

Lab 01A

Getting Started

Overview

The estimated time to complete the lab is 15 minutes

In this lab, you will sign in to the Power BI service, and then prepare a Power BI Desktop report.

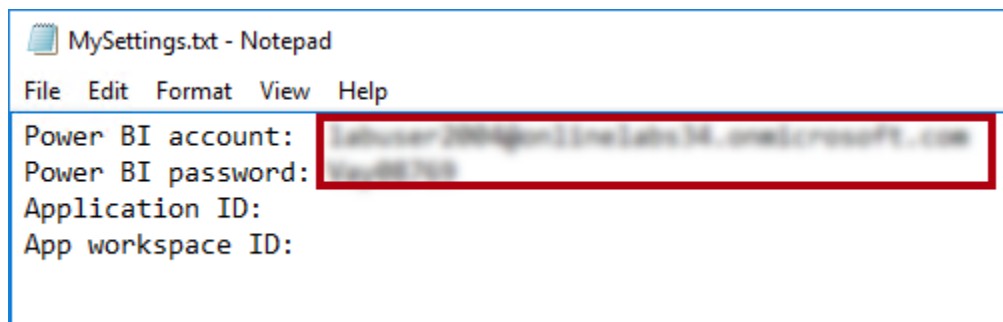
Signing In to Power BI

In this exercise, you will sign in to Power BI, and verify your account license.

Signing In to Power BI

In this task, you will sign in to Power BI.

1. Open the <CourseFolder>\PowerBIDevIAD\MySolution\MySettings.txt file in Notepad.
2. Enter the Power BI account and password provided to you.



*You will require the Power BI credentials when embedding Power BI content in **Lab 02A**.*

3. Save the **MySettings.txt** file.
4. Leave the **MySettings.txt** file open.

You will be instructed to return to this file in future labs—keep it open while working on all labs.

5. Open Google Chrome.

So that the lab activities do not conflict within existing authentication tokens on your PC, it is recommended that you open an incognito Google Chrome window.



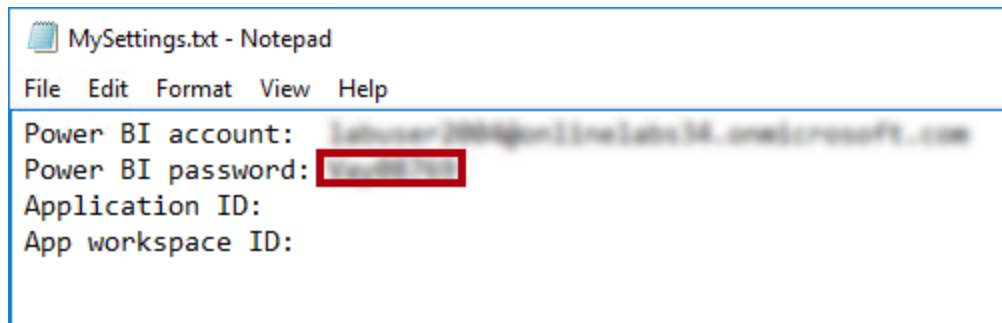
6. To open the Power BI portal, navigate to <https://powerbi.com>.
7. Click **Sign In** (located at the top-right corner).



- Complete the sign in process by copying and pasting the Power BI credentials from the **MySettings.txt** file.
- When prompted to update the password, reenter the provided password, and then enter and confirm a new password.

*Tip: You can simply add two additional characters, like **!!**, to the original password.*

- In the **MySettings.txt** file, update the Power BI account with your new password.

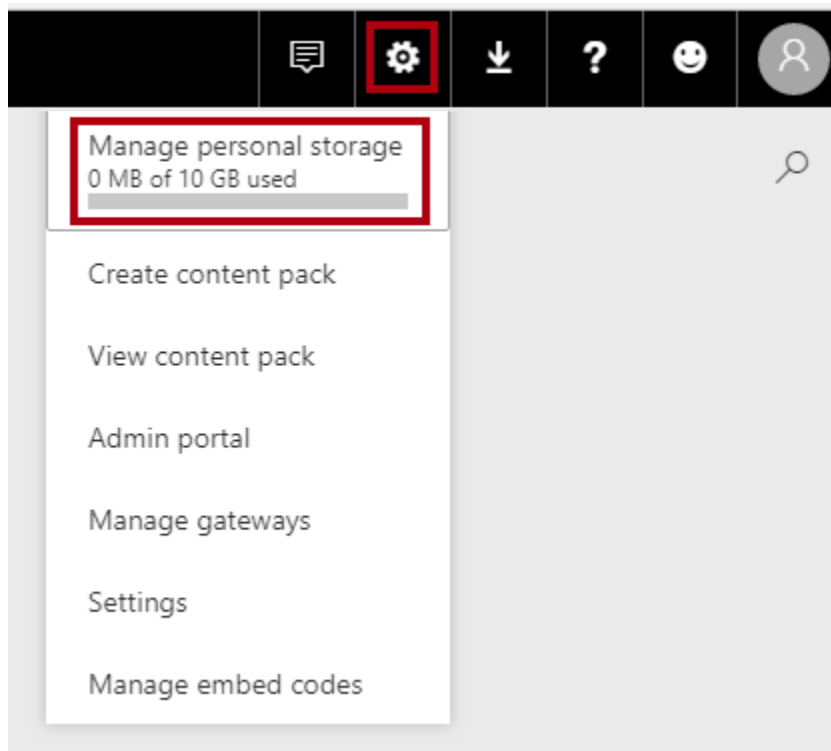


- Save the **MySettings.txt** file.
- During the Power BI sign in process, if prompted to stay signed in, click **Yes**.

Accepting the Power BI Pro Trial License

In this task, you will accept the **Power BI Pro Trial** license.

- At the top-right corner, click the **Settings** command (cog), and then select **Manage Personal Storage**.

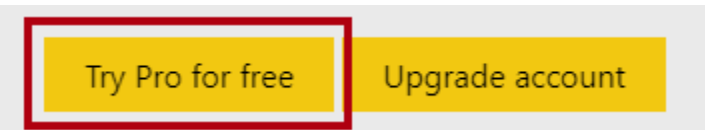


2. At the top-left corner in the pane, notice that your account has a **Free User** license.



A **Power BI Pro** license is required to create an app workspace, and to enable the embedding of Power BI content.

3. To accept the **Power BI Pro Trial** license, at the top-right corner, click **Try Pro for Free**.



4. In the trial dialog window, if you accept the terms and conditions, click **Start Trial**.



The free trial is available for a 60-day period.

5. When the trial has been extended, click **Close**.

Preparing a Power BI Report

In this exercise, you will open a Power BI Desktop template, and then update a parameter value to enable connecting to data stored in your course files. You will then interact with the report, add a report filter, and save the report.

Opening the Power BI Desktop Template

In this task, you will open a Power BI Desktop template, and update a parameter value to enable connecting to data stored in your course files.

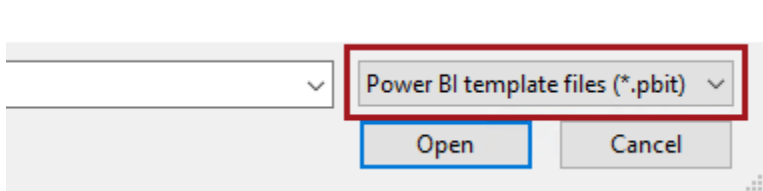
1. Open Power BI Desktop.



2. To close the startup screen, at the top-right corner, click **X**.



3. To open an existing file, click the **File** tab, and then select **Open**.
4. In the **Open** window, navigate to the **<CourseFolder>\PowerBIDevIAD\Lab01A\Assets** folder.
5. At the bottom-right corner, in the dropdown list, select **Power BI Template Files (*.pbit)**.



6. Select the **US Sales Analysis.pbit** file, and then click **Open**.

*The template file will prompt for a parameter value. The parameter is named **DataFilePath**, and its value is used to connect to the data file in your course folder.*

7. In the **US Sales Analysis** window, in the **DataFilePath** box, enter the full file path to the **<CourseFolder>\PowerBIDevIAD\Lab01A\Data\TailspinToys2017-US.xlsx** file.

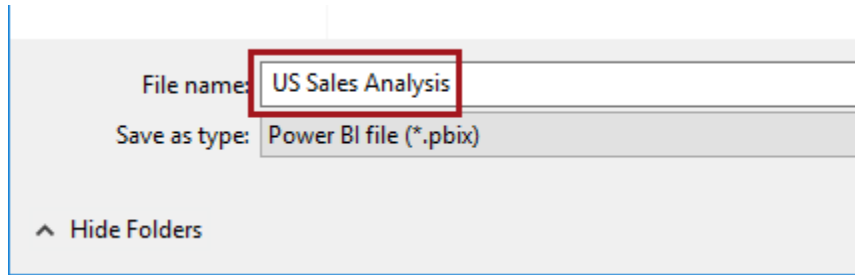
*For convenience, the **DataFilePath** value can be copied from the **<CourseFolder>\PowerBIDevIAD\Lab01A\Assets\Snippets.txt** file.*

*Be sure to replace **<CourseFolder>** with your course folder location, and that the value you enter is the correct file path.*

- Click **Load**.



- Once the data has loaded, to save a copy of the template, on the **File** tab, select **Save**.
- In the **Save As** window, navigate to the **<CourseFolder>\PowerBIDevIAD\MySolution** folder.
- In the **File Name** box, enter **US Sales Analysis**.



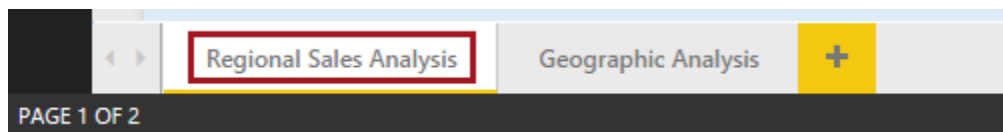
- Click **Save**.

*You will embed this report in **Lab 02A**.*

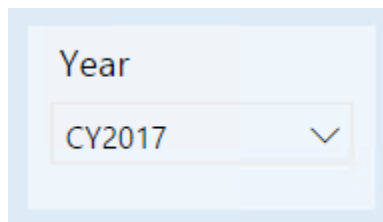
Interacting with the Report

In this task, you will interact with the report.

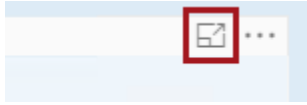
- At the bottom left-corner, notice that the first page of the report is named **Regional Sales Analysis**.



- In the **Year** slicer, expand the dropdown list, select **CY2017**, and then collapse the dropdown list.



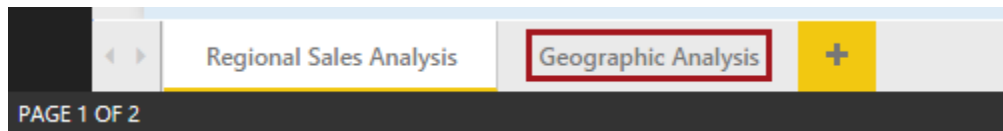
3. To filter by a specific month, in the combo chart, click any column, and notice that all report page visualizations filter by that month.
4. To zoom out the stacked bar chart, hover over **Sales by Demographic** chart, and then click **Focus Mode**.



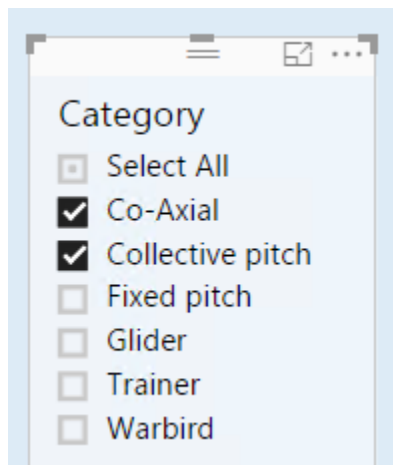
5. To revert, click **Back to Report**.



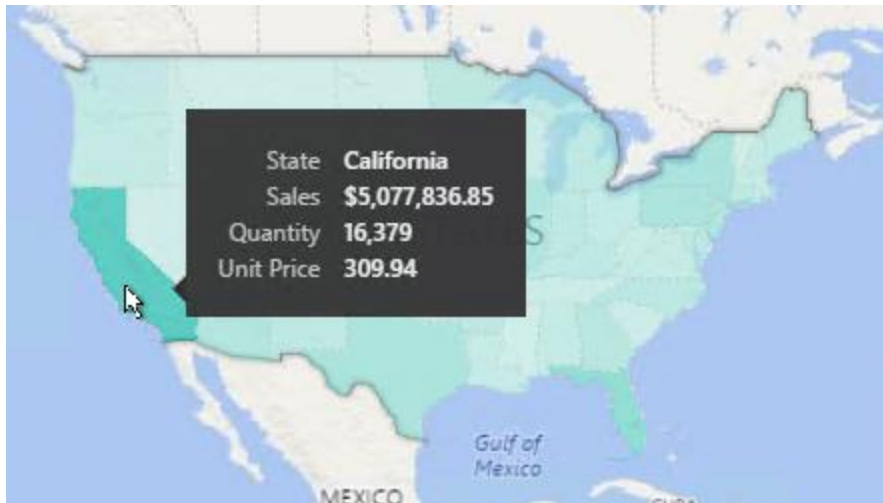
6. To clear the cross-filter, click in a blank area of the combo chart (or click the highlighted column again).
7. Select the **Geographic Analysis** report page.



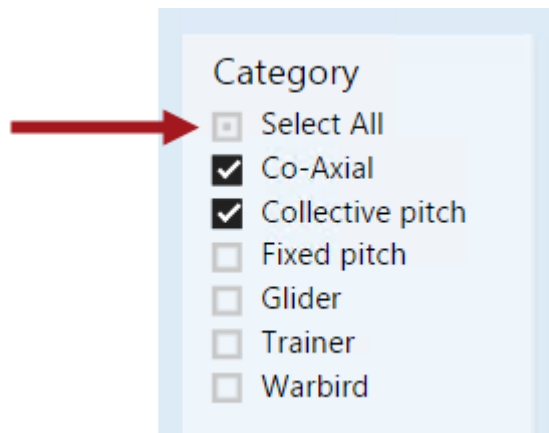
8. Notice that the **Year** slicer is set to **CY2017**.
*The **Year** slicers have been synced between report pages.*
9. Set the **Category** slicer to **Co-Axial** and **Collective pitch**.



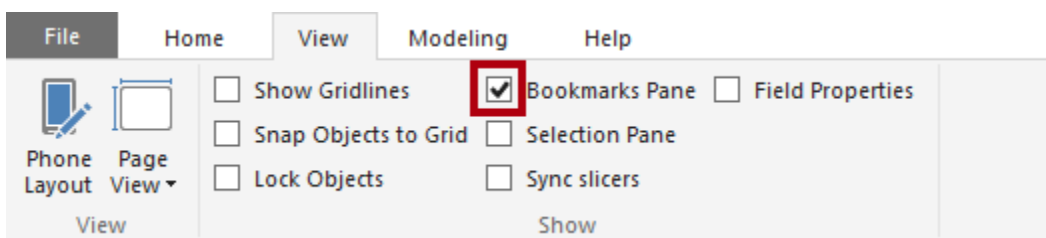
10. In the map visual, to determine the sales value for a state, hover the cursor over the state of **California**.



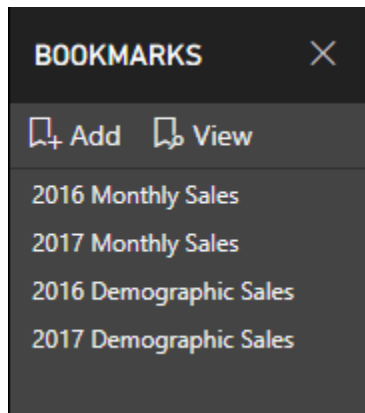
11. Set the **Category** slicer to **Select All**.



12. Return to the **Regional Sales Analysis** page.
13. On the **View** ribbon, check **Bookmarks Pane**.



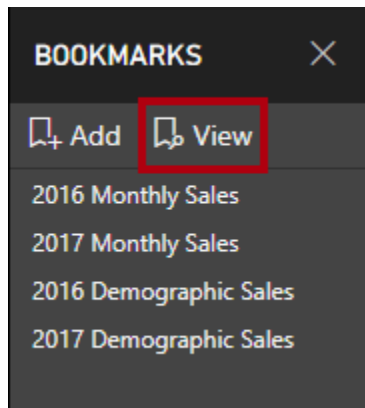
14. In the **Bookmarks** pane (located at the right), notice that four bookmarks exist.



15. Select any bookmark, and notice that the bookmark is applied to the report.

Bookmarks can capture a currently configured view of a report page, including filtering and the state of visuals, and lets users go back to that state by simply selecting the saved bookmark.

16. In the **Bookmarks** pane, click **View**.

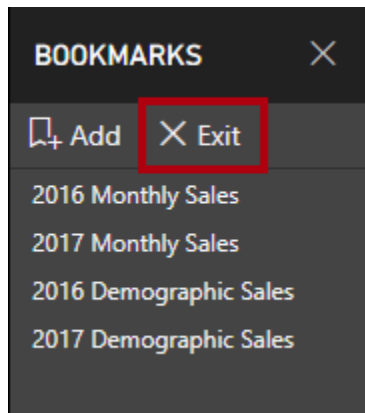


17. Along the bottom of the report, notice the bookmark navigator bar.
18. At the right of the bar, use the arrows to navigate between bookmarks.



A series of bookmarks can be viewed in sequence to tell a story.

19. To exit bookmark mode, in the **Bookmarks** pane, click **Exit**.



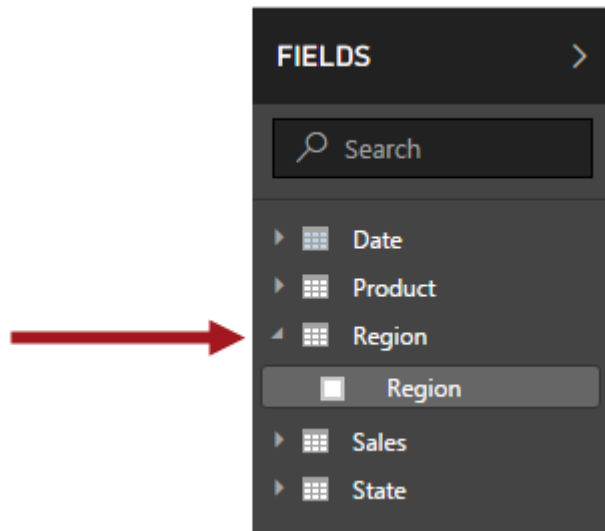
Tip: Or click the X in the bookmark navigator bar.

*You will work with bookmarks and the JavaScript API in **Lab 02C**.*

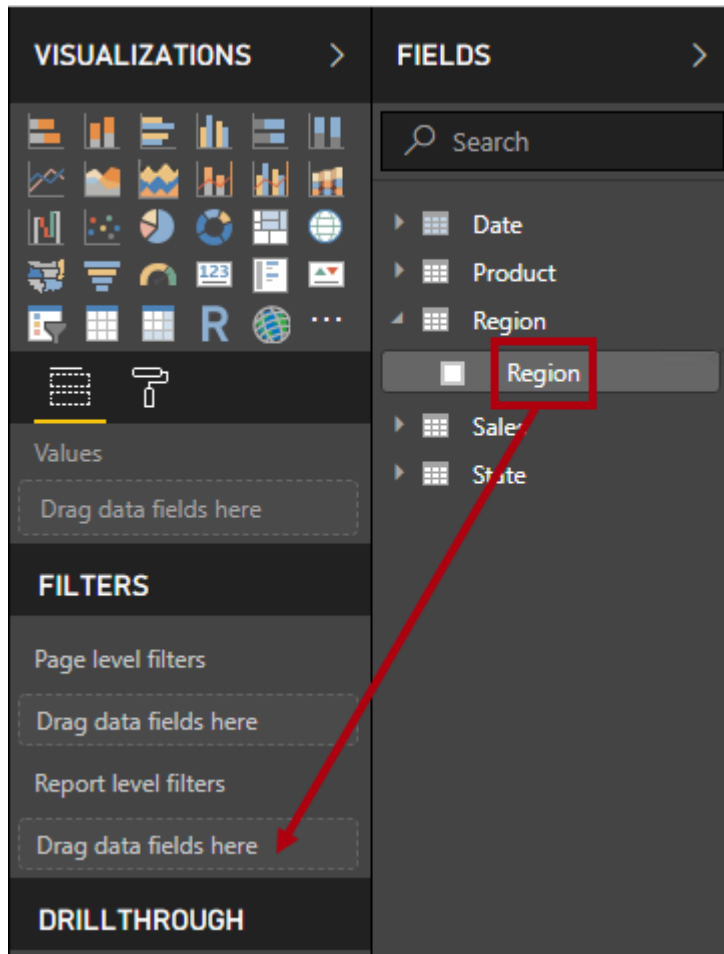
Adding a Report Filter

In this task, you will add a report filter.

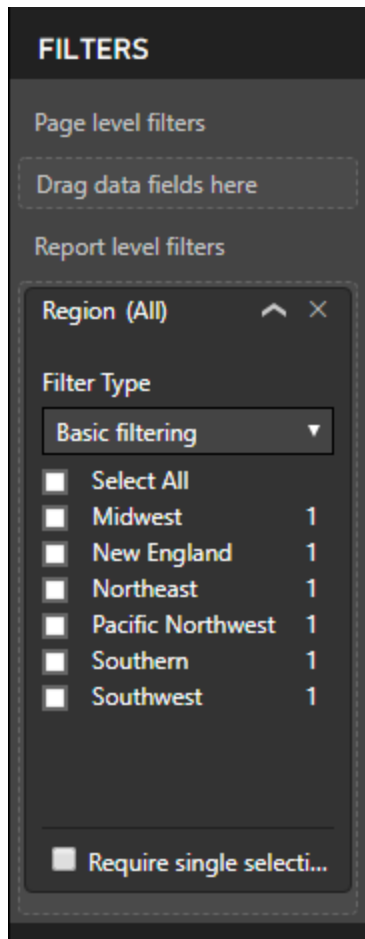
1. In the **Fields** pane (located at the right), expand the **Region** table.



2. Drag the **Region** field (not table) into the **Report Level Filters** drop zone in the **Filters** pane.



3. Notice the basic filtering options, enabling the multi-selection of regions—do not select any regions at this stage.



*You will programmatically pass filter values to the embedded report in **Lab 02C**, and you will review available filter options when enforcing row-level security in **Lab 02D**.*

4. To save the report, on the **File** menu, select **Save**.
5. Leave Power BI Desktop and the report open.

*You will return to Power BI Desktop to create and test security roles, and publish the report to the Power BI service in **Lab 02D**.*

Summary

In this lab, you signed in to the Power BI service, and then prepared a Power BI Desktop report.

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Document Version

#	Date	Author	Comments
2	31-DEC-2017	Peter Myers	This lab content separated from earlier version of lab Lab 01A . Power BI service v13.0.3495.220
3	21-FEB-2018	Peter Myers	Power BI service v13.0.4385.126
4	30-JUN-2018	Peter Myers	Renamed to "Getting Started" Removed creating an app workspace exercise Power BI Desktop v2.59.5135.601 (June 2018) 64-bit