

# Developer Introduction to Power BI



# Agenda

- Introduction to Power BI
- Creating PBIX Projects with Power BI Desktop
- Developer Opportunities in Power BI
- Developing for Power BI Embedded
- Creating a Power BI Development Environment



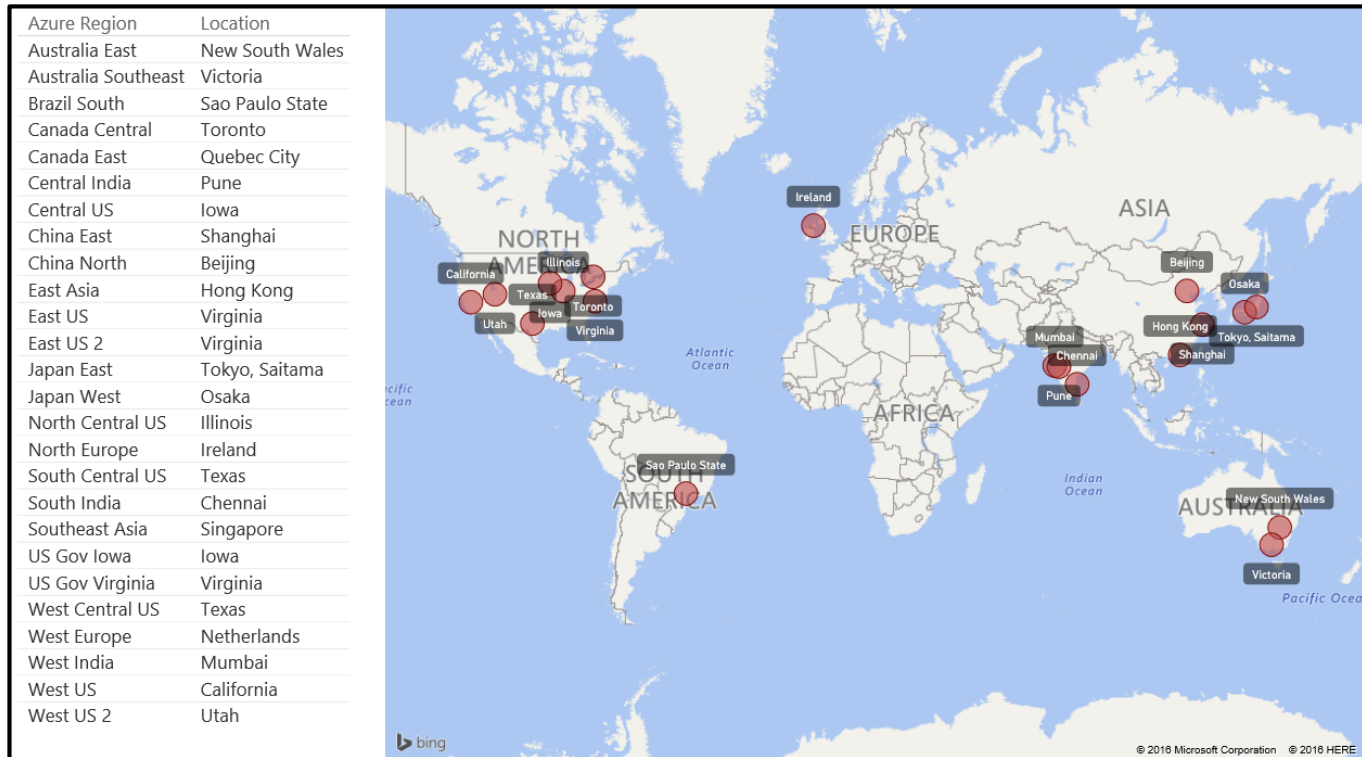
# What is Power BI?

- What is Power BI?
  - Cloud-based subscription service
  - Environment which promotes self-service BI *to the end user*
  - BI Platform to assists with data import, analysis and visualization
- Power BI benefits from being a cloud-based service
  - It takes only 5 seconds to subscribe to the Power BI service
  - New users can create something significant in 5 minutes or less



# Power BI Benefits from Microsoft Azure

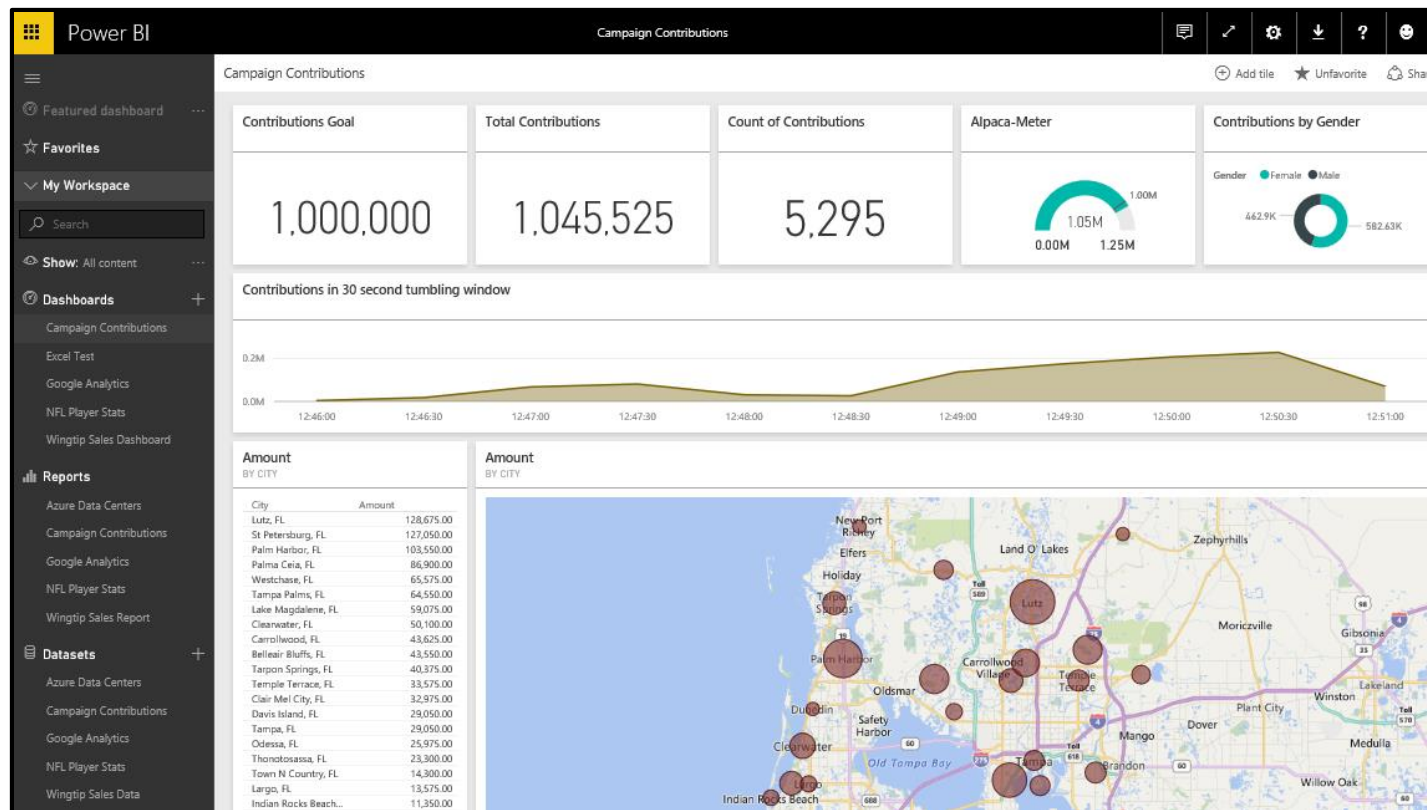
- Power BI is built on top of Microsoft Azure
  - Power BI solutions can be scaled as required
  - Power BI solutions have global reach





# The Power BI Service

- The Power BI Service
  - Provides cloud-based foundation for Power BI platform
  - Accessible through browser at <https://app.powerbi.com>



# Power BI Standard versus Power BI Pro

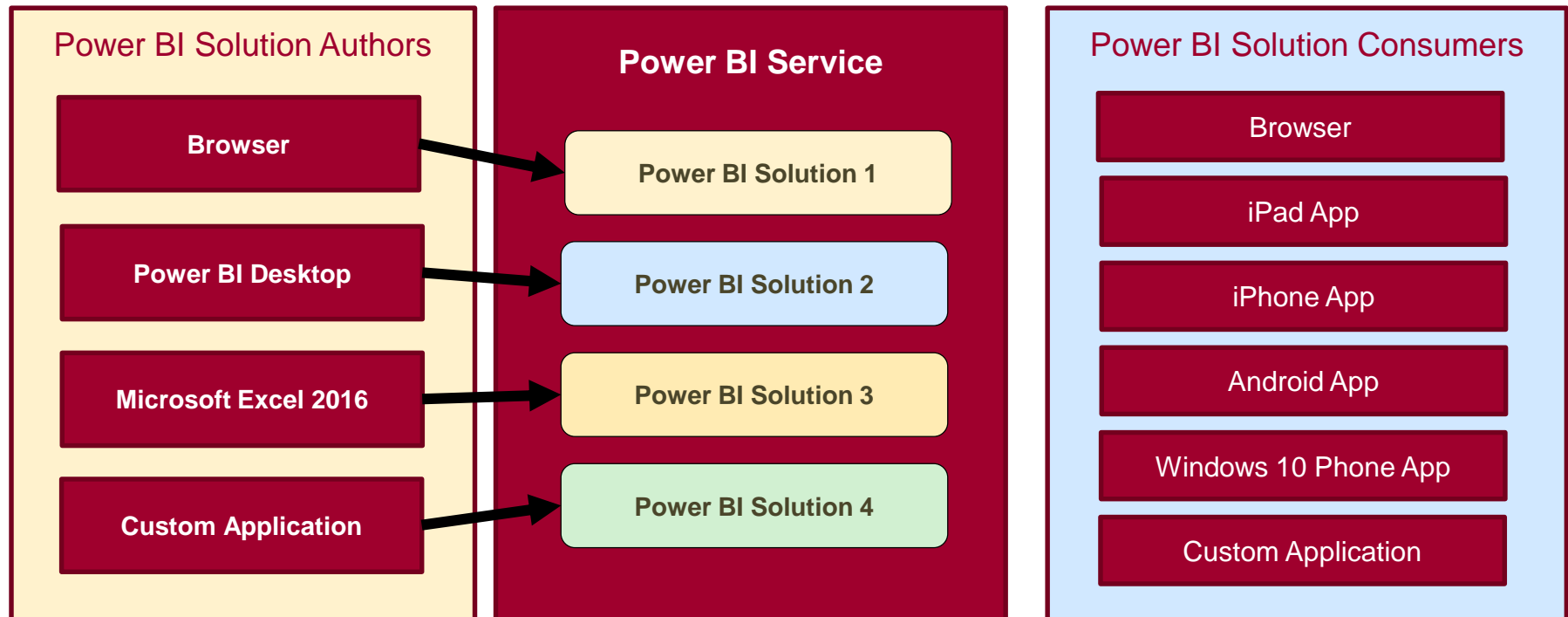
- Power BI offer licenses for two different subscriptions
  - Standard license is free
  - Pro licenses is \$10 per month or free with Office 365 E5
  - Power BI pricing is much lower than the competition (e.g. Tableau)

	Power BI Standard	Power BI Pro
Data capacity limit	1 GB	10 GB
Incoming Data Streams	10K rows/hour	1M rows/hour
Ability to refresh a dataset	Daily	Hourly
Consume live data with interactivity	NO	YES
Access on-premises data with gateway	NO	YES
Use Group Workspaces	NO	YES
Use Organizational Content Packs	NO	YES
Use Row-level Security (RLS)	NO	YES
Access a DirectConnect Dataset	NO	YES

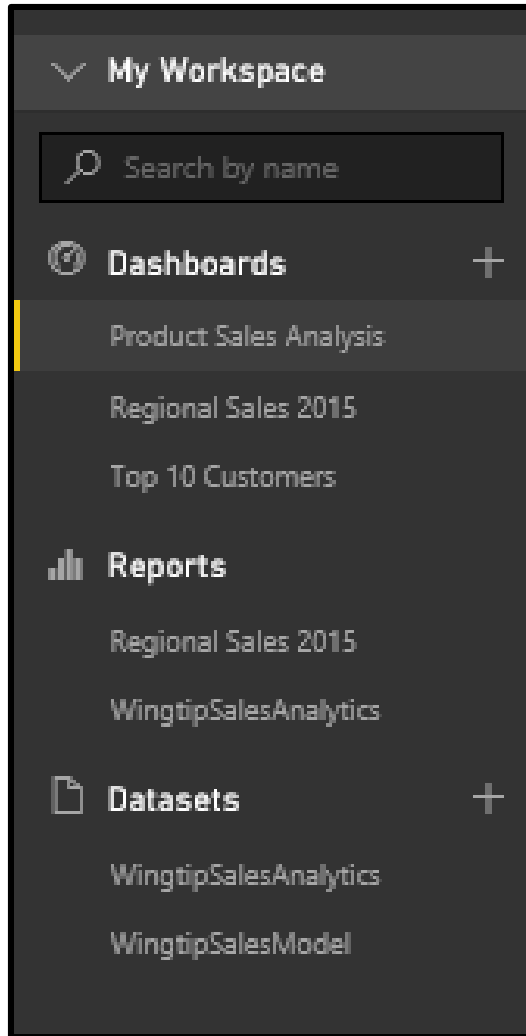


# Power BI Service Architecture

- Power BI support for authors and consumers
  - BI solution authors have a choice in authoring tools
  - BI solutions consumers can use wide range of devices



# Central Power BI Concepts



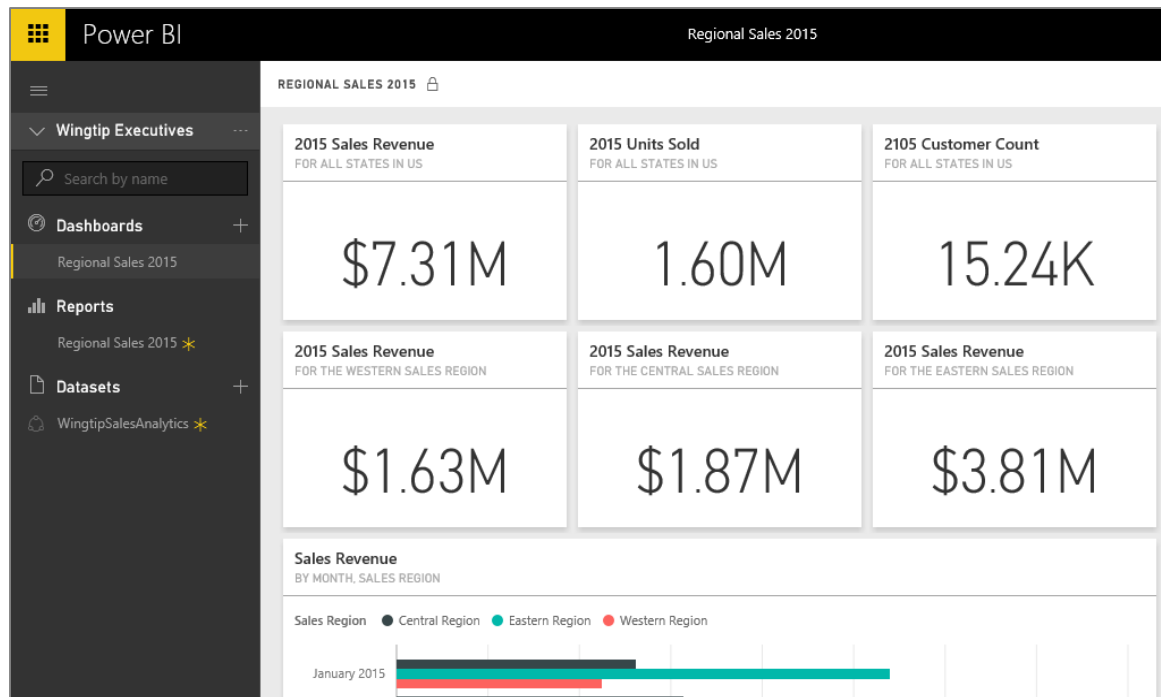
- **Workspace**
  - Provides user context and asset container
  - Every user has personal workspace
  - Team development requires group workspaces
- **Dashboard**
  - Consolidated view into reports and datasets
  - Custom solution entry point for mobile users
- **Report**
  - Collection of pages with tables & visualizations
  - Provides interactive control of filtering
- **Dataset**
  - Data model containing one or more tables
  - Can be very simple or very complex





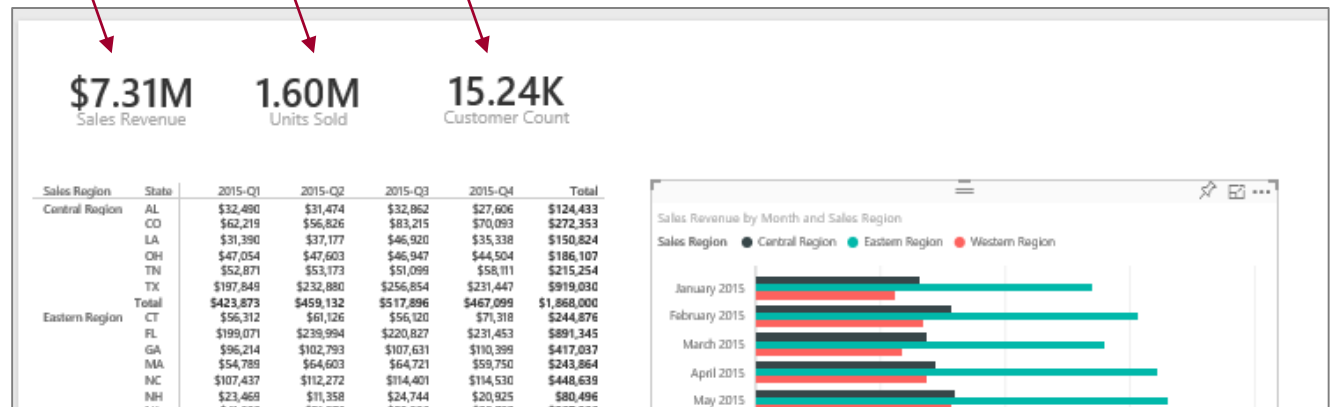
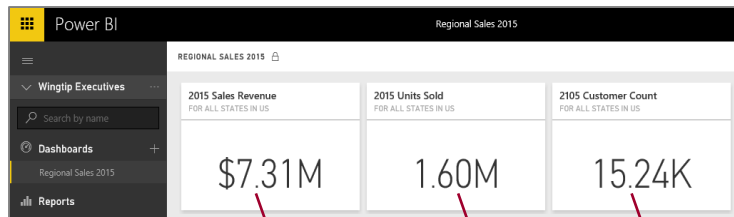
# Dashboards and Tiles

- Dashboard is a collection of tiles
  - Tile can be created by pinning visual from a report
  - Tile can be created by pinning query result from dataset



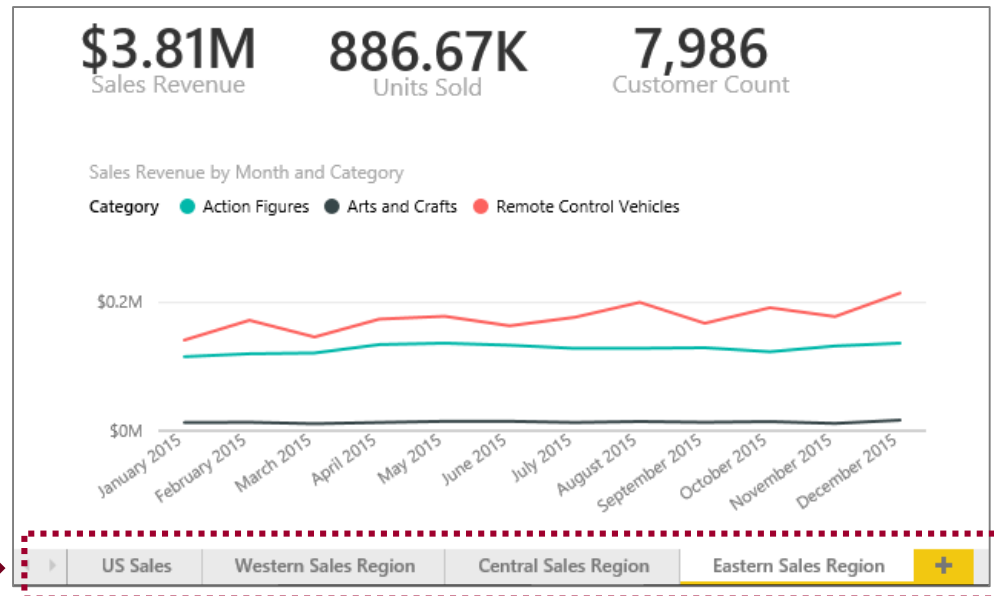
# Dashboards and Reports

- Dashboards link users to reports
  - Dashboard tiles designed to provide high-level view
  - Clicking tiles drills down into report to see more detail



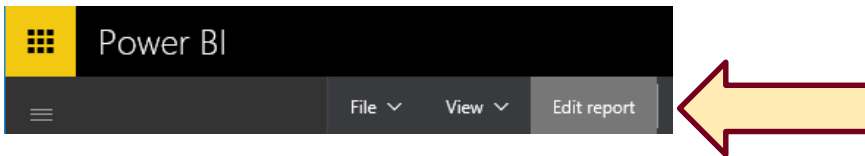
# Reports and Pages

- Reports contain one or more pages
  - A report can be designed with a single page
  - A report can be designed with many pages
  - Tabbed navigation located at bottom of report view
  - Each report is associated with exactly one dataset

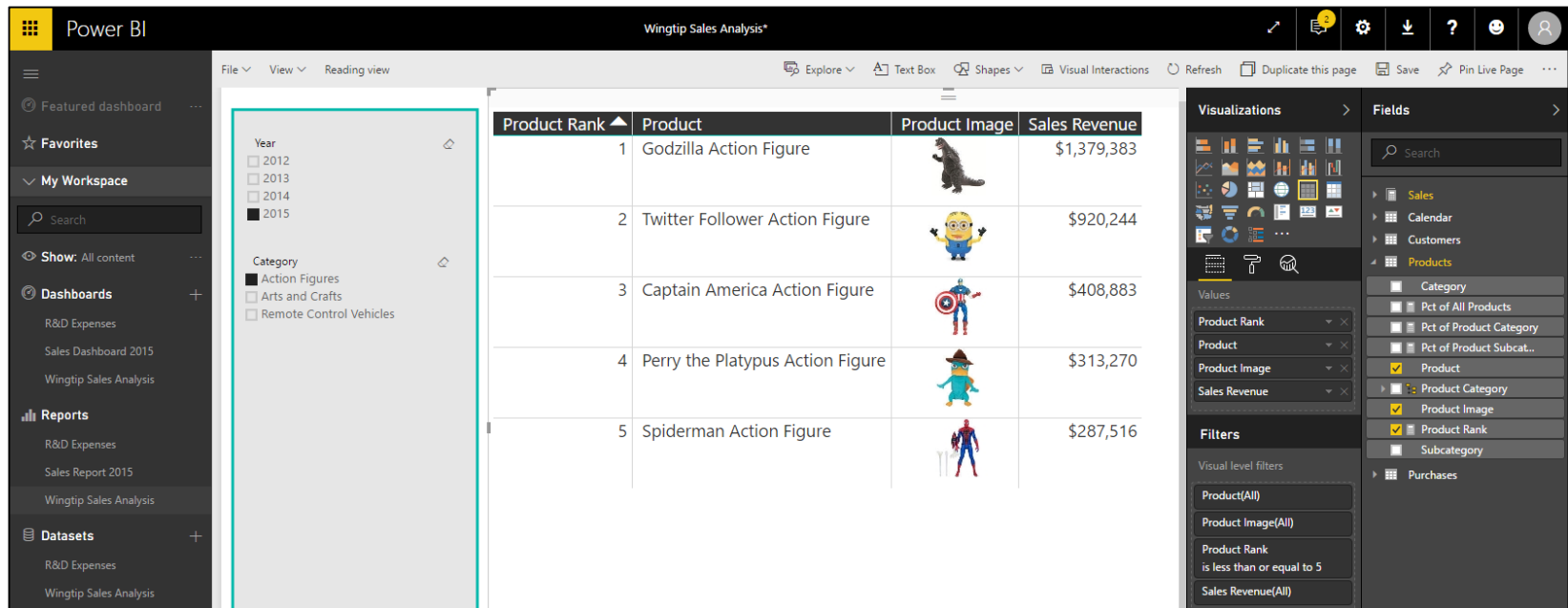







# Report Authoring

- Report initially opens in reading view
  - Click Edit report to switch to edit mode



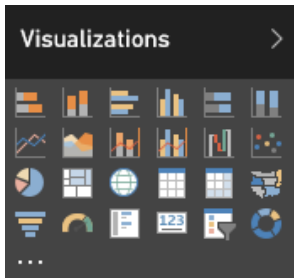
- Report design tools appear on right side of page

A screenshot of the Power BI report in edit mode. The report is titled 'Wingtip Sales Analysis' and is displayed in 'Reading view'. The main content area shows a table with 5 rows of product data. On the right side, the 'Visualizations' and 'Fields' panes are visible, showing various design tools and data fields. The 'Fields' pane shows a search bar and a list of fields including 'Sales', 'Calendar', 'Customers', 'Products', 'Category', 'Pct of All Products', 'Pct of Product Category', 'Pct of Product Subcat...', 'Product', 'Product Category', 'Product Image', 'Product Rank', 'Subcategory', and 'Purchases'. The 'Visualizations' pane shows a list of visual types and a 'Values' section with 'Product Rank', 'Product', 'Product Image', and 'Sales Revenue' selected. The 'Filters' section shows 'Product(All)', 'Product Image(All)', 'Product Rank is less than or equal to 5', and 'Sales Revenue(All)'.

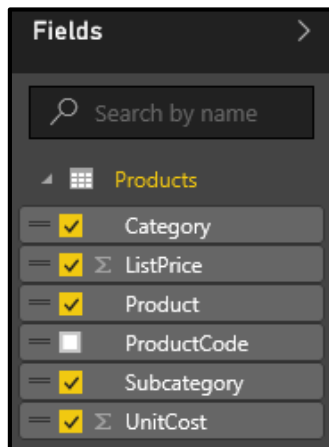
Product Rank	Product	Product Image	Sales Revenue
1	Godzilla Action Figure		\$1,379,383
2	Twitter Follower Action Figure		\$920,244
3	Captain America Action Figure		\$408,883
4	Perry the Platypus Action Figure		\$313,270
5	Spiderman Action Figure		\$287,516

# Visuals (aka Visualizations)

- Reports are designed using visual (aka visualizations)
  - Each visual is based on an underlying visualization type
  - Visualization type can be changed using **Visualizations** pane

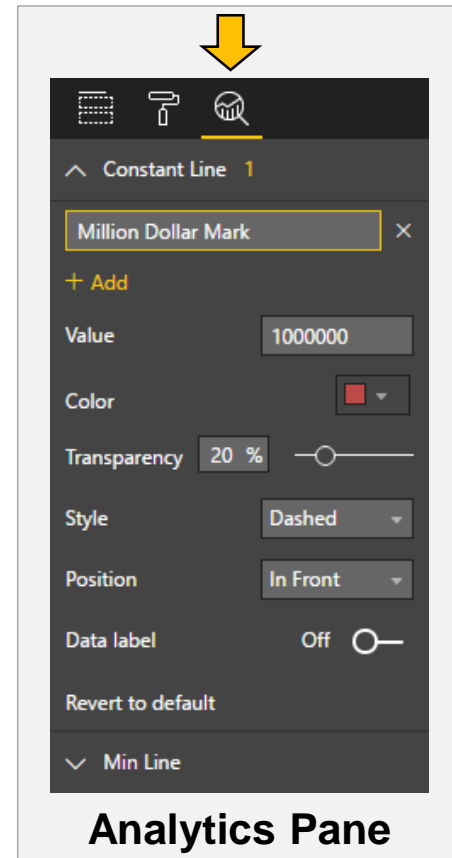
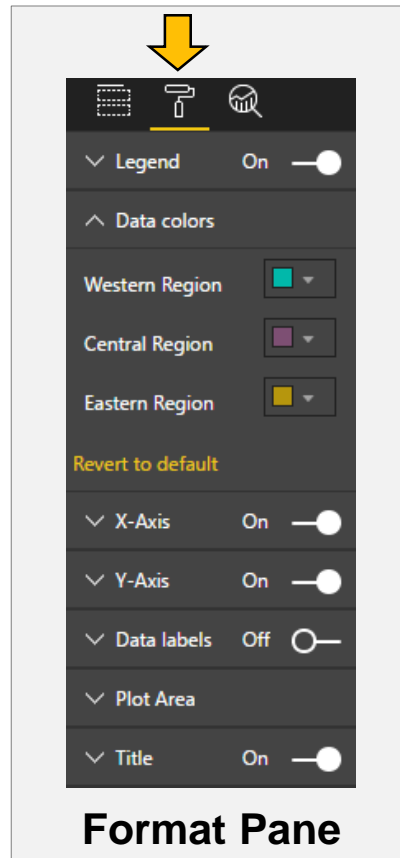
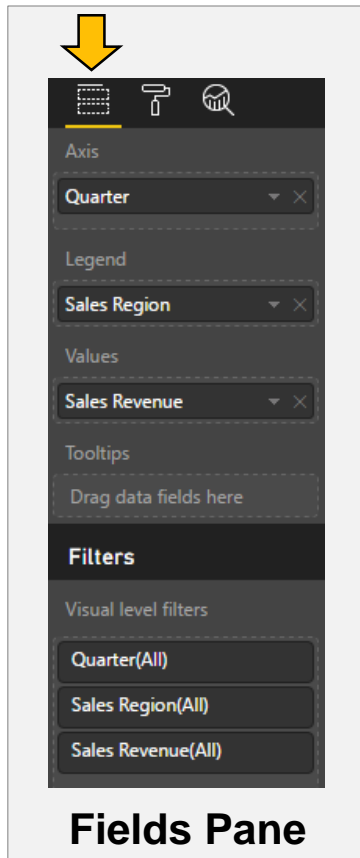


- Visuals creating by using fields from tables inside **Fields** list



# Editing Visual Properties

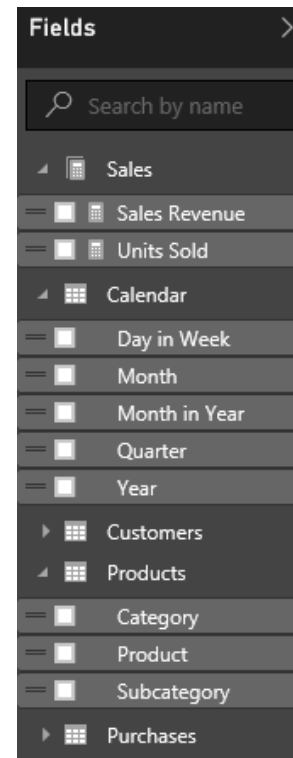
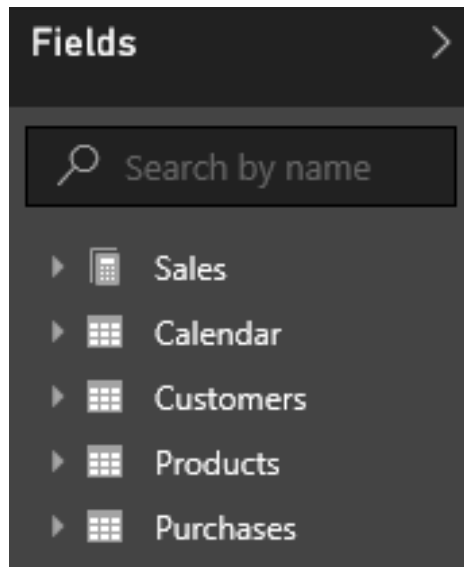
- Visual properties modified using three property panes
  - Visual properties vary greatly depending on type of visualization





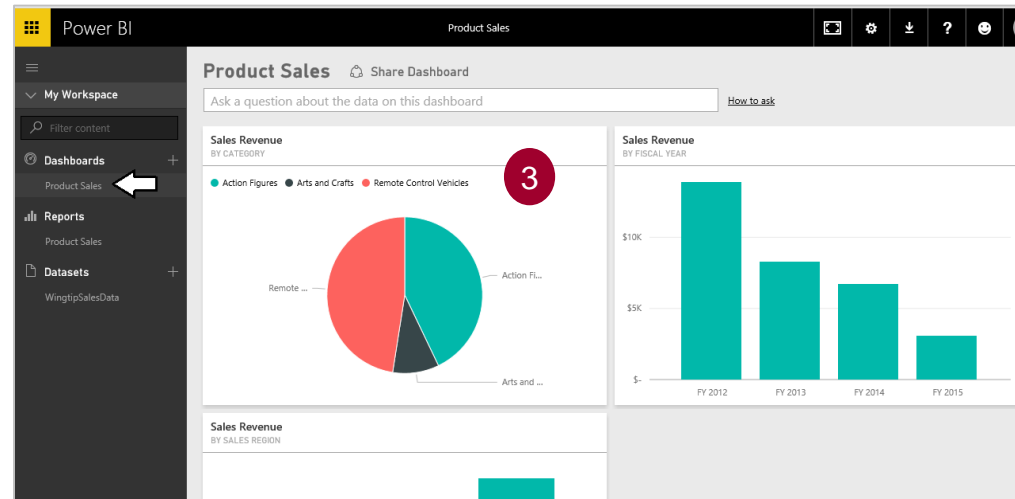
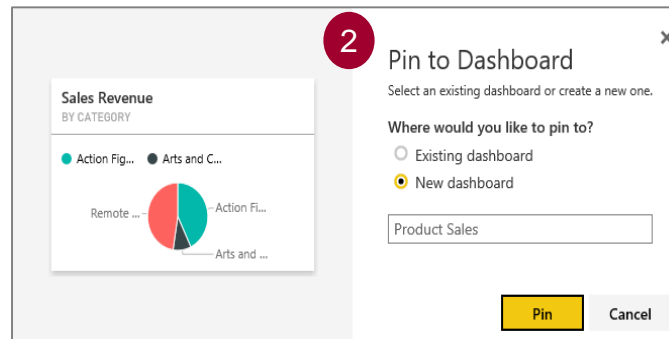
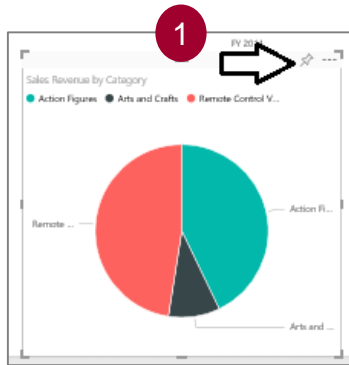
# Report and Datasets

- Each report is based on an underlying dataset
  - **Fields** list in report designer shows tables and fields
  - Report author sees tables & fields as dataset consumer



# Creating Dashboards

- Dashboards contain tiles
- Tiles created from visuals on report pages





**DEMO**

# Getting started with Datasets, Reports and Dashboards

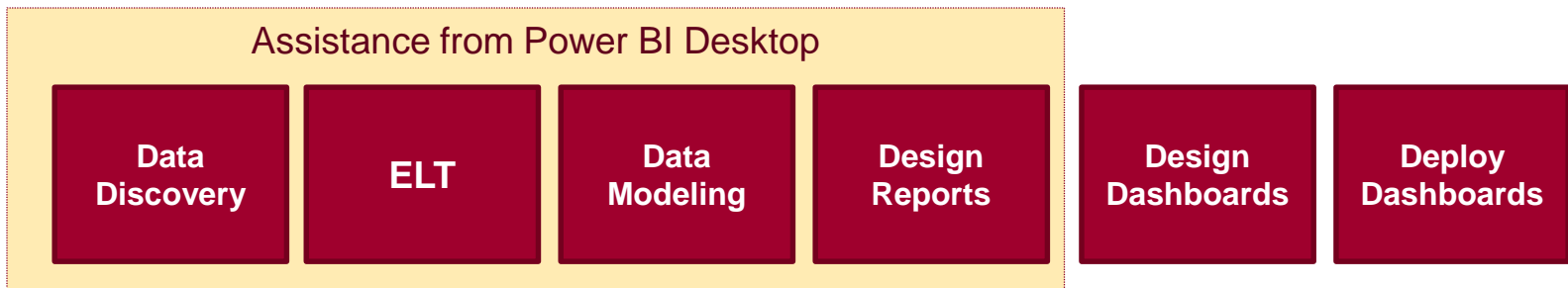
# Agenda

- ✓ Introduction to Power BI
- Creating PBIX Projects with Power BI Desktop
  - Developer Opportunities in Power BI
  - Developing for Power BI Embedded
  - Creating a Power BI Development Environment



# Working with Power BI Desktop

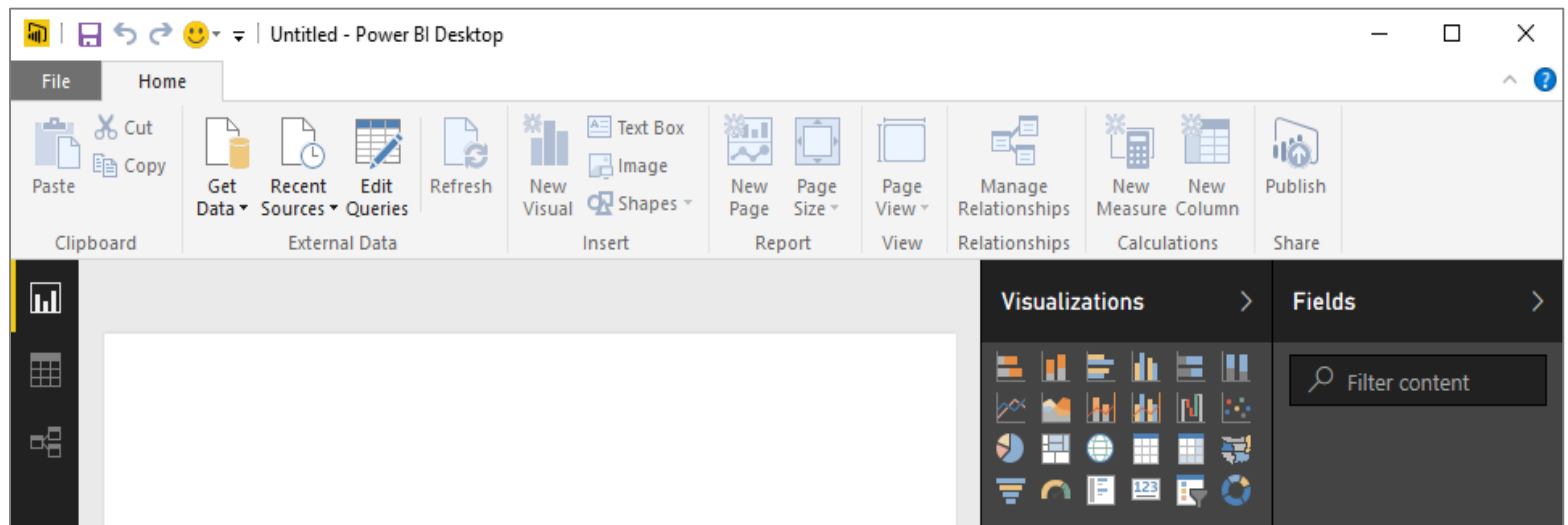
- Power BI Desktop focuses on first four phases
  - Query features for Data Discovery
  - Query features for ETL
  - Design features and DAX language for data modeling
  - Report design using a visual report designer
  - No support for designing dashboards
  - No support for packaging an entire solution





# Working with Power BI Desktop

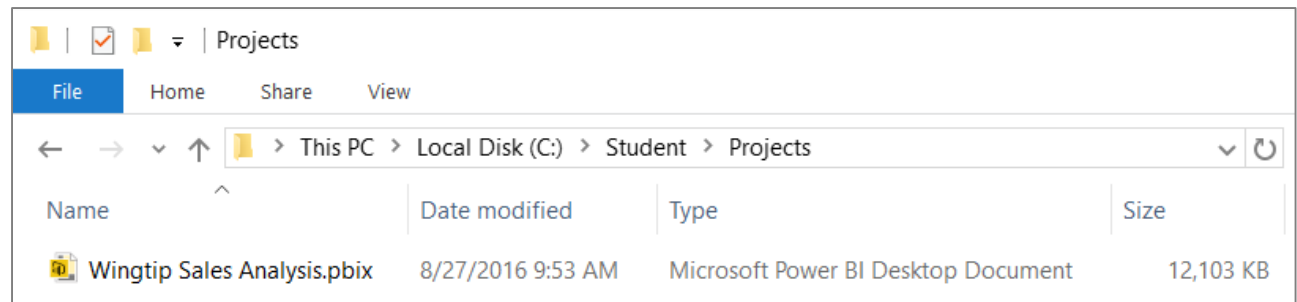
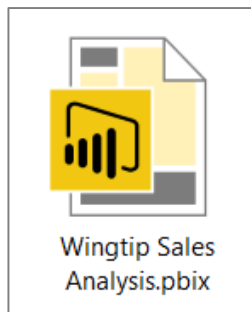
- Power BI Desktop is a Windows application
  - Work is saved and published in terms of projects
  - You can work on multiple projects at once
  - Each project runs in its own Power BI Desktop instance
  - Power BI Desktop can freeze up or act buggy
  - Quit & restart Power BI Desktop if it acts strangely





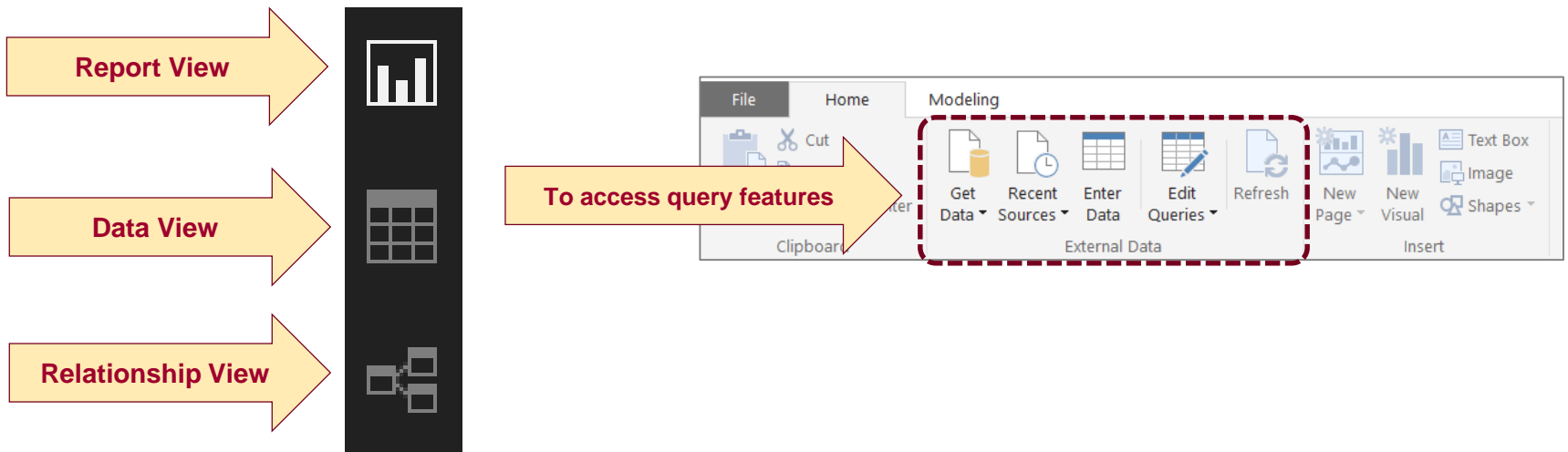
# Projects and PBIX Files

- Power BI Desktop projects saved using PBIX files
  - PBIX file contains data source definitions
  - PBIX file contains query definitions
  - PBIX file contains data imported from queries
  - PBIX file contains exactly one data model definition
  - PBIX file contains exactly one report
  - PBIX file never contains data source credentials



# Getting Around in Power BI Desktop

- What do you need to learn to use Power BI Desktop?
  - Query features for importing data
  - Design features for modeling data
  - Report designer for creating reports
- Navigating between view modes





**DEMO**

# Getting Up and Running with Power BI Desktop

# Agenda

- ✓ Introduction to Power BI
- ✓ Creating PBIX Projects with Power BI Desktop
- Developer Opportunities in Power BI
  - Developing for Power BI Embedded
  - Creating a Power BI Development Environment





# Developer Opportunities in Power BI

1. Developing Custom Visuals
2. Writing and Integrating Code Written in R
3. Programming the Power BI REST API
4. Embedding Power BI Reports in Websites
5. Developing Solutions using Power BI Embedded



# Developing Custom Visuals

- What is involved?
  - Learning to program in TypeScript instead of JavaScript
  - Learning to use graphics libraries such as D3.js
  - Getting up to speed on the cross-platform toolchain
  - Creating and debugging custom visuals using Node.js
  - Packaging custom visuals for distribution





# What is R?

- What is R?
  - Platform for statistics, data analysis and visualization
  - Free, cross-platform, open source software
  - Programming language + Runtime layer + Libraries
  - R code distributed and versioned using packages
  - Flourishing ecosystem of R package authors
- Why do you need it?
  - Analyzing data and generating statistics
  - Creating rich graphs and charts
  - Fitting statistical models for predictive analysis



# Writing and Testing R Code in Scripts

```
01_GettingStarted.R ×
Source on Save
1 # use <- for variable assignment
2 message <- "Hello world"
3
4 print(message)
5
6 # create vector using the c function
7 vector1 <- c(2, 4, 6, 8)
8
9 # create vectors using sequence
10 vector2 <- 1:10
11 vector3 = letters[1:5]
12 vector4 = LETTERS[24:26]
13 vector6 = 2^(1:8)
14
15 # create vector with election years
16 election.years <- seq(from = 1996, to = 2016, by = 4)
17
18 # enumerate through election years using for loop
19 for (year in election.years){
20   print(paste(year, "is an election year"))
21 }
22
23 # remove all objects from workspace
24 rm(list=objects())
```



# Where Can You Use R Code in PBIDT?

- As a data source to a query
  - You can use R code to import and reshape data
- Within a Query Applied Step
  - You can use R code to add transforms to a query
- Inside an R Visual in a Power BI Report
  - You can use R code to creates charts from your data



# Developing with the Power BI REST API

- Used to develop web and desktop applications
  - Requires registering app with Azure Active Directory
- What can you do with the Power BI REST API?
  - Upload PBIX files and configure data sources
  - Embed PBI reports and dashboard tiles into web apps
  - Create streaming dataset for real-time dashboards



# Agenda

- ✓ Introduction to Power BI
- ✓ Creating PBIX Projects with Power BI Desktop
- ✓ Developer Opportunities in Power BI
- Developing for Power BI Embedded
  - Creating a Power BI Development Environment



# What is Power BI Embedded?

- Power BI Embedded is an Azure Service
  - PBI Embedded service can be provisioned on-demand
  - Service provisioned in terms of workspace collections
  - PBI Embedded service requires an Azure subscription
- What is the core value of Power BI Embedded?
  - It eliminates need for Power BI license for each user
  - It eliminates need for Office 365 account for each user
  - It decouples user security from app security
  - It opens up PBI platform to commercial applications





# PowerBI.com versus Power BI Embedded

## PowerBI.com

-----

- Accessed via <https://app.powerbi.com>
- Requires Office 365 accounts
- Requires Power BI License
- Custom development not required
- Azure subscription not required

## Power BI Embedded

-----

- Accessed via custom URL
- No Office 365 accounts required
- No Power BI user licenses required
- Requires custom development
- Requires Azure subscription



# The Big Picture for Power BI Embedded

1. Create > Design > Test a PBIX project file on local PC
  - Done using Power BI Desktop
  - Note that Power BI Desktop only runs on Windows
2. Provision Azure resources for Power BI Embedded
  - Create a Power BI workspace collection
  - Create Power BI workspaces
3. Upload PBIX file to Power BI Embedded workspace
  - Use PowerShell, Power BI CLI or Azure REST API
4. Develop Web App with Embedded Power BI Reports
  - Most easily accomplished using ASP.NET MVC



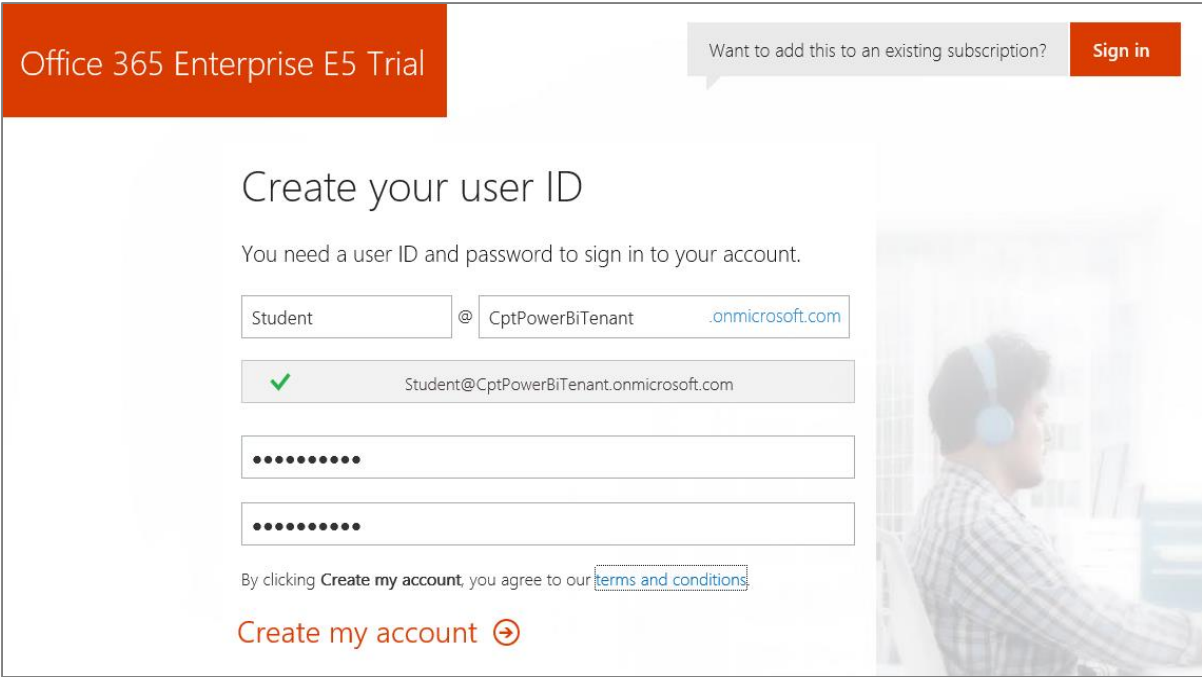
# Agenda

- ✓ Introduction to Power BI
- ✓ Creating PBIX Projects with Power BI Desktop
- ✓ Developer Opportunities in Power BI
- ✓ Developing for Power BI Embedded
- Creating a Power BI Development Environment



# Creating a Power BI Dev Environment

- Sign up for an Office 365 Enterprise E5 trial account
  - Creates a new Office 365 tenant
  - Creates an account which is tenant administrator
  - You can create 25 user accounts for testing purposes
  - You can create and test Office 365 unified groups



The screenshot shows the 'Office 365 Enterprise E5 Trial' sign-up page. At the top left, there's an orange banner with the text 'Office 365 Enterprise E5 Trial'. To the right, there's a grey box with the text 'Want to add this to an existing subscription?' and an orange 'Sign in' button. The main heading is 'Create your user ID'. Below it, a message says 'You need a user ID and password to sign in to your account.' The form has three input fields: a text field with 'Student', an '@' symbol, and a text field with 'CptPowerBiTenant' followed by a '.onmicrosoft.com' domain. Below these, a green checkmark icon is shown next to the email 'Student@CptPowerBiTenant.onmicrosoft.com'. There are two password fields, each with a masked password of eight dots. At the bottom, there's a link to 'terms and conditions' and a red 'Create my account' button with a right-pointing arrow. On the right side of the page, there's a blurred image of a person wearing a headset and working at a computer.

Office 365 Enterprise E5 Trial

Want to add this to an existing subscription? [Sign in](#)

## Create your user ID

You need a user ID and password to sign in to your account.

Student @ CptPowerBiTenant .onmicrosoft.com

✓ Student@CptPowerBiTenant.onmicrosoft.com

.....

.....

By clicking **Create my account**, you agree to our [terms and conditions](#)

**Create my account** ➔



# Office 365 admin center

- Chores to accomplish in Office 365 admin center
  - Learn how to add secondary user accounts for testing
  - Learn how to view and manage groups

Office 365 | Admin center preview

Home > Active users

Power BI Bootcamp Labs

[+ Add a user](#) [More](#) Filters All users  [Export](#)

<input type="checkbox"/>	Display name ^	User name	Status
<input type="checkbox"/>	James Bond	JamesB@PowerBiBootcamp.onmicrosoft.com	Office 365 Enterprise E5
<input type="checkbox"/>	Ted Pattison	Student@PowerBiBootcamp.onmicrosoft.com	Office 365 Enterprise E5

[+ User](#) [Types of users](#) [Filters](#)

Users are people in your organization who can access Office 365.

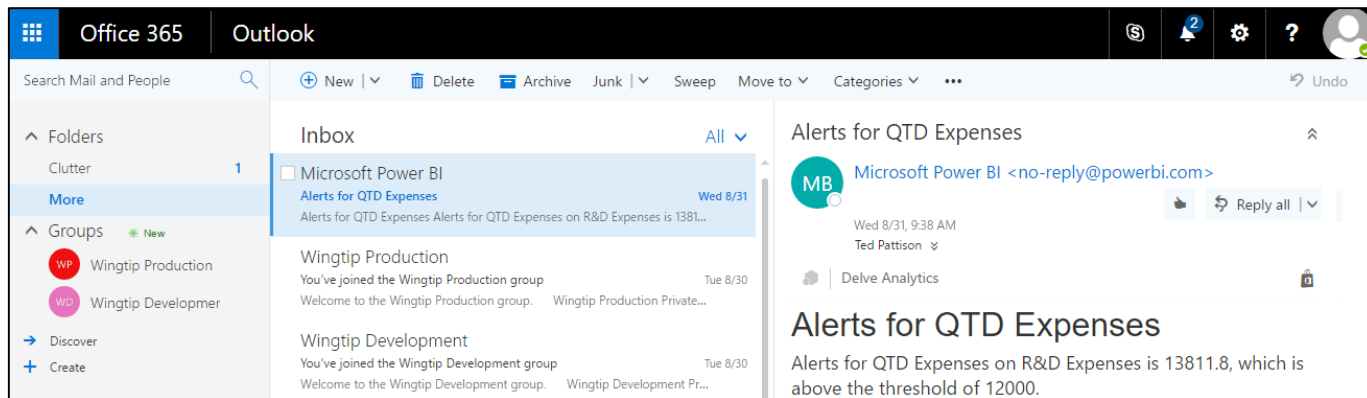
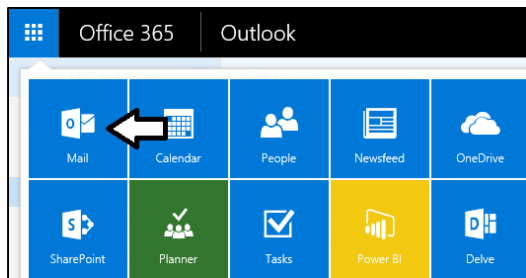
Different types of users and accounts can use Office 365 in distinct ways.

Learn how filtering will help you keep this list under control – before it gets too long.



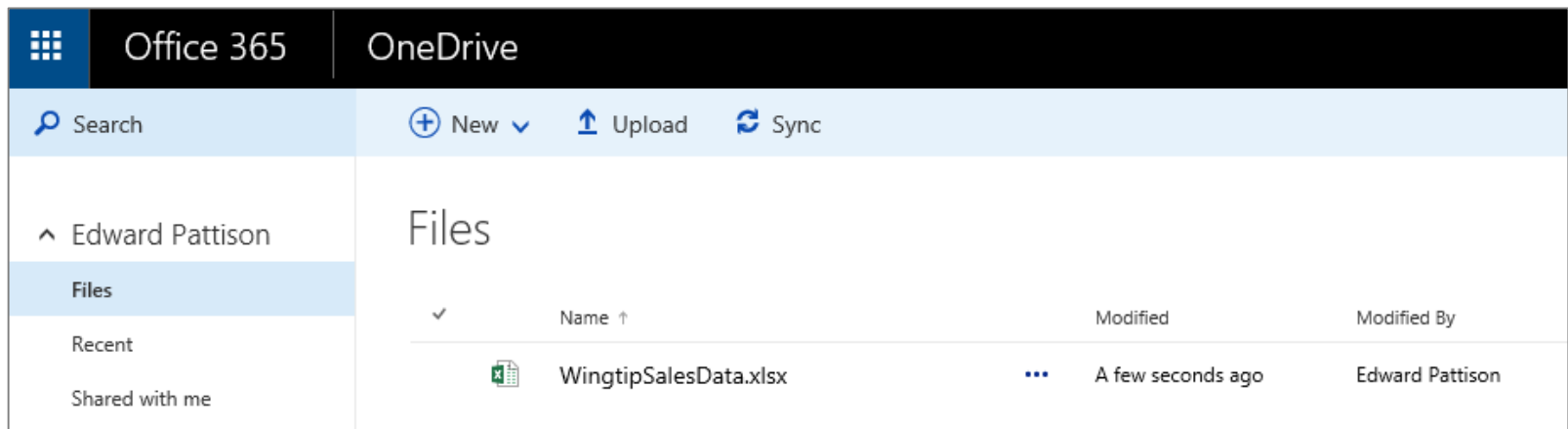
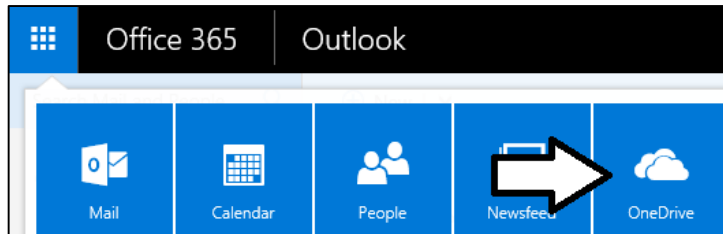
# Accessing Your Office 365 Mailbox

- Make sure you can access your Exchange Inbox
  - Accessible in browser using Outlook Web App (OWA)
  - View messages sent by Power BI service
  - View and interact with Office 365 groups



# Uploading Data Files to OneDrive for Business

- Preferred location for data files consumed by Power BI service
  - Excel workbooks
  - CSV files
  - PBIX files created using Power BI Desktop







**DEMO**

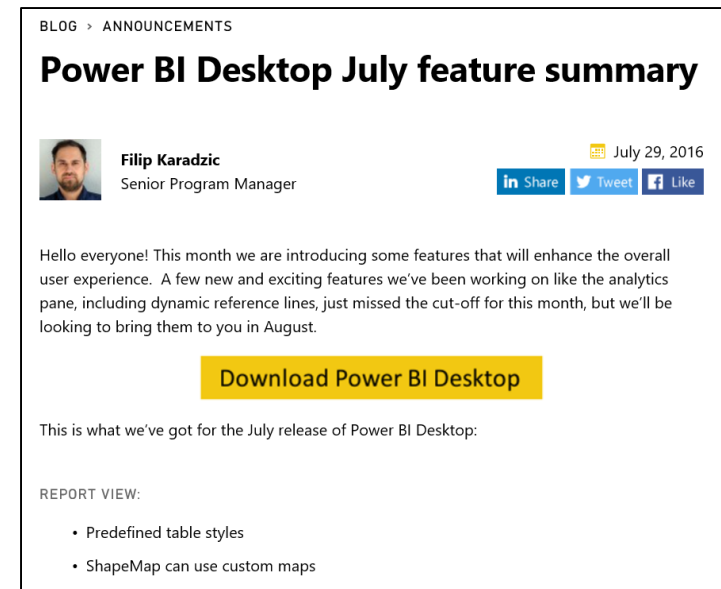
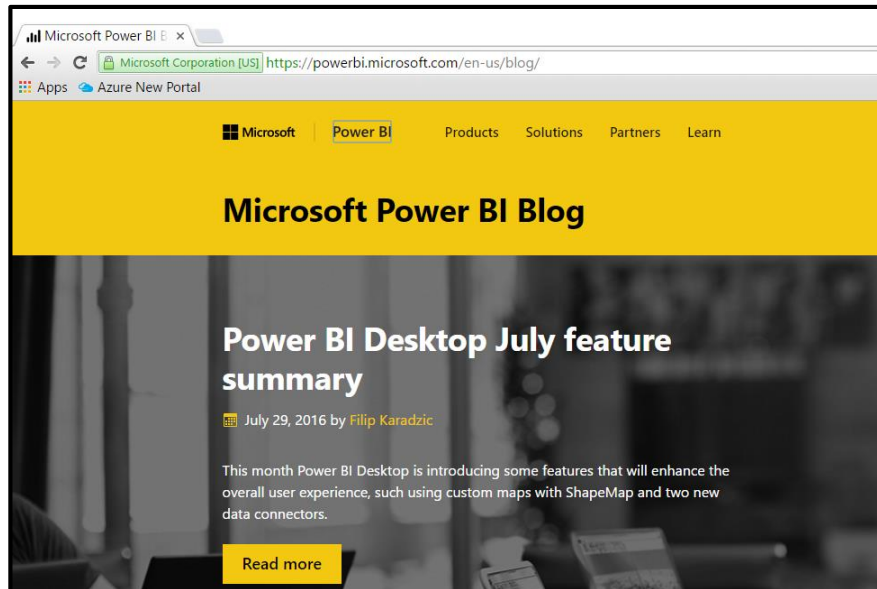
# **Managing Users and Subscriptions in the Office 365 admin center**

# Power BI Team Blog

- Power BI Team Blog is an Essential Resource

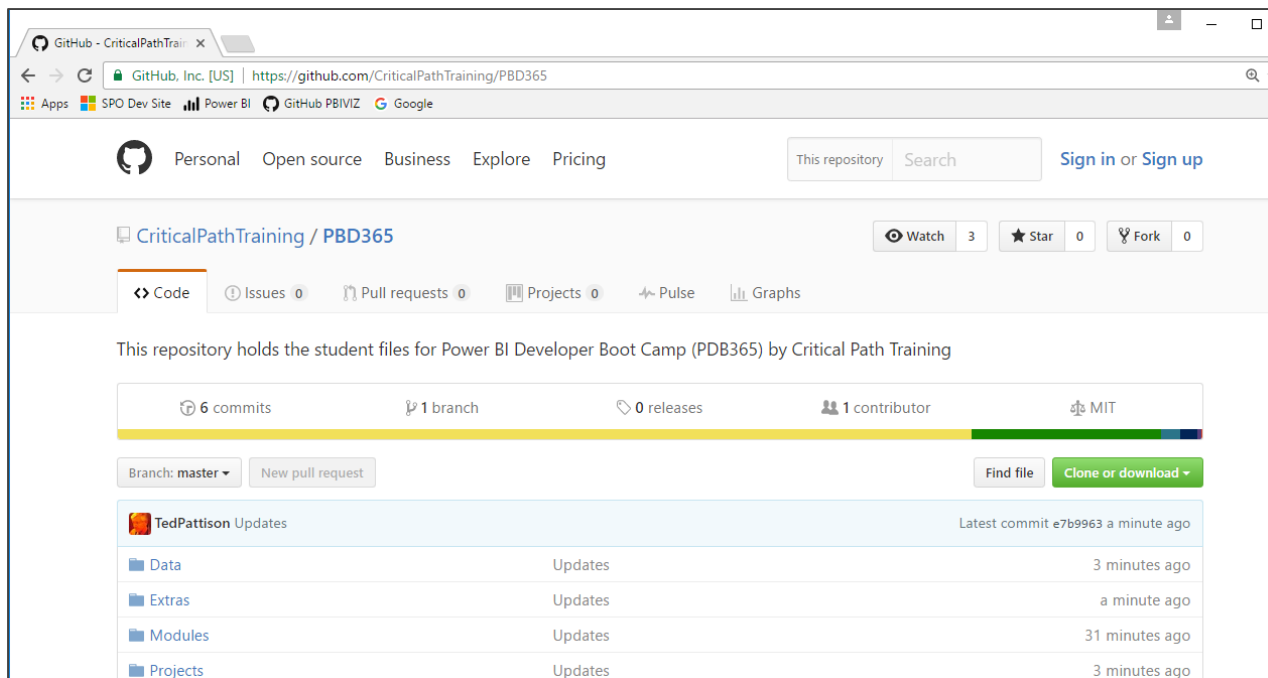
<https://powerbi.microsoft.com/en-us/blog/>

- Be on the lookout for monthly updates



# Live Labs for PBD365

- Student files for this course maintained in GitHub
  - Students files updated on a monthly basis
  - Lab write-ups available in PDF and XPS formats
  - Go to <https://github.com/CriticalPathTraining/PBD365>





# Summary

- ✓ Introduction to Power BI
- ✓ Creating PBIX Projects with Power BI Desktop
- ✓ Developer Opportunities in Power BI
- ✓ Developing for Power BI Embedded
- ✓ Creating a Power BI Development Environment

