Developing Custom Visuals for Power BI

Setup Time: 60 minutes

Lab Folder: C:\Student\Modules\05 PBIVIZ\Lab

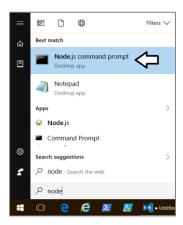
Overview: In this lab, you will begin be installing the Power BI Custom Visual Tool (PBIVIZ). After that, you will use PBIVIZ and Visual Studio Code to create and debug custom visual projects within the context of a Power BI workspace. You will also learn how to configure custom visual projects to use external libraries such as jQuery and the D3 library.

Prerequisites: This lab assumes you've already installed Node.JS and Visual Studio Code as described in setup.docx.

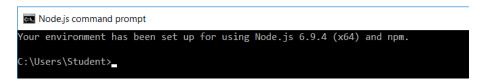
Exercise 1: Prepare Your PC for Developing Custom Visuals

In this exercise you will install the Power BI Custom Visual Tool (PBIVIZ) and then install a self-signed SSL certificate which makes it possible to debug custom visual projects in Node.js using an address of https://localhost.

- 1. Install the Power BI Custom Visual Tool (PBIVIZ).
 - a) Using the Windows Start menu, launch the **Node.js command prompt**.



b) You should now have an open Node.js command prompt.



c) Type and execute the following command to install the Power BI Custom Visual Tool (PBIVIZ).

npm install -g powerbi-visuals-tools

d) By inspecting the console output, you should be able to determine which version of the tools are being installed.

- 2. install a self-signed SSL certificate for the SSL address of https://localhost.
 - a) In the Node.js command prompt, type and execute the following command.

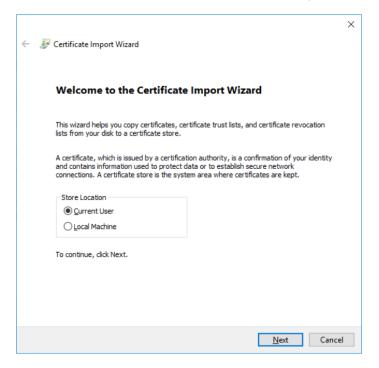
pbiviz --install-cert

When you execute this command, you will be prompted with the Certificate dialog for a new self-signed SSL certificate for localhost.

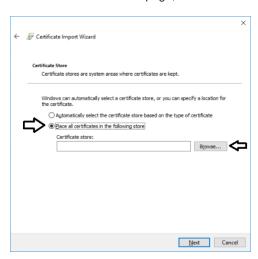
b) When prompted by the Certification dialog, click the Install Certificate... button to start the Certificate Import Wizard.



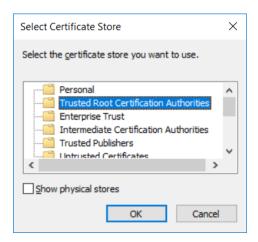
c) On the Welcome to the Certificate Import Wizard page, select Current user and then click the Next button.



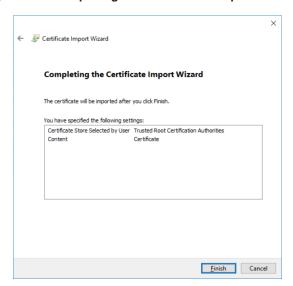
d) On the Certificate Store page, select Place all certificates in the following store and then click the Browse... button.



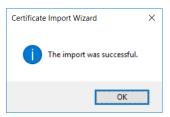
e) In the Select Certificate Store dialog, select Trusted Root Certificate Authorities and click the OK button.



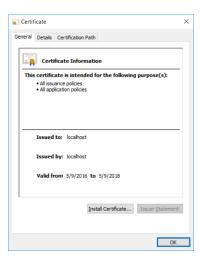
- f) On the Certificate Store page, click the Next button to continue.
- g) On the Completing the Certification Import Wizard page, click Finish.



h) You should be prompted with a dialog that tells you the certificate import was successful.



i) Click **OK** to close the **Certificate** dialog.

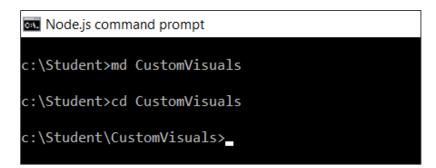


You have now installed the Power BI Custom Visual Tool (PBIVIZ) and a self-signed SSL certificate for the local debugging address of https://localhost. You can now begin to create and test custom visuals.

Exercise 2: Create and Debug a Simple Custom Visual

In this exercise you will create and test out your first custom visual project using the PBIVIZ utility.

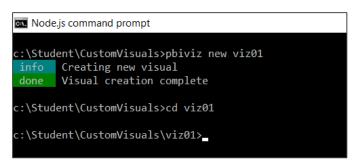
- 1. Create a new project for custom visual name viz01 using the PIVIZ utility.
 - a) Return to the Node.js command prompt.
 - b) Type and execute cd **c:\Student** to switch the current path to the **c:\Student** folder.
 - c) Type and execute the command **md CustomVisuals** to create a new folder named **c:\Student\CustomVisuals**.
 - d) Type and execute cd CustomVisuals to switch the current path to the c:\Student\CustomVisuals folder.



e) Type and execute the following command to create a new custom visual project named viz01.

pbiviz new viz01

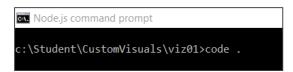
f) Once you have created the new project, type and execute cd viz01 to make the folder for this project the current directory.



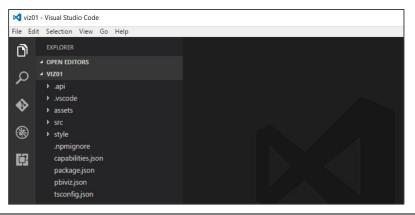
g) Type and execute the dir command to list all the files and folders in the viz01 project's root folder.

```
::\Student\CustomVisuals\viz01>dir
 Volume in drive C has no label.
Volume Serial Number is 9462-A114
Directory of c:\Student\CustomVisuals\viz01
02/23/2017 08:41 PM
                        <DIR>
02/23/2017
           08:41 PM
                        <DIR>
02/23/2017
           08:41 PM
                        <DIR>
                                       .api
02/23/2017
           08:41 PM
                                    40 .npmignore
02/23/2017
           08:41 PM
                        <DIR>
                                       .vscode
02/23/2017 08:41 PM
                        <DIR>
                                       assets
02/23/2017 08:41 PM
                                   893 capabilities.json
02/23/2017 08:41 PM
                                   23 package.json
02/23/2017 08:41 PM
                                   507 pbiviz.json
02/23/2017 08:41 PM
                        <DIR>
                                       src
02/23/2017
           08:41 PM
                        <DIR>
                                       style
02/23/2017
           08:41 PM
                                   281 tsconfig.json
               5 File(s)
                                  1,744 bytes
               7 Dir(s) 87,468,093,440 bytes free
```

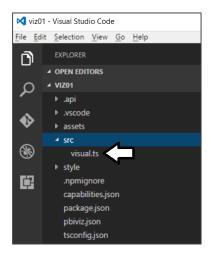
- 2. Open project using Visual Studio Code.
 - a) In the Node.js command prompt, type and execute the command **code** . to open the project with Visual Studio Code.



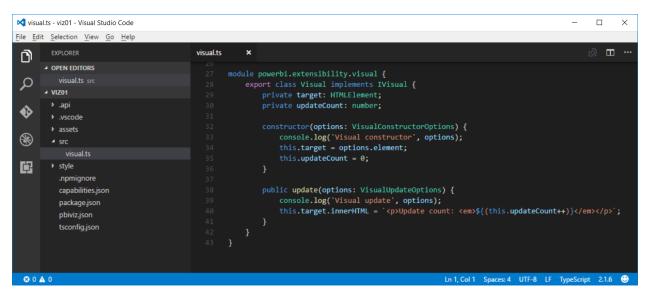
b) Visual Studio Code should start and open the root folder of the viz01 project.



- 3. Inspect the TypeScript code in visual.ts to see the custom visual code that was added to the project by the PBIVIZ utility.
 - a) In Visual Studio Code, expand the src folder and locate file named visual.ts and double-click this file to open it.



b) Inside visual.ts, inspect the code for the class named Visual.



c) As you can see, the code in the Visual class contains some private fields, a constructor and the update method.

```
module powerbi.extensibility.visual {
    export class Visual implements IVisual {
        private target: HTMLElement;
        private updateCount: number;

        constructor(options: VisualConstructorOptions) {
            console.log('Visual constructor', options);
            this.target = options.element;
            this.updateCount = 0;
        }

        public update(options: VisualUpdateOptions) {
            console.log('Visual update', options);
            this.target.innerHTML = `Update count: <em>${(this.updateCount++)}</em> ;
    }
}
```

- Use the PBIVIZ utility to start a debugging session for the viz01 custom visual project.
 - a) Return to the Node.js command prompt.
 - b) Type the following command to start a debugging session with the PBIVIZ utility and press ENTER

pbiviz start

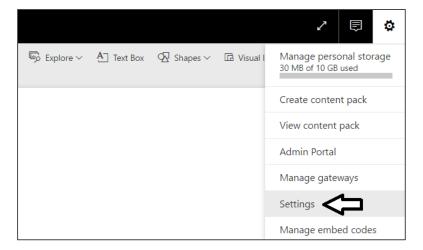
c) If you examine the console output, you can see that the web server provided by Node.js for debugging has started and is listening for incoming HTTP requests on https://localhost:8080.

```
Node.js command prompt - pbiviz start

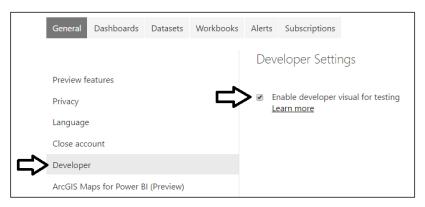
c:\Student\CustomVisuals\viz01>pbiviz start
info    Building visual...
done    build complete

info    Starting server...
info    Server listening on port 8080.
```

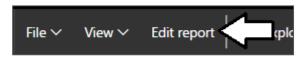
- 5. Test visual by loading it into the Power BI environment.
 - a) Log into our personal workspace at https://app.PowerBi.com.
 - b) Once you have logged into your personal workspace, drop down the Power BI Setting menu and select the **Settings** menu command as shown in the following dialog.



c) Select **Developer** on the left and then select the **Enable developer visual for testing** checkbox.



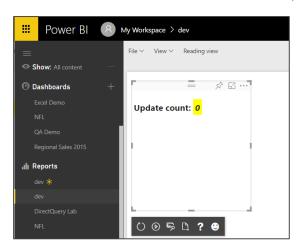
- d) Now navigate to any report in your workspace. It doesn't matter what report you use as long as you have a report.
- e) Move the report into edit mode by clicking the Edit report button.



- f) Add a new page to the report so you have a blank report page to work with.
- g) Add an of the Developer Visual to the page.



h) You should see the custom visual for viz01 on the report page.



i) Resize the visual by dragging and dropping the lower right corner of the visual with the mouse. You should see the **Update count** total increase whenever you resize the visual.

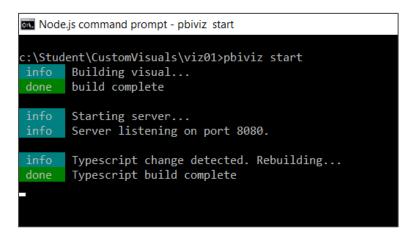


- 6. Make a change to the code in the visual.
 - a) Return to Visual Studio Code.
 - b) Open the source file visual.ts.
 - c) Inside visual.ts, locate the update method.

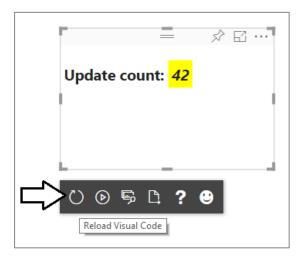
```
public update(options: VisualUpdateOptions) {
   console.log('Visual update', options);
   this.target.innerHTML = `Update count: <em>${(this.updateCount++)}</em>`;
}
```

d) Replace the code in the **update** method by copying and pasting the following code.

- e) After you have updated the update method, save your changes to the file visual.ts.
- f) When you save visual.ts, you will notice that the Node.js command prompt will run to recompile the code for your visual..



- g) Return to the browser when you instantiated the visual for testing.
- h) In the visual developer panel, click the Reload Visual Code button as shown in the following screenshot.



i) You should now see that the visual output as shown in the following screenshot which shows the visual width and height.

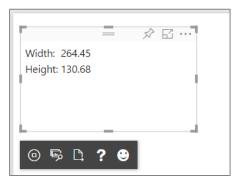


j) Click the Toggle Auto Reload button so that visual automatically reloads when you make additional updates.



- 7. Make another change to the code in your custom visual.
 - a) Return to Visual Studio Code.
 - b) Move down to the **update** method.
 - c) Modify the code that retrieve the visual width and height by adding the **toFixed(2)** method to configure the output to only show two digits of accuracy after the decimal.

- d) Save your changes to visual.ts.
- e) Return to the browser and you should see the impact of the change you just made.



f) Experiment by resizing the visual and you should see the width and height automatically update.



At this point, you are done testing your first custom visual.

- 8. Stop visual debugging session.
 - a) Return to Node.js command prompt.
 - b) Hold down the Ctrl key on the keyboard and then press C to interrupt the Node.js debugging session.

```
info
done    Typescript change detected. Rebuilding...
    Typescript build complete

info     Typescript change detected. Rebuilding...
    Typescript build complete

info     Stopping server...
^CTerminate batch job (Y/N)? __
```

9. When prompted to terminate the session, type Y and press ENTER.

```
info    Typescript change detected. Rebuilding...
done    Typescript build complete

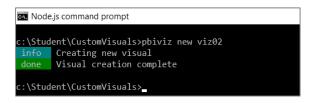
info    Stopping server...
^CTerminate batch job (Y/N)? y
c:\Student\CustomVisuals\viz01>_
```

Exercise 3: Create a Custom Visual using jQuery

In this exercise, you will create a new visual named viz02 which uses jQuery to implement a simple Power BI visual.

- 1. Create a new visual project named viz02.
 - a) Return to the Node.js command prompt.
 - b) Type and execute the following command to make the current directory back to C:\Student\CustomVisuals

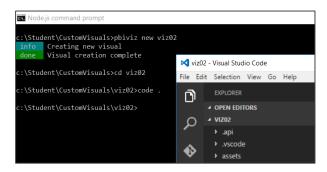
```
Cd ..
```



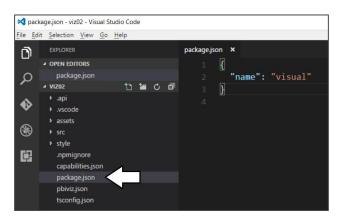
c) Type and execute the following three commands to create a new visual project and open it in Visual Studio Code.

```
pbiviz new viz02
cd viz02
code .
```

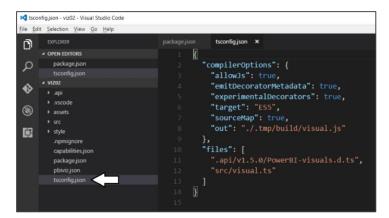
d) You should now have a new project named viz02 that is open in Visual Studio Code.



e) Open the **package.json** file and inspect its contents.



f) Open the **tsconfig.json** file and inspect its contents.



- 2. Add support to the viz02 project to program against jQuery
 - a) Return to the Node.js command prompt.
 - b) Type and execute the following command.

```
npm install jquery --save
```

c) When you execute this command, you should see the following output in the console.

```
Node.js command prompt

c:\Student\CustomVisuals\viz02>npm install --save jquery
visual@ c:\Student\CustomVisuals\viz02

-- jquery@3.1.1

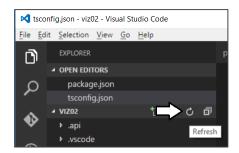
npm WARN visual@ No description
npm WARN visual@ No repository field.
npm WARN visual@ No license field.
```

d) Return to Visual Studio Code and inspect the **package.json** file to see how it has changed.

```
packagejson × tsconfigjson ●

1 {
2     "name": "visual",
3     "dependencies": {
4         "jquery": "^3.1.1"
5     }
6 }
```

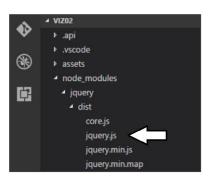
e) In the left navigation of Visual Studio Code, click the Refresh button to show any new folders.



f) After you refresh the project, you should see a new folder named **node_modules**.



g) Expand the node_modules folder and locate the main jQuery source file located at node_modules/jquery/dist/jquery.js.



- 3. Add the external file reference for **jquery.js** into the **pbiviz.json** file.
 - a) Open the pbiviz.json file and locate the externalJS setting as shown in the following screenshot.

b) Update the array for the **externalJS** setting by adding the path to **jquery.js**.

```
"externalJS": [
   "node_modules/jquery/dist/jquery.js"
],
```

c) When the externalJS setting matches the following screenshot, save and close pbiviz.json.

```
},
"assets": {
    "icon": "assets/icon.png"
},
"externalJS": [
    "node_modules/jquery/dist/jquery.js"
],
"style": "style/visual.less",
"capabilities": "capabilities.json",
"dependencies": "dependencies.json"
}
```

- 4. Add DefinitelyTyped package for the jQuery library to enabled strongly-typed programming
 - a) Return to the Node.js command prompt.
 - b) Type and execute the following command to add the typed definition files for jQuery into your project.

```
npm install @types/jquery --save
```

c) As the command executes, you should see the following output in the console window.

```
c:\Student\CustomVisuals\viz02>npm install @types/jquery --save
visual@ c:\Student\CustomVisuals\viz02
`-- @types/jquery@2.0.40

npm WARN visual@ No description
npm WARN visual@ No repository field.
npm WARN visual@ No license field.
```

d) Return to Visual Studio Code and inspect the package.json file. You should see the new reference to @types/jquery.

- 5. Update the tsonfig.json file.
 - a) Open the tsconfig.json file.
 - b) Move to the bottom of **tsconfig.json** and locate the files property.

```
},
  "files": [
    ".api/v1.5.0/PowerBI-visuals.d.ts",
    "src/visual.ts"
]
}
```

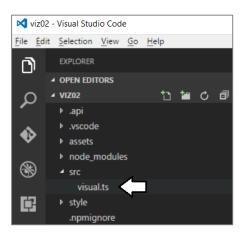
c) Add an entry for **node_modules/@types/jquery/index.d.ts** just before **src/visual.ts** as shown in the following screenshot.

```
},
"files": [
    ".api/v1.5.0/PowerBI-visuals.d.ts",
    "node_modules/@types/jquery/index.d.ts",
    "src/visual.ts"
]
```

d) Save and close tsconfig.js.

Now you are finally ready to begin programing with TypeScript code that uses the jQuery library.

- 6. Modify the visual.ts file.
 - a) Open visual.ts if it is not already open.



b) Examine the starting class definition named Visual that was created by the PBIVIZ utility.

```
module powerbi.extensibility.visual {
    export class Visual implements IVisual {
        constructor(options: VisualConstructorOptions) { }
        public update(options: VisualUpdateOptions) { }
    }
}
```

c) Modify the Visual class to match the following code listing,

```
module powerbi.extensibility.visual {
    export class Visual implements IVisual {
        private container: JQuery;
        constructor(options: VisualConstructorOptions) {
              this.container = $(options.element);
        }
        public update(options: VisualUpdateOptions) {}
}
```

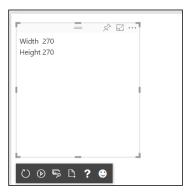
d) Modify the **update** method to match the following code listing.

```
public update(options: VisualUpdateOptions) {
    var table: JQuery = $("", {"id": "myTable"})
        .append( $("")
        .append( $("").text("Width") )
        .append( $("").text(options.viewport.width.toFixed(0))
        ))
        .append( $("")
        .append( $("")
        .append( $("").text("Height") )
        .append( $("").text(options.viewport.height.toFixed(0))
        )
    );
    this.container.empty().append(table);
}
```

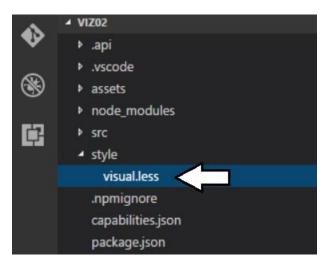
- e) Save our changes to visual.ts.
- 7. Test out your new visual on a Power BI report.
 - a) Return to the Node.js command prompt and run the following command to start a new debugging session.

pbiviz start

- b) Move back to the browser and return to the Power BI report you used in the previous exercise.
- c) Make sure the report is in edit mode.
- d) Add a Developer Visual to the page to see you visual. It should match the following screenshot.



- 8. Add some CSS styles to your visual.
 - a) Return to the viz02 project in Visual Studio Code.
 - b) Expand the style folder and open the file named visual.less.



c) Replace the contents of **visual.less** with the following CSS code.

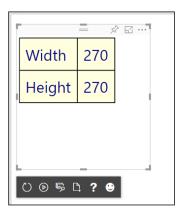
```
#myTable{
    background-color: black;
    font-size: 32px;

td{
        background-color: lightyellow;
        color:darkblue;
        padding: 12px;
    }
}
```

d) Save your changes to visual.less.

When you save your changes to visual.less, the PBIVIZ utility will recompile the entire viz02 project.

e) Return to the browser and refresh your visual. You should see the effects of the CSS styles in your visual.



- 9. Add scaling font behavior to your visual.
 - a) Return to Visual Studio Code.
 - b) Navigate to the **visual.ts** file and locate the **update** method.
 - c) Place your cursor in the update method just before the last line that looks like this.

this.container.empty().append(table);

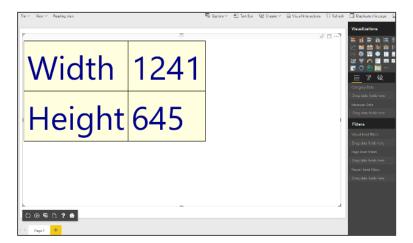
d) Copy and paste the following code into the **update**.

```
var scaledFontSizeWidth: number = Math.round(options.viewport.width / 7);
var scaledFontSizeHeight: number = Math.round(options.viewport.height / 5);
var scaledFontSize: number = Math.min(...[scaledFontSizeWidth, scaledFontSizeHeight]);
var scaledFontSizeCss: string = scaledFontSize + "px";

$("td", table).css({
    "font-size": scaledFontSizeCss
});

this.container.empty().append(table);
```

- e) Save your changes to visual.ts.
- f) Return to the browser and refresh your visual.
- g) As you change the size of the visual, the font size should now change along with it.

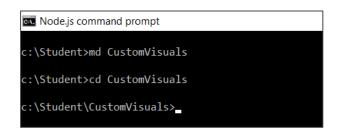


Exercise 4: Create a Custom Visual using the D3 Library

In this exercise, you will create a new visual named viz03 which uses D3 to implement a simple Power BI visual.

- 1. Create a new visual project named viz03.
 - a) Return to the Node.js command prompt.
 - b) Type and execute the following command to make the current directory back to C:\Student\CustomVisuals

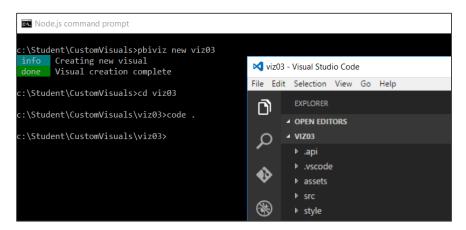
Cd ..



c) Type and execute the following three commands to create a new visual project and open it in Visual Studio Code.

```
pbiviz new viz03
cd viz03
code .
```

d) You should now have a new project named viz03 that is open in Visual Studio Code.



- 2. Add the NPM package for the D3 library.
 - a) Return to the Node.js command prompt.
 - b) Type and execute the following command.

```
npm install d3@3.5.5 --save
```

c) When the npm install command runs, you should see the following output in the console window.

```
c:\Student\CustomVisuals\viz03>npm install --save d3@3.5.5
visual@ c:\Student\CustomVisuals\viz03
`-- d3@3.5.5

npm WARN visual@ No description
npm WARN visual@ No repository field.
npm WARN visual@ No license field.
```

- d) Return to Visual Studio Code.
- e) Open the **package.json** file to see the new dependency on the D3 library.

```
package.json x

1 {
2     "name": "visual",
3     "dependencies": {
4         "d3": "^3.5.5"
5     }
6     }
7
```

You don't need to make any changes to package.json as the npm install command does that for you when you use the --save option.

- 3. Add the external file reference for d3.js into the pbiviz.json file.
 - a) Open the pbiviz.json file and locate the externalJS setting as shown in the following screenshot.

b) Update the array for the **externalJS** setting by adding the path to **d3.js**.

```
"externalJS": [
   "node_modules/d3/d3.js"
],
```

c) When the **externalJS** setting matches the following screenshot, save and close **pbiviz.json**.

```
"externalJS": [
    "node_modules/d3/d3.js"
],
```

- 4. Install typings utility using NPM.
 - a) Return to the Node.js command prompt.
 - b) Type and execute the following command to install the typings utility at a global level.

```
npm install typings -g
```

c) As the command executes, you should see output in the console that provides details of the installation.

```
© Nodejs command prompt

c:\Student\CustomVisuals\viz03>npm install typings -g

C:\Users\Student\AppData\Roaming\npm\typings -> C:\Users\Student\AppData\Roaming\npm\node_modules\typi

C:\Users\Student\AppData\Roaming\npm

-- typings@2.1.0
```

- 5. Install the Typed Definition files for the D3 library.
 - a) Type and execute the following command

```
typings install --save --global dt~d3#0.0.0+20160907005744
```

- 6. Modify the tsonfig.json file to include a reference to the typings file named index.d.ts.
 - a) Open the tsconfig.json file.
 - b) Move to the bottom of **tsconfig.json** and locate the files property.

```
},
"files": [
    ".api/v1.5.0/PowerBI-visuals.d.ts",
    "src/visual.ts"
]
}
```

c) Add an entry for typings/index.d.ts just before src/visual.ts as shown in the following screenshot.

```
"files": [
   ".api/v1.5.0/PowerBI-visuals.d.ts",
   "typings/index.d.ts",
   "src/visual.ts"
]
```

d) Save and close tsconfig.json.

Now you are finally ready to begin programing with TypeScript code that uses the jQuery library.

- 7. Modify the visual.ts file.
 - a) Open visual.ts if it is not already open.
 - b) Examine the starting class definition named Visual that was created by the PBIVIZ utility.

```
module powerbi.extensibility.visual {
    export class Visual implements IVisual {
        constructor(options: VisualConstructorOptions) { }
        public update(options: VisualUpdateOptions) { }
    }
}
```

c) Modify the Visual class as shown in the following code listing.

```
module powerbi.extensibility.visual {
    export class Visual implements IVisual {
        private svgRoot: d3.Selection<SVGElementInstance>;
        private ellipse: d3.Selection<SVGElementInstance>;
        private text: d3.Selection<SVGElementInstance>;
        private padding: number = 20;
        constructor(options: VisualConstructorOptions) {
            this.svgRoot = d3.select(options.element).append("svg");
        }
        public update(options: VisualUpdateOptions) {}
}
```

d) Modify the constructor using the following code.

```
constructor(options: VisualConstructorOptions) {
    this.svgRoot = d3.select(options.element).append("svg");

    this.ellipse = this.svgRoot.append("ellipse")
        .style("fill", "rgba(255, 255, 0, 0.5)")
        .style("stroke", "rgba(0, 0, 0, 1.0)")
        .style("stroke-width", "4");

    this.text = this.svgRoot.append("text")
        .text("Hello D3")
        .attr("text-anchor", "middle")
        .attr("dominant-baseline", "central")
        .style("fill", "rgba(255, 0, 0, 1.0)")
        .style("stroke", "rgba(0, 0, 0, 1.0)")
        .style("stroke-width", "2");
}
```

e) Modify the update method by adding code to append the svgRoot element.

```
public update(options: VisualUpdateOptions) {
    this.svgRoot
        .attr("width", options.viewport.width)
        .attr("height", options.viewport.height);
}
```

f) Add the following code to create a plot variable.

```
this.svgRoot
    .attr("width", options.viewport.width)
    .attr("height", options.viewport.height);

var plot = {
    xOffset: this.padding,
    yOffset: this.padding,
    width: options.viewport.width - (this.padding * 2),
    height: options.viewport.height - (this.padding * 2),
};
```

g) Add the following code to resize the ellipse.

```
this.ellipse
   .attr("cx", plot.xOffset + (plot.width * 0.5))
   .attr("cy", plot.yOffset + (plot.height * 0.5))
   .attr("rx", (plot.width * 0.5))
   .attr("ry", (plot.height * 0.5))
```

h) Add the following code to scale the font size.

```
var fontSizeForWidth: number = plot.width * .20;
var fontSizeForHeight: number = plot.height * .35;
var fontSize: number = d3.min([fontSizeForWidth, fontSizeForHeight]);
```

i) Add the following code to resize the text element.

```
this.text
    .attr("x", plot.x0ffset + (plot.width / 2))
    .attr("y", plot.y0ffset + (plot.height / 2))
    .attr("width", plot.width)
    .attr("height", plot.height)
    .attr("font-size", fontSize);
```

j) Your implementation of **update** should now match the following code listing.

```
public update(options: VisualUpdateOptions) {
    this.svgRoot
        .attr("width", options.viewport.width)
        .attr("height", options.viewport.height);

var plot = {
        XOffset: this.padding,
        yoffset: this.padding,
        width: options.viewport.width - (this.padding * 2),
        height: options.viewport.height - (this.padding * 2),
};

this.ellipse
        .attr("cx", plot.xoffset + (plot.width * 0.5))
        .attr("ry", plot.yoffset + (plot.height * 0.5))
        .attr("ry", (plot.width * 0.5))
        .attr("ry", (plot.height * 0.5))

var fontSizeForWidth: number = plot.height * .35;
var fontSizeForHeight: number = plot.height * .35;
var fontSizeForHeight: number = plot.height * .50;

this.text
        .attr("x", plot.xoffset + (plot.width / 2))
        .attr("y", plot.yoffset + (plot.height / 2))
        .attr("y", plot.yoffset + (plot.height / 2))
        .attr("height", plot.height)
        .attr("height", plot.height)
        .attr("height", plot.height)
        .attr("font-size", fontSize);
}
```

- 8. Test out your new visual on a Power BI report.
 - a) Return to the Node is command prompt and run the following command to start a new debugging session.

pbiviz start

- b) Move back to the browser and return to the Power BI report you used in the previous exercise.
- c) Make sure the report is in edit mode.
- d) Add a Developer Visual to the page to see you visual. It should match the following screenshot.



e) Experiment by resizing the visual and seeing how to scales to various sizes.

