Deploying Solutions using Apps and App Workspaces

Lab Time: 40 minutes

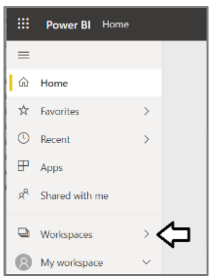
Lab Folder: C:\Student\Modules\06_AppWorkspaces\Lab

Lab Overview: In the first exercise, you will create and populate the **Wingtip Reports** app workspace by importing the report and dataset from **Wingtip Sales Report.pbix**. In the second exercise, you will publish the **Wingtip Reports** 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.

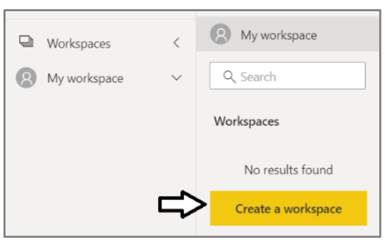
Exercise 1: Create an App Workspaces and Add Content

In this exercise, you will create a new app workspace named **Wingtip Reports** and then you will publish the report from the Power BI Desktop project named **Wingtip Sales Report.pbix**.

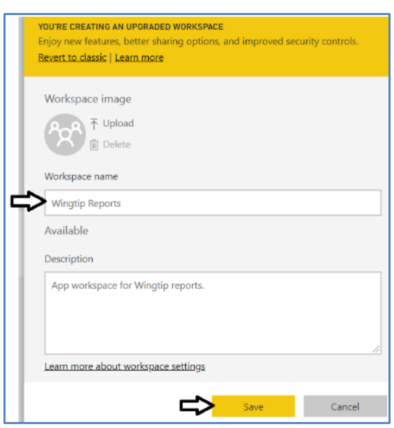
1. Log into the Power BI Service with your Office 365 account.
   a) Navigate the Power BI portal at https://app.powerbi.com and if prompted, log in using your Office 365 account.
2. Create a new app workspace named **Wingtip Reports**.
   a) Click the **Workspace** flyout menu in the left navigation.



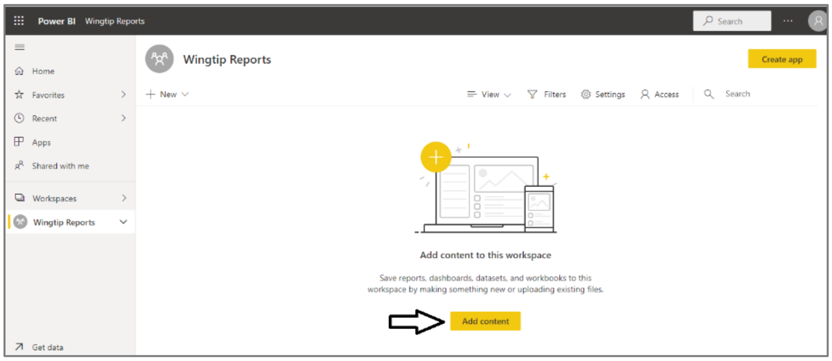
   b) Click the **Create a workspace** button to display the **Create a workspace** dialog.



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

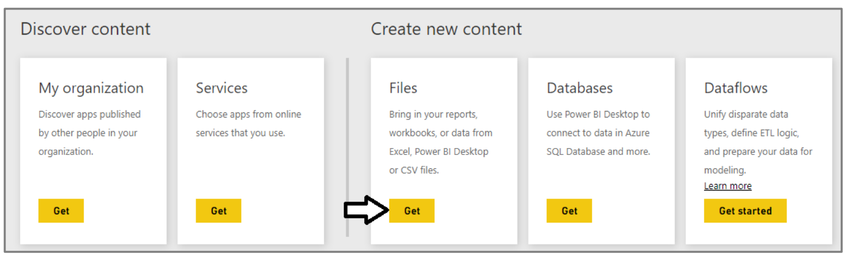


When you click **Save**, the Power BI service should create the new app workspace and then switch your current Power BI session to be running within the context of this new **Wingtip Reports** workspace.

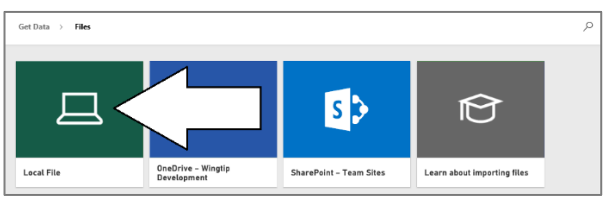


You have now created an app workspace which will provide the foundation for publishing and managing the Power BI reports and dashboards used by a custom solution.

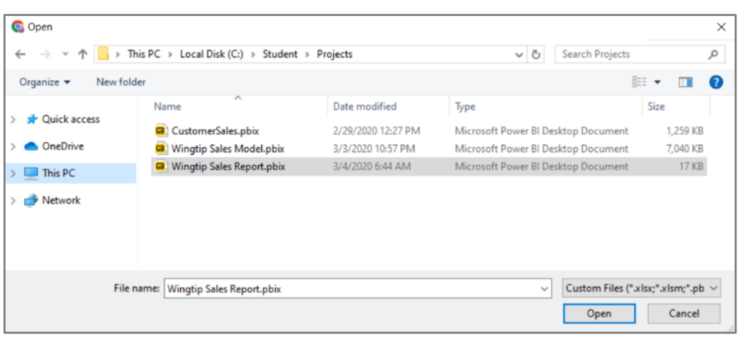
3. Click the **Add content** button to navigate to the **Get Data** page.
4. The **Wingtip Reports** app workspace should currently display the **Get Data** page.



5. Import the **Wingtip Sales Reports.pbix** project into the **Wingtip Reports** 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.

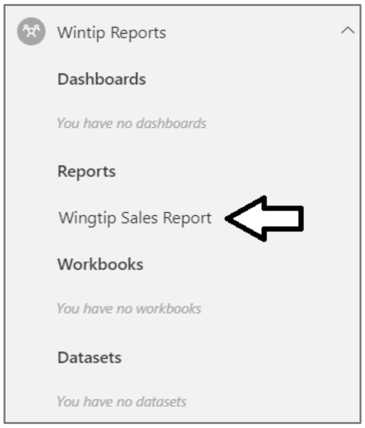


   c) In the Windows **Open** file dialog, select the project file at **c:\Student\Projects\Wingtip Sales Report.pbix** and click **Open**.



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

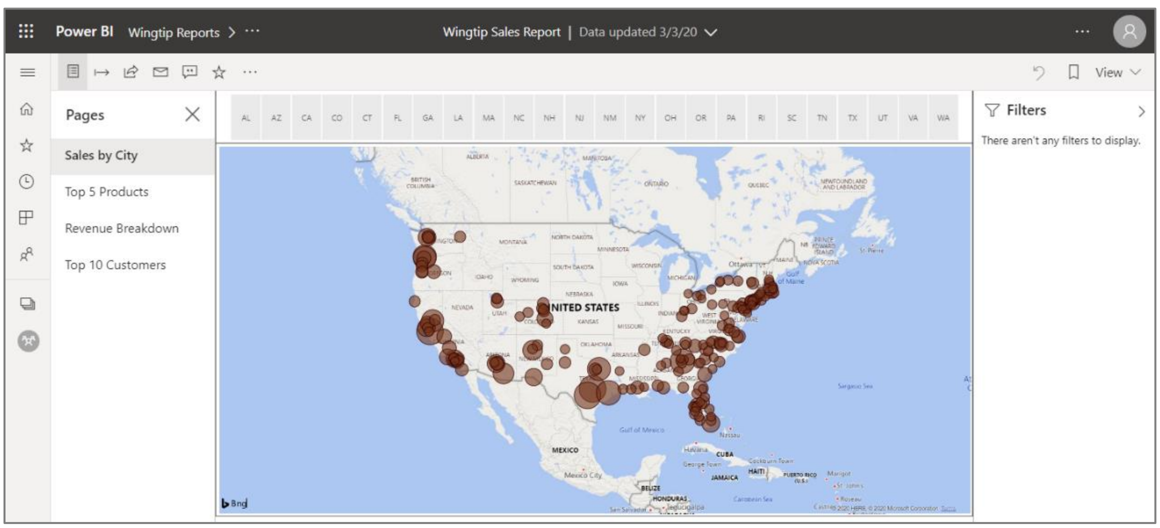
e) Once the import operation has completed, you should only see a report in the left nav menu.



f) Click on the report named **Wingtip Sales Report** in the **Reports** section.

6. Examine the report named **Wingtip Sales Report**.

a) Locate the page tabs in the top left corner of the report.

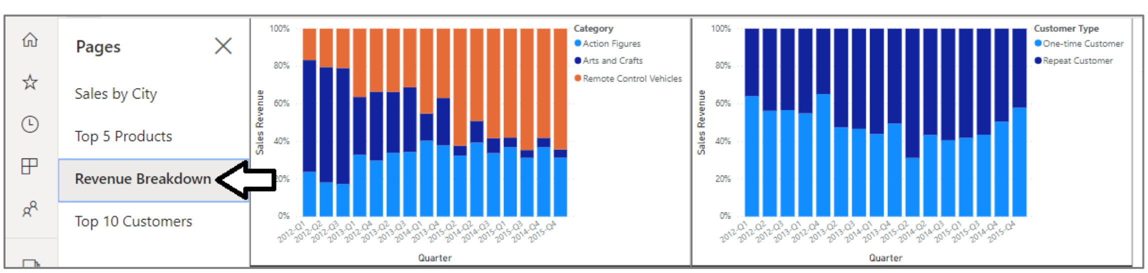


Note that you must always create dashboards using the browser. You cannot create a dashboard with Power BI Desktop.

7. Create a new dashboard named **Wingtip Sales Dashboard**.

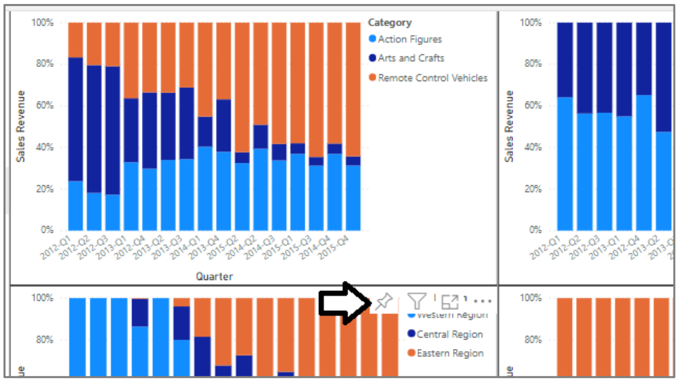
a) Navigate to the **Reports** tab and open the report named **Wingtip Sales Report**.

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



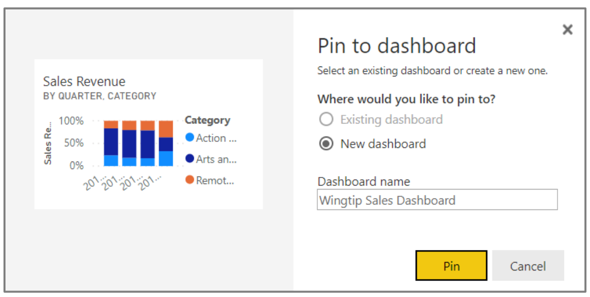
c) Hover the mouse over the column chart visual which displays a sales revenue breakdown by product category.

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

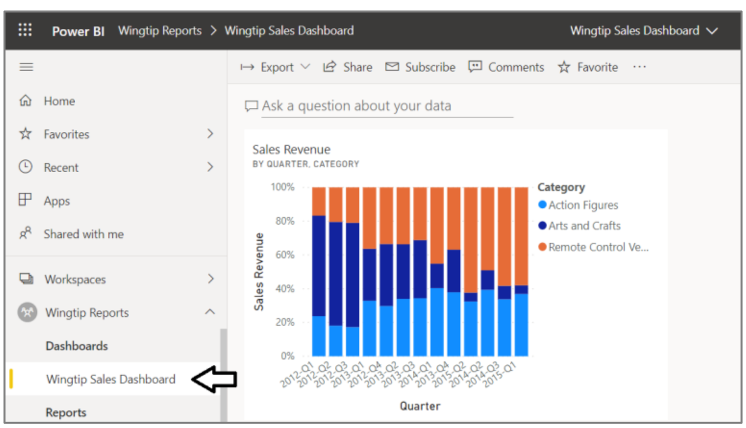


When you click the thumbtack button, you'll be prompted with the **Pin to dashboard** dialog where you must select a dashboard.

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

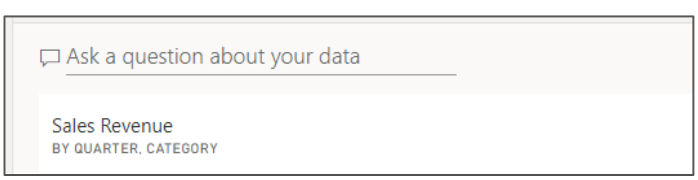


f) Click the **Wingtip Sales Dashboard** link in the **Dashboards** section of the left navigation to display the new dashboard.

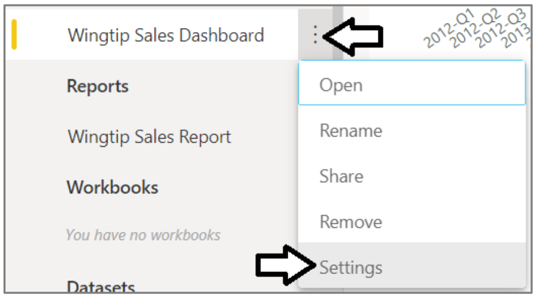


8. Remove the Q&A search box from **Wingtip Sales Dashboard**.

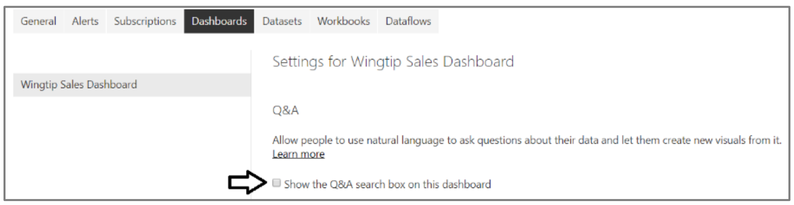
a) You can see the dashboard is initially displayed with the ***Ask a question about your data*** search box.



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

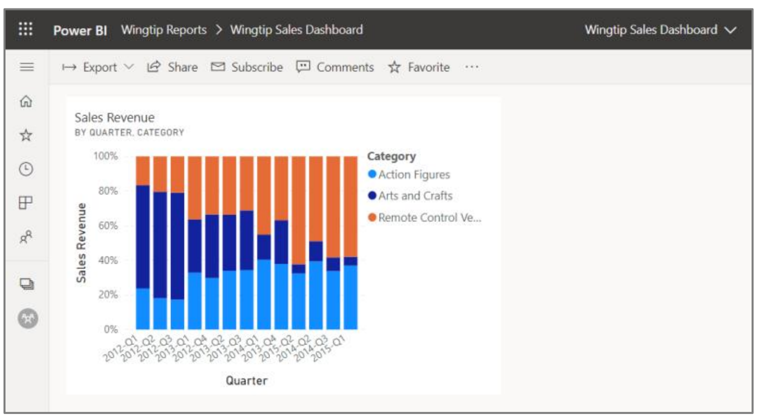


c) In the **Settings for Wingtip Sales Dashboard** pane, uncheck **Show the Q&A search box on this dashboard**.



d) Click **Apply** below in the **Settings for Wingtip Sales Dashboard** pane.

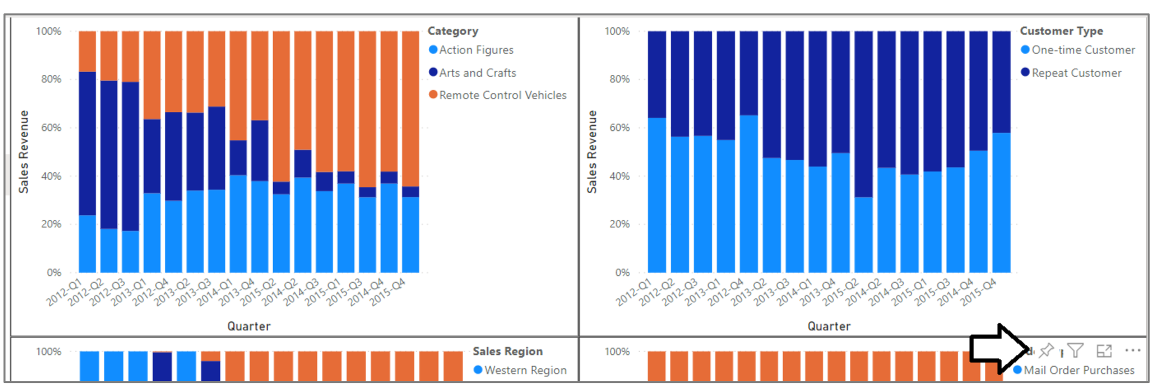
e) Confirm the Q&A search box is no longer showing.



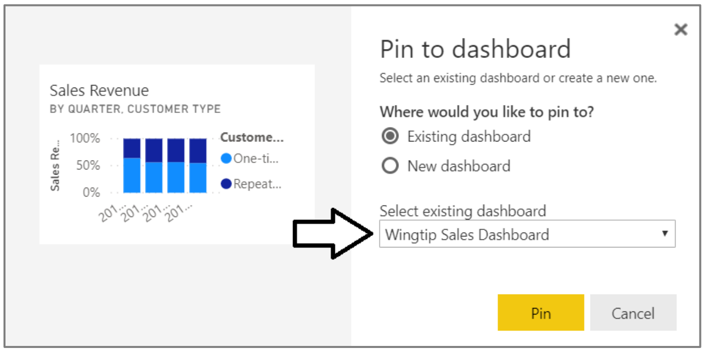
9. Add a second tile to the dashboard by pinning another visual from **Wingtip Sales Report**.

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

b) Click the thumbtack button of the visual underneath the visual.

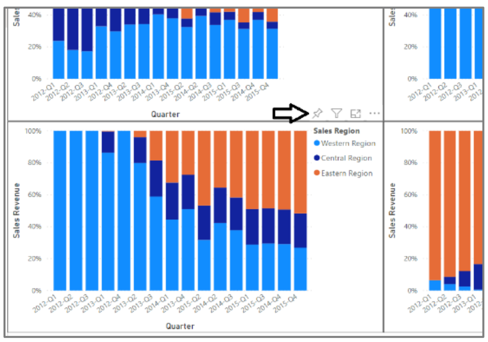


c) Pin the visual to the dashboard named **Wingtip Sales Dashboard**.

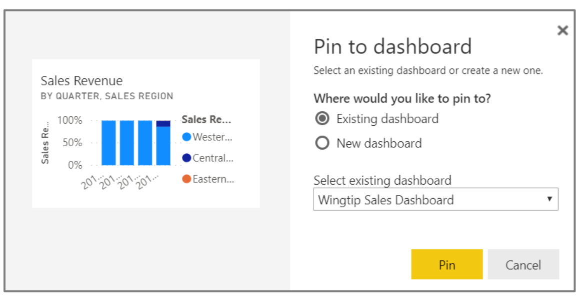


10. Add a third tile to the dashboard by pinning another visual from **Wingtip Sales Report**.

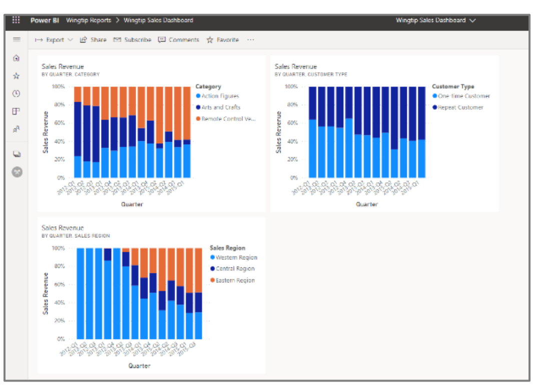
a) Click the thumbtack button of the visual in the top left corner.



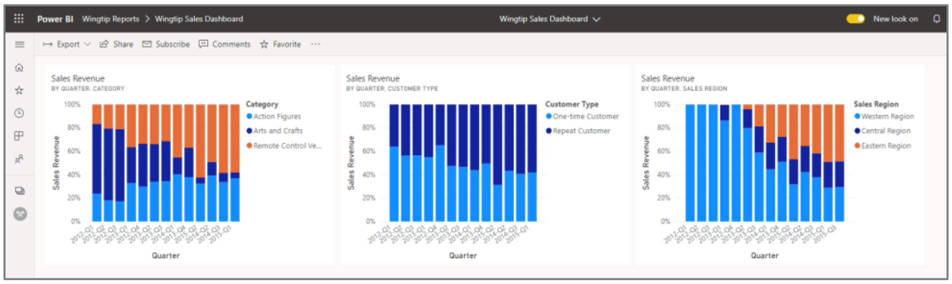
b) Pin the visual to **Wingtip Sales Dashboard**.



c) Navigate to the dashboard named **Wingtip Sales Dashboard**. The tile layout should match the following screenshot.

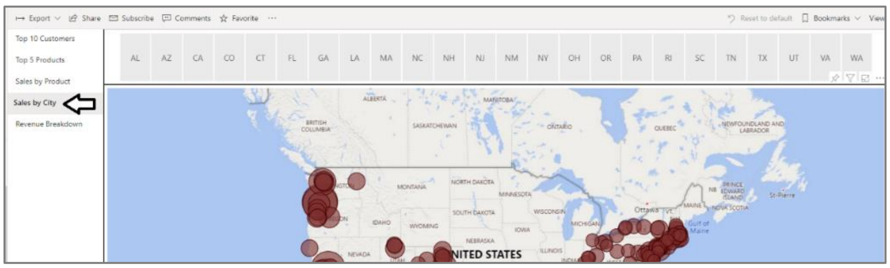


d) Using the mouse, move the tile on the bottom row up so it's to the right of the two other tiles.

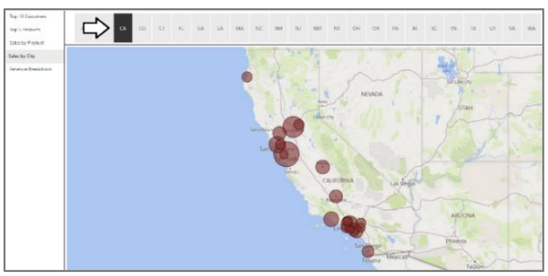


11. Add three more tiles to **Wingtip Sales Dashboard** to show sales revenue by city in CA, TX and FL.

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

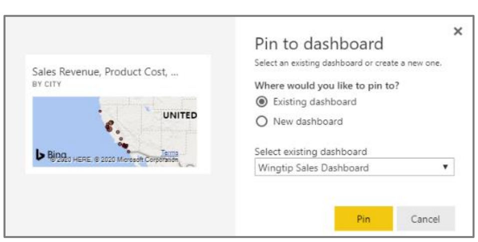


b) Click on **CA** in the top slicer to filter cities by the state of California.

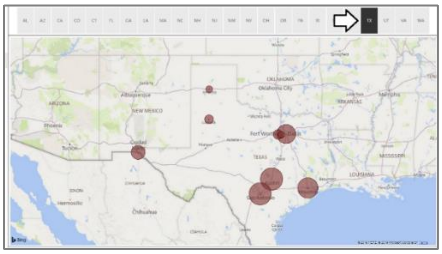


c) Once you have applied a filter for the state of **CA**, click the thumbtack button to pin the visual as a dashboard tile.

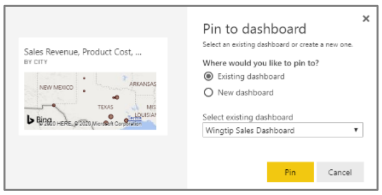
d) Pin the filtered map visual to **Wingtip Sales Dashboard**.



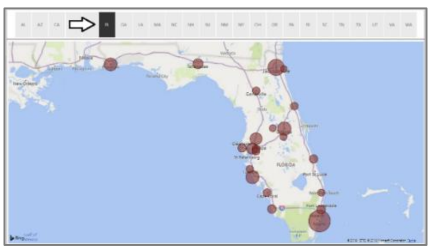
e) Click on **TX** in the top slicer to filter cities by the state of Texas.



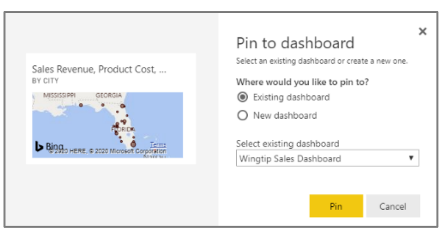
f) Pin the filtered map visual to **Wingtip Sales Dashboard**.



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

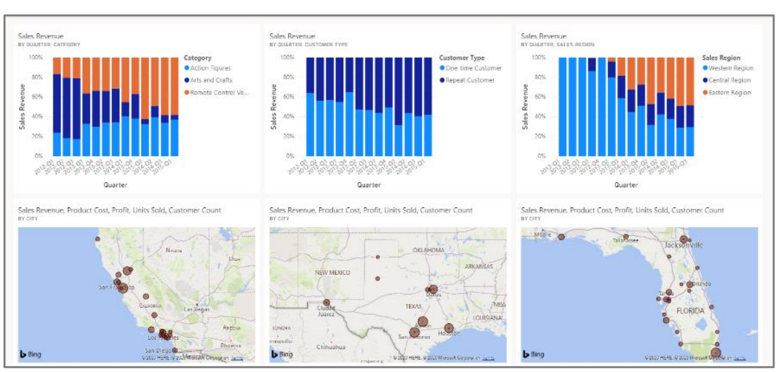


h) Pin the filtered visual to **Wingtip Sales Dashboard**.



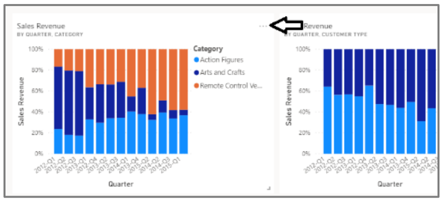
i) Navigate back to **Wingtip Sales Dashboard**.

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

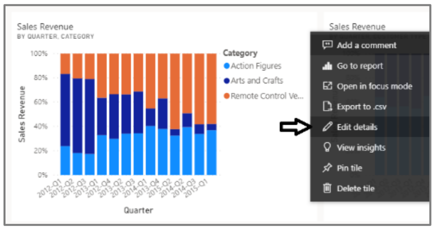


12. Remove the titles and subtitles from all six dashboard tiles

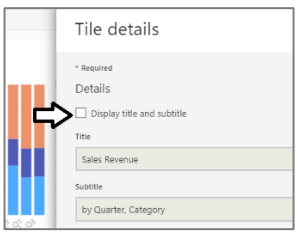
a) Click the ellipse flyout menu for the tile at the top left of the dashboard.



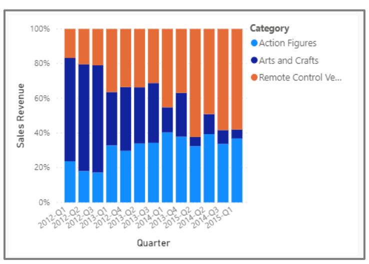
b) Select the **Edit details** to open the **Tile details** pane for this tile.



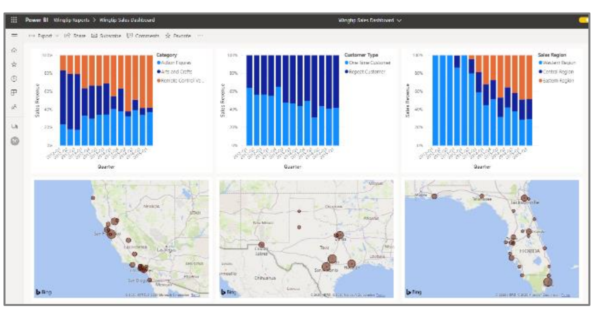
c) On the **Tile details** pane, uncheck the **Display title and subtitle** checkbox and then click **Apply**.



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.

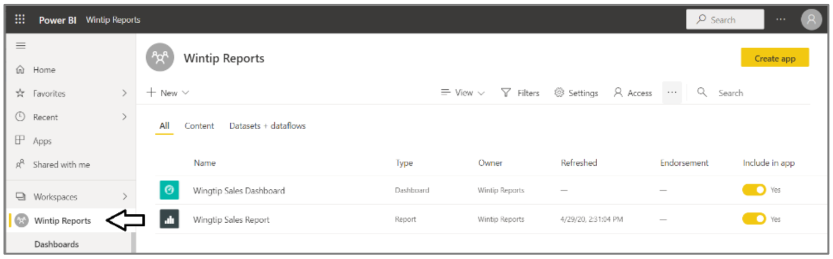


You have finished populating the **Wingtip Sales Reports** workspace with content and it's time to publish this workspace as an app.

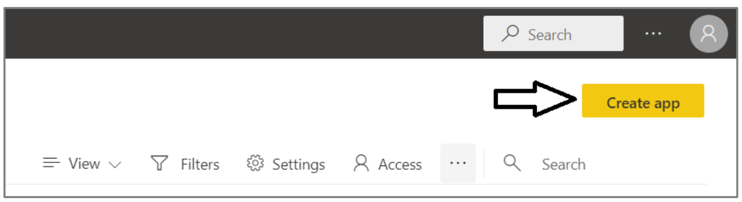
Exercise 2: Publish an App Workspace as a Power BI App

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

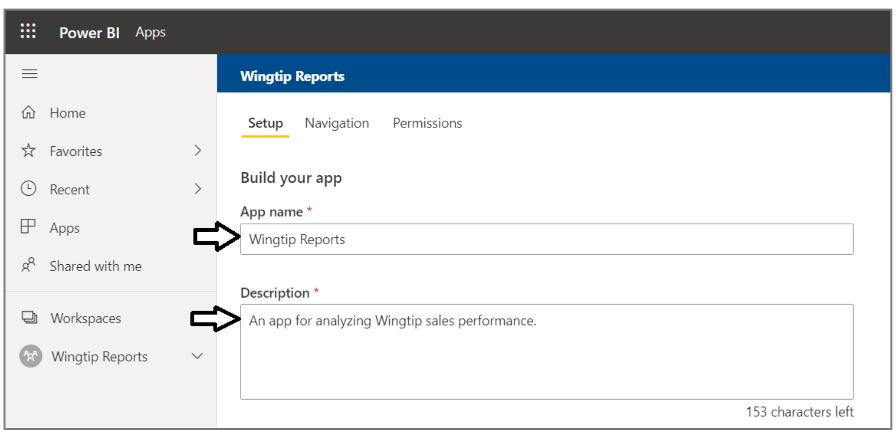
1. Publish the **Wingtip Reports** workspace as a Power BI app.
   a) Navigate to the **Wingtip Reports** workspace.
   b) Click the **Wingtip Reports** link in the left navigation to show the summary page for the **Wingtip Reports** workspace.



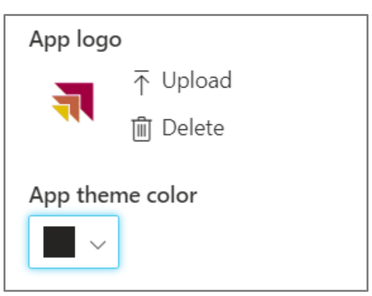
   c) Click the **Create app** button.



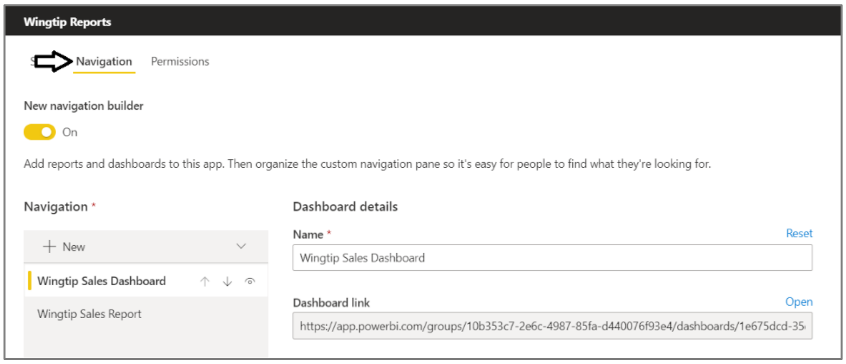
   d) On the **Setup** tab, enter an **App name** of **Wingtip Reports** and a short **Description**.



   e) Upload an **App logo** from **C:\Student\Extras\Images\AppIcon.png**.
   f) Select an **App theme** color of black.

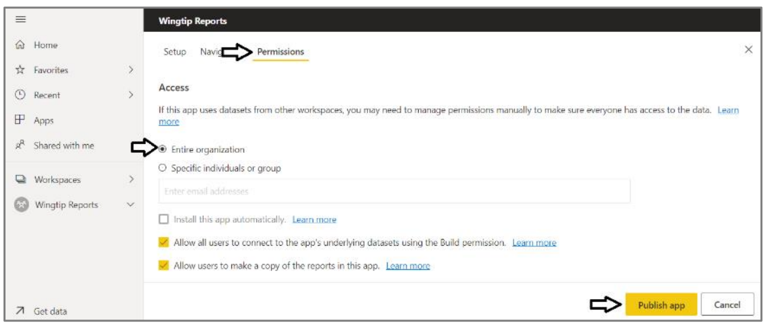


g) Click on the **Navigation** tab and **Set New navigation builder** to **On**.

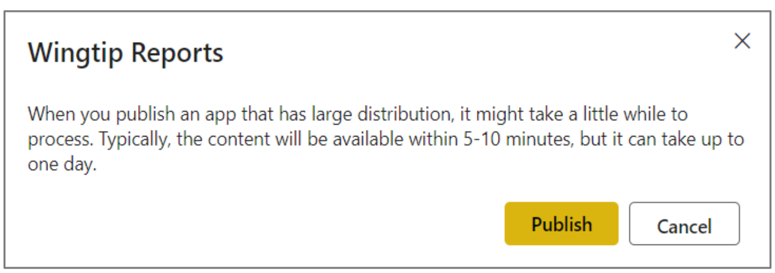


h) On the **Permissions** tab under **Access**, select **Entire organization**

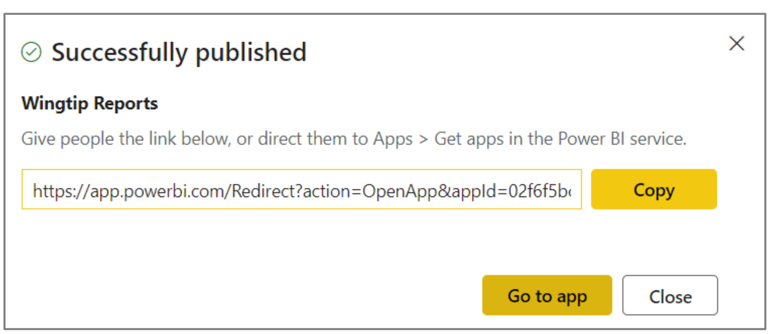
i) Click the **Publish app** button on the right to complete the publication process.



j) When prompted by the **Wingtip Reports5** dialog, click **Publish**.

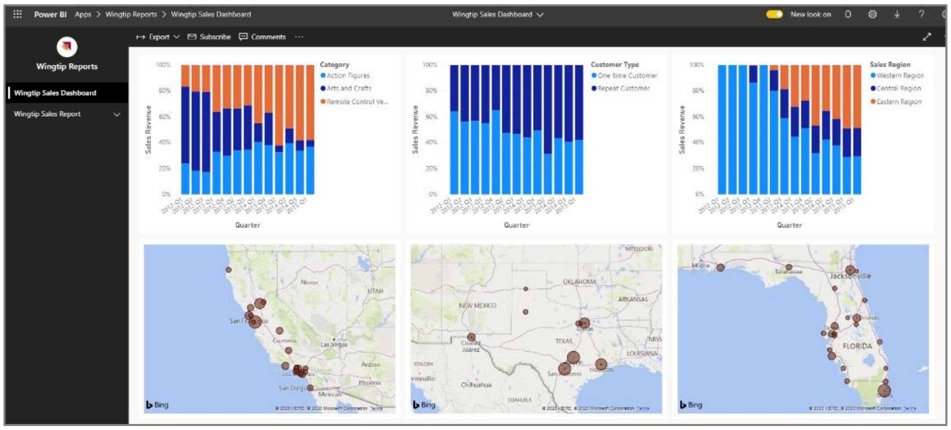


k) When you see the **Successfully Published** dialog, click the **Go to app** button.



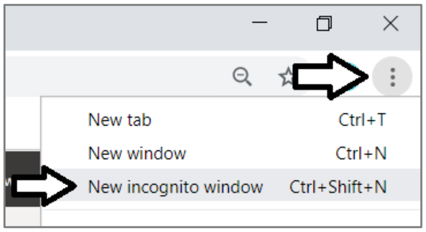
The **Wingtip Reports** app is now being installed for your organization account,

l) You should now be redirected into the **Wingtip Reports** app.



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

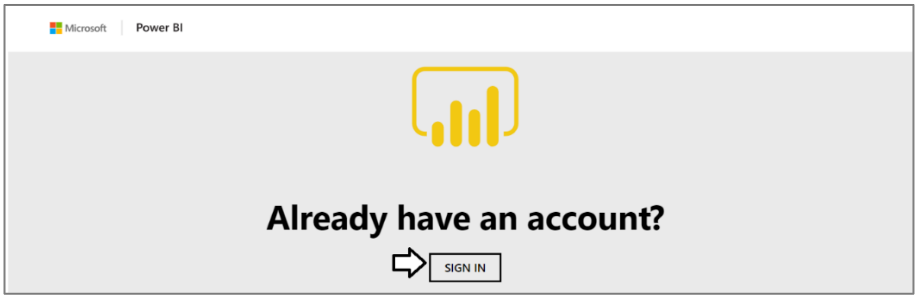
2. Launch a new browser session to sign into the Power BI Service as the user James Bong.
   a) Launch a new session of the Chrome browser in incognito mode. (or you can launch a different browser such as IE or Edge)



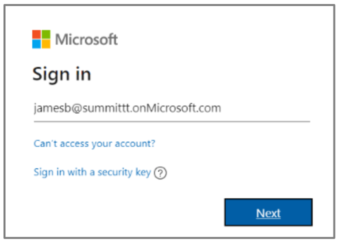
   b) In the new browser window, copy and paste the following URL into the address bar to navigate the Power BI Service.

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

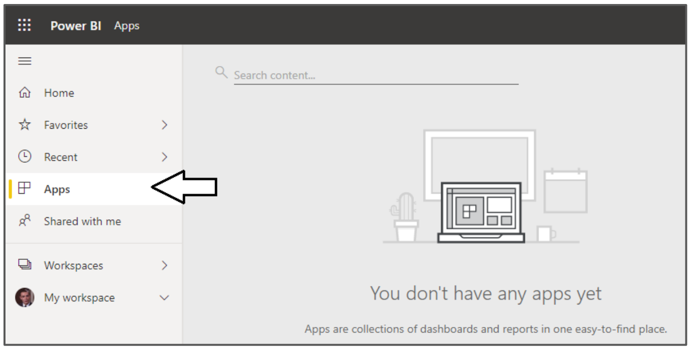
   c) When you navigate to the Power BI Service, you should see a page with a **Sign In** button. Click the **Sign in** button.



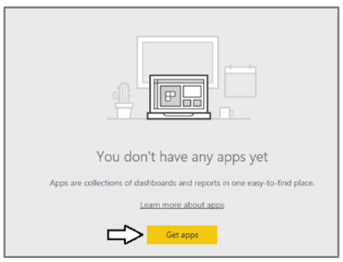
   d) Sign in using the account name and the password of the user account for James Bond.



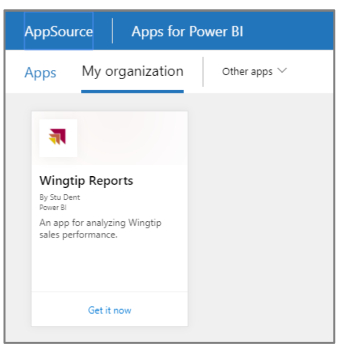
3. Install the **Wingtip Sales** app from the perspective of an app consumer.
   a) Click the **Apps** button in the left navigation menu.



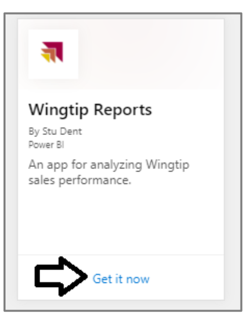
   b) You should see there are no apps currently installed for the current user, James Bond.
   c) Click the **Get apps** button.



   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 Reports**.

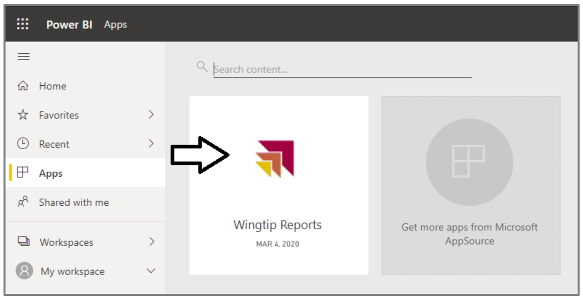


   f) Click the **Get it now** link.

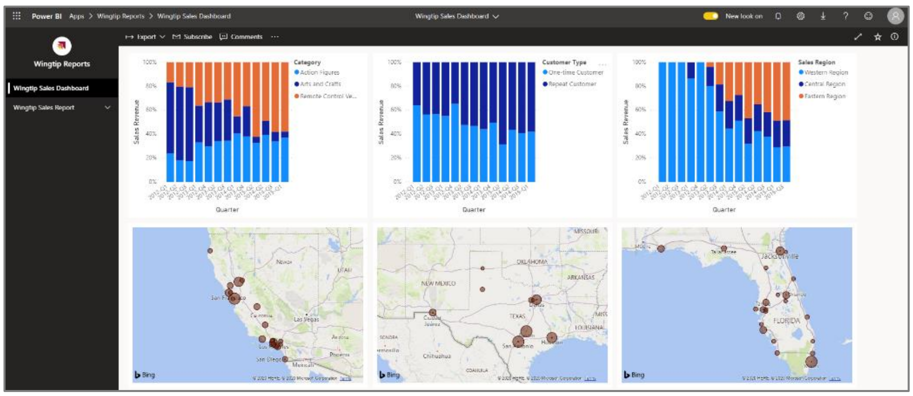


g) The app should install and then be displayed as shown in the following screenshot.

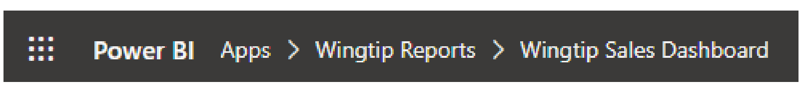
h) Click on the tile for the **Wingtip Reports** app to launch it,



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

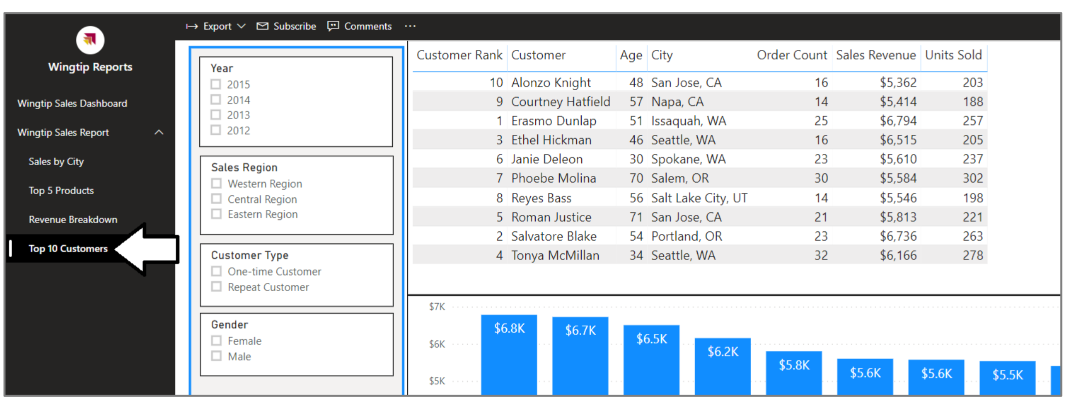


j) Note the breadcrumb at the top shows a path with the app and the dashboard inside the app.



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.