Deploying Solutions using Apps and Template Apps

Lab Time: 40 minutes

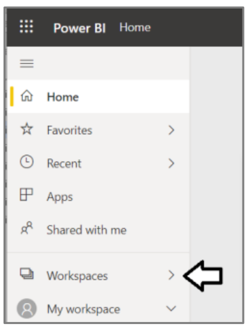
Lab Folder: C:\Student\Modules\03_TemplateApps\Lab

Lab Overview: In this lab you will continue to work with the report and dataset that you created in the Power BI Desktop project named **Wingtip Sales Analysis.pbix**. You will focus on the techniques required to create and deploy dashboards to an audience of business users in a Microsoft 365 environment.

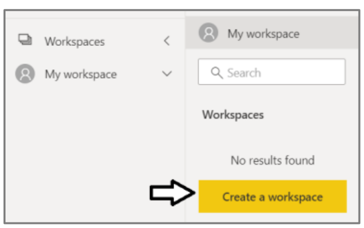
Exercise 1: Create an App Workspaces and Add Content

In this exercise, you will create a new app workspace so you have a place to publish Power BI content for your custom solutions.

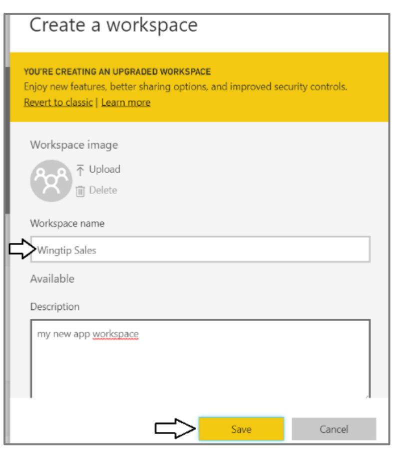
1. Log into the Power BI Service with your new organizational account.
   a) Navigate the Power BI portal at https://app.powerbi.com and if prompted, log in using your new organizational account.
2. Create a new app workspace named **Wingtip Sales**.
   a) Click the **Workspace** flyout menu in the left navigation.



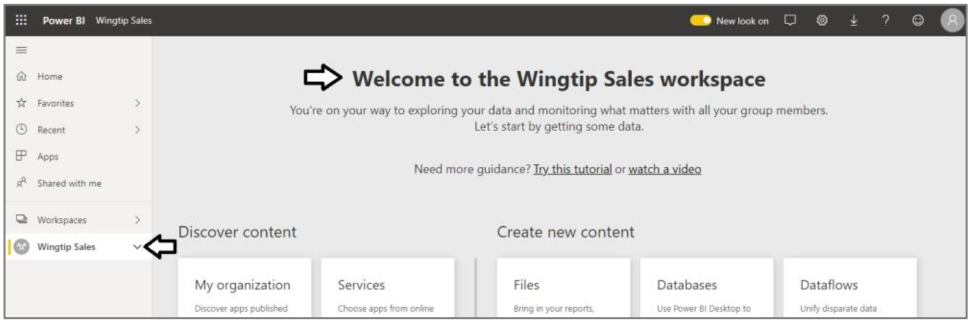
   b) Click the **Create app workspace** button to display the **Create an app workspace** dialog.



   c) In the **Create an app workspace** pane, enter a workspace name of **Wingtip Sales**.
   d) Click the **Save** button to create the new app workspace named **Wingtip Sales**.

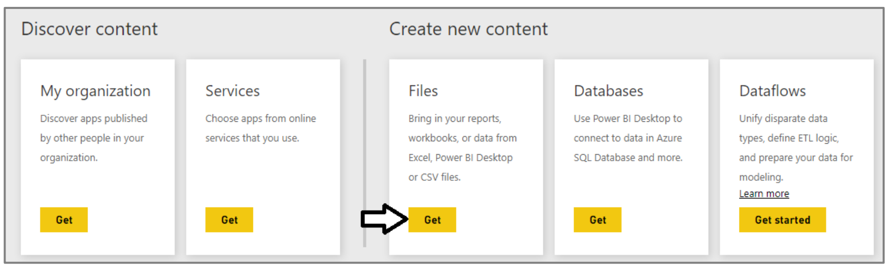


e) When you click **Save**, the Power BI service should create the new app workspace and then switch your current Power BI session to be running within the context of this new app workspace.



You have now created an app workspace which will provide the foundation for publishing and managing the Power BI datasets, reports and dashboards used by a custom solution.

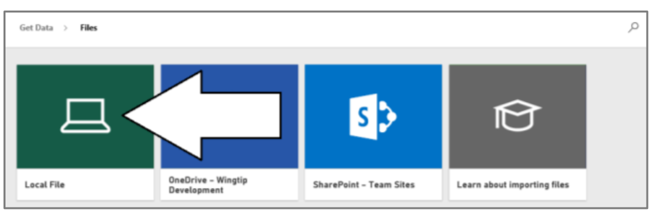
3. Navigate to the **Wingtip Sales** app workspace that you created in the previous exercise. This workspace should currently display the standard Welcome page because it does not yet contain any datasets, reports or dashboards.



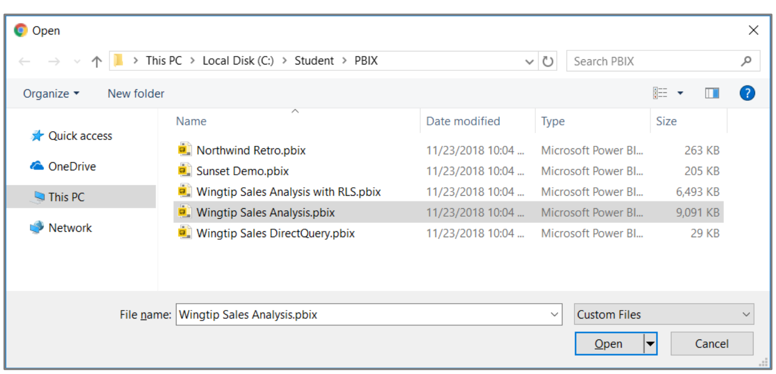
4. Import the **Wingtip Sales Analysis.pbix** project into the **Wingtip Sales** app workspace.

a) On the Welcome page, click the **Get** button in the **Files** section.

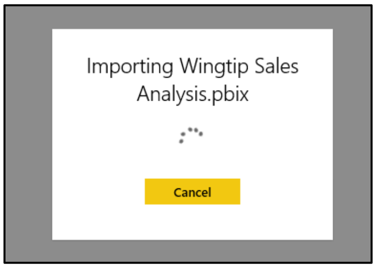
b) On the **Get Data > Files** page, click the **Local File** button to display the Windows **Open** file dialog.



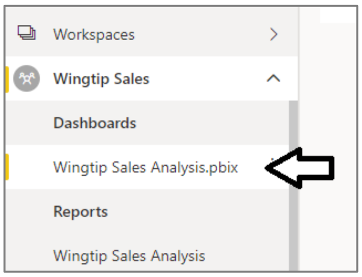
c) In the Windows **Open** file dialog, select the project file at **c:\Student\PBIX\Wingtip Sales Analysis.pbix** and click **Open**.



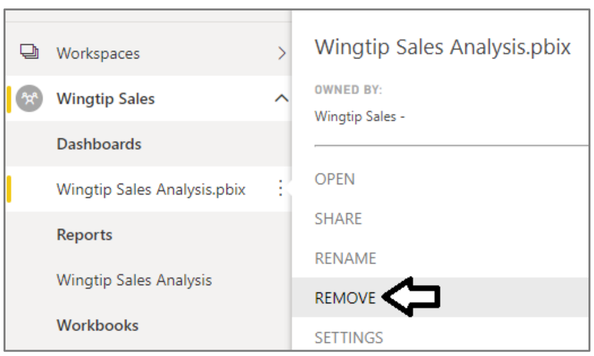
d) Wait while the Power BI service uploads the PBIX files and imports its assets into the **Wingtip Sales** app workspace



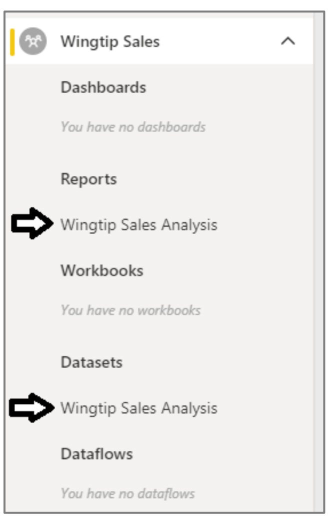
e) Check to see if the PBIX upload process has created a new dashboard named **Wingtip Sales Analysis.pbix**.



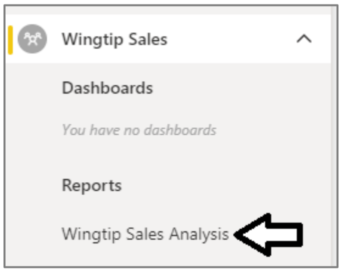
f) If it exists, delete the dashboard named **Wingtip Sales Analysis.pbix**.



g) Now, you should only see a dataset and report in the left nav menu which are both named **Wingtip Sales Analysis**.

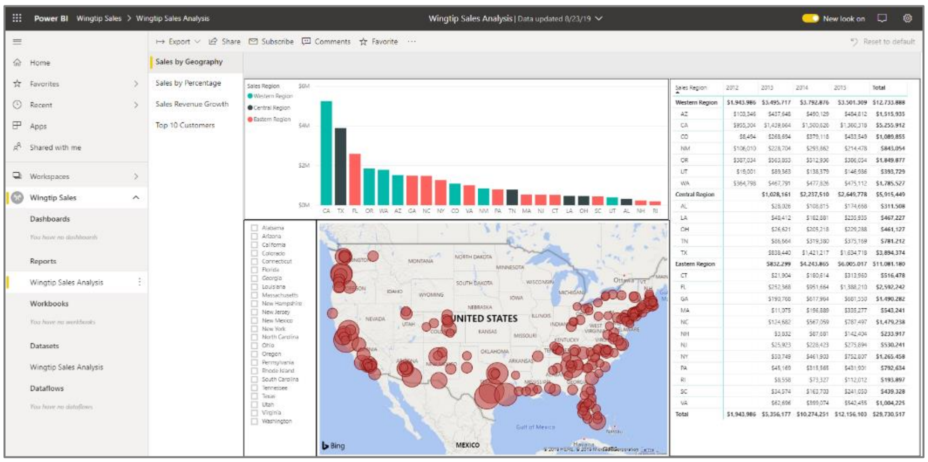


h) Click on the report named **Wingtip Sales Analysis** in the **Reports** section.



5. Examine the report named **Wingtip Sales Analysis**.

a) Locate the page tabs on the report.

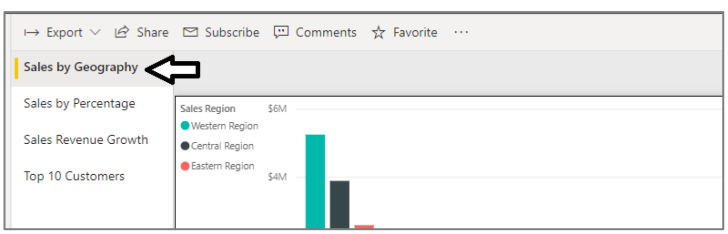


Note that the new look in the Power BI Service brings a significant new change with the layout of the page tabs for a report. While the old look displays page tabs horizontally at the bottom of a report, the new look moves page tabs to the top left in a vertical layout.

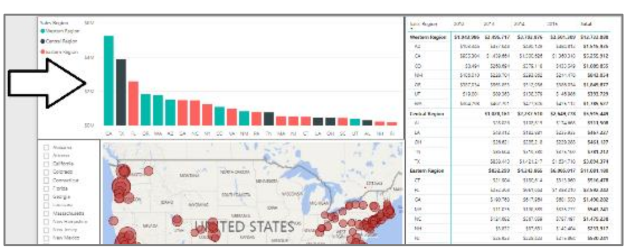
6. Create a new dashboard named **Wingtip Sales Analysis**.

a) Navigate to the **Reports** tab and open the report named **Wingtip Sales Analysis**.

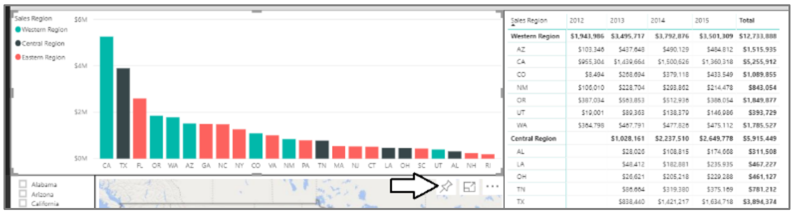
b) Navigate to the **Sales by Geography** page of the **Wingtip Sales Analysis** report.



c) Hover the mouse over the column chart visual which displays a sales revenue breakdown across sales regions and states.

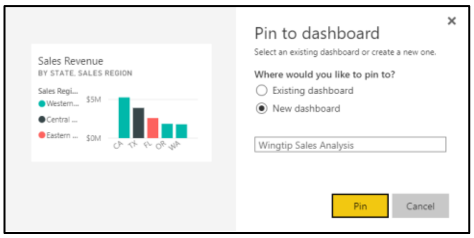


d) Locate and click the button with the thumbtack icon to pin this report visual to a new dashboard.

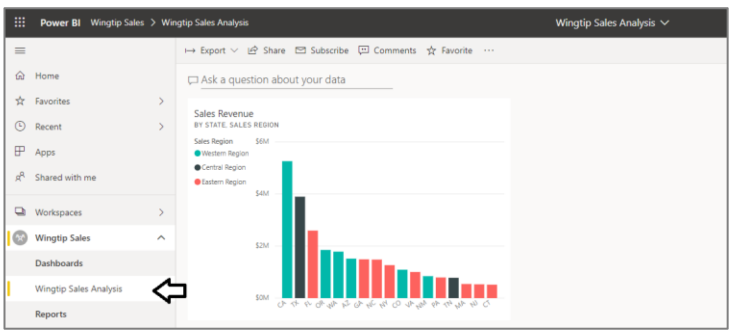


When you click the thumbtack button, you'll be prompted with the **Pin to dashboard** dialog which prompts you to select a dashboard.

e) Select **New Dashboard**, give it a name of **Wingtip Sales Analysis** and click the **Pin** button.



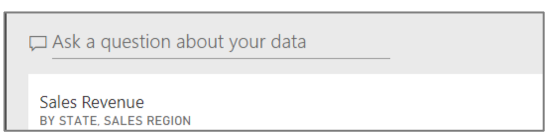
f) Click the **Wingtip Sales Analysis** link in the **Dashboards** section of the left navigation to display the new dashboard.



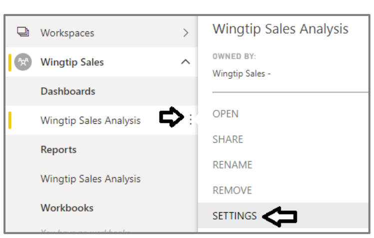
If you haven't previously worked with a Power BI dashboard, take a moment to experiment with resizing and moving the dashboard tile. Unlike a report, the changes you make to a dashboard tile are automatically saved without an explicit save action.

7. Remove the Q&A search box from the **Wingtip Sales Analysis** dashboard.

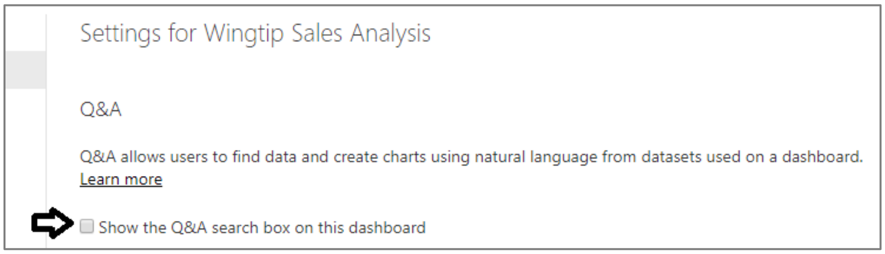
a) You can see that the new dashboard is initially displayed with the Q&A search box in the upper left corner.



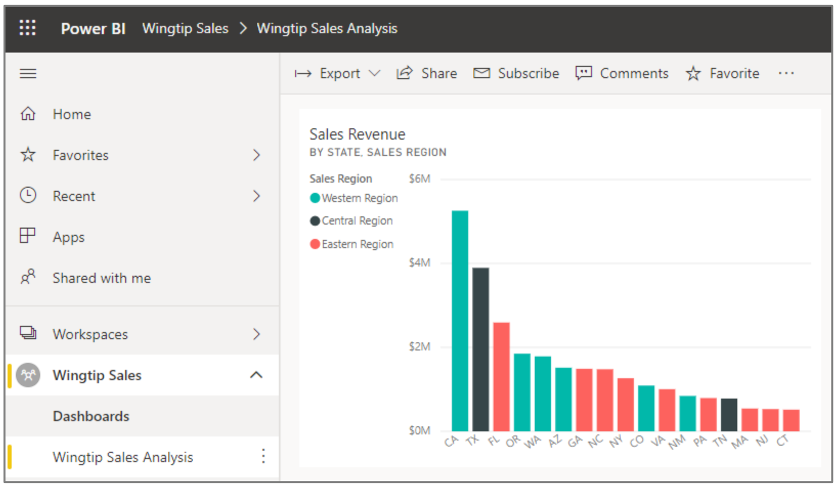
b) Click **Dashboards > SETTINGS** in the left navigation to display the **Settings for Wingtip Sales Analysis** pane.



c) In the **Settings for Wingtip Sales Analysis** pane, uncheck the **Show the Q&A search box on this dashboard** checkbox.



d) Click **Apply** below in the **Settings for Wingtip Sales Analysis** pane and confirm the Q&A search box is no longer showing.

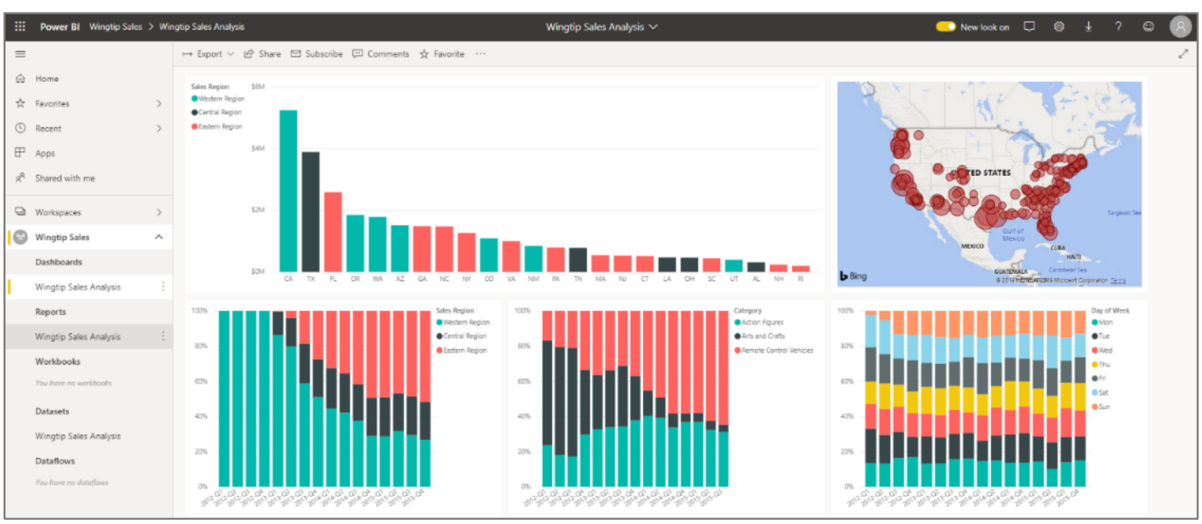


8. Add several more tiles to the dashboard by pinning visuals from the **Wingtip Sales Analysis** report.

a) Repeat the process you used in step 1 to create the first dashboard tile to add additional tiles to the dashboard.

Choose whatever visuals you'd like from the **Wingtip Sales Analysis** report. However, you should make sure that your dashboard contains several tiles. Be creative and design a dashboard that looks better than the dashboards of the other students around you.

b) When you're done, your dashboard should look something like the dashboard shown in following screenshot.



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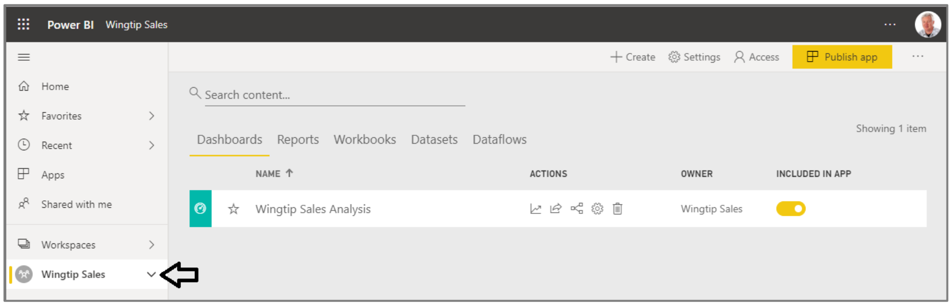
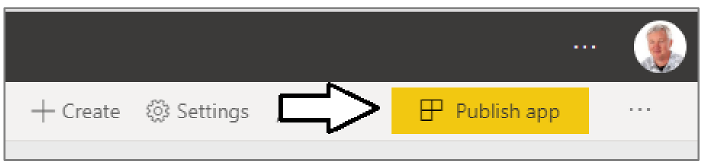
Exercise 2: Publish an App Workspace as a Power BI App

In this exercise you will publish the **Wingtip Sales** app workspace as a Power BI app.

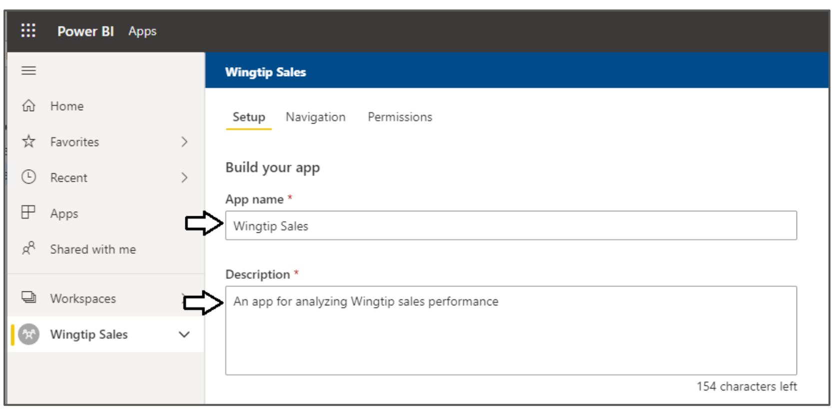
1. Publish the Wingtip Sales workspace as a Power BI app.
   a) Click the Wingtip Sales link in the left navigation to show the summary page for the **Wingtip Sales** app workspace.

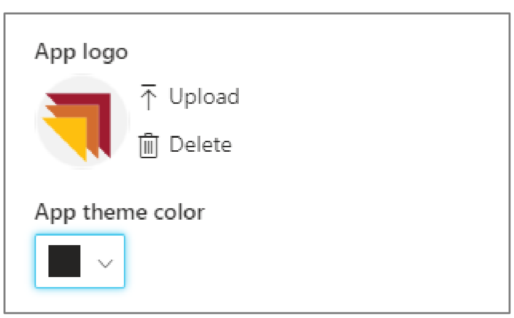


   b) Click the **Publish app** button.



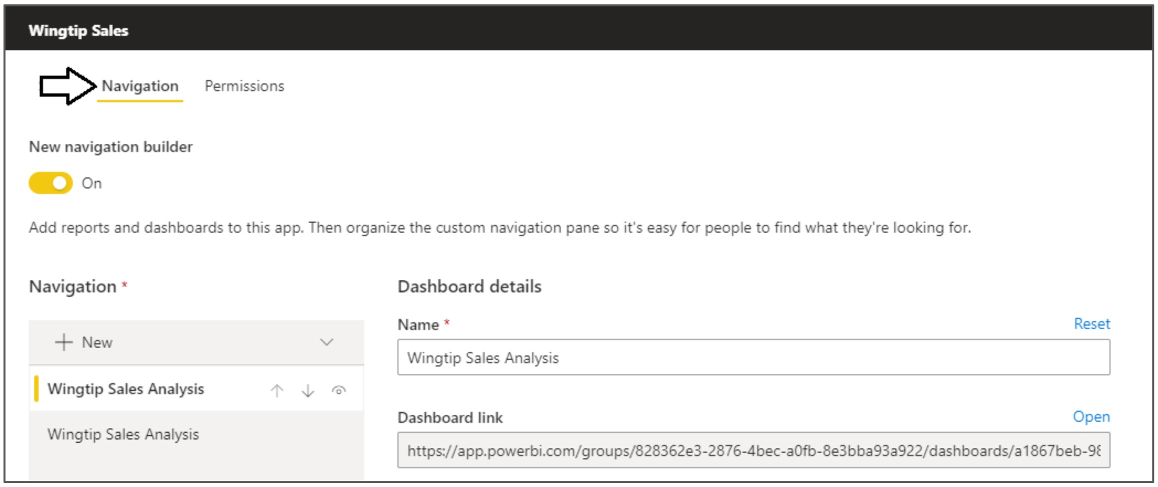
   c) On the **Details** tab of the **Publish app** page, enter a **Description** for the app and select a **Background color** as shown in the following screenshot.

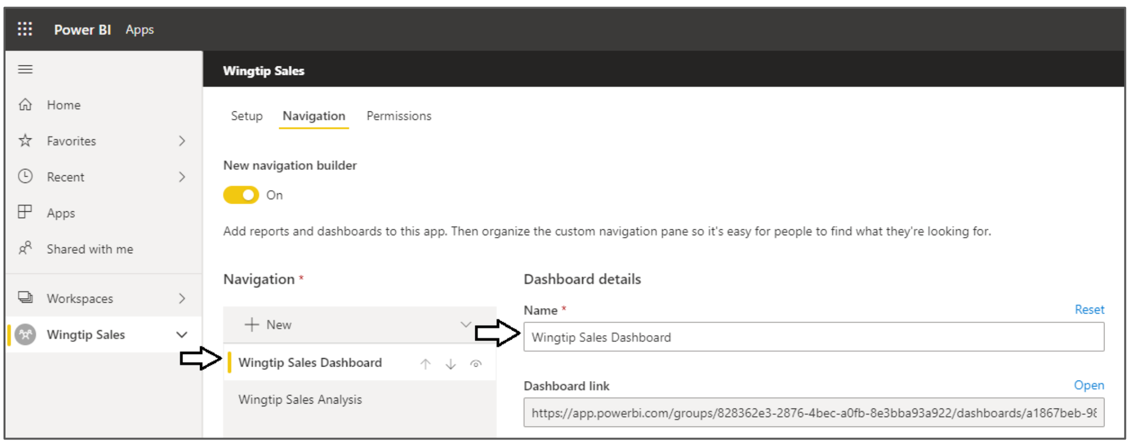


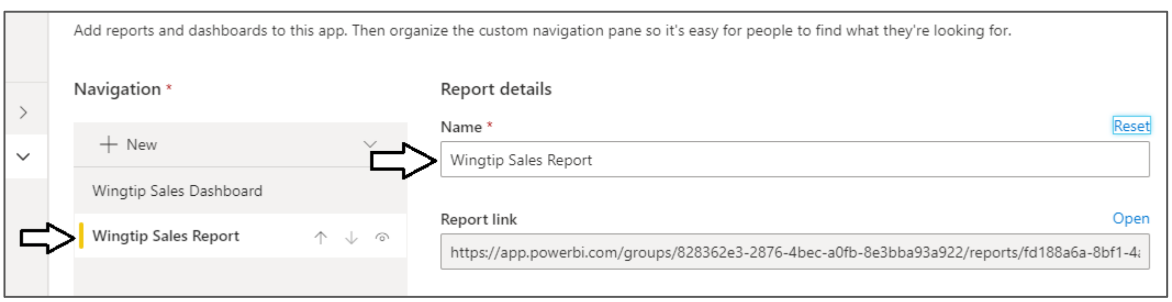


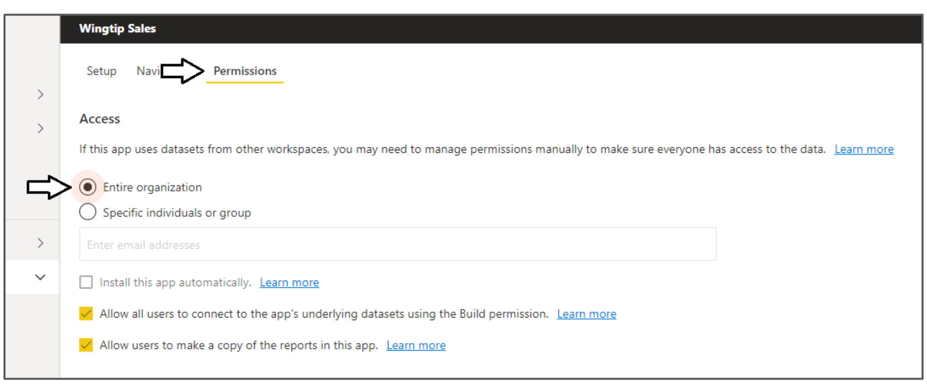
   d) Click on the **Content** tab and configure the App landing page for the **Wingtip Sales Analysis (dashboard)**.

e) Click on the **Access** tab and configure app **Permissions** for the **Entire Organization**.

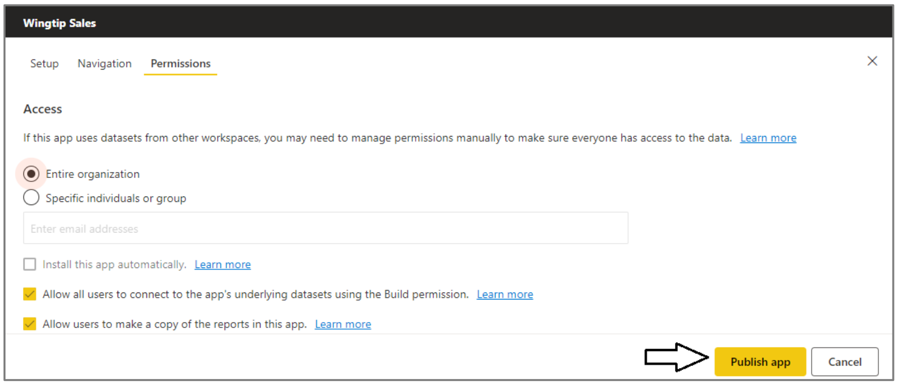




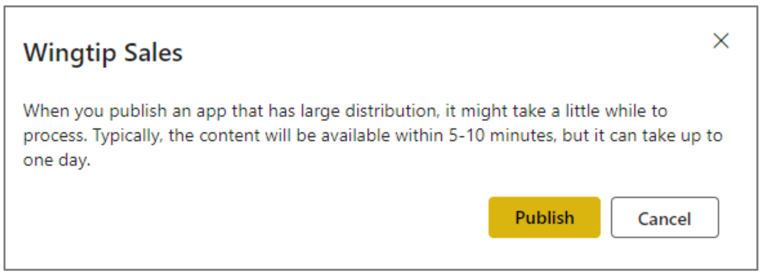




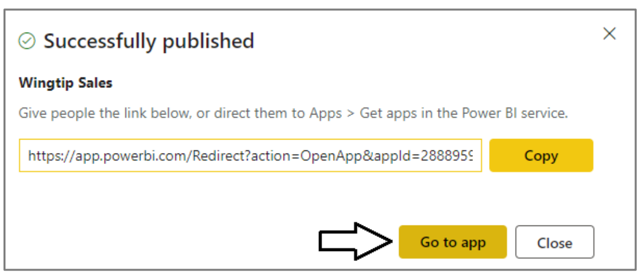
f) Click the **Finish** button on the right to complete the publication process.



g) When prompted by the **Ready to publish** dialog, click **Publish**.



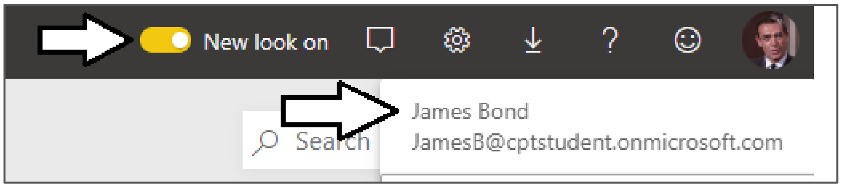
h) When you see the **SUCCESSFULLY PUBLISHED** dialog, close it by clicking the **X** button in the upper right corner.



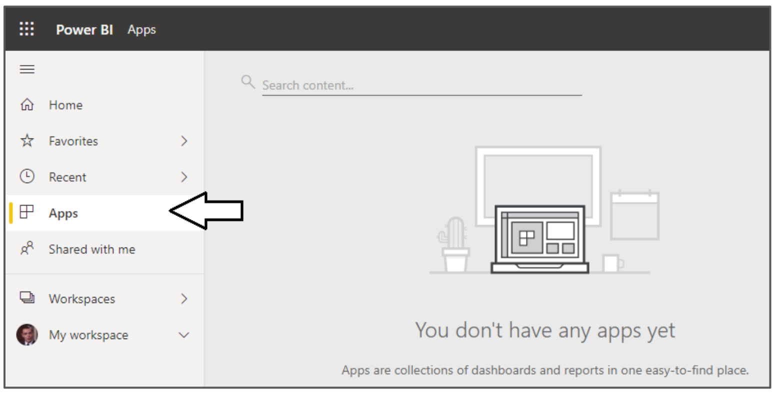
i) You should now see the report through the app.

In the next step, you will logon as a different user. If you use a different browser (e.g. Chrome, Edge, Internet Explorer) for the secondary user, you can be logged on with two different users at the same time.

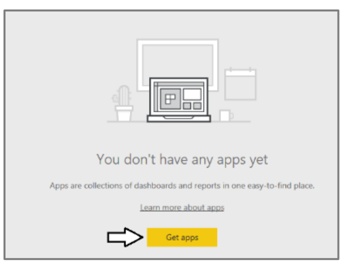
2. Install the app as a secondary user,
   a) Log into https://app.powerbi.com using the secondary user account.



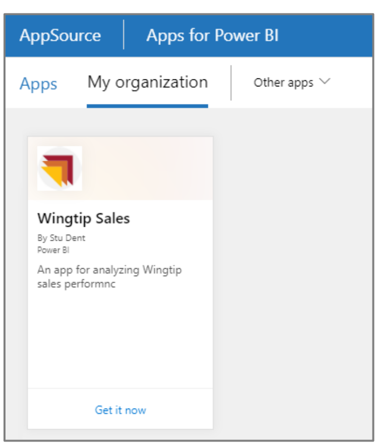
   b) Click the **Apps** button in the left navigation menu.



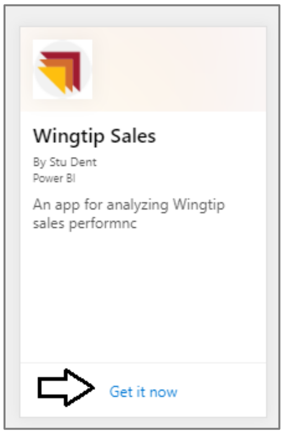
   c) You should see there are no apps currently installed.
   d) Click the **Get apps** button.



   e) You should see the **AppSource** dialog showing you what apps are available for installation. The Wingtip Sales app should be displayed as an app available for installation.

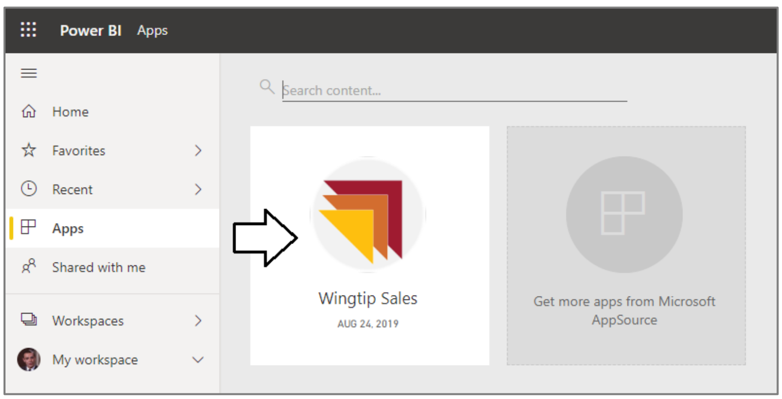


f) Click the **Get it now** link.

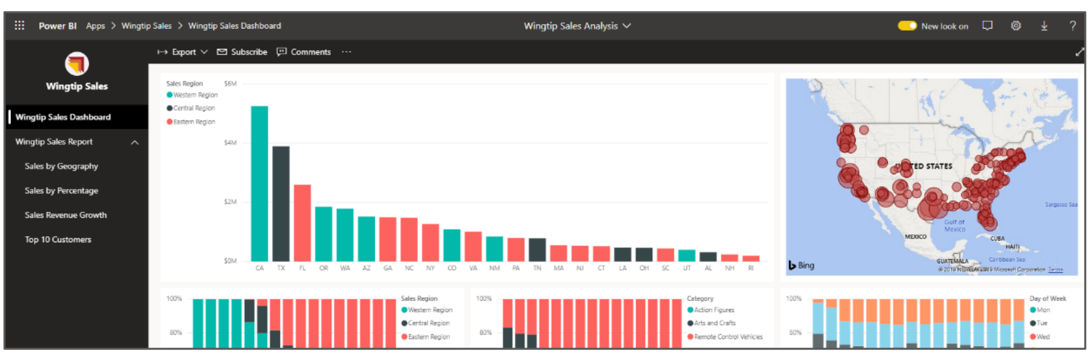


g) The app should install and then be displayed as shown in the following screenshot.

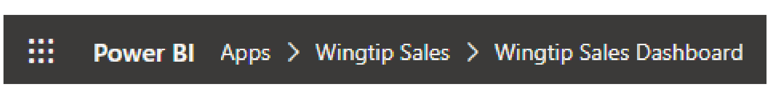
h) Click on the tile for the **Wingtip Sales** app to launch it,



i) When the app is launched, it should display the **Wingtip Sales Analysis** dashboard



j) Note the breadcrumb at the top shows a path with the app and the dashboard inside the app.



k) Inspect the contents of the app by clicking the **View content list** button on the left.