Developing Custom Visuals for Power BI



Agenda

- Installing the Power BI Developer Tools
- Creating Your First Custom Visual
- Defining Data Roles and Data Mappings
- Extending a Visual with Custom Properties
- Migrating to Version 3 of the Power BI Developer Tools



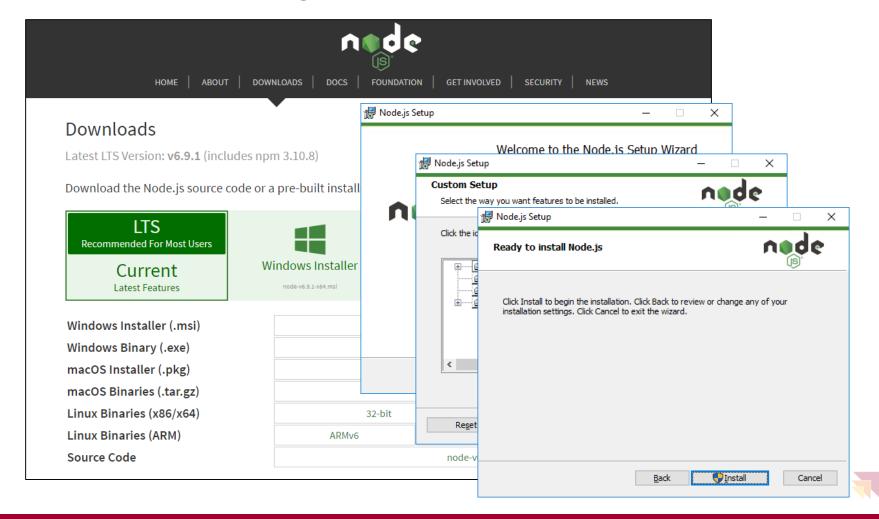
Installing the Power BI Developer Toolchain

- Install Node.JS
 - Installs Node Package Manage (npm)
- Install Visual Studio Code
 - Lightweight Alternative to Visual Studio for Node.js Development
- Install the Power BI Developer Tools (pbiviz)
 - Install using Node Package Manager (npm)
- Create and install a local self-signed certificate
 - Install using Power BI visuals CLI tool (pbiviz)



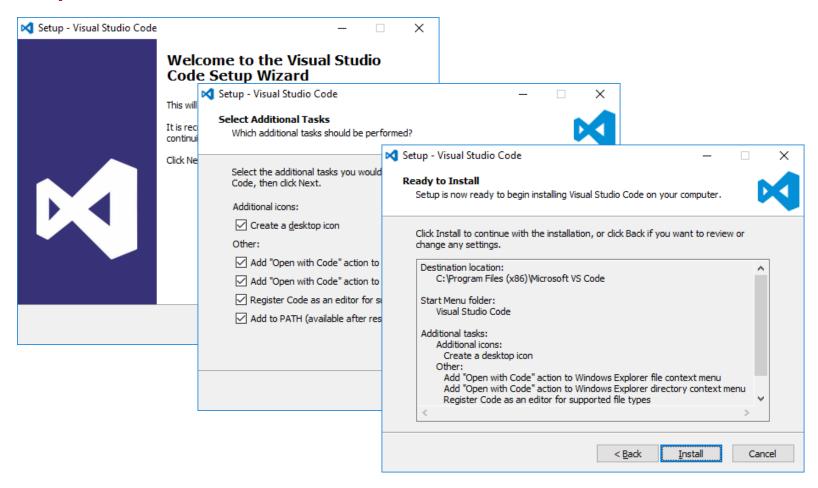
Installing node.js

https://nodejs.org/en/download/



Install Visual Studio Code

http://code.visualstudio.com/





Developing with Visual Studio Code

Provides great development experience with node.js

```
File Edit Selection View Go Debug Terminal
                                                                                     visual.ts - helloD3 - Visual Studio Code
       EXPLORER
                               TS visual.ts
冏
                                       module powerbi.extensibility.visual {

▲ OPEN EDITORS

       X TS visual.ts src
Q
                                            export class Visual implements IVisual {

▲ HELLOD3

                                   4
Y
       ▶ .api
                                                 private svgRoot: d3.Selection<SVGElementInstance>;
       .vscode
                                                 private ellipse: d3.Selection<SVGElementInstance>;
       assets
(\%)
                                                 private text: d3.Selection<SVGElementInstance>;
       ▶ node modules
                                                 private padding: number = 20;
       TS settings.ts
                                                 constructor(options: VisualConstructorOptions) {
        TS visual.ts
                                                     this.svgRoot = d3.select(options.element).append("svg");
       this.ellipse = this.svgRoot.append("ellipse");
        {} visual.less
                                                     this.text = this.svgRoot.append("text").text("Hello D3");
       {} capabilities.json
                                  13
       {} package-lock.json
                                  14
      {} package.json
                                                 public update(options: VisualUpdateOptions) {
      {} pbiviz.json
      {} tsconfig.json
                                  17
       {} tslint.json
                                PROBLEMS
                                                  DEBUG CONSOLE TERMINAL
                                PS C:\CustomVisuals\PowerBiToolsV2\helloD3> pbiviz start
                                        Building visual...
                                        build complete
                                        Starting server...
                                        Server listening on port 8080.
```

Power BI Visual CLI Tool (PBIVIZ)

- What is the Power BI Custom Visual Tool?
 - Command-line utility for cross-platform dev
 - Use it with Visual Studio or Visual Studio Code
 - Requires that you first install node.js
 - Install by running command from node.js command prompt
 npm install -g powerbi-visuals-tools

```
c:\CustomVisuals>npm install -g powerbi-visuals-tools
C:\Users\TedP\AppData\Roaming\npm\pbiviz -> C:\Users\TedP\AppData\Roaming\npm\node_modules\power
viz.js
+ powerbi-visuals-tools@2.3.0
added 13 packages from 47 contributors, removed 714 packages and updated 27 packages in 20.082s
c:\CustomVisuals>_
```



Getting Started with PBIVIZ

- PBIVIZ.EXE is a command-line utility
 - You execute PBIVIZ commands from the NODE.JS command line

```
Node.is command prompt
c:\Student>pbiviz --help
 Usage: pbiviz [options] [command]
 Commands:
   new [name]
                     Create a new visual
   info
                     Display info about the current visual
                     Start the current visual
   start
   package
                     Package the current visual into a pbiviz file
                     Validate pbiviz file for submission
   validate [path]
   update [version] Updates the api definitions and schemas in the current visual. Changes the version if speci
   help [cmd]
                     display help for [cmd]
 Options:
                   output usage information
   -h, --help
   -V, --version output the version number
   --create-cert Create new localhost certificate
    --install-cert Install localhost certificate
c:\Student>_
```



Creating a Certificate for Local Testing

- PBIVIZ provide local web server for testing & debugging
 - Web server runs locally on developer's workstation in Node.js
 - Makes it possible to test custom visuals in Power BI Service
 - Custom visual resources served up from https://localhost
 - Setup requires creating self-signed SSL certificate
 - SSL certificate created using pbiviz --create-cert command
 - You must copy a passphrase to properly install the certificate



Installing the SSL Certificate

- Installing certificate enables SSL through https://localhost
 - Installing certificate is a one time operation not once per project
 - SSL certificate installed using pbiviz --install-cert command
 - Running --install-cert command starts Certificate Import Wizard

```
Node.js command prompt

c:\Student>pbiviz --install-cert

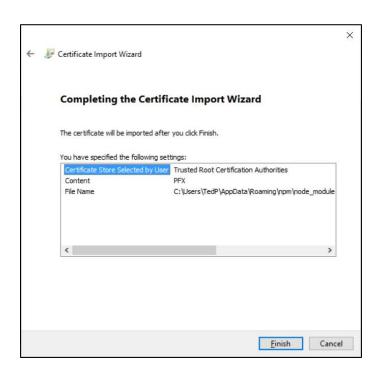
info Use '15581865083792024' passphrase to install PFX certificate.

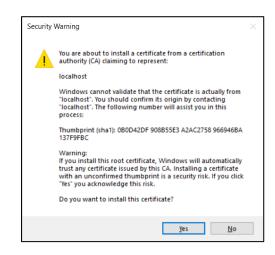
c:\Student>_
```

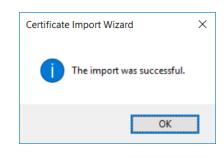


The Certificate Import Wizard

- Wizards steps you through process of installing certificate
 - You enter certificate passphrase as part of installation process









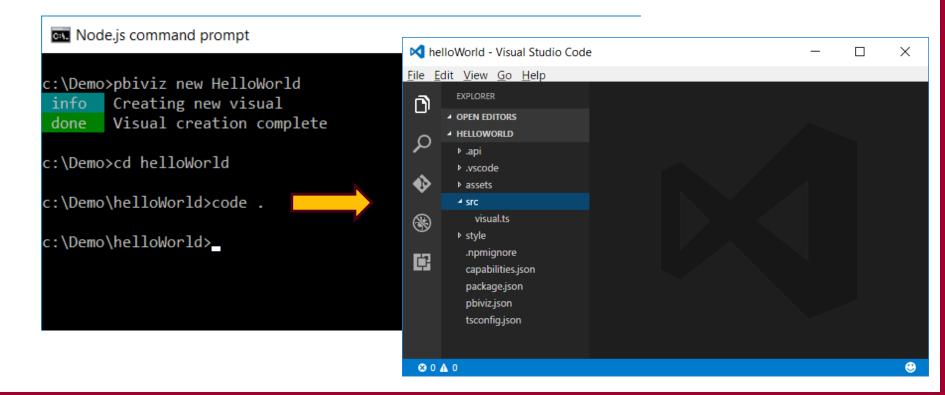
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Creating a New Custom Visual Project

- Creating a new project
 pbiviz new <ProjectName>
- Open the Project with Visual Studio Code code



Top-level project files

- package.json
 - Used by npm to manage packages
- pbiviz.json
 - Main manifest file for your custom visual project
- capabilities.json
 - File used to define visual capabilities
- tsconfig.json & tslint.json
 - Typescript compiler settings

▲ HELLOWORLD

- ▶ .api
- .vscode
- assets
- node_modules
- src
- style
- {} capabilities.json
- {} package.json
- {} pbiviz.json
- {} tsconfig.json
- tslint.json



The pbiviz.json File

- Acts as top-level manifest file for custom visual project
 - Indicated which version of the Custom Visual API is used
 - External JS library files must be referenced in externalJS section

```
File Edit Selection View Go Debug Terminal Help
                                                                                   pbiviz.json - helloWorld - Visual Studio Code
                                    {} pbiviz.json ×

▲ OPEN EDITORS

                                        1
                                               "visual": {
       ★ {} pbiviz.json

▲ HELLOWORLD

                                                 "name": "helloWorld",
                                                 "displayName": "HelloWorld",
                                                 "guid": "helloWorldE7F4986C5F864D7589F9F4E14FAAE3EF",
       ▶ .vscode
                                                 "visualClassName": "Visual",
                                                 "version": "1.0.0".
       node modules
                                                 "description": "",
       "supportUrl": "",
       TS settings.ts
                                                 "gitHubUrl": ""
       TS visual.ts
                                      11
       {} visual.less
                                              "apiVersion": "2.3.0",
      {} capabilities.json
                                               "author": {
                                                 "name": "",
      {} package.json
                                                 "email": ""
      pbiviz.json
      {} tsconfig.json
                                              },
                                              "assets": {
      {} tslint.json
                                                 "icon": "assets/icon.png"
                                              },
                                              "externalJS": [
                                                 "node_modules/powerbi-visuals-utils-dataviewutils/lib/index.js"
                                               "style": "style/visual.less",
                                               "capabilities": "capabilities.json",
```



The tsconfig.json File

- Used to add references to other TypeScript files
 - Controls which TypeScript files are passed to TypeScript compiler
 - No need to reference *.d.ts files in the node_modules/@types folder

```
{} tsconfig.json •
         "compilerOptions": {
           "allowJs": true,
           "emitDecoratorMetadata": true,
           "experimentalDecorators": true,
           "target": "ES5",
           "sourceMap": true,
           "out": "./.tmp/build/visual.js"
         "files": [
           ".api/v1.11.0/PowerBI-visuals.d.ts",
           "node modules/powerbi-visuals-utils-dataviewutils/lib/index.d.ts",
           "node modules/powerbi-visuals-utils-typeutils/lib/index.d.ts",
           "node modules/powerbi-visuals-utils-formattingutils/lib/index.d.ts",
           "src/settings.ts",
           "src/visual.ts"
```



Installing D3 when using PBIVIZ Version 2

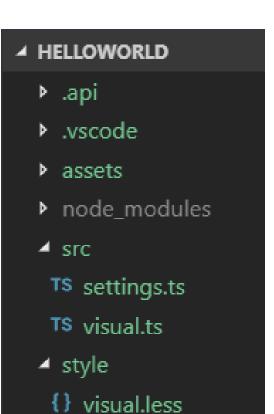
- Install package for D3 library version 3.x
 npm install d3@3 --save-dev
- Install package for type definition files version 3
 npm install @types/d3@3 --save-dev
- Update externalJS section of pbiviz.json

```
"assets": {
    "icon": "assets/icon.png"
},
    "externalJS": [
    "node_modules/powerbi-visuals-utils-dataviewutils/lib/index.js",
    "node_modules/d3/d3.js"
],
    "style": "style/visual.less",
    "capabilities": "capabilities.json",
    "dependencies": "dependencies.json",
    "stringResources": []
}
```



Visual Source Files

- visual.ts
 - visual class definition
- settings.ts
 - helper class to manage visual properties
- visual.less
 - CSS used to style custom visual





Authoring a Custom Visual Class

- Custom visual is a class that implements IVisual
 - Class must be defined in powerbi.extensibility.visual namespace
 - Minimum visual class must provide update method
 - Parameterized constructor used to create visual elements

```
Terminal
    File Edit Selection View Go Debug

    visual.ts - helloD3 - Visual Studio Code

                                 TS visual.ts
       EXPLORER
                                         module powerbi.extensibility.visual {

▲ OPEN EDITORS 1 UNSAVED

    TS visual.ts src

                                              export class Visual implements IVisual {

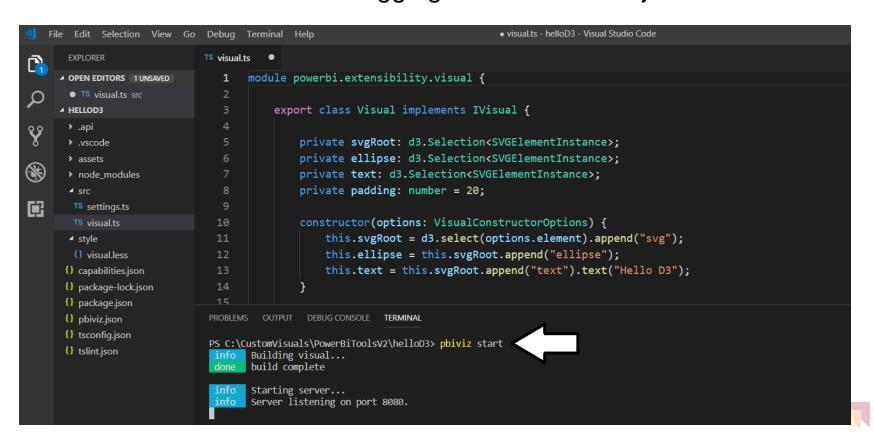
▲ HELLOD3

       ▶ .api
                                                   constructor(options: VisualConstructorOptions) {
       .vscode
                                                        // one-time initialization code
       assets
       node_modules
        public update(options: VisualUpdateOptions) {
        TS settings.ts
                                                        // called when viewport or data changes
        TS visual.ts
                                   10
        {} visual.less
                                   12
       {} capabilities.json
                                   13
       {} package-lock.json
                                   14
```



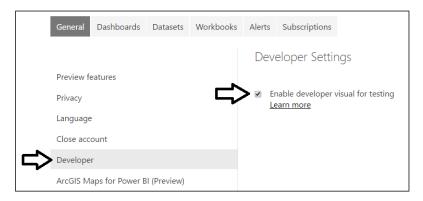
Running a Custom Visual Project

- Visual projects run & tested using pbiviz start command
 - Run pbiviz start from Visual Studio Code from Integrated console
 - Command starts local debugging session in node.js

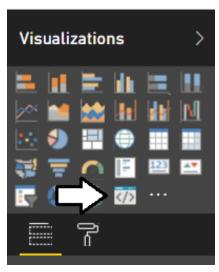


The Developer Visual

Must be enabled on Developer Settings page



Provides new visual for testing and debugging custom visuals





Working with the Developer Visual

- Developer visual loads custom visual from node.js
 - Makes it possible to test custom visual inside Power BI Service
 - Developer visual provides toolbar with development utilities







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Visual Capabilities

- Visual capabilities defined inside capabilities.json
 - dataRoles defines the field wells displayed on Fields pane
 - dataViewMappings defines the type of DataView used by visual
 - objects defines custom properties for visual

```
▶ .api
▶ .vs
▶ .vscode
▶ assets
▶ node_modules
▶ src
▶ style
➡ .npmignore
{} capabilities.json
{} package-lock.json
{} pbiviz.json
```

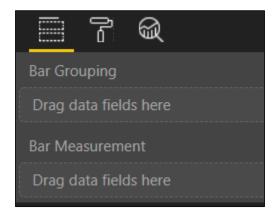
```
capabilities.json * X

{
     "dataRoles": ...,
     "dataViewMappings": ...,
     "objects": ...
}
```



Data Roles

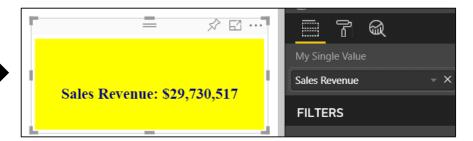
- DataRoles define how fields are associated with visual
 - Each dataRole is display as field well in the Field pane
 - dataRoles can be defined with conditions and data mappings





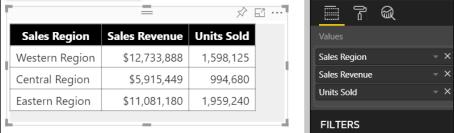
Data Mapping Modes

- Power BI visual API provides several mapping modes
 - Single
 - Table
 - Categorical
 - Matrix
 - Tree

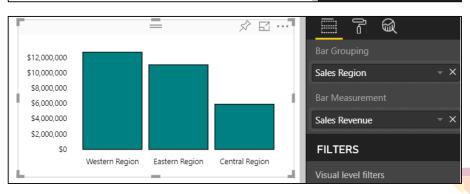




Single Mapping



Categorical Mapping



Developer Visual DataView

- Developer visual supports DataView mode
 - Allows you to see and explore data mapping
 - Allows you to see metadata for custom properties





Designing with View Model

- Best practice involves creating view model for each visual
 - View model defines data required for rendering
 - createViewModel method gets data to generate view model
 - update method calls createViewModel to get view model

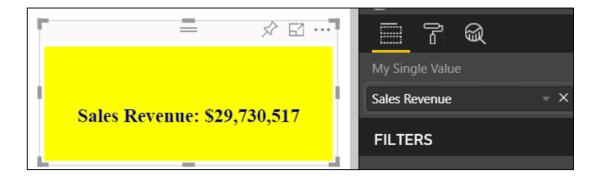
```
export interface BarchartDataPoint {
   Category: string;
   Value: number;
}

export interface BarchartViewModel {
   IsNotValid: boolean;
   DataPoints?: BarchartDataPoint[];
   Format?: string;
   SortBySize?: boolean;
   XAxisFontSize?: number;
   YAxisFontSize?: number;
   BarColor?: string;
}
```



Single Mapping Example: oneBigNumber

- dataRole can use dataViewMapping mode of single
 - For visuals like Card which only display single value
 - Condition can define that a dataRole requires exactly one measure





Programming in Single Mapping Mode

- Single mapping easy to access through visuals API
 - DataView object provides single.value property
 - value property defined as PrimativeValue { bool | number | string }
 - PrimativeValue must be explicitly cast
 - Other measure properties available through column metadata

```
"tree": \bigoplus \{\ldots\}.
"categorical": \bigoplus\{\ldots\},
"table": \bigoplus \{\ldots\},
"matrix": \bigoplus \{\ldots\},
"single": ⊖{
     "column": \bigoplus \{\ldots\},
     "value": 29730517.14
"metadata": ⊖{
     "columns": ⊖[
                "roles": \bigoplus\{\ldots\},
                "type": \bigoplus \{\ldots\},
                "format": "\\$#,0;(\\$#,0);\\$#,0",
                "displayName": "Sales Revenue",
                "queryName": "Sales.Sales Revenue",
                "expr": \bigoplus \{\ldots\},
                "index": 0,
                "isMeasure": true
```

```
public update(options: VisualUpdateOptions) {
    // get DataView object
    this.dataView = options.dataViews[0];

    // get single value
    var value: number = <number>this.dataView.single.value;

    // get metadata to discover field name and format string
    var column: DataViewMetadataColumn = this.dataView.metadata.columns[0];
    var valueName: string = column.displayName
    var valueFormat: string = column.format;
```



Using the Power BI Formatting Utilities

- Used to format values using Power BI formatting strings
 - Requires installing powerbi-visuals-utils-formattingutils package

```
var value: number = <number>this.dataView.single.value;
var column: DataViewMetadataColumn = this.dataView.metadata.columns[0];
var valueName: string = column.displayName
var valueFormat: string = column.format;

var valueFormatterFactory = powerbi.extensibility.utils.formatting.valueFormatter;
var valueFormatter = valueFormatterFactory.create({
   format: valueFormat,
   formatSingleValues: true
});

var valueString: string = valueFormatter.format(value);
```

```
"column": ⊖{
    "roles": ⊕{...},
    "type": ⊕{...},
    "format": "\\$#,0;(\\$#,0);\\$#,0",
    "displayName": "Sales Revenue",
    "queryName": "Sales.Sales Revenue",
```

```
"column": ⊖{
    "roles": ⊕{...},
    "type": ⊕{...},
    "format": "#,0",
    "displayName": "Units Sold",
    "queryName": "Sales.Units Sold",
```

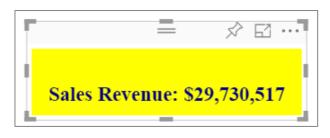






Table Mapping Example: Snazzy Table

- dataRole can use dataViewMapping mode of table
 - For visuals which display rows & columns for ordered set of fields
 - condition can define number of fields that can be added

	=	ø	EZ	
Sales Region	Sales Revenue	Units Sold		Values
Western Region	\$12,733,888	1,598,125		Sales Region
Central Region	\$5,915,449	994,680		Sales Revenue
Eastern Region	\$11,081,180	1,959,240		Units Sold
	_			FILTERS



Programming in Table Mapping Mode

- Table mapping data accessible through visuals API
 - DataView object provides table property
 - table property provides columns property and rows property

```
"table": ⊖{
    "columns": ⊖[
       \Theta{
              "roles": \bigoplus\{\ldots\},
              "type": \bigoplus\{\ldots\},
              "format": undefined,
              "displayName": "Sales Region",
              "queryName": "Customers.Sales Region",
              "expr": \bigoplus\{\ldots\},
              "index": 0,
              "identityExprs": ⊕[ ... ]
       \oplus \{\ldots\}
        \oplus \{\dots\}
    "identity": \oplus[ ... ],
    "identityFields": ⊕[ ... ],
    "rows": ⊖[
       \Theta
              "Western Region",
             12733888.2,
              1598125
```

```
public update(options: VisualUpdateOptions) {
  var dataView: DataView = options.dataViews[0];
  var table: DataViewTable = dataView.table;
  var columns: DataViewMetadataColumn[] = table.columns;
  var rows: DataViewTableRow[] = table.rows;
```



Categorical Mapping Example: Barchart

- dataRole can use dataViewMapping mode of categorical
 - This is the most common type of data mapping
 - For visuals which divide data into groups for analysis
 - Groups defined as columns and values defined as measures

```
"dataRoles": [
  { "displayName": "Bar Grouping", "name": "myCategory", "kind": "Grouping" },
  { "displayName": "Bar Measurement", "name": "myMeasure", "kind": "Measure" }
],
"dataViewMappings": [
     "conditions": [ { "myCategory": { "max": 1 }, "myMeasure": { "max": 1 } } ].
     "categorical": {
       "categories": {
          "for": { "in": "myCategory" },
          "dataReductionAlgorithm": { "top": {} }
       "values": {
          "select": [ { "bind": { "to": "mvMeasure" } } ]
                                                                            $12,000,000
                                                                            $10,000,000
                                                                            $8,000,000
                                                                            $6,000,000
                                                                            $4,000,000
                                                                            $2,000,000
                                                                                                               FILTERS
                                                                                   Western Region Eastern Region Central Region
                                                                                                                Visual level filters
```



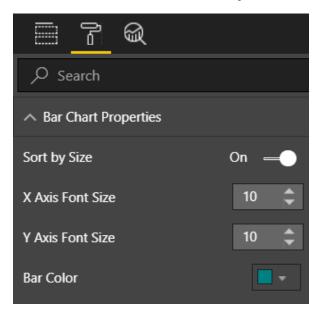
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Extending Visuals with Custom Properties

- Custom properties defined using objects
 - You can define one or more objects in capabilities.json
 - Each object defined with name, display name and properties
 - object properties automatically persistent inside visual metadata
 - properties can be seen and modified by user in Format pane
 - Custom properties require extra code to initialize Format pane





DataViewObjectParser and VisualSettings

- Power BI visual utilities provide DataViewObjectParser
 - Abstracts away tricky code to initialize and read property values

```
module powerbi.extensibility.visual {
  import DataViewObjectsParser = powerbi.extensibility.utils.dataview.DataViewObjectsParser;
  export class VisualSettings extends DataViewObjectsParser {
    public barchartProperties: BarchartProperties = new BarchartProperties();
  }
  export class BarchartProperties {
    sortBySize: boolean = true;
    xAxisFontSize: number = 10;
    yAxisFontSize: number = 10;
    barColor: Fill = { "solid": { "color": "teal" } };
}
```



Mapping Object Properties to VisualSettings

- VisualSettings class must map to named objectnamed
 - VisualSetting class contains named field that maps to object name
 - Named field based on custom class with mapped properties
 - Object & property names must match what's in capabilities.json



Initializing Objects in the Format Pane

- Visual must initialize properties in Format pane
 - Visual must implement enumerateObjectInstances
 - VisualSettings makes this relatively easy
 - Extra code required to make property appear as spinner

```
public enumerateObjectInstances(options: EnumerateVisualObjectInstancesOptions): VisualObjectInstanceEnumeration {
  // register object properties
  var visualObjects: VisualObjectInstanceEnumerationObject =
    <VisualObjectInstanceEnumerationObject>VisualSettings
      .enumerateObjectInstances(this.settings.options);

∠ Search

  // configure spinners for integers properties
  visualObjects.instances[0].validValues = {
    xAxisFontSize: { numberRange: { min: 10, max: 36 } },
                                                                          Bar Chart Properties
   yAxisFontSize: { numberRange: { min: 10, max: 36 } },
                                                                          Sort by Size
  // return visual object collection
  return visualObjects;
                                                                          X Axis Font Size
                                                                          Y Axis Font Size
                                                                                                     10
                                                                          Bar Color
```



Retrieving Property Values

- Property values persisted into visual metadata
 - Properties not persisted white they still retain default values

Property values retrieved using VisualSettings object

```
public update(options: VisualUpdateOptions) {
   if (options.dataViews[0]) {
      // create VisualSettings object
      this.settings = VisualSettings.parse(options.dataViews[0]) as VisualSettings;
      // retrieve property values
      var sortBySize: boolean = this.settings.barchartProperties.sortBySize
      var xAxisFontSize: number = this.settings.barchartProperties.xAxisFontSize;
```



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Tools v2

- Power BI API added to your project
 - Power BI API files added to project
 - You install packages for utilities
 - Add externalJS entries for JavaScript libraries required on page

```
File Edit Selection View Go Debug Terminal Help
                                                                          • pbiviz.json - oneBigNumber - Visual Studio Code
                                                                                                  ··· {} pbiviz.json •

■ OPEN EDITORS ■1 UNSAVED
                                          "name": "visual",
                                                                                                                "visual": {
                                          "dependencies": {
                                                                                                                  "name": "oneBigNumber",
                                            "powerbi-visuals-utils-formattingutils": "^0.4.0"
                                                                                                                  "displayName": "One Big Number",
    • {} pbiviz.json
                                                                                                                  "guid": "PBI_CV_5C3FDC9C_58FC_41F3_BDF9_1D6FB3CB9C9F",
                                          "devDependencies": {
                                                                                                                  "visualClassName": "OneBigNumber",
                                            "@types/d3": "^3.5.41",
                                                                                                                  "version": "1.0.0",
    ₄ .api
                                            "@types/jquery": "^2.0.45",
                                                                                                                  "description": "",
                                            "d3": "^3.5.17",
                                                                                                                  "supportUrl": "",
                                            "jquery": "^3.2.1"
                                                                                                                  "gitHubUrl": ""
      {} schema.capabilities.ison
                                                                                                                 "apiVersion": "2.3.0",
      {} schema.pbiviz.json
      {} schema.stringResources.json
                                                                                                                "author": {
    ▶ assets
                                                                                                                                "icon": "assets/icon.png"
    node modules
                                                                                                                 "externalJS": [
                                                                                                                  "node_modules/jquery/dist/jquery.js",
    ▶ style
                                                                                                                  "node_modules/d3/d3.min.js",
   {} capabilities.ison
                                                                                                                  "node_modules/lodash/lodash.min.js",
   {} package.ison
                                                                                                                   "node_modules/globalize/lib/globalize.js",
   {} pbiviz.json
   {} tsconfig.json
                                                                                                                   "node_modules/powerbi-visuals-utils-typeutils/lib/index.js",
                                                                                                                   "node_modules/powerbi-visuals-utils-svgutils/lib/index.js",
                                                                                                                   "node_modules/powerbi-visuals-utils-dataviewutils/lib/index.js",
                                                                                                                   "node_modules/powerbi-visuals-utils-formattingutils/lib/index.js
                                                                                                                "style": "style/visual.less",
                                                                                                                "capabilities": "capabilities.json",
                                                                                                                "dependencies": "dependencies.json"
```



EcmaScript2015 Modules and D3 version 5

- ECMAScript 2015 add modules to JavaScript
 - TypeScript builds on the concept
 - Each file defines it own module
- Modules execute in their own scope not at global scope
 - Code in module not visible to other modules by default
 - Classes and function must be exported to use across modules
 - Modules must import types from other modules
 - relationships between modules defined using imports and exports



Dynamic Module Loading

- Webpack controls dynamic module loading
 - Your project just references app.ts
 - Compiler dynamically determines other files to include

```
TS quote.ts
                                                                                         export class Quote {
                                                                                             value: string;
                                                                                             author: string;
                                                                                             constructor(value: string, author: string)
TS app.ts
                                                                                                 this.value = value:
import { Quote } from './quote';
                                                                                                 this.author = author;
import { QuoteManager } from './quote-manager'
$( () => {
  var displayNewQuote = (): void => {
    var quote: Quote = QuoteManager.getQuote();
                                                             rs quote-manager.ts 🗶
    $("#quote").text(quote.value);
                                                                    import { Quote } from './quote';
    $("#author").text(quote.author);
                                                                    export class QuoteManager {
                                                                      private static quotes: Quote[] = [
                                                                        new Quote("Always borrow money from a p
                                                                        new Quote("Behind every great man is a
                                                                        new Quote("In Hollywood a marriage is a
```

WebPack

- WebPack serves as a bundling utility
 - Bundles many js/ts files into a single file
 - Can handle dynamic module loading
 - Provides a dev server for testing and debugging
- When using Webpack version 4 or later
 - Install packages for webpack and webpack-cli
 - npm install webpack webpack-cli --save-dev



Webpack Loaders

- Loaders do two things
 - Identify which file or files should be transformed
 - Transform files and ad them to dependency graph

- Example loaders
 - awesome-typescript-loader
 - style-loader
 - css-loader
 - url-loader



Summary

- ✓ Installing the Power BI Developer Tools
- ✓ Creating Your First Custom Visual
- ✓ Defining Data Roles and Data Mappings
- ✓ Extending a Visual with Custom Properties
- ✓ Migrating to Version 3 of the Power BI Developer Tools

