

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

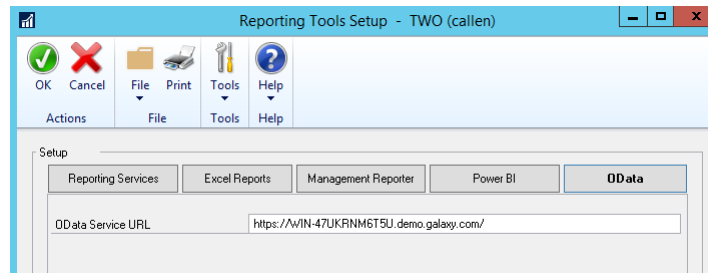


- Direct SQL
 - Enables you to connect to SQL objects like tables & views
 - Be aware of load it puts on the server when running queries
- OData Feed – Enables you to use a web service called OData in 2016 & 2018
- There is a free content pack for GP 2018 using OData

CONNECTING TO DYNAMICS GP



- Set up the OData Service URL in Reporting Options

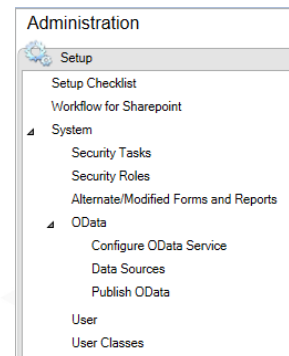


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CONNECTING TO DYNAMICS GP



- 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



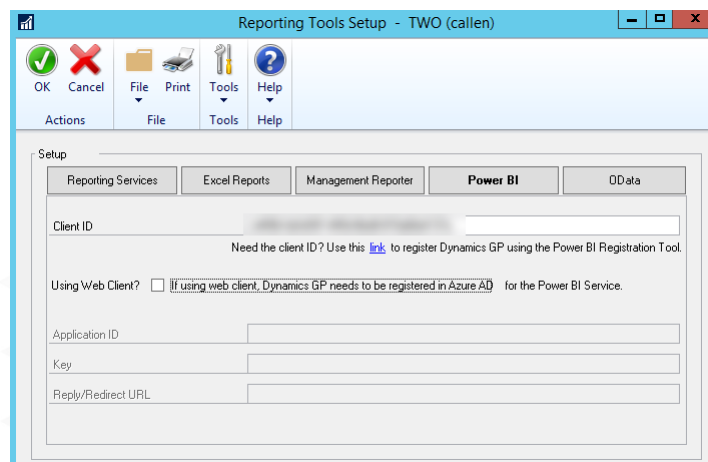
- Set up your home page settings
- Mark the checkbox for Power BI
- Select the Dashboards to display

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CONNECTING TO DYNAMICS GP

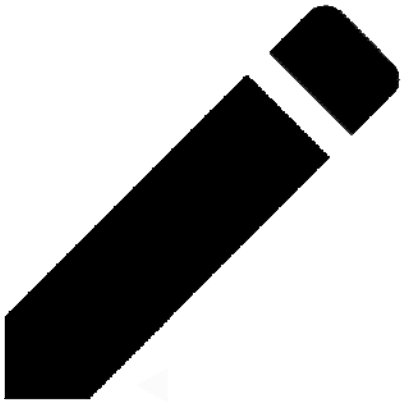


- Set up the Power BI reporting options to enable you to display Power BI dashboards on the home screen





The screenshot shows a Windows dialog box titled "Reporting Tools Setup - TWO (callen)". The dialog has a standard Windows menu bar with "OK", "Cancel", "File", "Print", "Tools", and "Help". Below the menu bar, there are tabs for "Reporting Services", "Excel Reports", "Management Reporter", "Power BI", and "ODData". The "Power BI" tab is selected. The "Client ID" field is empty, with a note below it: "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, with a note: "If using web client, Dynamics GP needs to be registered in Azure AD for the Power BI Service." Below this, there are three text input fields for "Application ID", "Key", and "Reply/Redirect URL".


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Creating Dashboards & Reports

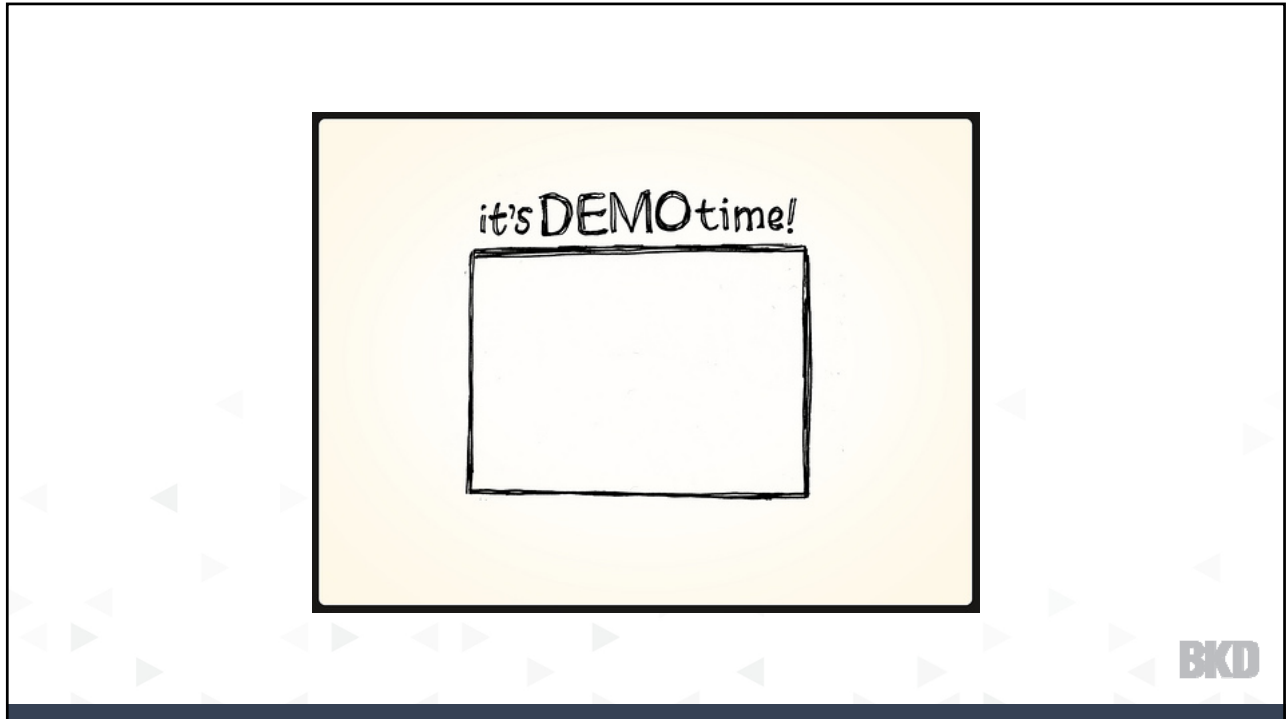


CREATING DASHBOARDS & REPORTS



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

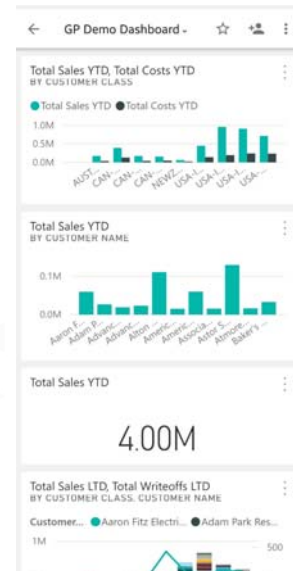




VIEWING DASHBOARDS & REPORTS



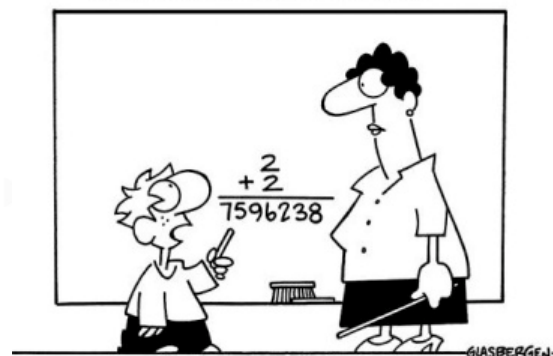
- Use Power BI Desktop
- Use Powerbi.com
- Use a mobile device



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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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