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**Dynamics 365**

**Technology Specialist Environment**

A group of people sitting on a couch

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Analytics & Reporting   
Demo Setup – Dataverse Data

Authored by:

**Scott Sewell**

Principal Program Manager

Fabric BI CAT (Customer Advisory Team)

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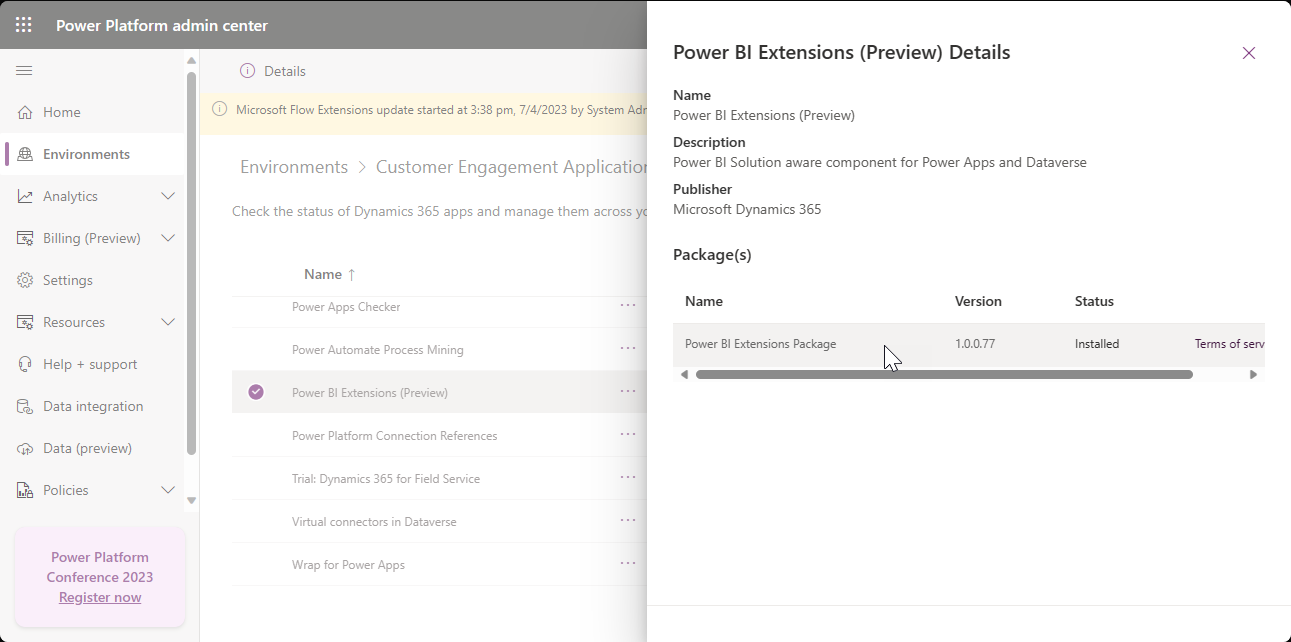
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# Introduction

These assets are designed to help demonstrate the power of using Power BI analytics and reporting to expose the value of the data in a Dynamics 365 CE implementation.

# Getting your Dataverse environment ready

## *Ensure the Power BI Extensions are updated*

In Power Platform Admin Center, under “Dynamics 365 apps”, check to see that the “Power BI Extensions (Preview) application has been updated to at least 1.0.0.77.   


## *Ensure the option to allow Embedded Power BI content is enabled*

In Power Platform Admin Center navigate to “Settings/Product/Features.” Under “Embedded content”, ensure that the “Power BI visualization embedding” option is set to “On.”  
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# Create Local Copies of the Solution and Source Data file

1. Download the example files from the source: <https://github.com/mscottsewell/ContosoBI> (From the “Code” menu choose “Download Zip”  
   Graphical user interface, text

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2. Once Downloaded - right click on the file, select ‘Properties’ and then check the ‘unblock’ option and ‘apply’ that change.  
   Graphical user interface, application

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3. Right click on the zip file and “extract” it to a temporary folder on your pc. – We’ll make a few changes before publishing it to your instance.
4. You should see these files in the “\Contoso - Sales - Current Release\Dataverse Data” folder:  
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# Import the Sample Data from Excel

There are 4 source files with Campaign, Territory, Account and Opportunity sample data. These are intended to give you a faster way to get a fully loaded demo to ‘light up’ the reports with a rich and varied dataset. See [Import or export data from Microsoft Dataverse - Power Apps | Microsoft Learn](https://learn.microsoft.com/en-us/power-apps/maker/data-platform/data-platform-import-export#import-from-an-excel-or-csv-file) for instructions on loading data from Excel into a demo environment. –

Note that the Account and Opportunity “Owners” in the files are based on one of the standard demo datasets, but that list may not match yours. – If the list of Owners in your environment is different from the ones used in the Excel spreadsheets, you’ll need to bulk update the excel files with the users in your environment.

# Import Solution containing Power BI report and dashboard.

1. In the <https://make.powerapps.com/> import the Sales Analytics solution previously downloaded.  
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2. Once the import of the solution is completed, click Publish All customizations  
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# Set up Power BI Credentials and Report Refresh

1. Open the newly published solution and select the “**Power BI Report**” named “*Dynamics 365 Sales Demo – Excel*” – Then click “Open In Power BI  
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2. Once Power BI opens – select the Workspace (named “Solutions […]” and click the ellipse (“…”) beside the Dataset and open “Settings”.  
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3. You may need to set the “Data source credentials” – if so, just click on ‘Edit Credentials” then select “OAuth2” as the authentication method and enter your demo admin user/password  
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4. Once that’s in place you can scroll a little further down the same list of settings to enable a refresh schedule –(to keep the dates in the report ‘current’)  
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   (Be sure to click ‘Apply’)
5. If you ever want to change which file is used for the report’s data, you can change the URL here in settings under Parameters.

# Adding the Power BI report to Dynamics

1. Open the PowerApp Maker Portal <https://make.powerapps.com/> (be sure your environment is selected) and go to the list of Apps – Select the app you want to add this report to and ‘Edit’  
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2. Click “Add page” and then select “Dashboard” as the type of page you’re adding.  
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3. Scroll down and choose “Sales Analytics” under Power BI dashboards to add this report to the list of reports in the “Dashboard” section in the app – If the ‘Show in navigation’ option is left selected, it will also add it to the navigation as a top level element.  
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4. Save/Publish/Play to see your new dashboard in the App  
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