

Power BI Embedded Workshop Guide

Outcome

At the end of this workshop, you will learn how to –

1. Module 1: Embed a Power BI report using [App Owns Data](#) embedding
2. Module 2: Embed Q&A (Question & Answer) for a Power BI dataset
3. Module 3: Understand exporting a visual's data
4. Module 4: Enable data security based on user context

Getting started

1. Open the App Owns Data sample code from your desktop
2. Open the sample in VS Code and run the sample as is

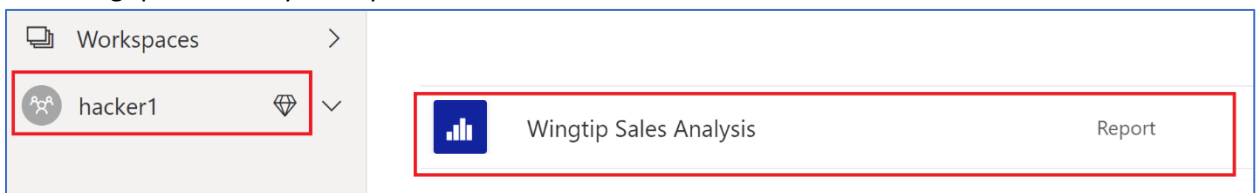
Files to be updated while completing the modules

1. **/appsettings.json**
2. **/wwwroot/js/index.js**
3. **/Services/PBIEmbedService.cs**

Hands-on

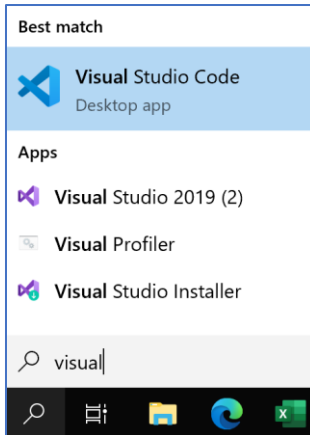
Module 1: Embedding Your First Power BI report

1. Login to your virtual machine with the username and password provided (hacker1/password)
2. Open up a browser and login to powerbi.com with the user and password provided (i.e. hacker1@ /password)
3. Find the workspace related to your hacker# (i.e. hacker1, hacker2, ... hackerXX, etc.) and locate the “Wingtip Sales Analysis” report

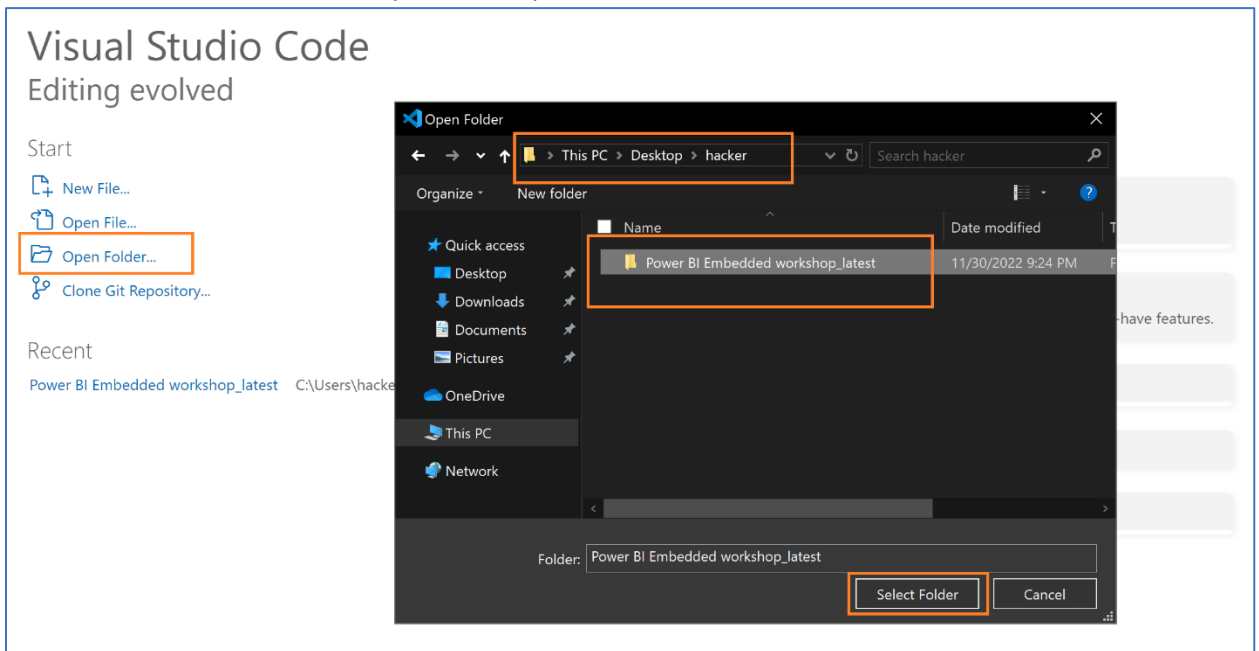


Capture the Workspace ID, Report ID, and Dataset ID for this report and put it into notepad

4. Launch Visual Studio Code – which can be found on your virtual machine



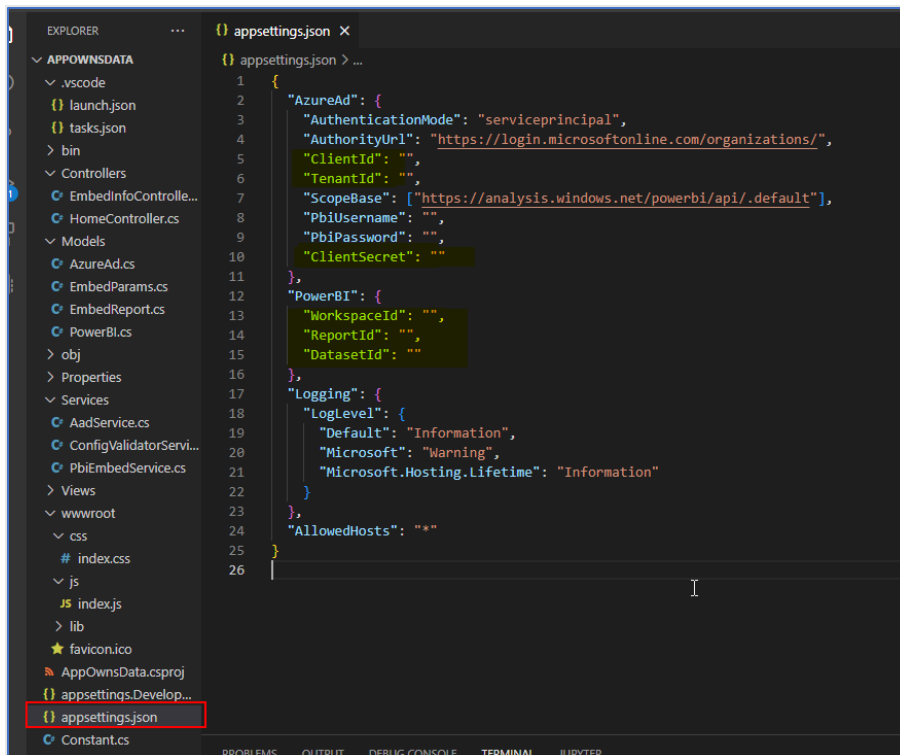
5. In Visual Studio Code – click on “Open Folder” and point to the folder where the solution can be found – this folder should be on your desktop:



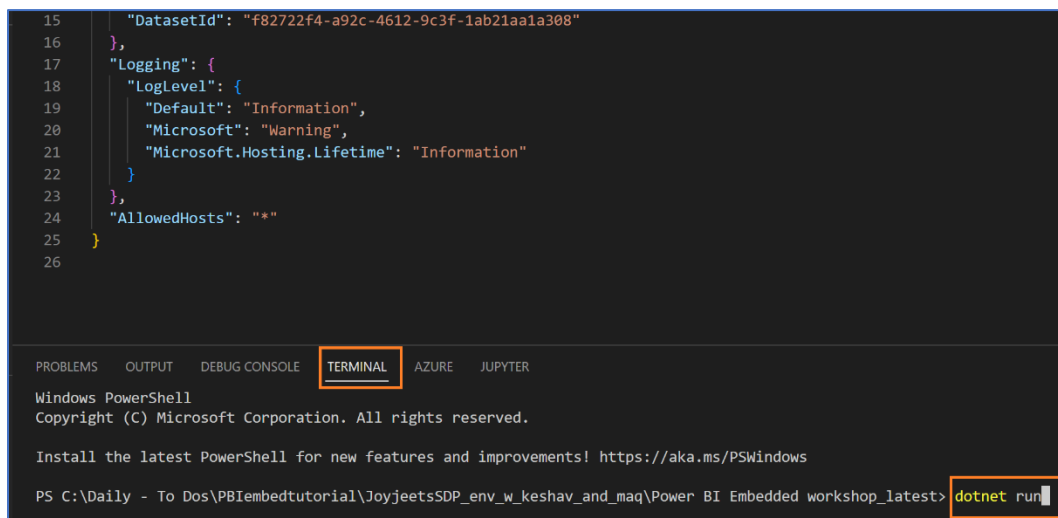
6. Navigate to the `/appsettings.json` file and add/update the Azure AD and Power BI configurations i.e., client ID, tenant ID, client secret, workspace ID, report ID, and dataset ID

Important:

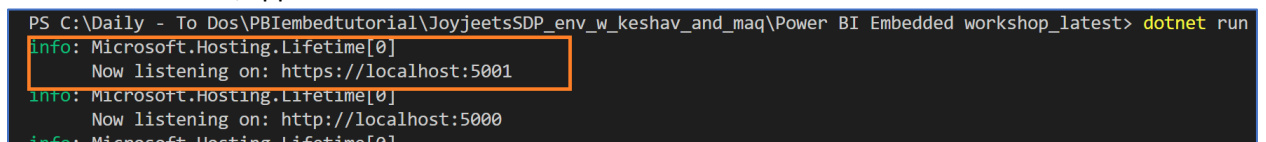
1. Azure AD configurations (client ID, tenant ID, client secret) will be shared with you during the session.
2. For Power BI configuration, you can refer to the earlier steps where you captured workspace ID, report ID, dataset ID



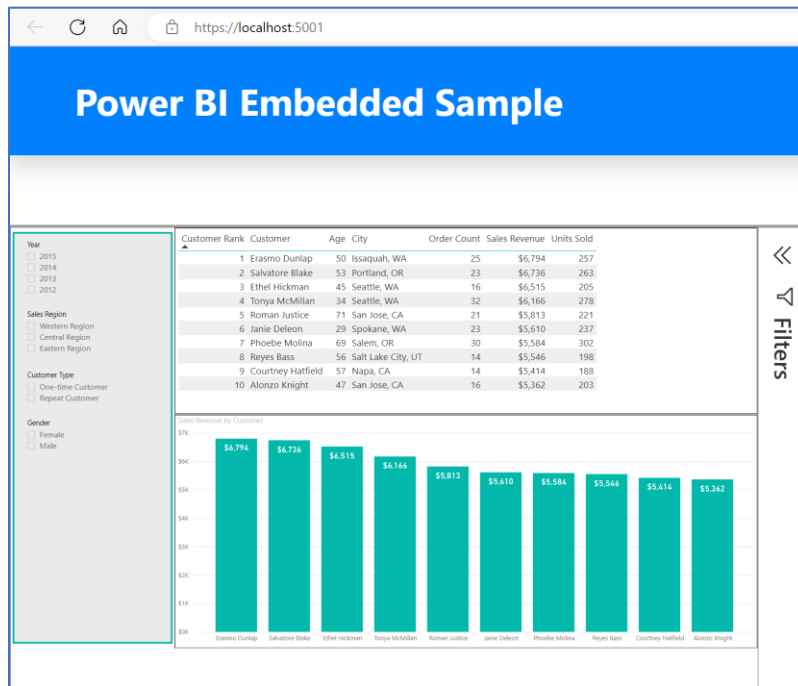
- Click on the Terminal and type in “dotnet run” and Enter to run the sample code to embed the power bi report “Wingtip Sales Analysis” in READ mode.



- Once the code is executed, you can click on the link <https://localhost:5001> as shown below to launch the browser/app:

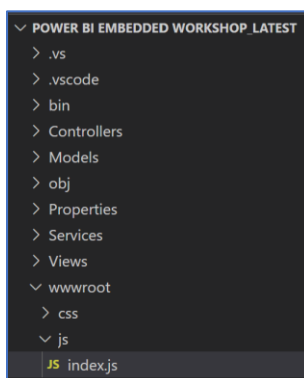


9. Once the browser is launched, you should see a web app that has now embedded your “Wingtip Sales Analysis” report you viewed from Power BI in the earlier steps.



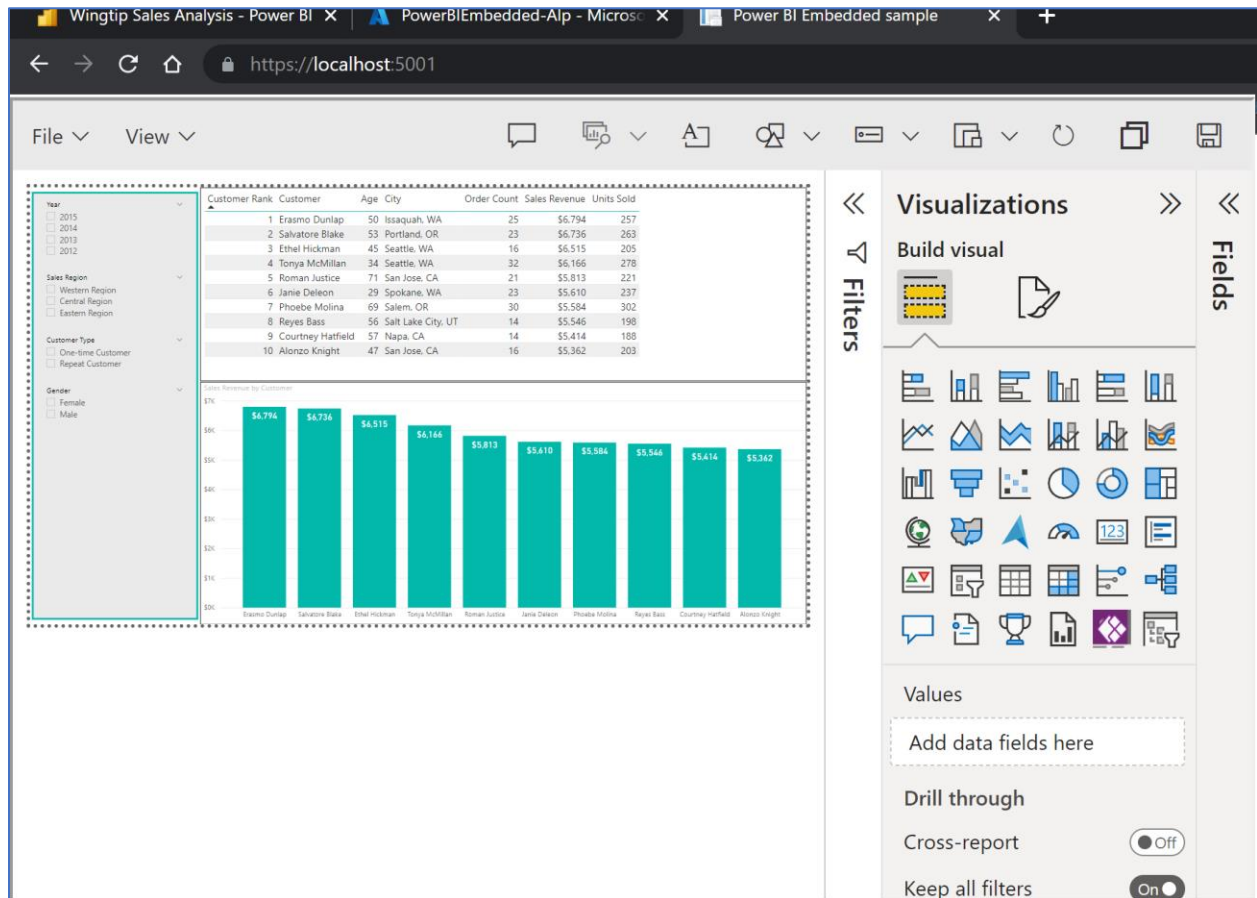
Navigate the report like you did when you were in the power bi service and note the interactivity. Now, leave the browser open and go back to your Visual Studio Code

10. Open `/wwwroot/js/index.js` file. Uncomment the WRITE MODE embedding (i.e., line #59)

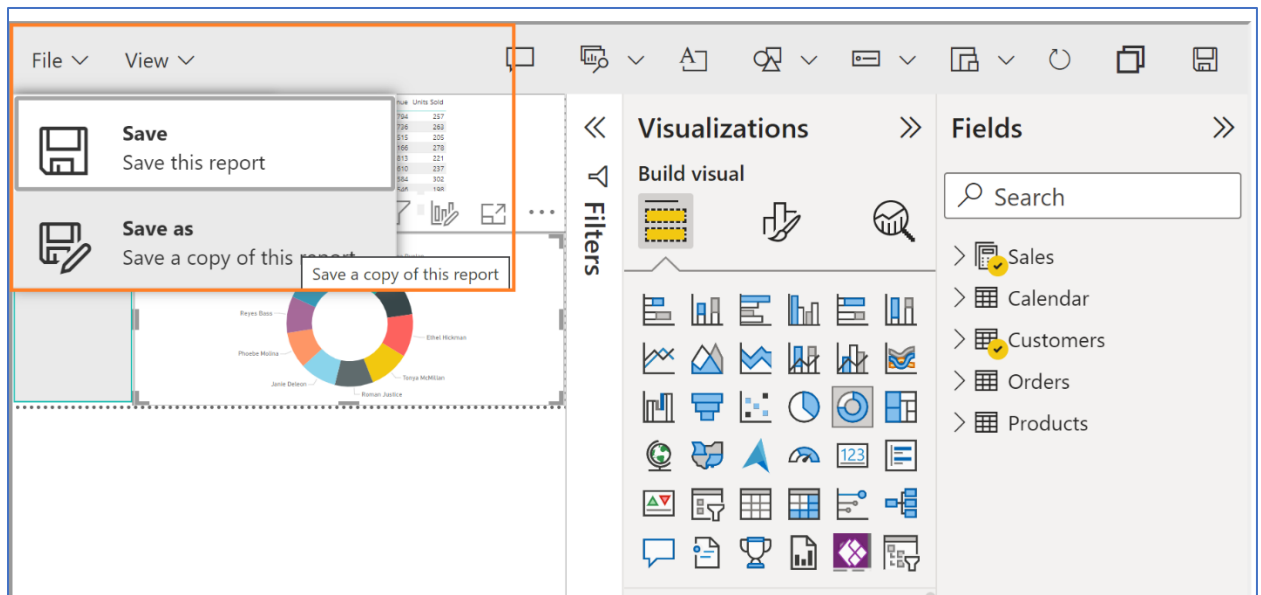


```
57 // Embed Power BI report/QnA when Access token and Embed URL are available
58 var report = powerbi.embed(reportContainer, reportLoadConfig);
59 // var editReport = powerbi.embed(editReportContainer, editReportLoadConfig);
60 // var qna = powerbi.embed(qnaContainer, qnaLoadConfig)
61
```

11. Save the code CTRL-S in Visual Studio Code; and refresh the web page in browser. You should see the same Wingtip Sales Analysis Report as a second report below the original report – except – now you have edit/modification capabilities:



12. Perform a test update to the embedded report and verify that the updates are getting reflected in Power BI service report after clicking on the SAVE button



In this module, you have learnt to embed a report in Read and Edit mode

Module 2: Embedding Q&A

1. In `/wwwroot/js/index.js` file, add/update the dataset ID on line #11

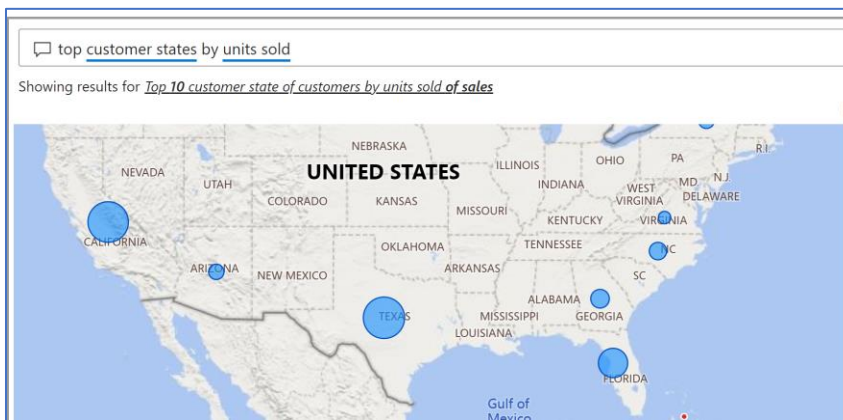
```
11      var embedDatasetId = "6f22f059-088b-40ca-9adf-f285dc9ff2bb";
```

Important:

1. Dataset ID was captured earlier in the exercise
2. Uncomment the Q&A embed code (i.e., line #60) to embed a Q&A visual

```
57      // Embed Power BI report/QnA when Access token and Embed URL are available
58      var report = powerbi.embed(reportContainer, reportLoadConfig);
59      var editReport = powerbi.embed(editReportContainer, editReportLoadConfig);
60      // var qna = powerbi.embed(qnaContainer, qnaLoadConfig);
```

3. Save the code CTRL-S in Visual Studio Code; and refresh the web page in browser
4. Try querying the dataset through the question suggestions in the visual to view the output



You can also type “top 5 customer segments by customer unit” as a custom question and check the results

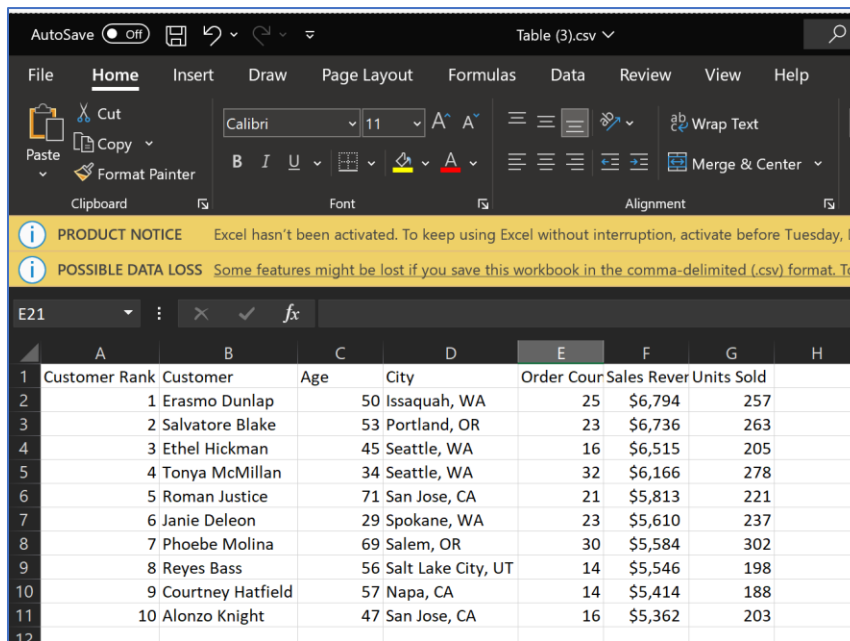
In this module, you have learnt to embed Q&A into your web application

Module 3: Export to CSV

1. Comment line #12 to enable the “Export to CSV” button by adding “//” in front of the export statement

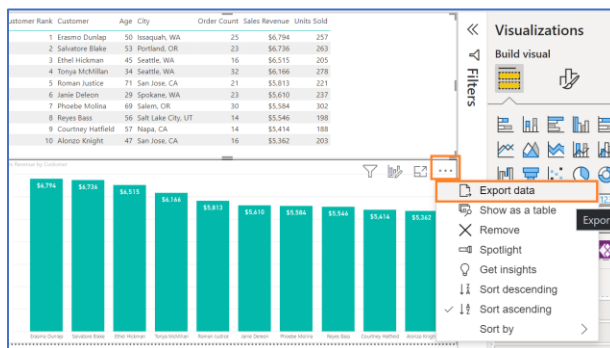
```
// $("#exportCsv").hide();
```

2. Save the code; and refresh the web page in browser
3. Click on “Export to CSV” button on the top right of the embedded report. A CSV file named will get downloaded with the exported data present in it

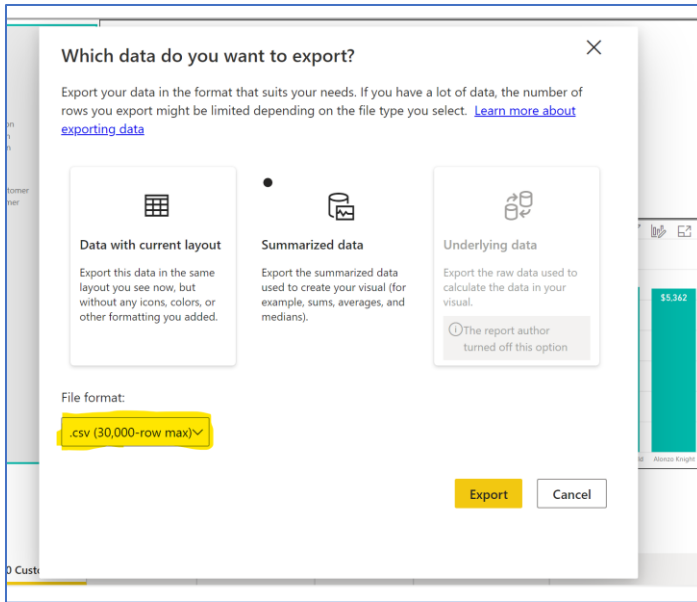


| Customer Rank | Customer | Age | City | Order Count | Sales Revenue | Units Sold |
|---------------|-------------------|-----|--------------------|-------------|---------------|------------|
| 1 | Erasmus Dunlap | 50 | Issaquah, WA | 25 | \$6,794 | 257 |
| 2 | Salvatore Blake | 53 | Portland, OR | 23 | \$6,736 | 263 |
| 3 | Ethel Hickman | 45 | Seattle, WA | 16 | \$6,515 | 205 |
| 4 | Tonya McMillan | 34 | Seattle, WA | 32 | \$6,166 | 278 |
| 5 | Roman Justice | 71 | San Jose, CA | 21 | \$5,813 | 221 |
| 6 | Janie Deleon | 29 | Spokane, WA | 23 | \$5,610 | 237 |
| 7 | Phoebe Molina | 69 | Salem, OR | 30 | \$5,584 | 302 |
| 8 | Reyes Bass | 56 | Salt Lake City, UT | 14 | \$5,546 | 198 |
| 9 | Courtney Hatfield | 57 | Napa, CA | 14 | \$5,414 | 188 |
| 10 | Alonzo Knight | 47 | San Jose, CA | 16 | \$5,362 | 203 |

4. You can also hover over the visuals and click on the ... to export the data – as shown below:



5. Please note – you will be prompted to explore various options as part of your export – make sure to choose the CSV option as shown below:



Module 4: Embedding with RLS

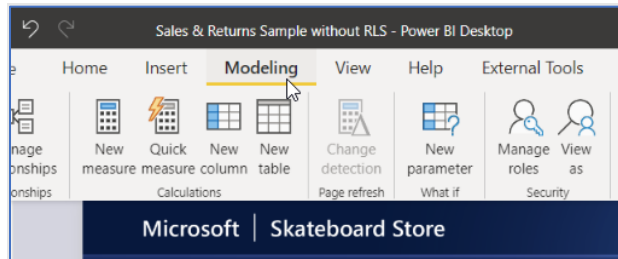
1. Download the “Sales and Returns Sample without RLS” from your Power BI HackerXX workspace.



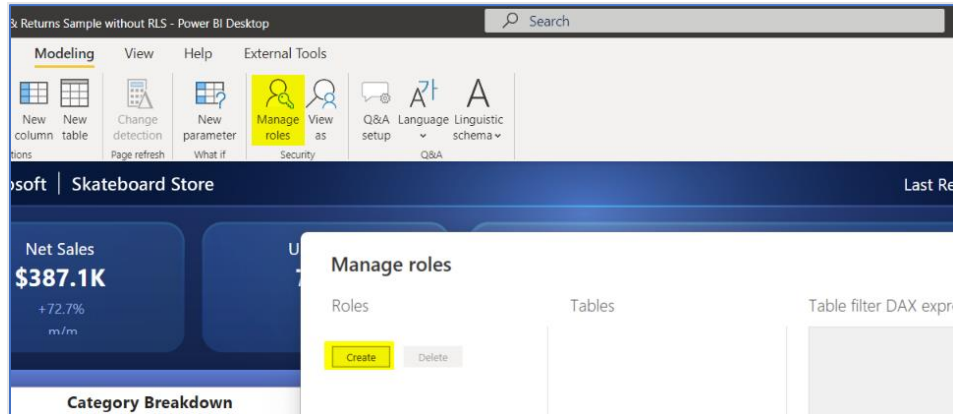
2. Open your “Sales and Returns Sample without RLS” report in the Power BI desktop.
3. In this part, we will create a role in order to enable row level security. In our case, we are going to apply row level security (RLS) on Internal v/s External stores so that, internal users can only see internal sales data and external users can only see external sales data. Here is a sample of the Store data:

| StoreID | Store | Type | Longitude | Latitude | it |
|---------|-----------|----------|------------|-----------|----|
| 1 | Abbas | External | -87.774353 | 41.965639 | |
| 2 | Aliqui | External | -87.719251 | 42.012424 | |
| 3 | Barba | External | -87.695392 | 41.958968 | |
| 4 | Salvus | External | -87.742799 | 41.911624 | |
| 5 | Fama | Internal | -87.908907 | 41.904651 | |
| 6 | Leo | External | -87.747134 | 41.831725 | |
| 7 | VanArsdel | External | -87.745508 | 41.765605 | |
| 8 | Natura | External | -87.633043 | 41.740204 | |
| 9 | Palma | Internal | -87.686287 | 41.721761 | |
| 10 | Pirum | External | -87.800632 | 41.706594 | |
| 11 | Pomum | External | -87.598982 | 41.696435 | |
| 12 | Quibus | External | -87.861037 | 41.839119 | |
| 13 | Contoso | Internal | -87.638602 | 41.837455 | |
| 14 | Victoria | Internal | -87.675154 | 41.793668 | |

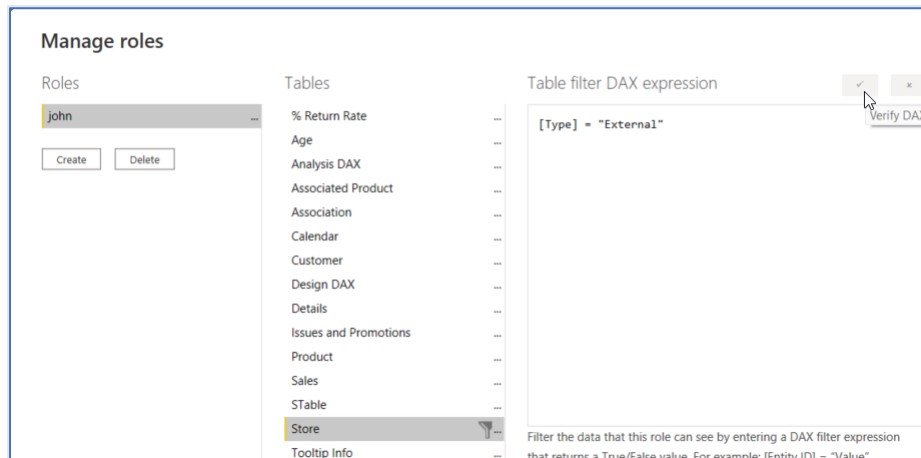
- a. Open PBI report and click on Modeling tab



- b. Click on Manage roles option and then click on Create button



- c. Create a role named "john" and then click on Store table in the section
- d. Set the filter for this user as [Store] = "External"



- e. Save and publish the report to PBI service

4. In /Services/PBIEmbedService.cs file, uncomment line #118

```
117 // Update the RLS config on this line once you update the PBIX and republish
118 identities = new List<EffectiveIdentity> { new EffectiveIdentity(username: "john", roles: new List<string> { "john" }, dat
119
```

5. Update the username and role values to the new role which you have created in PBI Desktop
6. Similar to Module 1 earlier, navigate to /appsettings.json file and update your parameters to reflect the new report "Sales and Returns Sample without RLS"

7. Click on the Terminal and type in “dotnet run” and Enter to run the sample code



The screenshot shows a Visual Studio Code interface with the 'TERMINAL' tab selected. The terminal window displays the following output:

```
PS C:\Daily - To Dos\PIEmbedtutorial\JoyjeetsSDP_env_w_keshav_and_maq\Power BI Embedded workshop_latest> dotnet run
info: Microsoft.Hosting.Lifetime[0]
      Now listening on: https://localhost:5001
info: Microsoft.Hosting.Lifetime[0]
      Now listening on: http://localhost:5000
info: Microsoft.Hosting.Lifetime[0]
      Application started. Press Ctrl+C to shut down.
```

8. Now, you can see that the numbers in the visual are slightly on the lower side due to user (john) specific filtering
9. In this module, you have learned to embed a Power BI report with data security as per user's context