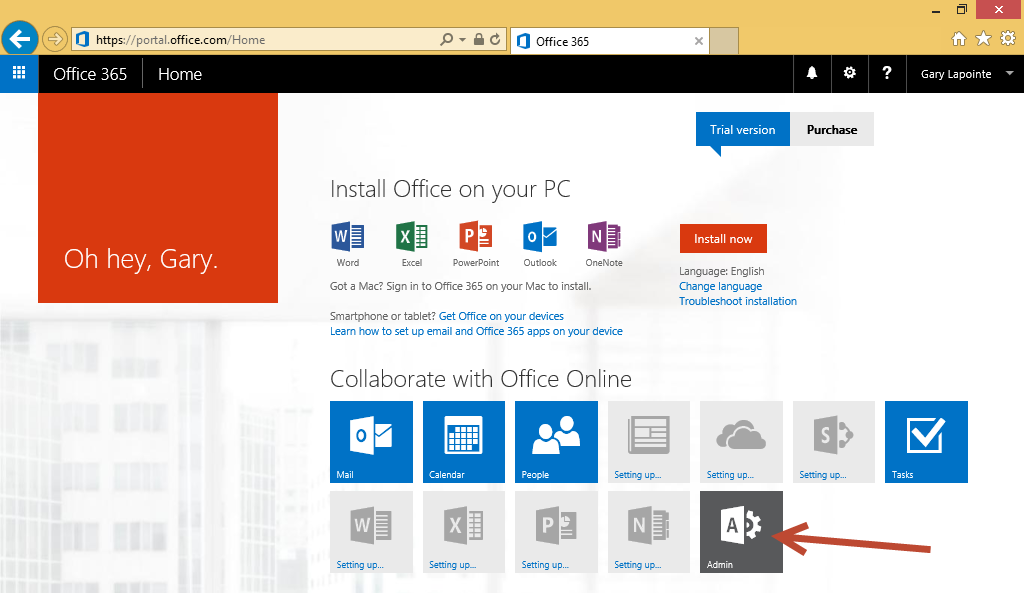


1. Once you have completed the validation process, click the **You’re ready to go…** link to navigate to the portal welcome page for your new Office 365 trial tenant. Note that you should already be logged on using the user account that was created during the sign up process.

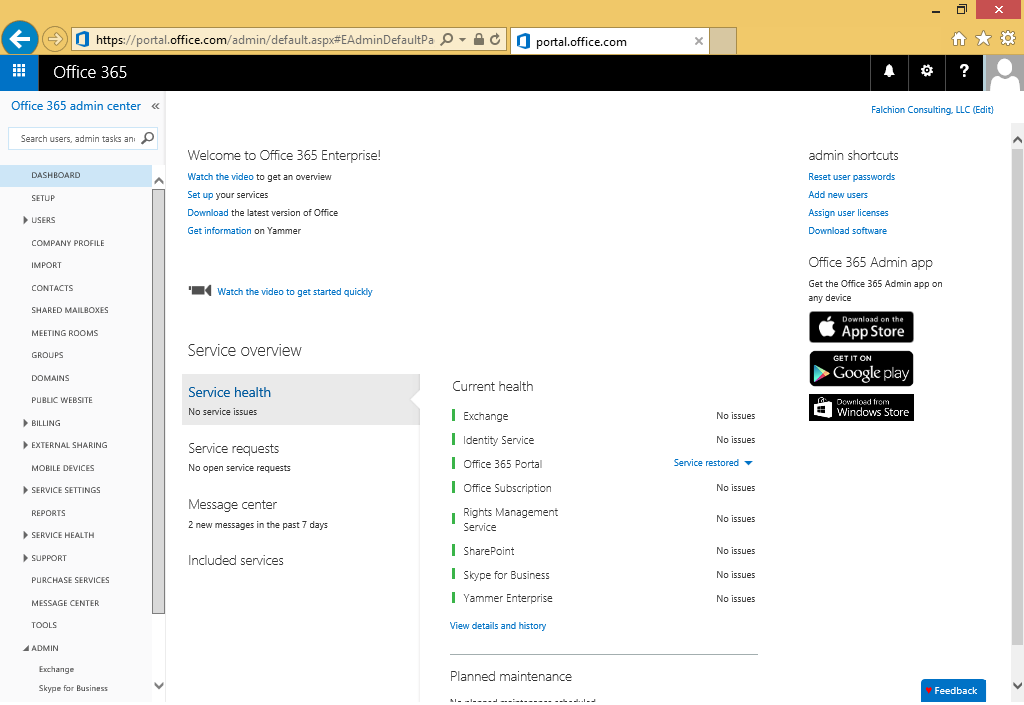


At this point, you have already created your new Office 365 tenant with 25 Office 365 Enterprise E3 trial licenses. Some services within your new Office 365 tenant can be accessed immediately. Other services within your Office 365 tenant are not ready immediately and will take some time to provision. Next, you will navigate to the Office 365 admin center so you can begin to view and modify the configuration for your new Office 365 tenant.

1. On the portal welcome page, you will notice that it is slowly setting up each of the individual services that make up your new Office 365 tenant. Click the **Admin** tile to proceed to the Office 365 Tenant Admin site.



1. Verify that you are able to access the home page of the **Office 365 admin** center.

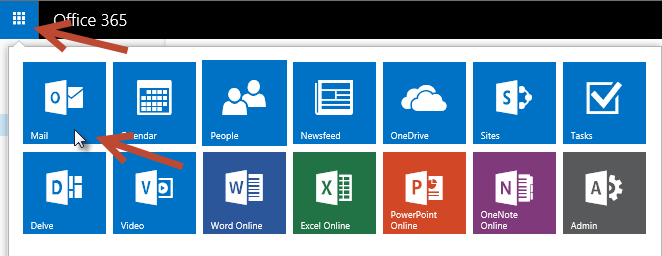


If interested, take a minute to explore what’s available in the Office 365 admin center before you move on to the next step.

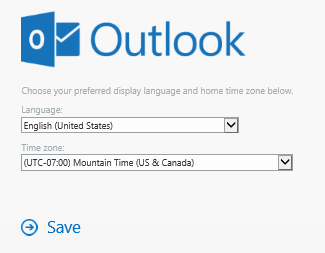
### Setup Task 2: Verify You Have Access to Office 365 Mail

In this setup task you will verify that you have access to the Outlook Web Access client for Office 365 mail.

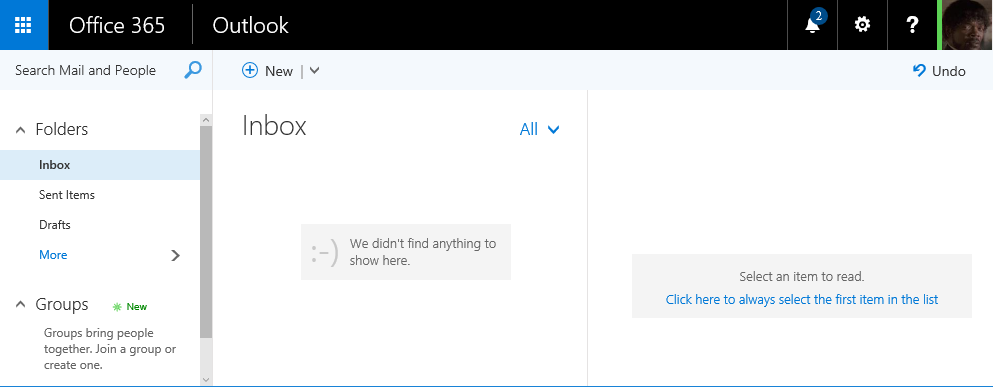
1. Open the Outlook web client by navigating to [**https://outlook.office365.com**](https://outlook.office365.com)or clicking the **Mail** icon in the Application Launcher accessible via the **Waffle** **Button**.



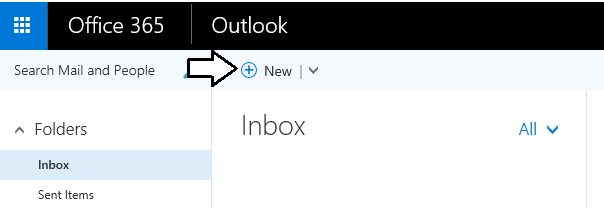
1. If prompted, specify your language and time zone for Outlook.



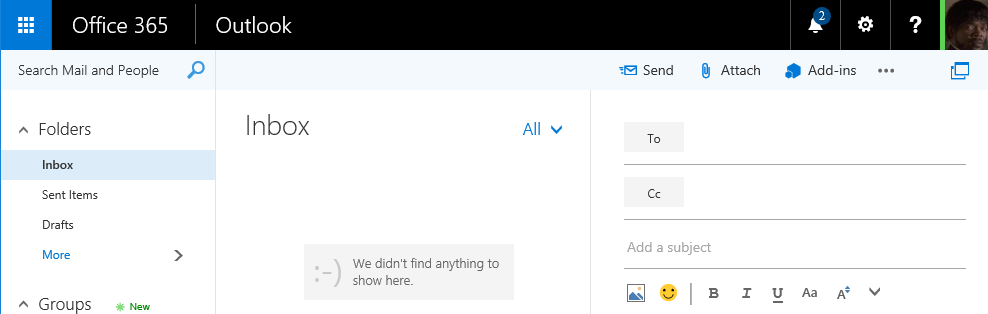
1. You should now see a web page with the Office 365 Outlook Web Access client and a view the Exchange inbox that is associated with the primary user account that was created when you created the Office 365 tenancy.



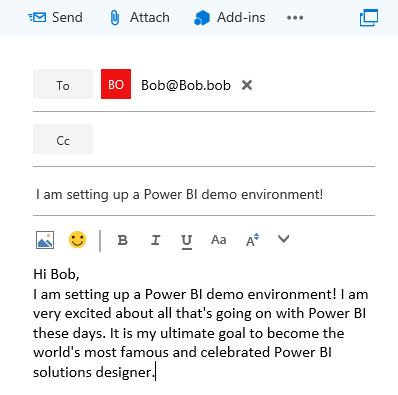
1. Test email by sending a message to one of your other email addresses,
   1. Display the form to create a new email clicking the **New** button. If the **New** button is not showing, it’s probably because the form to create a new email is already showing.



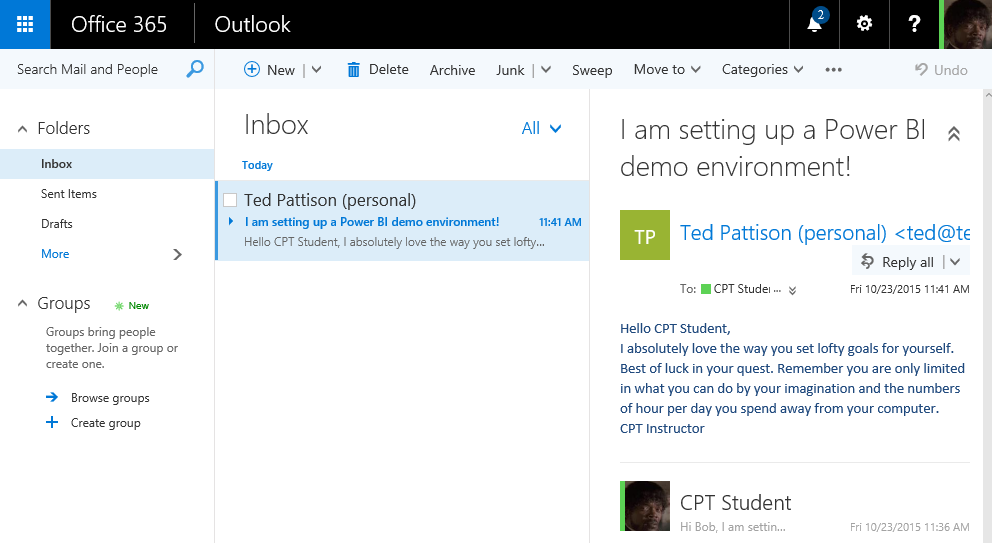
1. At this point, you should see the Outlook form to create new email on the right side of the page.



1. Fill out the new email form using sample data (see example below) to send a test message. Be sure to send the test message to an email address that is yours. Click **Send** when it’s ready to go.



1. Click **Send** to send the email.
2. Check the email account you sent the email to and verify that you received the email.
3. Reply to the email to verify that you can send an email to your new account.
4. Return to the Outlook Web Client and verify receipt of your reply.



### Setup Task 3: Upload a Workbook with Sample Data to OneDrive for Business

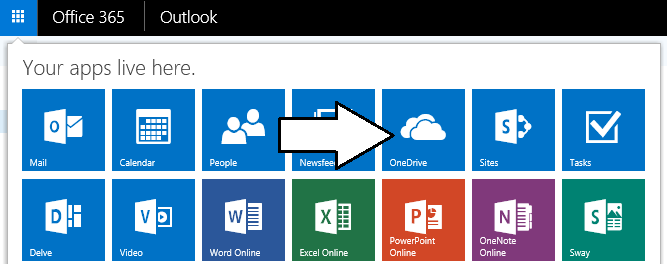
In this setup task, you will upload an Excel workbook file containing sample data to OneDrive for Business. However, the first step will to download a copy of the sample Excel workbook to your local hard drive.

1. Download the sample Excel workbook file from Critical Path Training’s GitHub repository.
   1. In the browser, use the URL below to access and download the Excel workbook named **WingtipSalesData.xlsx** to the Downloads folder in your local machine.

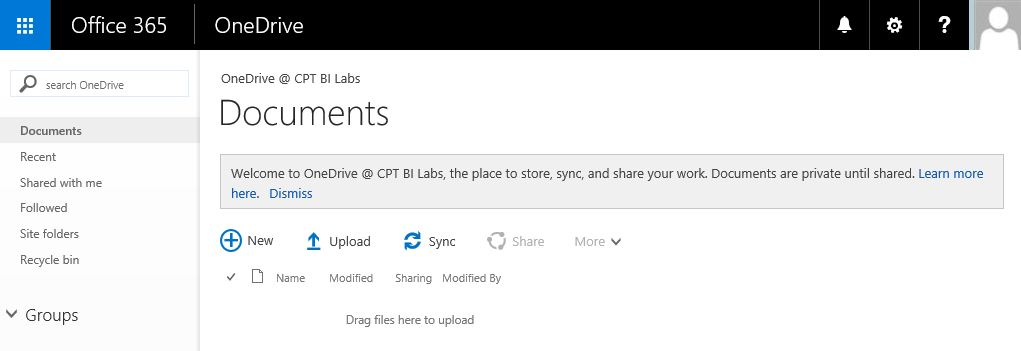
<https://github.com/CriticalPathTraining/PBI365/raw/master/Data/WingtipSalesData.xlsx>

* 1. Ensure that the Excel workbook file has been saved to your local hard drive.

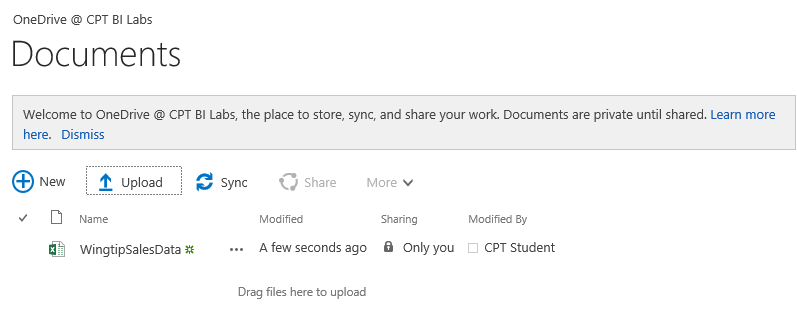
1. Open OneDrive for Business by clicking the **OneDrive** icon in the Application Launcher accessible via the **Waffle** **Button**.



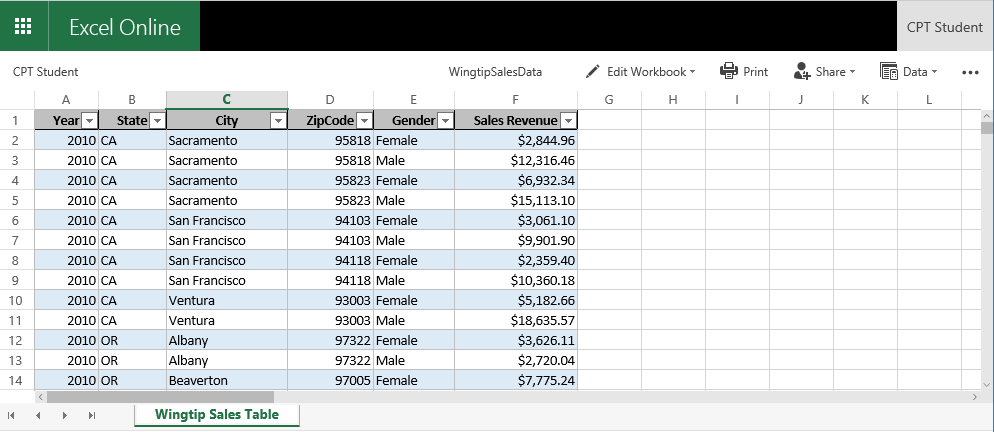
1. You should now be at the main landing page for **OneDrive for Business** which displays the **Documents** library.



1. Click the **Upload** button and go through the steps to upload the local copy of **WingtipSalesData.xlsx** to the **Documents** library. Once you have completed this step, you should be able to verify that the **Documents** library contains **WingtipSalesData.xlsx**.



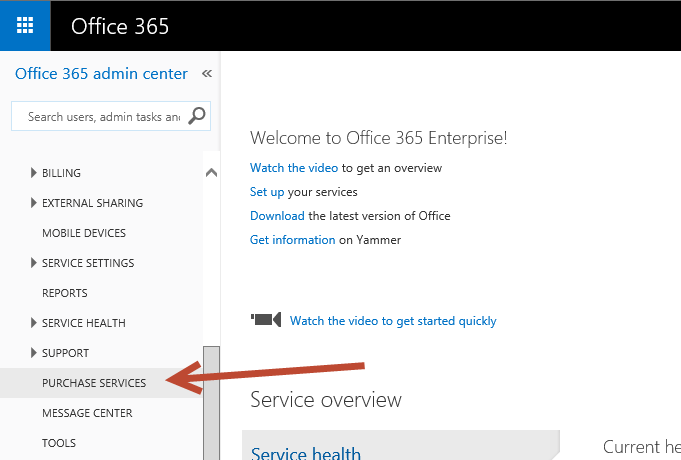
1. Inside the **Documents** library, locate and click on the **WingtipSalesData** link to open the workbook in Excel Online. As you can see, the workbook contains a sample set of tabular data that will be used in later setup tasks.



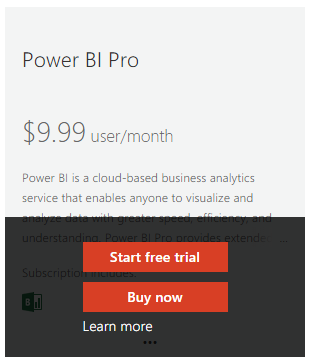
### Setup Task 4: Add Trial User Licenses for Power BI Pro

In this task, you will configure your new Office 365 tenant by adding trial subscriptions for Power BI Pro. Once you have completed this task, you will be able to begin working with the Power BI service.

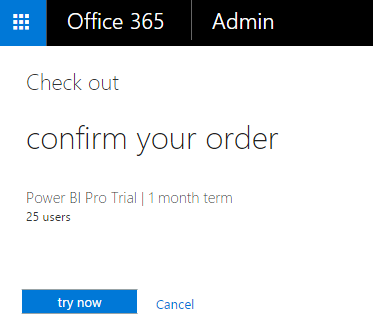
1. Return to Office 365 admin center by clicking the **Admin** icon in the Application Launcher accessible via the **Waffle** **Button**.
2. Start a free trial of Power BI Pro.
   1. In the **Office 365 admin center**, click the **Purchase Services** link in the left column.



* 1. Scroll down the page of available services and locate the **Power BI Pro** tile. Hover over the ellipses (…) in the bottom of the tile and click **Start free trial**.



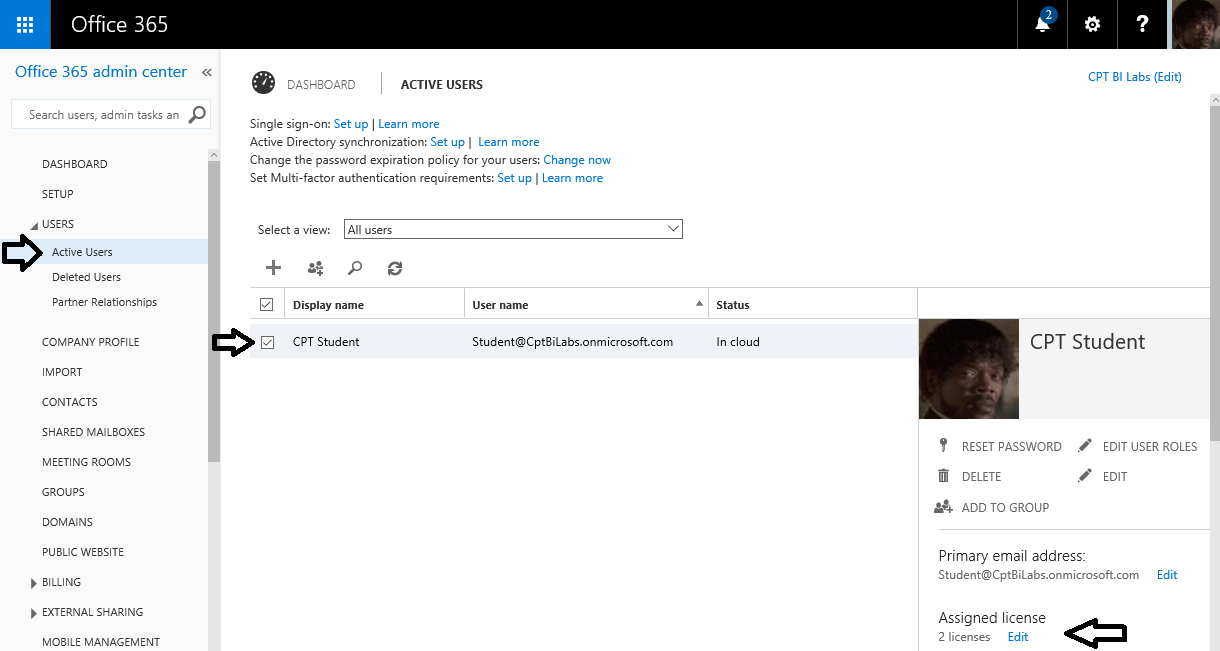
* 1. On the **Check out** page, click **try now** to add the subscription to your tenant.



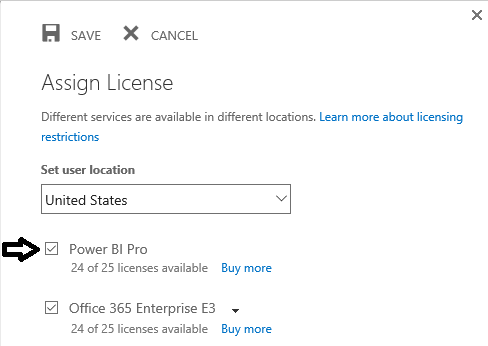
* 1. Click **continue** on the **order receipt** page.

While you have just started the Power BI Pro trial, you cannot use it yet. First, you must now configure your user account with a trial license for Power BI Pro.

1. Assign the Power BI license to your account.
   1. In the Office 365 admin center, expand the **Users** node in the left column and click **Active Users**.
   2. Check the box next to your account and click **Edit** next to **Office 365 Enterprise E3** in the tool pane on the right.

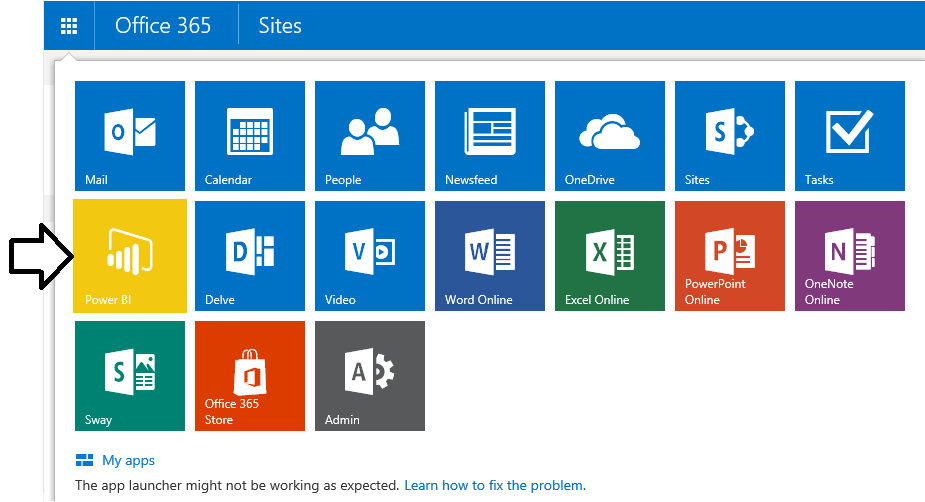


* 1. Expand **Microsoft Power BI for Office 365** and select the checkbox for the Power Bi pro license.



* 1. Click **Save** to complete the assignment.

1. Check the Application Launcher accessible via the **Waffle** button and verify you can see a tile for **Power BI**.

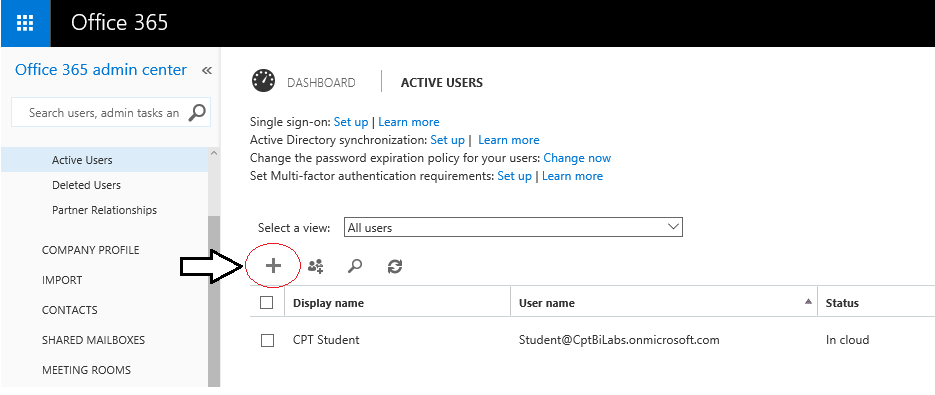


Don’t click on the tile for **Power BI** just yet. You will get to the Power BI environment in just a few more minutes. There is just one more setup task you must first complete in the Office 365 admin center which is to create a second user account. This second user account will be needed when you begin to test the effects of dashboard sharing.

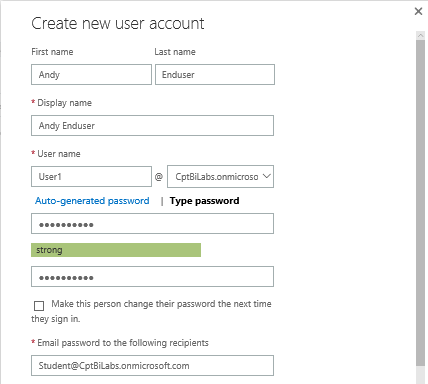
### Setup Task 5: Create a Second User Account for Testing Purposes

In this step you will create a second user account and configure it with a Power BI Pro trial license.

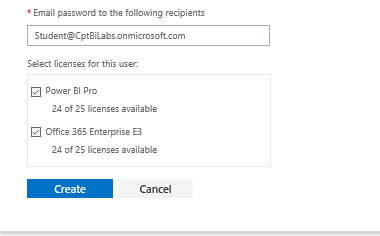
1. In the Office 365 admin center, expand the **Users** node in the left column and click **Active Users**.
2. Click the button with the plus sign (**+**) to create a new user account

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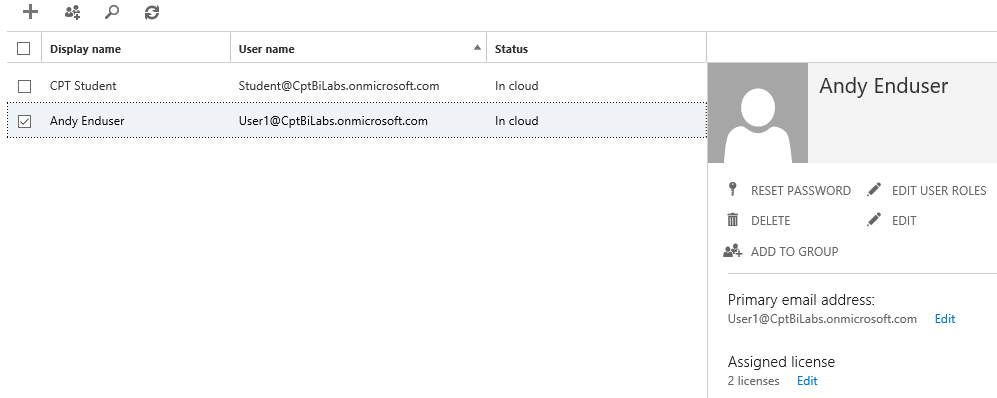
1. Fill in the **Create new user account** form with information for a new user account.
   1. When creating this account, you can use any name you would like.
   2. Click **Type password** and enter a password that you will remember.
   3. For your convenience, uncheck the option to **Make this person change their password the next time they sign in**.



* 1. Make sure to create the new user with trial licenses for **Office 365 Enterprise E3** and **Power BI Pro**. Click the **Create** button to create the new user account.



1. Verify that the new user account has been created.



### Setup Task 6: Begin using Power BI

Now, you finally get to begin working with Power BI.

1. Navigate to the Power BI environment by clicking the **Power BI** icon in the Application Launcher accessible via the **Waffle** **Button**.

