Microsoft Power BI

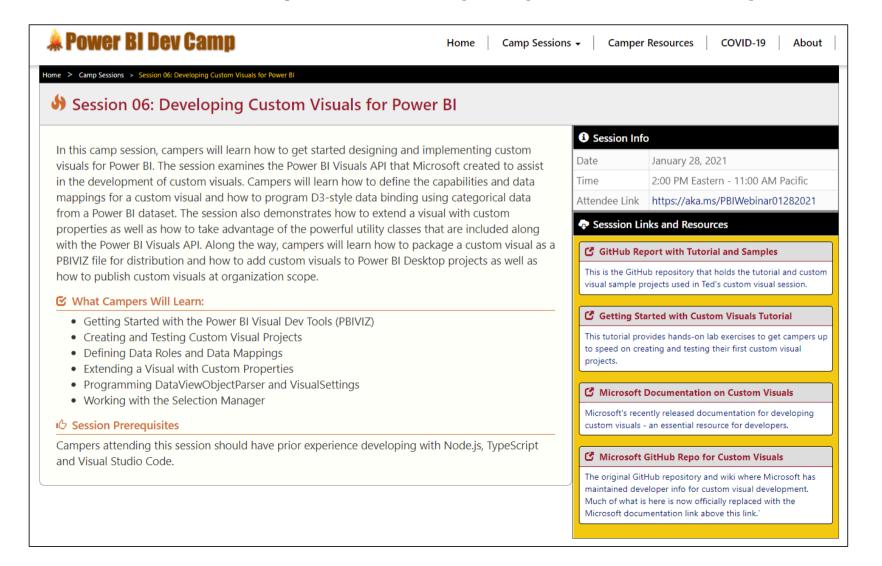
Power BI Dev Camp – Session 6 Developing Custom Visuals for Power BI

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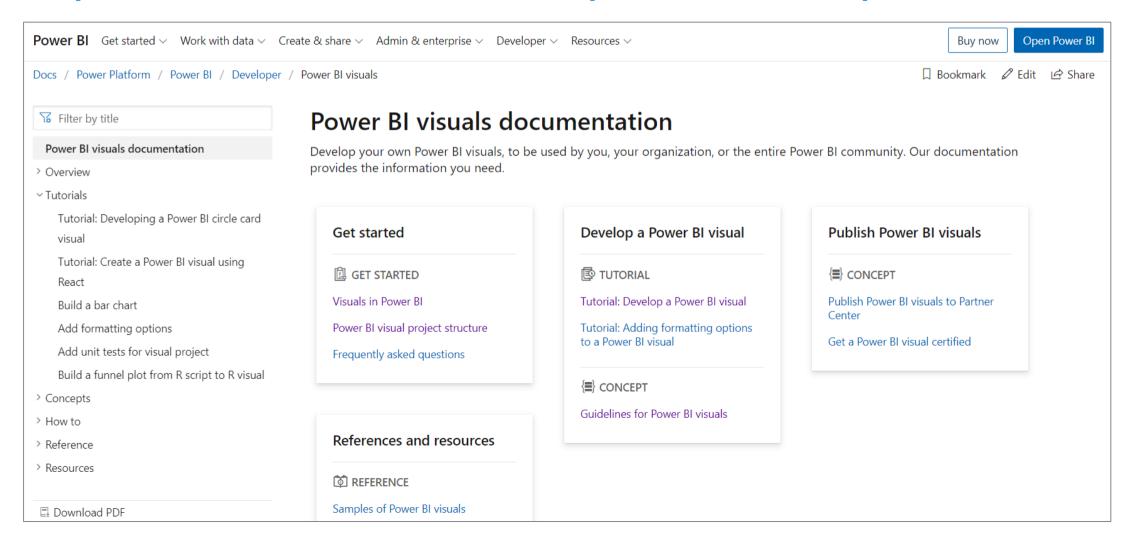
Welcome to Power BI Dev Camp

Power BI Dev Camp Portal - https://powerbidevcamp.net



Microsoft Custom Visual Documentation

https://docs.microsoft.com/en-us/power-bi/developer/visuals/



Agenda

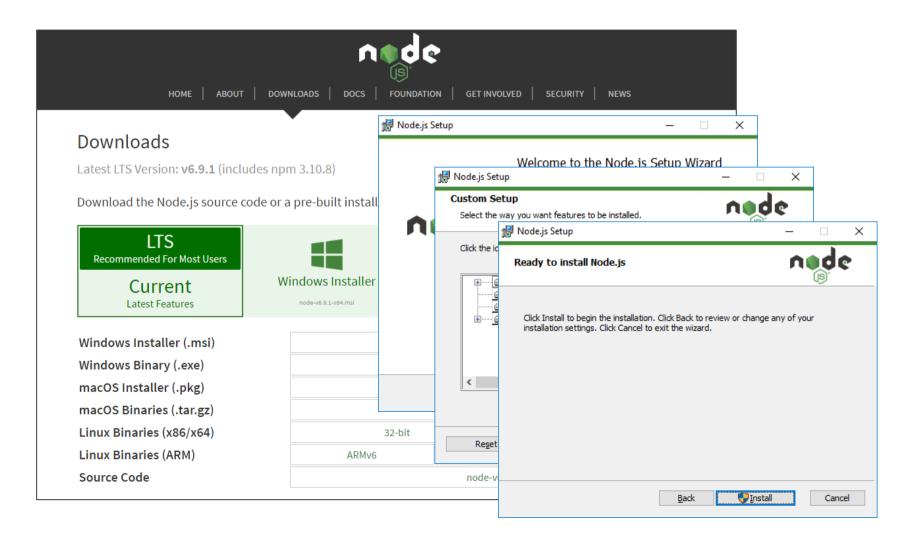
- Installing the Power BI Developer Tools
- Creating Your First Custom Visual
- Defining Data Roles and Data Mappings
- Extending a Visual with Custom Properties
- Implementing Highlighting with SelectionManager
- Custom Visual Packaging and Distribution

Installing the Power BI Developer Toolchain

- Install Node.JS
 - Installs Node Package Manage (npm)
- Install Visual Studio Code
 - Lightweight Alternative to Visual Studio for Node.js Development
- Install the Power BI Developer Tools (pbiviz)
 - Install using Node Package Manager (npm)
- Create and install a local self-signed certificate
 - Install using Power BI visuals CLI tool (pbiviz)

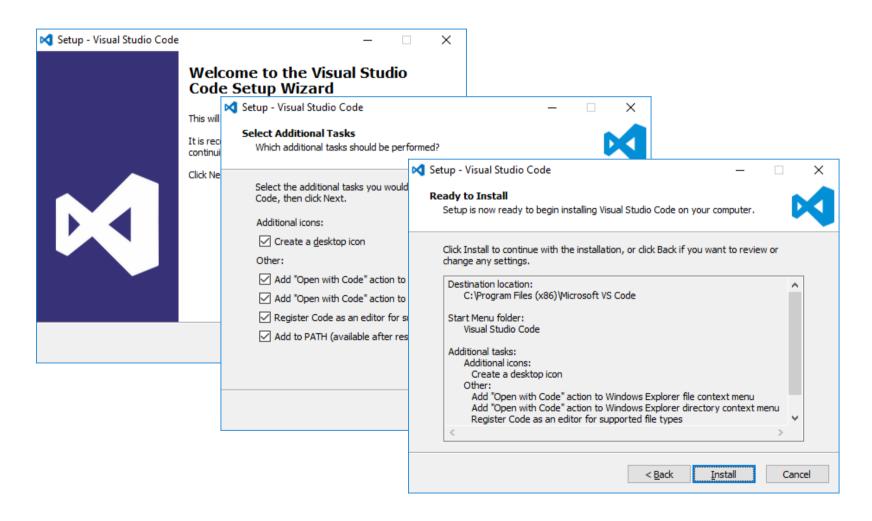
Installing node.js

https://nodejs.org/en/download/



Install Visual Studio Code

http://code.visualstudio.com/



Power BI Visual CLI Tool (PBIVIZ)

- What is the Power BI Custom Visual Tool?
 - Command-line utility for cross-platform dev
 - Use it with Visual Studio or Visual Studio Code
 - Requires that you first install node.js
 - Install by running command from node.js command prompt
 npm install -g powerbi-visuals-tools

```
c:\CustomVisuals>npm install -g powerbi-visuals-tools
C:\Users\TedP\AppData\Roaming\npm\pbiviz -> C:\Users\TedP\AppData\Roaming\npm\node_modules\power
viz.js
+ powerbi-visuals-tools@2.3.0
added 13 packages from 47 contributors, removed 714 packages and updated 27 packages in 20.082s
c:\CustomVisuals>_
```

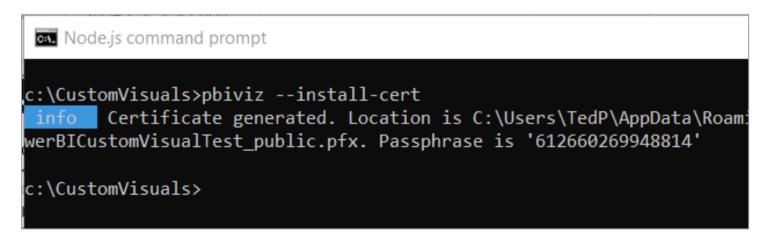
Getting Started with PBIVIZ

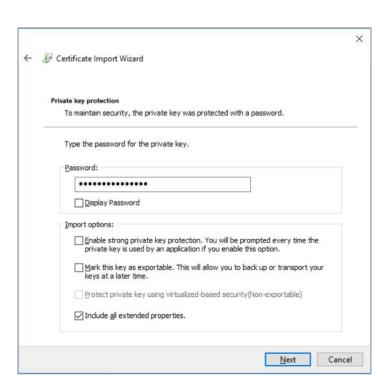
- PBIVIZ.EXE is a command-line utility
 - You execute PBIVIZ commands from the NODE.JS command line

```
Select Node.js command prompt
c:\Student>pbiviz --help
 Usage: pbiviz [options] [command]
 Options:
   -V, --version output the version number
                     Creates and installs localhost certificate
   --install-cert
   -h, --help
                     output usage information
 Commands:
   new [name]
                     Create a new visual
   info
                     Display info about the current visual
                     Start the current visual
   start
                     Package the current visual into a pbiviz file
   package
   update [version] Updates the api definitions and schemas in the current visual.
   help [cmd]
                     display help for [cmd]
```

Creating a Certificate for Local Testing

- PBIVIZ provide local web server for testing & debugging
 - Web server runs locally on developer's workstation in Node.js
 - Makes it possible to test custom visuals in Power BI Service
 - Custom visual resources served up from https://localhost
 - Setup requires creating self-signed SSL certificate
 - SSL certificate created using pbiviz --install-cert command
 - You must copy a passphrase to properly install the certificate





Installing the SSL Certificate

- Installing certificate enables SSL through https://localhost
 - Installing certificate is a one time operation not once per project
 - SSL certificate installed using pbiviz --install-cert command
 - Running --install-cert command starts Certificate Import Wizard

```
Node.js command prompt

c:\Student>pbiviz --install-cert

info Use '15581865083792024' passphrase to install PFX certificate.

c:\Student>_
```

The Certificate Import Wizard

- Wizards steps you through process of installing certificate
 - You enter certificate passphrase as part of installation process





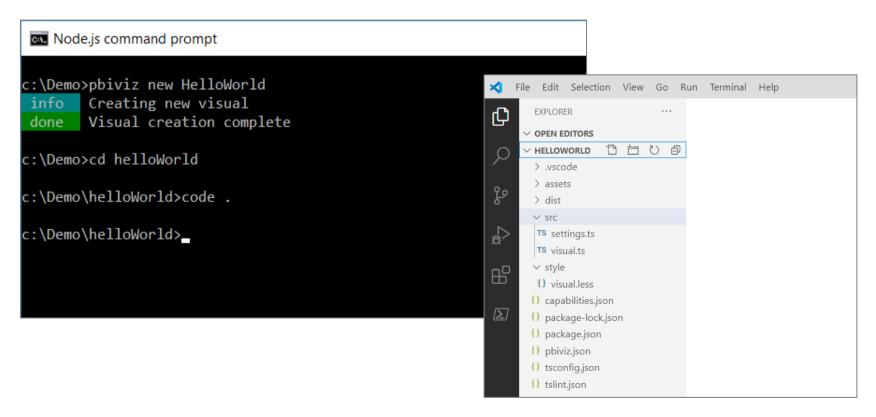


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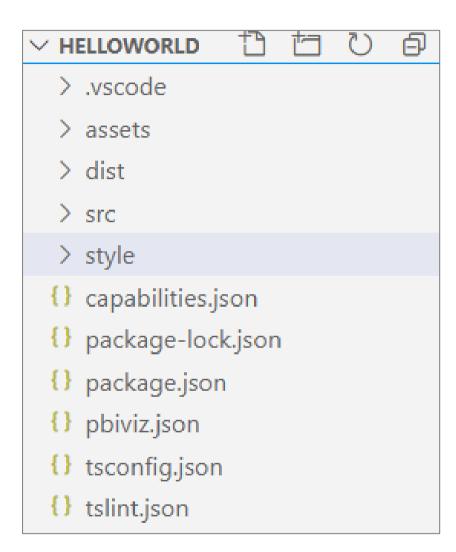
Creating a New Custom Visual Project

- Creating a new project
 pbiviz new <ProjectName>
- Open the Project with Visual Studio Code
 code



Top-level project files

- package.json
 - Used by npm to manage packages
- pbiviz.json
 - Main manifest file for your custom visual project
- capabilities.json
 - File used to define visual capabilities
- tsconfig.json & tslint.json
 - Typescript compiler settings



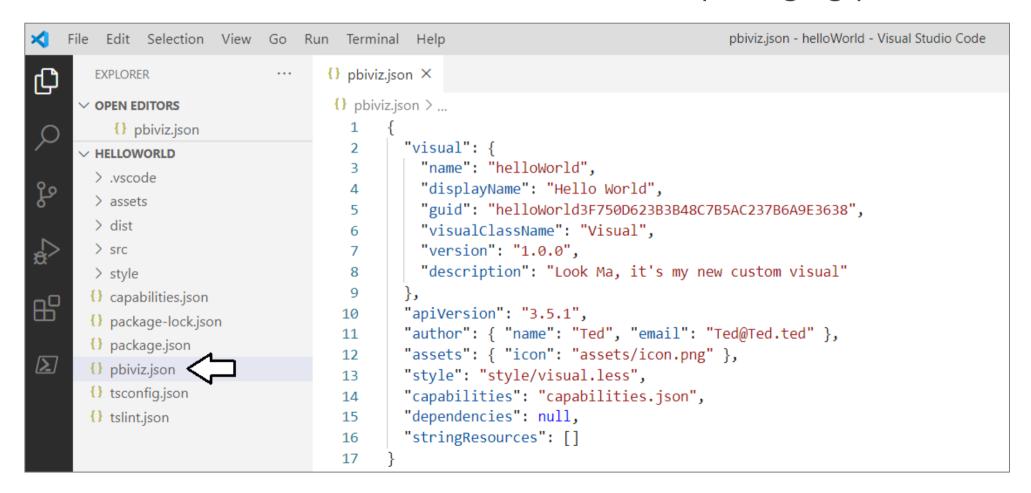
Package.json

```
VIZ01
  > vscode
  assets
  > node_modules
  > src
  > style
 {} capabilities.json
    package-lock.json
    package.json
 {} pbiviz.json
```

```
{} package.json > ...
        "name": "visual",
  2
         ▶ Debug
        "scripts": {
           "pbiviz": "pbiviz",
  4
           "start": "pbiviz start",
          "package": "pbiviz package",
           "lint": "tslint -c tslint.json -p tsconfig.json"
  8
         "dependencies": {
           "@babel/runtime": "7.6.0",
 10
           "@babel/runtime-corejs2": "7.6.0",
 11
           "@types/d3": "5.7.2",
 12
           "d3": "5.12.0",
 13
           "powerbi-visuals-utils-dataviewutils": "2.2.1",
 14
           "powerbi-visuals-api": "~2.6.1",
 15
           "core-js": "3.2.1"
 16
 17
         "devDependencies": {
 18
           "ts-loader": "6.1.0",
 19
           "tslint": "^5.18.0",
 20
           "tslint-microsoft-contrib": "^6.2.0",
 21
 22
           "typescript": "3.6.3"
 23
 24
```

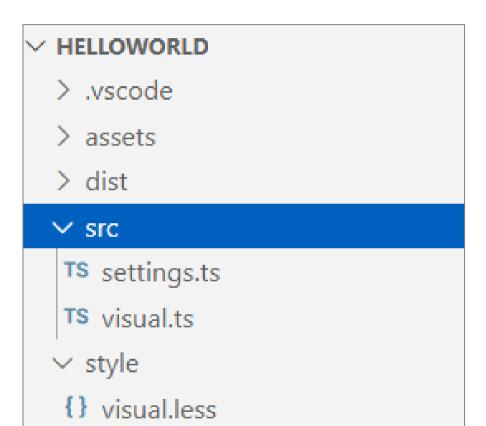
The pbiviz.json File

- Acts as top-level manifest file for custom visual project
 - Contains information used in final visual PBIVIZ packaging process



Visual Source Files

- src/visual.ts
 - visual class definition
- src/settings.ts
 - helper class to manage visual properties
- style/visual.less
 - CSS used to style custom visual



Authoring a Custom Visual Class

- Custom visual is a class that implements IVisual
 - Minimum visual class must implement IVisual interface and provide update method
 - Parameterized constructor used to create visual elements
 - update method performs visual rendering

```
File Edit Selection View Go Run Terminal Help
                                                                                        visual.ts - viz01 - Visual Studio Code
   EXPLORER
                                        TS visual.ts X
  > OPEN EDITORS
                                        src > TS visual.ts > ...
                                                import powerbi from "powerbi-visuals-api";

∨ VIZ01

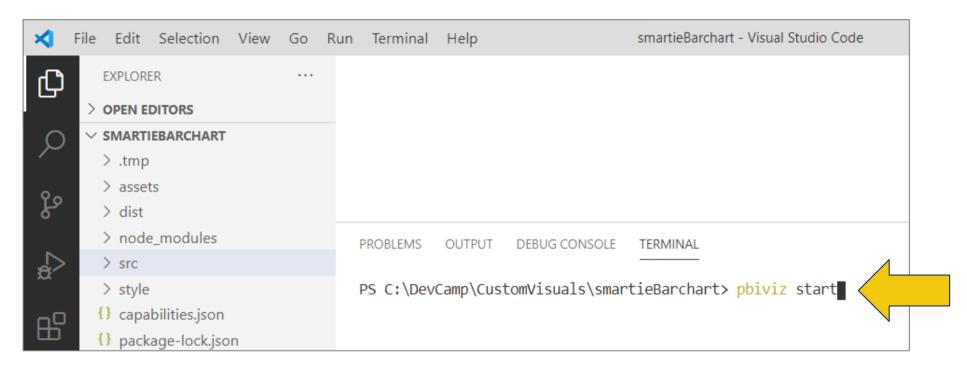
                                                import VisualConstructorOptions = powerbi.extensibility.visual.VisualConstructorOptions;
   .vscode
                                                import VisualUpdateOptions = powerbi.extensibility.visual.VisualUpdateOptions;
   ) assets
                                                import IVisual = powerbi.extensibility.visual.IVisual;
   > node modules

✓ src

                                                import "./../style/visual.less"
    TS settings.ts
                                                export class Visual implements IVisual {
    TS visual.ts
                                           9
   > style
                                          10
                                                    private target: HTMLElement;
  {} capabilities.json
                                                    private updateCount: number;
                                          11
  {} package-lock.json
                                          12
  {} package.json
                                                    constructor(options: VisualConstructorOptions) {
                                          13
  {} pbiviz.json
                                          14
                                                        console.log('Visual constructor', options);
  {} tsconfig.ison
                                          15
                                                        this.target = options.element;
                                          16
                                                        this.updateCount = 0;
  {} tslint.json
                                          17
                                          18
                                          19
                                                    public update(options: VisualUpdateOptions) {
                                                        console.log('Visual update', options);
                                          20
```

Visual Studio Code Terminal

Use the Terminal to execute commands with npm and pbiviz



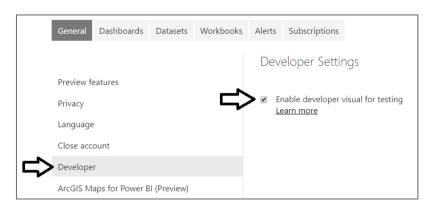
Running a Custom Visual Project

- Visual projects run & tested using pbiviz start command
 - Run pbiviz start from Visual Studio Code from Integrated console
 - Command starts local debugging session in node.js

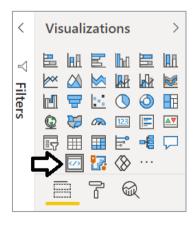
```
PS C:\Student\CustomVisuals\viz01> pbiviz start
       Starting server...
info Start preparing plugin template
i wds]: Generating SSL Certificate
i | wds]: Project is running at https://localhost:8080/webpack-dev-server/
i | wds]: webpack output is served from /assets
i | wds]: Content not from webpack is served from C:\Student\CustomVisuals\viz01\.tmp\drop
 info Finish preparing plugin template
 info Start packaging...
 info Finish packaging
Webpack Bundle Analyzer saved report to C:\Student\CustomVisuals\viz01\webpack.statistics.dev.html
      Compiled successfully in 1966ms
```

The Developer Visual

Must be enabled on Developer Settings page



Provides new Developer visual for testing and debugging custom visuals





Working with the Developer Visual

- Developer visual loads custom visual from node.js
 - Makes it possible to test custom visual inside Power BI Service
 - Developer visual provides toolbar with development utilities



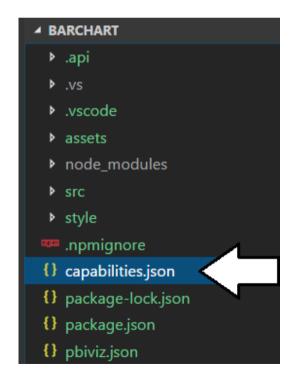


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Visual Capabilities

- Visual capabilities defined inside capabilities.json
 - dataRoles defines the field wells displayed on Fields pane
 - dataViewMappings defines the type of DataView used by visual
 - objects defines custom properties for visual

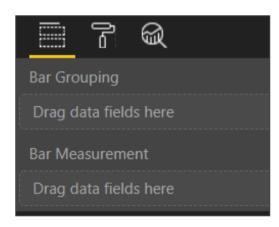


```
capabilities.json **

{
     "dataRoles": ...,
     "dataViewMappings": ...,
     "objects": ...
}
```

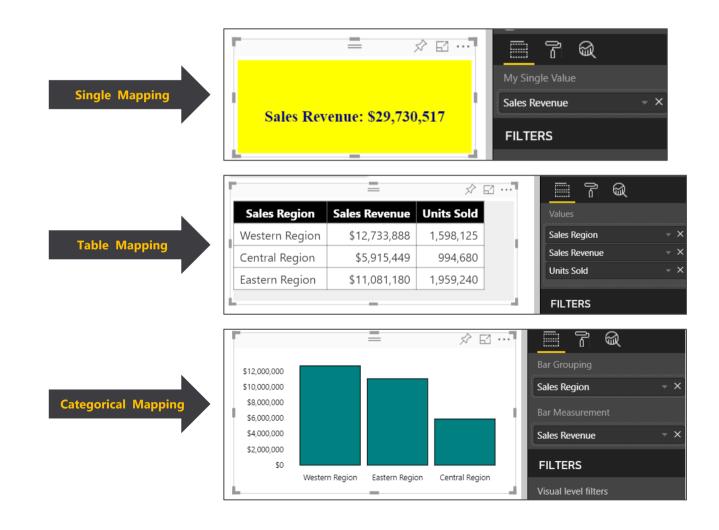
Data Roles

- DataRoles define how fields are associated with visual
 - Each dataRole is display as field well in the Field pane
 - dataRoles can be defined with conditions and data mappings



Data Mapping Modes

- Power BI visual API provides several mapping modes
 - Single
 - Table
 - Categorical
 - Matrix
 - Tree



Developer Visual DataView

- Developer visual supports DataView mode
 - Allows you to see and explore data mapping
 - Allows you to see metadata for custom properties

```
\Theta
    \Theta{
             "tree": \bigoplus\{\ldots\},
             "categorical": \bigoplus\{\ldots\},
             "table": \bigoplus \{\ldots\},
             "matrix": \bigoplus \{\ldots\},
             "single": undefined,
             "metadata": \bigoplus \{\ldots\}
```

Designing with View Model

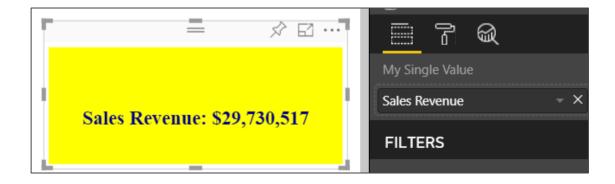
- Best practice involves creating view model for each visual
 - View model defines data required for rendering
 - createViewModel method gets data to generate view model
 - update method calls createViewModel to get view model

```
export interface BarchartDataPoint {
   Category: string;
   Value: number;
}

export interface BarchartViewModel {
   IsNotValid: boolean;
   DataPoints?: BarchartDataPoint[];
   Format?: string;
   SortBySize?: boolean;
   XAxisFontSize?: number;
   YAxisFontSize?: number;
   BarColor?: string;
}
```

Single Mapping Example: oneBigNumber

- dataRole can use dataViewMapping mode of single
 - For visuals like Card which only display single value
 - Condition can define that a dataRole requires exactly one measure



Programming in Single Mapping Mode

- Single mapping easy to access through visuals API
 - DataView object provides single.value property
 - value property defined as PrimativeValue { bool | number | string }
 - PrimativeValue must be explicitly cast
 - Other measure properties available through column metadata

```
"tree": \bigoplus \{\ldots\},
"categorical": \bigoplus\{\ldots\},
"table": \bigoplus \{\ldots\},
"matrix": \bigoplus \{\ldots\},
"single": ⊖{
     "column": \bigoplus \{\ldots\},
     "value": 29730517.14
"metadata": ⊖{
     "columns": ⊖
                "roles": \bigoplus\{\ldots\},
                "type": \bigoplus \{\ldots\},
               "format": "\\$#,0;(\\$#,0);\\$#,0",
                "displayName": "Sales Revenue",
                "queryName": "Sales.Sales Revenue",
                "expr": \bigoplus\{\ldots\},
                "index": 0,
                "isMeasure": true
```

```
public update(options: VisualUpdateOptions) {
    // get DataView object
    this.dataView = options.dataViews[0];

    // get single value
    var value: number = <number>this.dataView.single.value;

    // get metadata to discover field name and format string
    var column: DataViewMetadataColumn = this.dataView.metadata.columns[0];
    var valueName: string = column.displayName
    var valueFormat: string = column.format;
```

Using the Power BI Formatting Utilities

- Used to format values using Power BI formatting strings
 - Requires installing powerbi-visuals-utils-formattingutils package

```
var value: number = <number>this.dataView.single.value;
var column: DataViewMetadataColumn = this.dataView.metadata.columns[0];
var valueName: string = column.displayName
var valueFormat: string = column.format;

var valueFormatterFactory = powerbi.extensibility.utils.formatting.valueFormatter;
var valueFormatter = valueFormatterFactory.create({
   format: valueFormat,
   formatSingleValues: true
});

var valueString: string = valueFormatter.format(value);
```

```
"column": ⊖{
    "roles": ⊕{...},
    "type": ⊕{...},
    "format": "\\$#,0;(\\$#,0);\\$#,0",
    "displayName": "Sales Revenue",
    "queryName": "Sales.Sales Revenue",
```



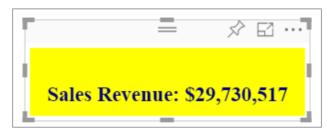
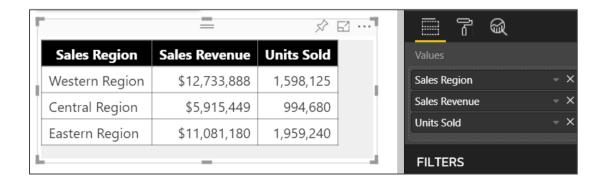




Table Mapping Example: Snazzy Table

- dataRole can use dataViewMapping mode of table
 - For visuals which display rows & columns for ordered set of fields
 - condition can define number of fields that can be added



Programming in Table Mapping Mode

- Table mapping data accessible through visuals API
 - DataView object provides table property
 - table property provides columns property and rows property

```
"table": ⊖{
   "columns": ⊖
             "roles": \bigoplus \{\ldots\},
             "type": \bigoplus \{\ldots\},
             "format": undefined,
             "displayName": "Sales Region",
             "queryName": "Customers.Sales Region",
             "expr": \bigoplus \{\ldots\},
             "index": 0.
             "identityExprs": ⊕[ ... ]
    "identity": \bigoplus[ ... ],
    "identityFields": ⊕[ ... ],
    "rows": ⊖
             "Western Region",
             12733888.2,
             1598125
```

```
public update(options: VisualUpdateOptions) {
   var dataView: DataView = options.dataViews[0];
   var table: DataViewTable = dataView.table;
   var columns: DataViewMetadataColumn[] = table.columns;
   var rows: DataViewTableRow[] = table.rows;
```

Categorical Mapping Example: Barchart

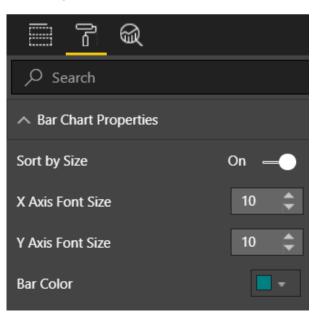
- dataRole can use dataViewMapping mode of categorical
 - This is the most common type of data mapping
 - For visuals which divide data into groups for analysis
 - Groups defined as columns and values defined as measures

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Extending Visuals with Custom Properties

- Custom properties defined using objects
 - You can define one or more objects in capabilities.json
 - Each object defined with name, display name and properties
 - object properties automatically persistent inside visual metadata
 - properties can be seen and modified by user in Format pane
 - Custom properties require extra code to initialize Format pane



DataViewObjectParser and VisualSettings

- Power BI visual utilities provide DataViewObjectParser
 - Abstracts away tricky code to initialize and read property values

```
module powerbi.extensibility.visual {
   import DataViewObjectsParser = powerbi.extensibility.utils.dataview.DataViewObjectsParser;
   export class VisualSettings extends DataViewObjectsParser {
    public barchartProperties: BarchartProperties = new BarchartProperties();
   }
   export class BarchartProperties {
    sortBySize: boolean = true;
    xAxisFontSize: number = 10;
    yAxisFontSize: number = 10;
    barColor: Fill = { "solid": { "color": "teal" } };
}
```

Mapping Object Properties to VisualSettings

- VisualSettings class must map to named objectnamed
 - VisualSetting class contains named field that maps to object name
 - Named field based on custom class with mapped properties
 - Object & property names must match what's in capabilities.json

Initializing Objects in the Format Pane

- Visual must initialize properties in Format pane
 - Visual must implement enumerateObjectInstances
 - VisualSettings makes this relatively easy
 - Extra code required to make property appear as spinner

```
public enumerateObjectInstances(options: EnumerateVisualObjectInstancesOptions): VisualObjectInstanceEnumeration {
  // register object properties
 var visualObjects: VisualObjectInstanceEnumerationObject =
    <VisualObjectInstanceEnumerationObject>VisualSettings
      .enumerateObjectInstances(this.settings, options);
                                                                           O Search
  // configure spinners for integers properties
  visualObjects.instances[0].validValues = {
 yAxisFontSize: { numberRange: { min: 10, max: 36 } }, };
    xAxisFontSize: { numberRange: { min: 10, max: 36 } },
                                                                          Bar Chart Properties
                                                                         Sort by Size
                                                                                                  On —
 // return visual object collection
  return visualObiects:
                                                                          X Axis Font Size
                                                                                                    10
                                                                                                    10
                                                                          Y Axis Font Size
                                                                          Bar Color
```

Retrieving Property Values

- Property values persisted into visual metadata
 - Properties not persisted white they still retain default values

Property values retrieved using VisualSettings object

```
public update(options: VisualUpdateOptions) {
   if (options.dataViews[0]) {
      // create VisualSettings object
      this.settings = VisualSettings.parse(options.dataViews[0]) as VisualSettings;
      // retrieve property values
      var sortBySize: boolean = this.settings.barchartProperties.sortBySize
      var xAxisFontSize: number = this.settings.barchartProperties.xAxisFontSize;
```

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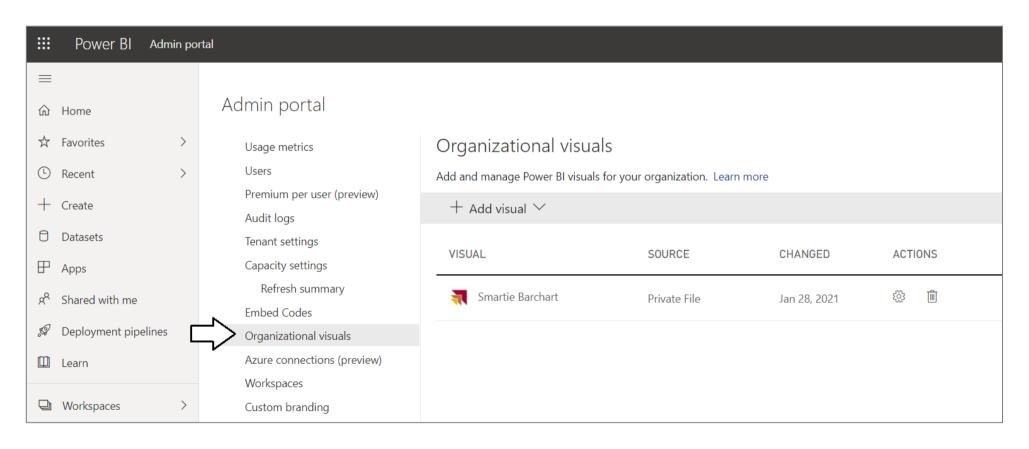
Packaging A Custom Visual for Deployment

- Use the pbiviz package command to build PBIVIZ file for distribution
 - Build versioned package for distribution
 - Build version for testing in Power BI Desktop

```
Usage: pbiviz package [options]
Options:
  -t, --target [target]
                                        Enable babel loader to compile JS into ES5 standart (default: "es5")
                                        Produces a folder containing the pbiviz resource files (js, css, json) (default: false)
  --resources
                                        Doesn't produce a pbiviz file (must be used in conjunction with resources flag)
  --no-pbiviz
                                        Doesn't minify the js in the package (useful for debugging)
  --no-minify
                                        Doesn't include a plugin declaration to the package
  --no-plugin
  -c, --compression <compressionLevel>
                                        Enables compression of visual package (default: "6")
  -h, --help
                                        output usage information
```

Organizational Visuals Gallery

Make custom visuals available on organization-wide basis



Summary

- ✓ Installing the Power BI Developer Tools
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Get Ready for Next Month...



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About

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Session 07: Developing with .NET 5 and App-Owns-Data Embedding

This session focuses on developing custom applications in .NET 5 using the Power BI APIs and the App-Owns-Data embedding model. Campers will then learn how to program Azure AD authentication using Microsoft's most recent Authentication Library named Microsoft.Identity.Web. This session will teach developers how to implement app-owns-data embedding using the Power BI Service API combined together with the Power BI JavaScript API.

The session will also explore advanced development topics such as adding TypeScript support to a Visual Studio Code development project and programming the Power BI Service API to generate multi-resource embed tokens

What Campers Will Learn:

- Developing with .NET 5 Primer
- Authentication with Microsoft.Identity.Web
- Calling the Power BI Service API
- Programming the Power BI JavaScript API
- Adding TypeScript Support to a .NET 5 Project
- Programming with Multi-Resource Embed Tokens

1 Session Prerequisites

Campers should know how to program in C# and JavaScript as well as how develop custom web application using ASP.NET MVC.

	Session Info	
	Date	February 25, 2021
	Time	2:00 PM Eastern - 11:00 AM Pacific
	Attendee Link	https://aka.ms/PBIWebinar02252021

Questions