

Creating Dashboards for Dynamics GP with Power BI



June 21, 2018

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INTRODUCTIONS



Charles Allen
Senior Managing Consultant

- Currently in his 28th year of consulting
- 10-time Microsoft MVP
- Holds Advanced DynamicsPro Credential

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AGENDA



- What Is Power BI?
- Connecting to Dynamics GP
- Creating Dashboards & Reports
- Viewing Power BI Dashboards & Reports
- Q&A

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What Is Power BI?

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WHAT IS POWER BI?



- Suite of business analytics tools
- Used to create dashboards & reports
- Connects to hundreds of data sources
- Enables you to view data on multiple devices
- Works with PowerApps

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WHAT IS POWER BI?



- Different Options
 - Power BI Desktop – It's Free!
 - Power BI Pro – \$9.99/user/month
 - Power BI Premium – Based on capacity/per node/per month
- Power BI Desktop – Download & use & publish to the Power BI service
- Power BI Pro – Enables automatic data updates & includes data auditing & governance

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WHAT IS POWER BI?



- Power BI Premium
 - Includes Power BI Report Server for On Premise reporting
 - Has higher limits on data
 - Does not require per-user licenses

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CONNECTING TO DYNAMICS GP

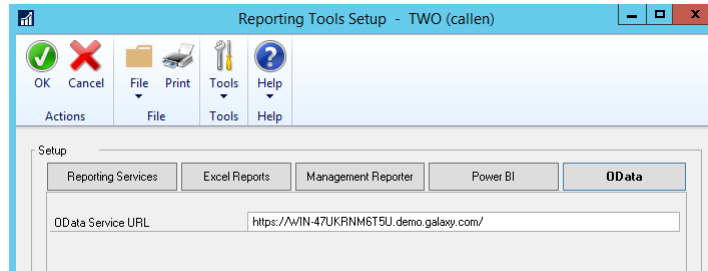


- Direct SQL
 - Enables you to connect to SQL objects like tables & views
 - Be aware of load it puts on the server when running queries
- OData Feed – Enables you to use a web service called OData in 2016 & 2018
- There is a free content pack for GP 2018 using OData

CONNECTING TO DYNAMICS GP



- Set up the OData Service URL in Reporting Options

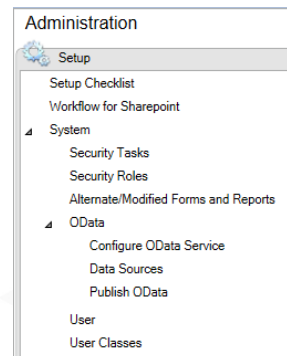


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CONNECTING TO DYNAMICS GP



- Set up user security – assign a Windows domain account to the GP login
- Assign users to OD security roles
- Publish OData



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CONNECTING TO DYNAMICS GP



- Set up your home page settings
- Mark the checkbox for Power BI
- Select the Dashboards to display

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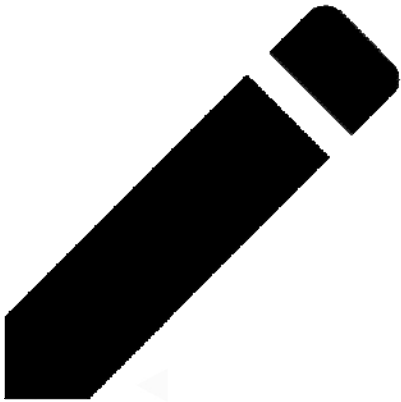
CONNECTING TO DYNAMICS GP





- Set up the Power BI reporting options to enable you to display Power BI dashboards on the home screen

The screenshot shows the 'Reporting Tools Setup - TWO (callen)' dialog box. The 'Power BI' tab is selected. The 'Client ID' field is populated with a value. Below it, there is a note: 'Need the client ID? Use this [link](#) to register Dynamics GP using the Power BI Registration Tool.' There is a checkbox for 'Using Web Client?' which is currently unchecked. Below this, there are three text input fields: 'Application ID', 'Key', and 'Reply/Redirect URL'. The 'OK' button is highlighted in green.


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Creating Dashboards & Reports

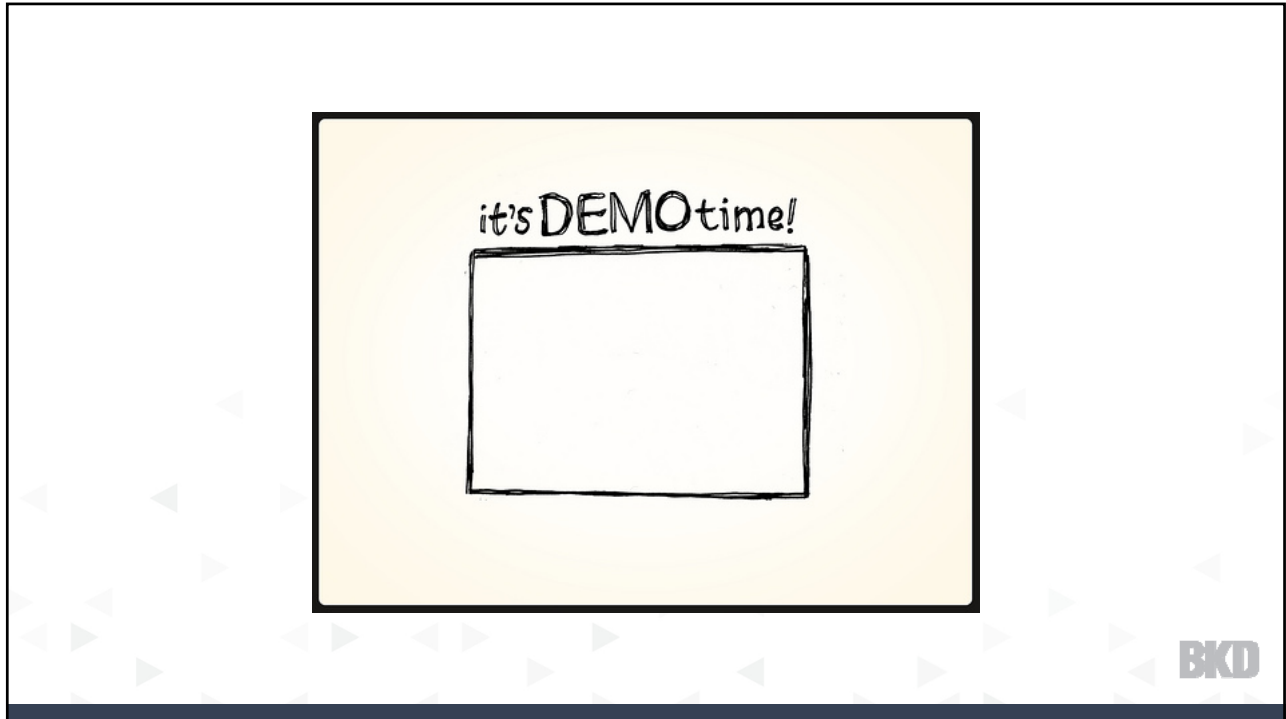


CREATING DASHBOARDS & REPORTS



- Install Power BI Desktop (It's FREE!)
 - <https://powerbi.microsoft.com/en-us/>
- Set up an account
- Start developing!





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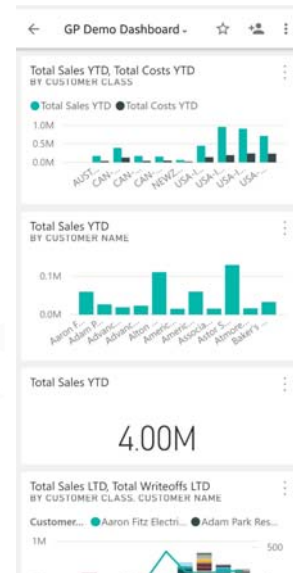
Viewing Dashboards & Reports

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VIEWING DASHBOARDS & REPORTS



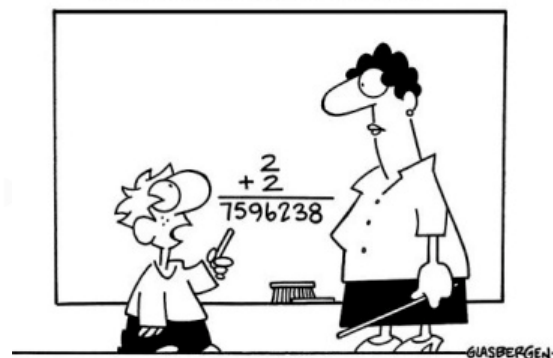
- Use Power BI Desktop
- Use Powerbi.com
- Use a mobile device



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Time for Some Q&A

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"In an increasingly complex world, sometimes old questions require new answers."

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Thank You!

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