Deploying Solutions using Apps and App Workspaces

Lab Time: 40 minutes

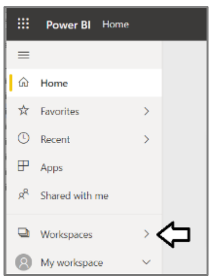
Lab Folder: C:\Student\Modules\06_AppWorkspaces\Lab

Lab Overview: In the first exercise, you will create and populate the **Wingtip Sales** app workspace by import a report and dataset from **Wingtip Sales Analysis.pbix**. In the second exercise, you will publish the **Wingtip Sales** app workspace as an organization app. In the last exercise, you will work through the process of creating and testing a Power BI template app.

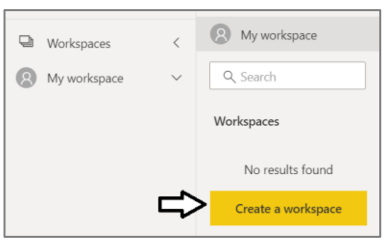
Exercise 1: Create an App Workspaces and Add Content

In this exercise, you will create a new app workspace named **Wingtip Sales** and then you will import a new dataset and report from **Wingtip Sales Analysis.pbix**.

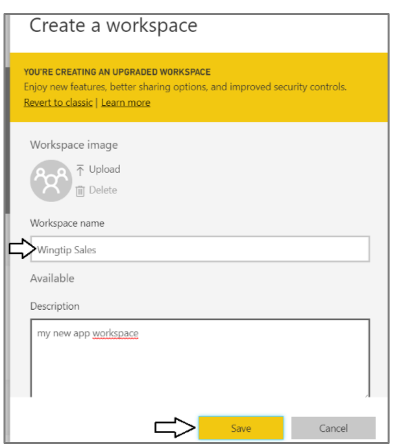
1. Log into the Power BI Service with your Office 365 account.
   a) Navigate the Power BI portal at https://app.powerbi.com and if prompted, log in using your Office 365 account.
2. Create a new app workspace named **Wingtip Sales**.
   a) Click the **Workspace** flyout menu in the left navigation.



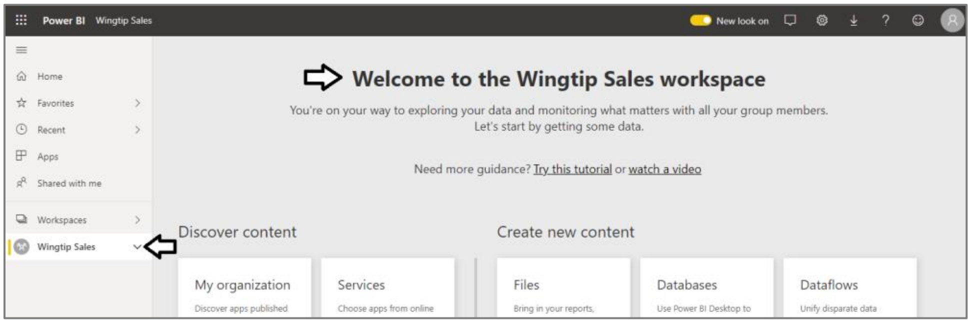
   b) Click the **Create a workspace** button to display the **Create a workspace** dialog.



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

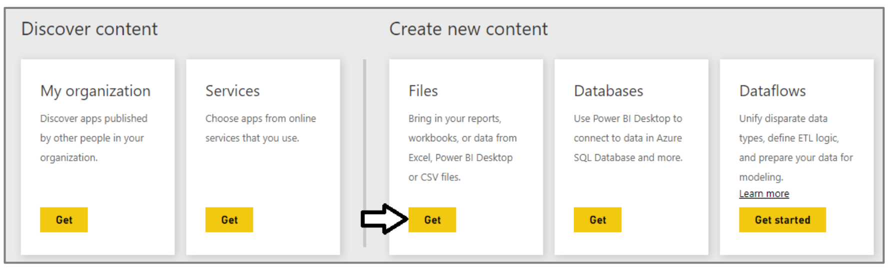


e) When you click **Save**, the Power BI service should create the new app workspace and then switch your current Power BI session to be running within the context of this new app workspace.

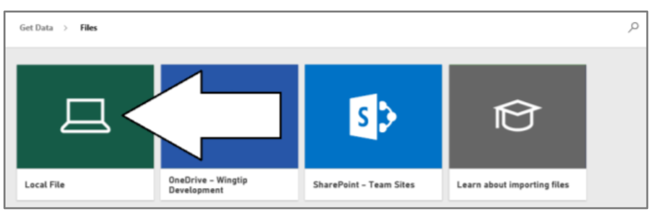


You have now created an app workspace which will provide the foundation for publishing and managing the Power BI datasets, reports and dashboards used by a custom solution.

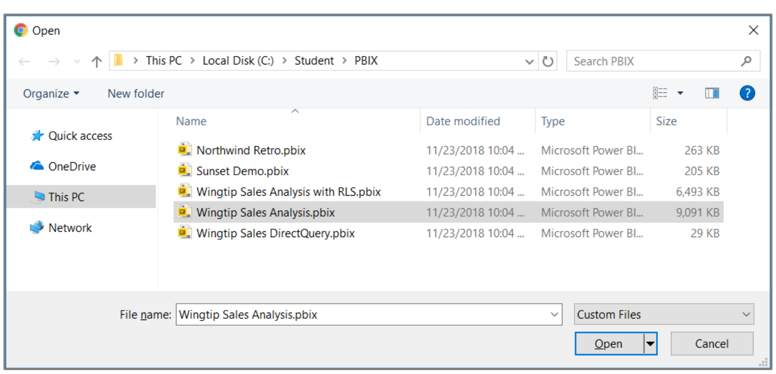
3. The **Wingtip Sales** app workspace should currently display the standard Welcome page because it does not yet contain any datasets, reports or dashboards.



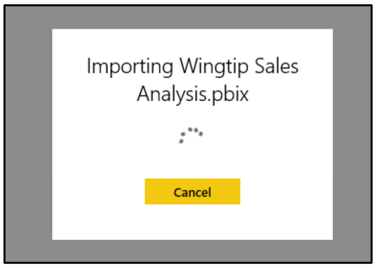
4. Import the **Wingtip Sales Analysis.pbix** project into the **Wingtip Sales** app workspace.
   a) On the Welcome page, click the **Get** button in the **Files** section.
   b) On the **Get Data > Files** page, click the **Local File** button to display the Windows **Open** file dialog.



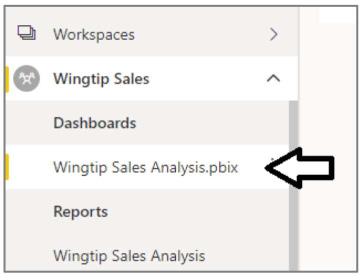
   c) In the Windows **Open** file dialog, select the project file at **c:\Student\PBIX\Wingtip Sales Analysis.pbix** and click **Open**.



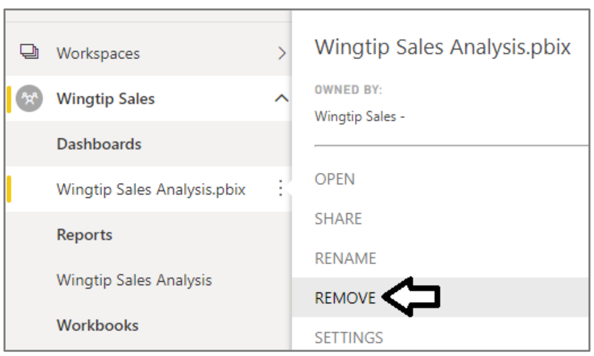
d) Wait while the Power BI service uploads the PBIX files and imports its assets into the **Wingtip Sales** app workspace



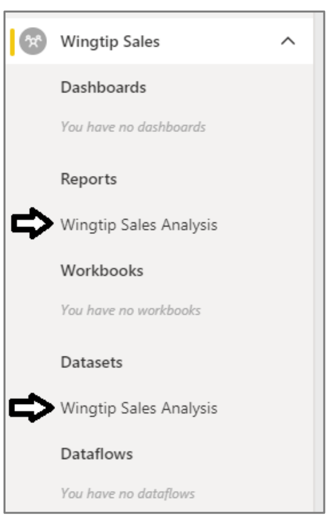
e) Check to see if the PBIX upload process has created a new dashboard named **Wingtip Sales Analysis.pbix**.



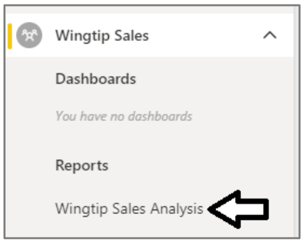
f) If it exists, delete the dashboard named **Wingtip Sales Analysis.pbix**.



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

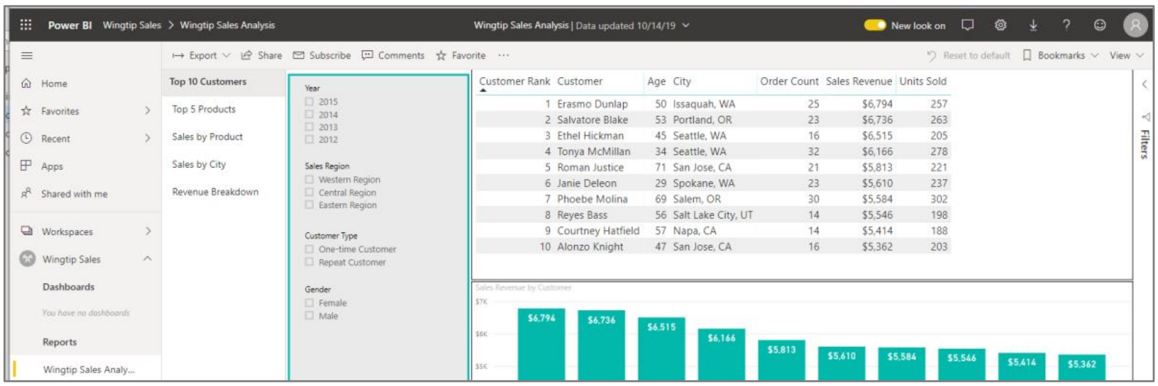


h) Click on the report named **Wingtip Sales Analysis** in the **Reports** section.



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

a) Locate the page tabs on the report.

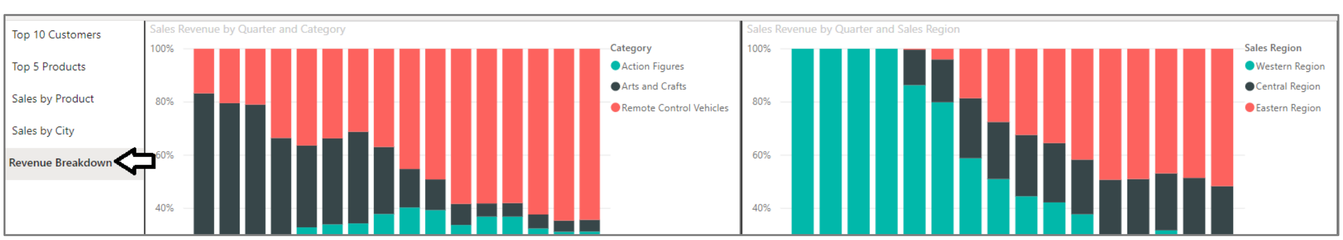


Note that you must always create dashboards using the browser. Even though you created a dashboard in your personal workspace in the previous lab, there is no way to reuse that dashboard and copy it between workspaces. Unfortunately, you must recreate a new dashboard from scratch using the browser.

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

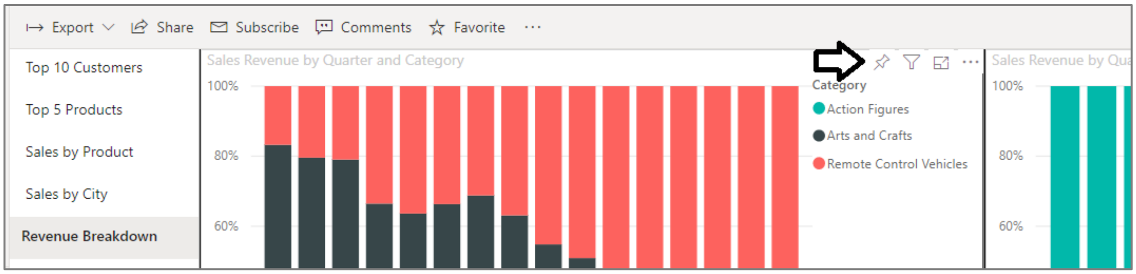
a) Navigate to the **Reports** tab and open the report named **Wingtip Sales Analysis**.

b) Navigate to the **Revenue Breakdown** page of the **Wingtip Sales Analysis** report.



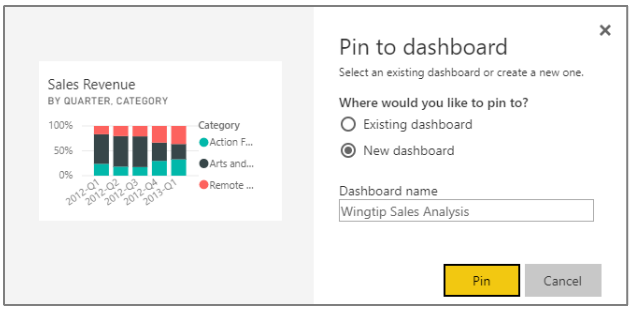
c) Hover the mouse over the column chart visual which displays a sales revenue breakdown by product category.

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

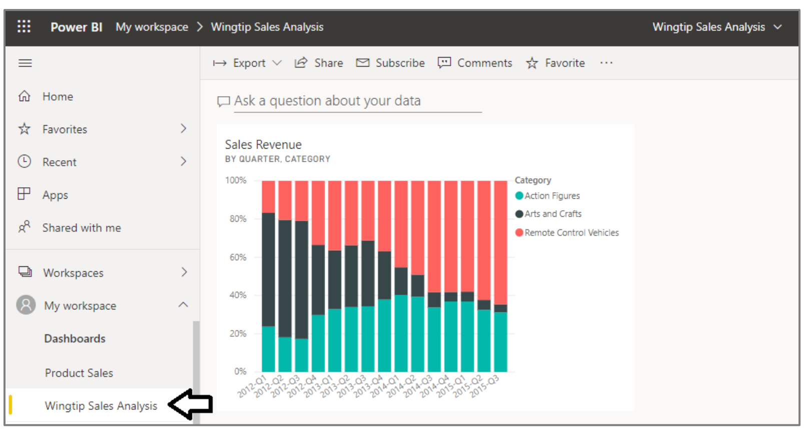


When you click the thumbtack button, you'll be prompted with the **Pin to dashboard** dialog where you must select a dashboard.

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

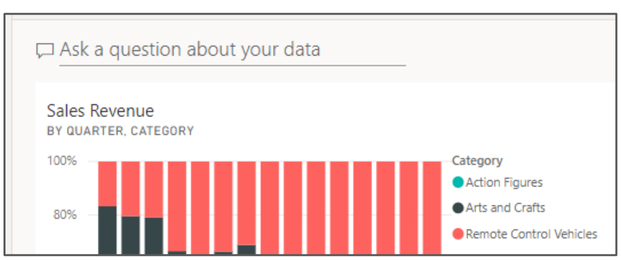


f) Click the **Wingtip Sales Analysis** link in the **Dashboards** section of the left navigation to display the new dashboard.



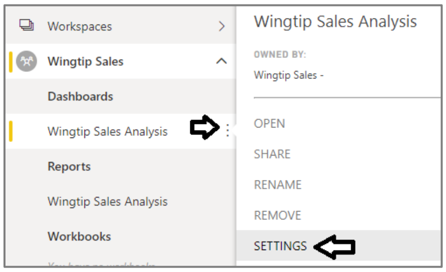
7. Remove the Q&A search box from the **Wingtip Sales Analysis** dashboard.

a) You can see the dashboard is initially displayed with the ***Ask a question about your data*** search box.

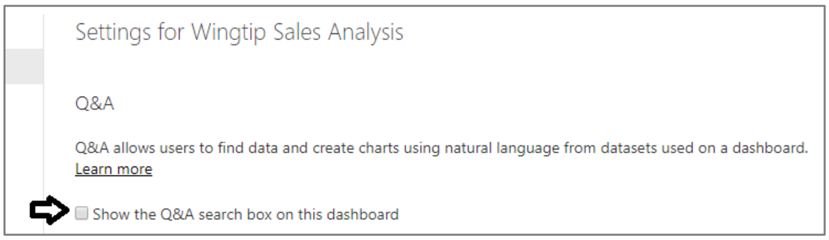


www.CriticalPathTraining.com

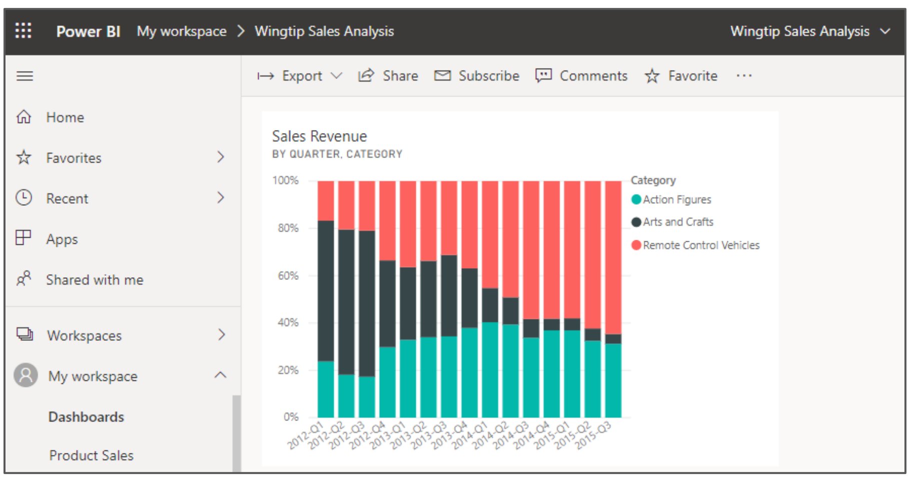
b) Click **Dashboards > SETTINGS** in the left navigation to display the **Settings for Wingtip Sales Analysis** pane.



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



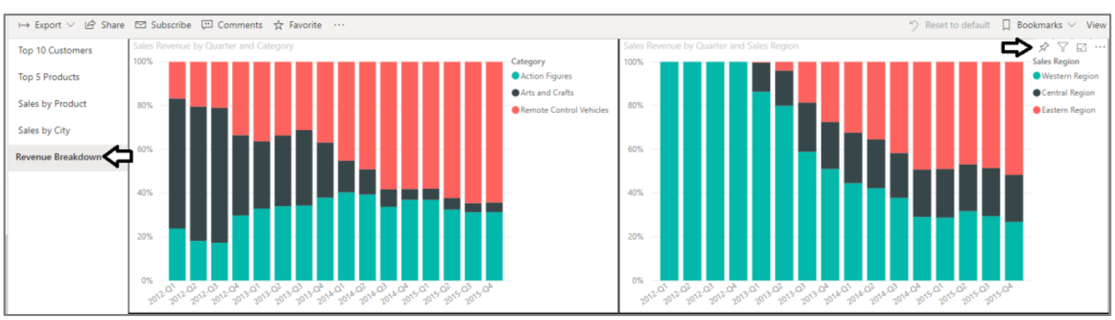
d) Click **Apply** below in the **Settings for Wingtip Sales Analysis** pane and confirm the Q&A search box is no longer showing.



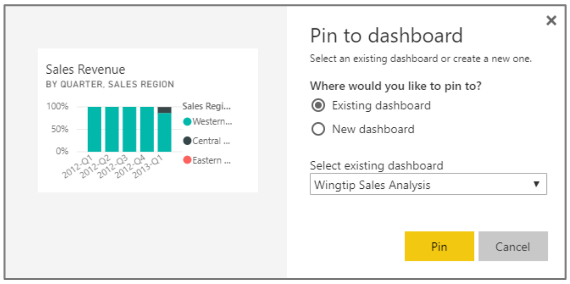
8. Add a second tile to the dashboard by pinning another visual from the **Wingtip Sales Analysis** report.

a) Navigate the **Revenue Breakdown** page of the **Wingtip Sales Analysis** report.

b) Click the thumbtack button of the visual in the upper right corner.

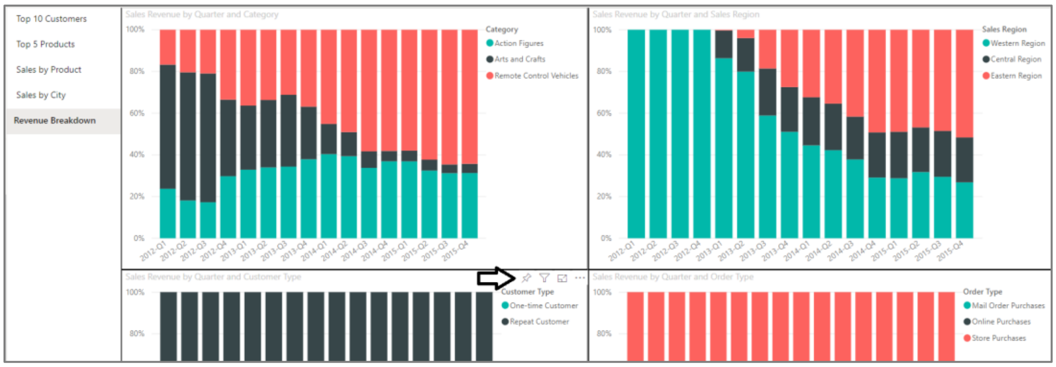


c) Pin the visual to the **Wingtip Sales Analysis** dashboard.

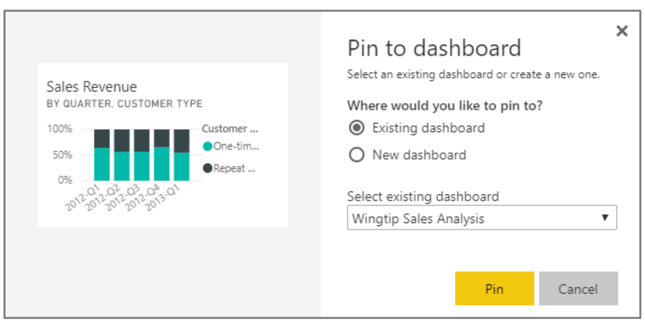


9. Add a third tile to the dashboard by pinning another visuals from the **Wingtip Sales Analysis** report.

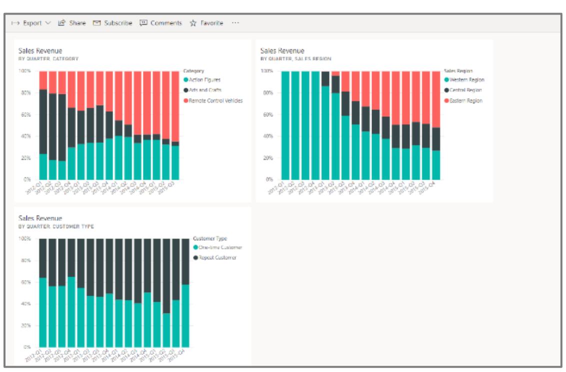
   a) Click the thumbtack button of the visual in the lower left corner.



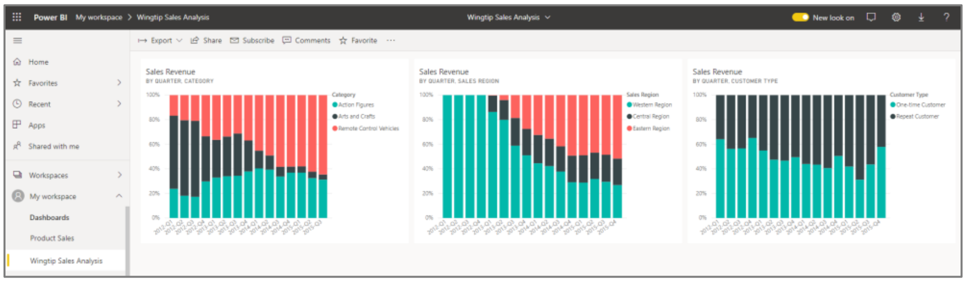
b) Pin the visual to the **Wingtip Sales Analysis** dashboard.



c) Navigate to the **Wingtip Sales Analysis** dashboard. The layout of dashboard tiles should match the following screenshot.

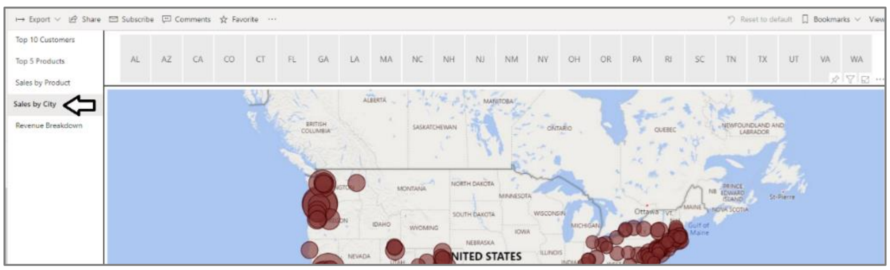


d) Using the mouse, move the tile on the bottom row up so it's to the right of the two other tiles.

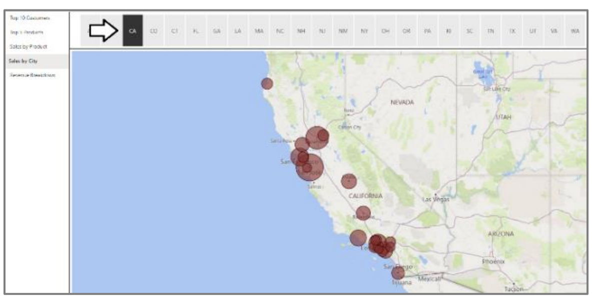


10. Add three more tiles to the **Wingtip Sales Analysis** dashboard to show sales revenue by city in CA, TX and FL.

a) Navigate to the **Sales by City** page of the **Wingtip Sales Analysis** report.

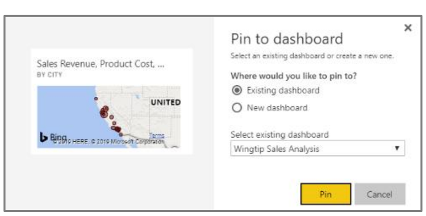


b) Click on **CA** in the top slicer to filter cities by the state of California.

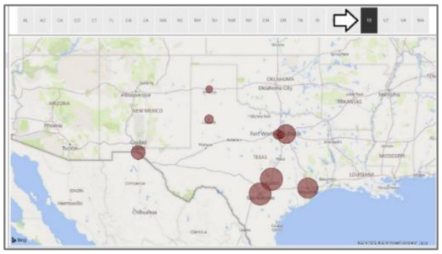


c) Once you have applied a filter for the state of **CA**, click the thumbtack button to pin the visual as a dashboard tile.

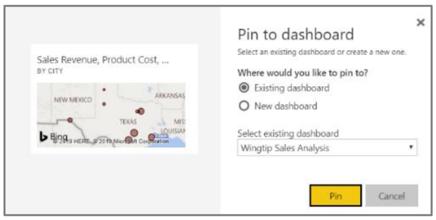
d) Pin the filtered map visual to the **Wingtip Sales Analysis** dashboard.



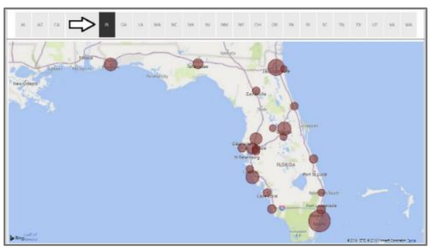
e) Click on **TX** in the top slicer to filter cities by the state of Texas.



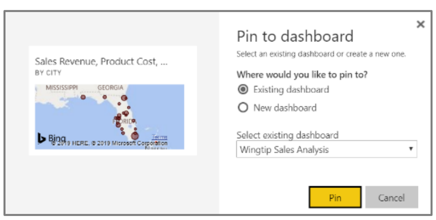
f) Pin the filtered map visual to the **Wingtip Sales Analysis** dashboard.



g) Click on **FL** in the top slicer to filter cities by the state of Florida.

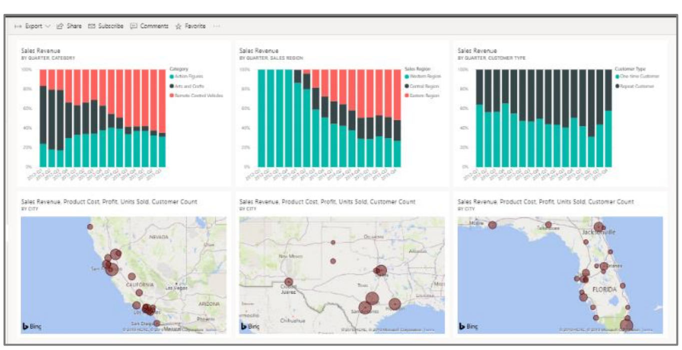


h) Pin the filtered visual to the **Wingtip Sales Analysis** dashboard.



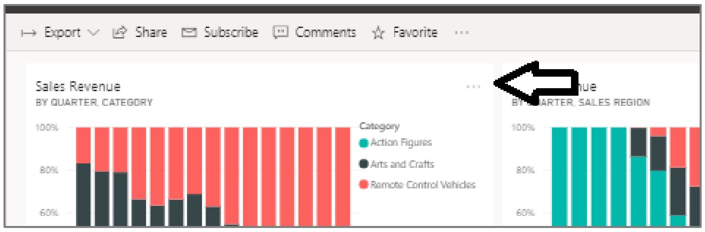
i) Navigate back to the **Wingtip Sales Analysis** dashboard.

j) Rearrange the tiles in the **Wingtip Sales Analysis** dashboard to match the following screenshot.

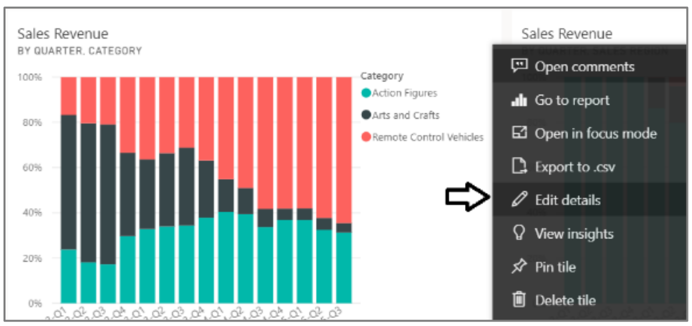


11. Remove the titles and subtitles from all six dashboard tiles

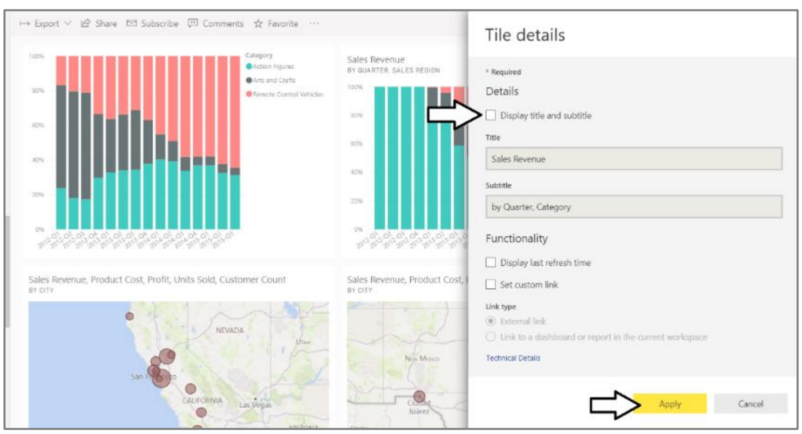
a) Click the ellipse flyout menu for the tile at the top left of the dashboard.



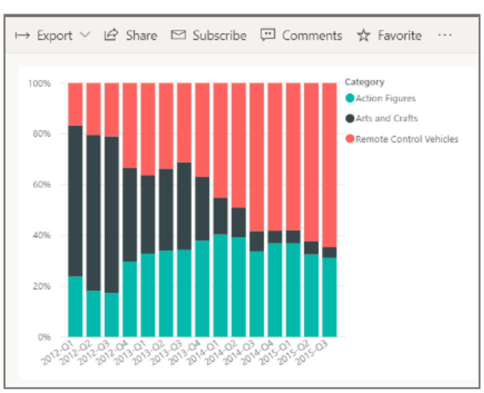
b) Select the **Edit details** to open the **Tile details** pane for this tile.



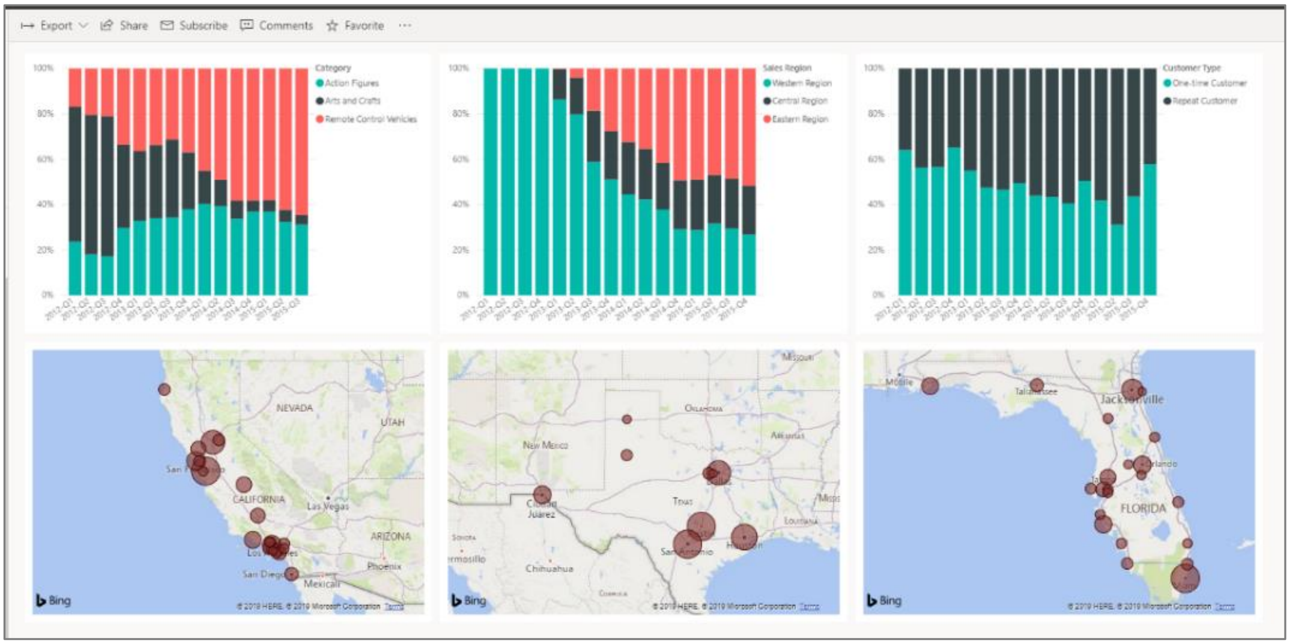
c) On the **Tile details** pane, uncheck the **Display title and subtitle** checkbox and then click **Apply**.



d) The top left tile should now display without a title or subtitle.



e) Follow the same set of steps to remove the title and subtitle from the other 5 tiles.

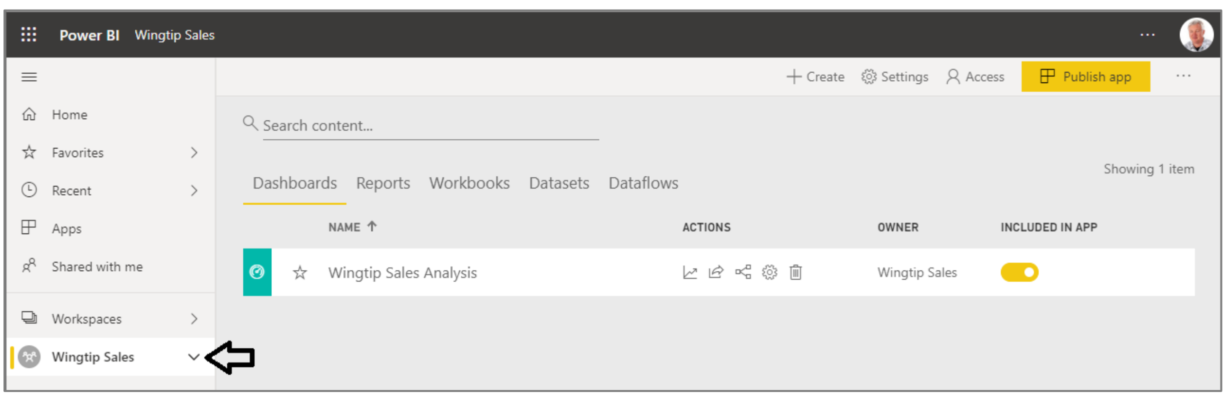


You have finished populating the **Wingtip Sales Analysis** workspace with content and it's time to publish this workspace as an app.

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

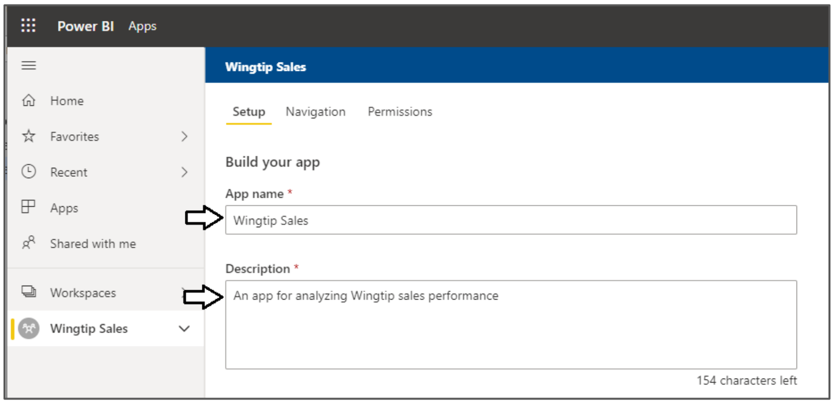
In this exercise you will publish the **Wingtip Sales** app workspace as a Power BI app.

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



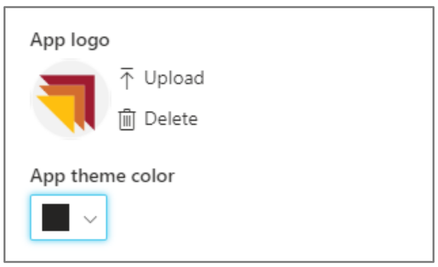
   c) Click the **Publish app** button.

d) On the **Setup** tab, enter an **App name** of **Wingtip Sales** and a short **Description**.

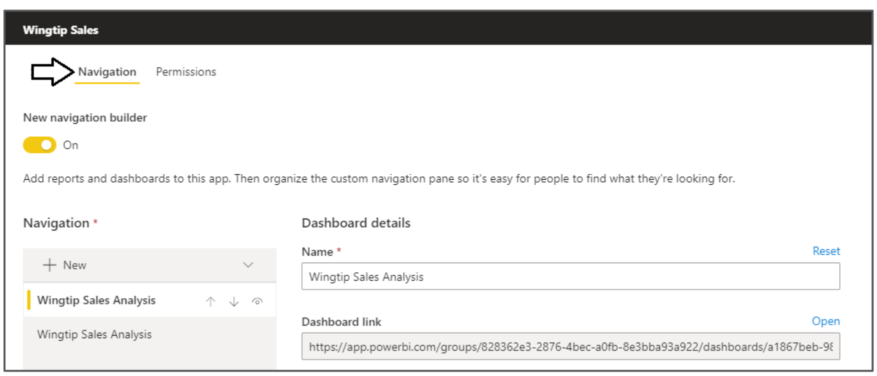


e) Upload an **App logo** from **C:\Student\Extras\Images\AppIcon.png**.

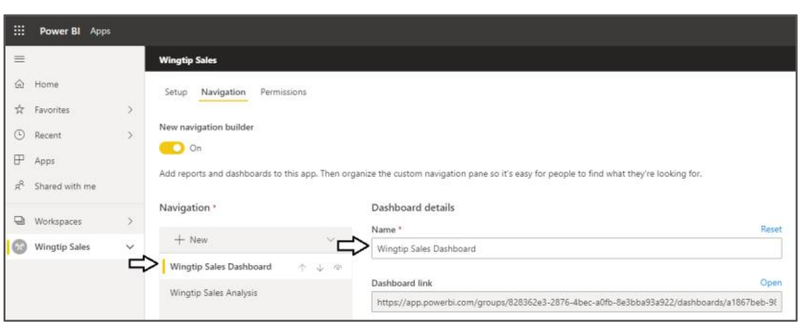
f) Select a **App theme** color of black.



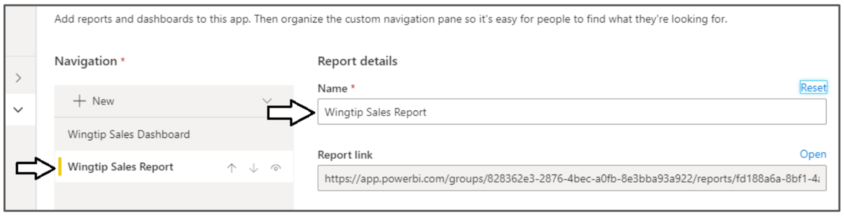
g) Click on the **Navigation** tab and **Set New navigation builder** to **On**.



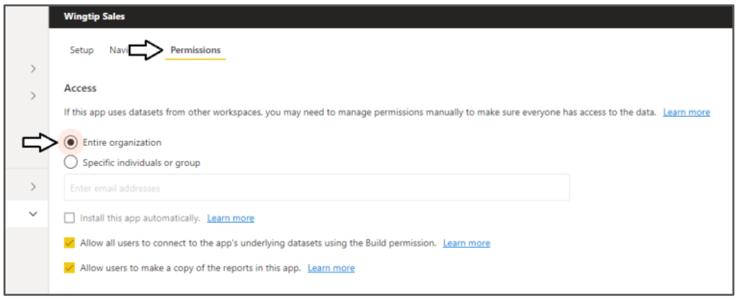
h) Select **Wingtip Sales Analysis** dashboard in the **Navigation** section and change its **Name** to **Wingtip Sales Dashboard**.



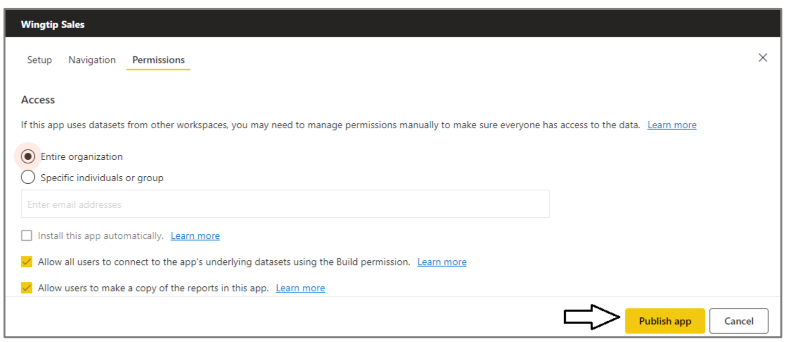
i) Select **Wingtip Sales Analysis report** in the **Navigation** section and change the **Name** to **Wingtip Sales Report**.



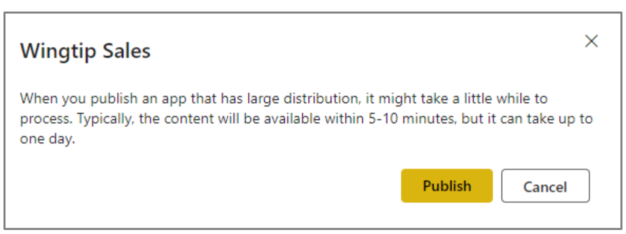
j) On the **Permissions** tab under **Access**, select **Entire organization**



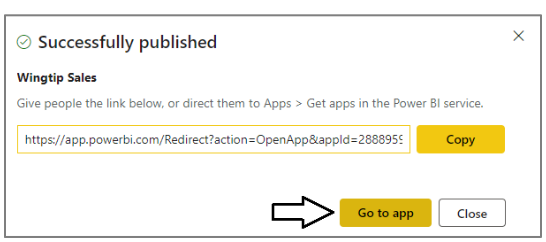
k) Click the **Publish app** button on the right to complete the publication process.



l) When prompted by the **Wingtip Sales** dialog, click **Publish**.

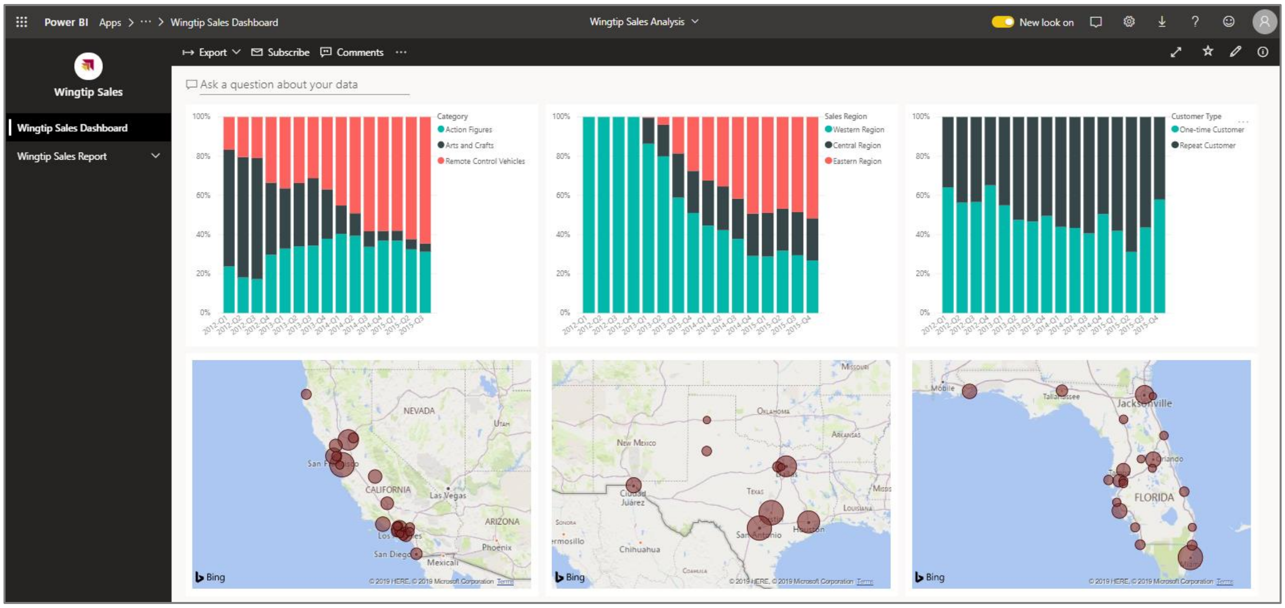


m) When you see the **Successfully Published** dialog, click the **Go to app** button.



The Wingtip Sales app is now being installed for your organization account,

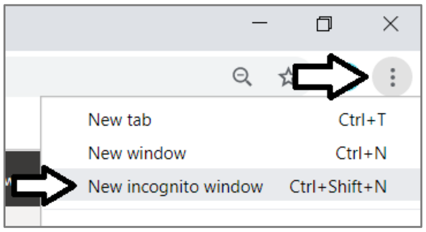
n) You should now be redirected into the Wingtip Sales app.



In the next step, you will logon as James Bond and you will access the **Wingtip Sales** app as a consumer.

2. Launch a new browser session to sign into the Power BI Service as the user James Bong.

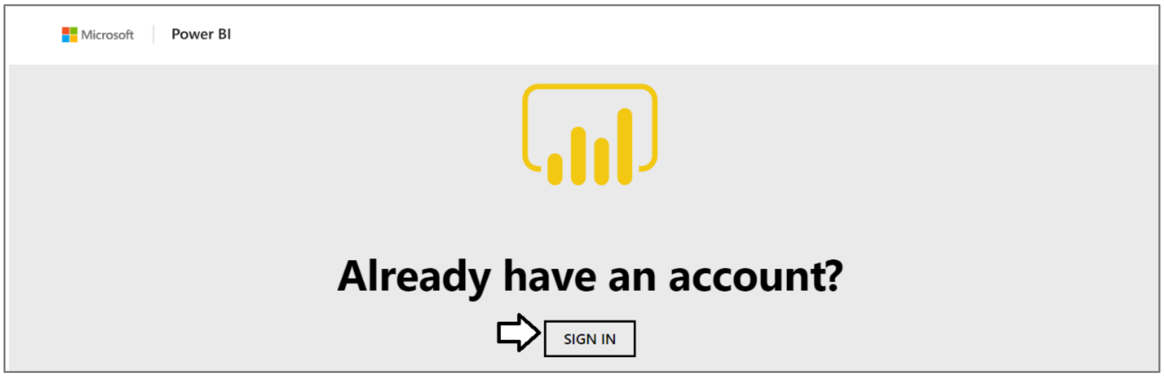
a) Launch a new session of the Chrome browser in incognito mode. (or you can launch a different browser such as IE or Edge)



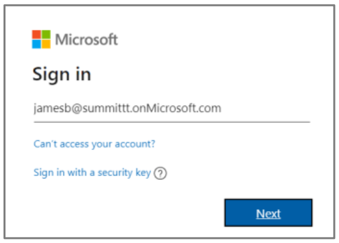
b) In the new browser window, copy and paste the following URL into the address bar to navigate the Power BI Service.

```
https://app.powerbi.com
```

c) When you navigate to the Power BI Service, you should see a page with a **Sign In** button. Click the **Sign in** button.

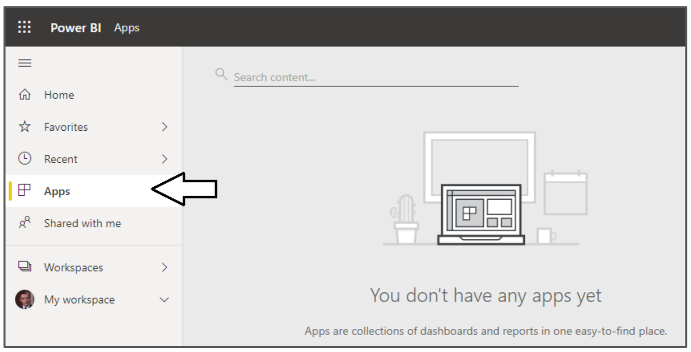


d) Sign in using the account name and the password of the user account for James Bond.



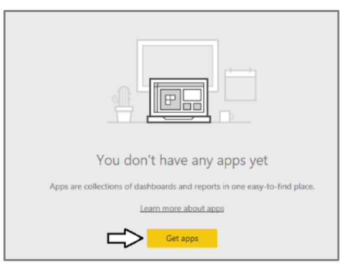
3. Install the **Wingtip Sales** app from the perspective of an app consumer.

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



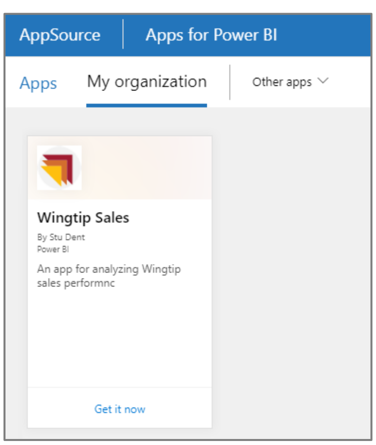
b) You should see there are no apps currently installed for the current user, James Bond.

c) Click the **Get apps** button.

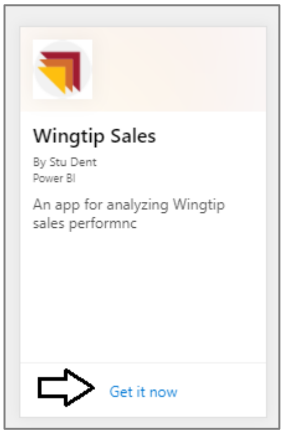


d) You should see the **AppSource** dialog showing you what apps are available for installation.

e) Inspect the apps in the **My organization** tab where you should see the new app named **Wingtip Sales**.

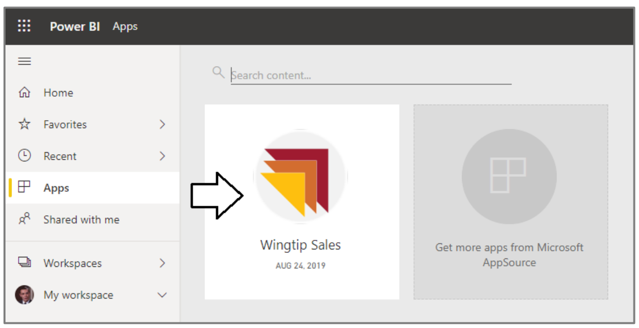


f) Click the **Get it now** link.

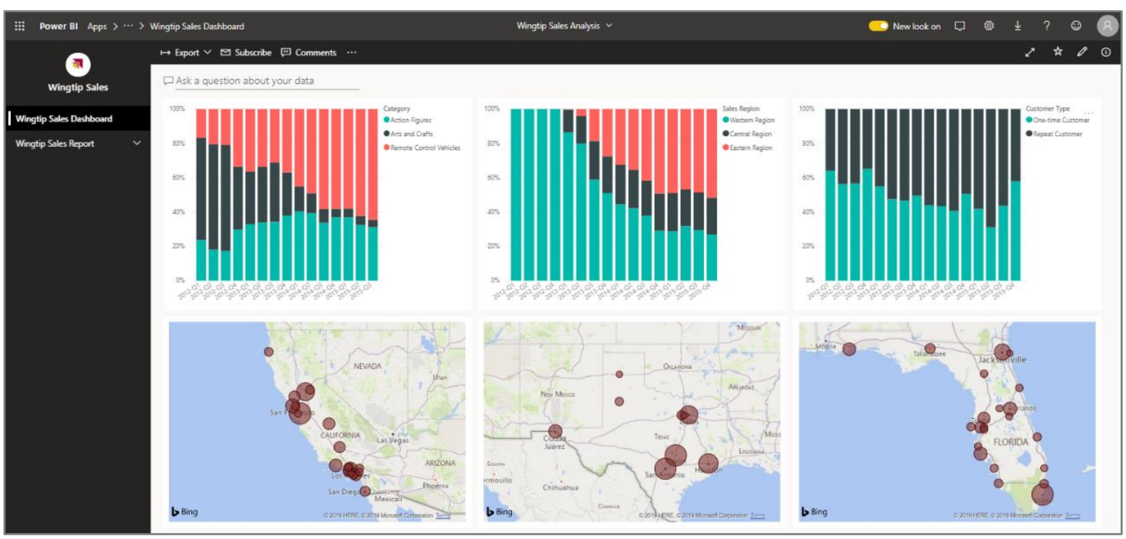


g) The app should install and then be displayed as shown in the following screenshot.

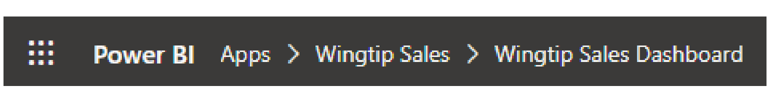
h) Click on the tile for the **Wingtip Sales** app to launch it,



i) When the app is launched, it displays a left navigation menu and also initially displays the **Wingtip Sales Dashboard**.

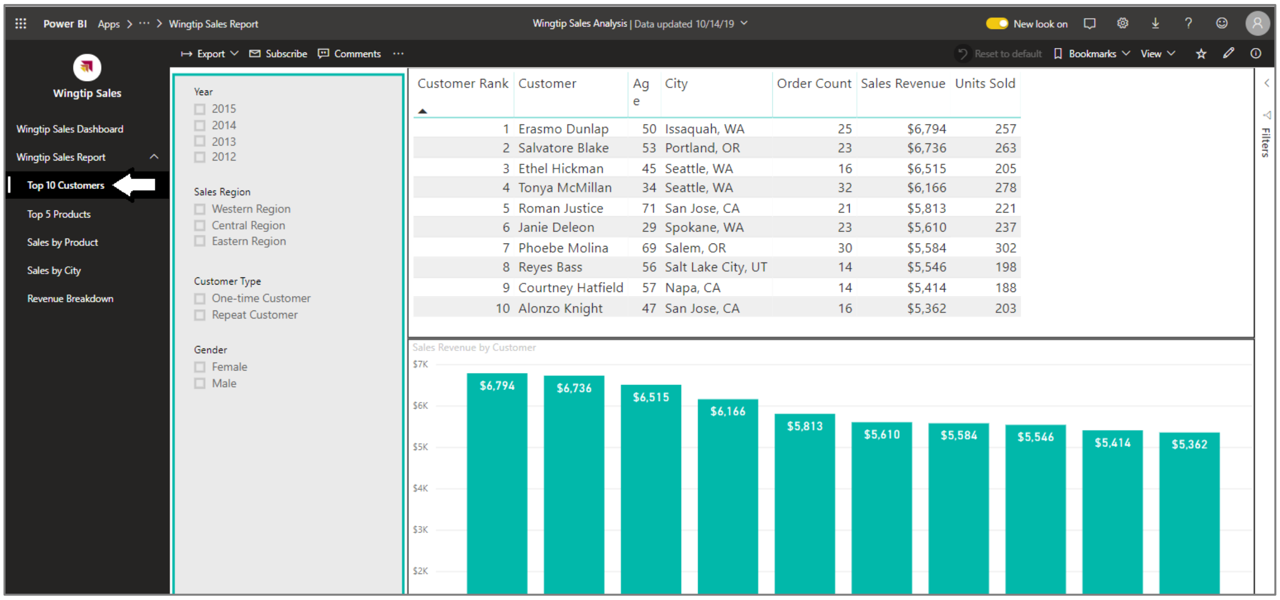


j) Note the breadcrumb at the top shows a path with the app and the dashboard inside the app.



k) Expand the **Wingtip Sales Report** node in the left navigation so you can see all the report pages in left navigation.

l) Experiment navigating to the report pages such as the **Top 10 Customers** page.



You have now installed and tested an app from the perspective of an ordinary user who does not an administrator.