

# Power BI for Dynamics 365

Course Level: 200

This instructor-led course provides a deep dive into the Power BI Desktop tool. It will walk through how to leverage PowerBI.com Service and Dashboard functionality, an introduction to Data Analysis Expressions (DAX), using the tablet app, as well as Excel Integration.



# At A Glance: Power BI for Dynamics 365

## Why Enroll?

Prepare admins and anyone responsible for working with Power BI to prepare analytics in ways which are most helpful to the organization.



## Who to Enroll?

- System Administrators
- Power Users
- Customizers
- Developers
- Business Analysts



## Key Takeaways

Power BI Desktop & Online, Administration, Collaboration, Data Querying, Report Authoring, Mobility, DAX, Advanced Topics, Resources



## Register

Register today!

[Click to Register.](#)

# About this Training



## Intended Audience

This course is designed to support individuals who will be responsible for reporting and analytics of not only Dynamics 365 data but other sources such as separate ERP solutions, spreadsheets, and other corporate data. It's also useful for those interested in improving charts, analytics, and discovering new insights into data.



## Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Understanding of data, relational databases, and data structuring is helpful
- Exposure to Microsoft Dynamics 365 is helpful

# Key Takeaways

## This Training Will Allow You To:

- Understand and use the Power BI Desktop application.
- Learn best practices for building and administering Power BI within your organization.
- Understand and use the PowerBI.com application.
- Learn to use Power BI for collaboration, data querying, and report authoring.
- Explore mobility options and use cases.
- Learn other functionality including DAX, resources, and other advanced topics.



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

## CRM CONCEPTS & BASICS

### Introductions

- Overview of Power BI
  - Components
  - Licensing
  - Download and Install the Power BI Desktop

### Intro to Desktop

- My First Power BI Report
- Basic data transformation

### Office Interaction

- Power BI Excel Publisher
- Import Excel Assets
- Export to Excel from Power BI

### Access Power BI Service

- Explore features and functionality
  - Use and Navigation

- Favorites
- Exporting
  - PowerPoint
  - Data
- Publish to web

- Publish desktop reports and create dashboard

### App Workspaces

- Create app
- Sharing content

### Online Dynamics Apps

- Sales
- Service
- Business Process Flow Analytics
- Social Engagement

### Power BI Reporting in Dynamics

- Enable
- Embed Power BI Tiles
- Create Power BI dashboard in Dynamics
- Connect to CRM Online**
- Connect to Online Org
- Explore the Data Feed
- Using OData Feed as a data source
- Using OData Query designer
- Connect to Dynamics 365 On-premises (if pertinent)
- Continue Querying**
- Multiple Data Sets and relationships
- Option sets and custom lists
- Direct Query
- Streaming data
- Power BI Service Data Source

- Connecting to websites
- Folder queries
- Connecting to SharePoint
- Common Data Service
- Blank Query
- Data transformation and Modeling**
- Calculated columns
- Measures (Intro)
- Data type and Formatting
- Data category and Summarization
- Grouping

Agenda is tentative and subject to changes based upon learner comprehension, instructor's discretion, and other factors. Order, pace, content, and timeline subject to change.

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DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

## SALES

### Data transformation and Modeling Continued

- Query hierarchy
- Parameters
- Advanced Query Editing
  - Split columns
  - Pivoting
  - Parameters
- DAX 101
- Quick calc measures
- Report Visualizations Deep dive**
- Out-of-the-box visuals

- Advanced report building
- Custom visuals
- Other report objects
- Formatting visualizations
- Gridlines and Snap to Grid
- Data points and labels
- Text Boxes
- Images
- Predictive
  - Trends
  - Forecasts

### Report Visualizations Deep Dive Continued

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## SERVICE

### Mobile App

- Download
- Connect and Explore
- Annotate

### Overview of Development Features

- Intro to R Scripting
- Embedded Power BI
- Power BI Web Resource

### Additional Resources Overview

# DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED