**Enable Power BI Reports in Dynamics CRM**

Contents

[I. **Publish Power BI Report from Power BI Desktop**: 2](#_Toc70621779)

[a. Open “Telco Analytics.pbix” file in Power BI Desktop. 3](#_Toc70621780)

[b. Click on “Sign-in” on Top-Right corner. 3](#_Toc70621781)

[c. Click on Publish as Highlighted. 3](#_Toc70621782)

[d. Click on “Select” to start publishing the Report to Power BI. 3](#_Toc70621783)

[e. Below Screen will appear once the Report is successfully Published to Power BI. 3](#_Toc70621784)

[II. **Create Power BI Dashboards** 3](#_Toc70621785)

[a. Open browser and login to https://app.powerbi.com/ . 3](#_Toc70621786)

[b. Open “Telco Analytics” report from the List. 3](#_Toc70621787)

[c. Choose “New Dashboard” option. 3](#_Toc70621788)

[d. Select “Network Resources” from the Pages Option. 3](#_Toc70621789)

[e. Choose “New Dashboard” option. 3](#_Toc70621790)

[f. Go back to Workspace and select “Content”. 3](#_Toc70621791)

[III. **Update Environment URL** 3](#_Toc70621792)

[a. Go to “Datasets + dataflows”. 3](#_Toc70621793)

[b. Select “…” on the Dataset and go to “Settings”. 3](#_Toc70621794)

[c. In Parameter section: 3](#_Toc70621795)

[d. In Data Source Credentials section: 3](#_Toc70621796)

[IV. **Create personal Power BI Dashboards in Telco Apps** 3](#_Toc70621797)

[a. Open **browser** and login to https://make.powerapps.com/ . 3](#_Toc70621798)

[b. Open an app in which you want to see the Power BI dashboard. 3](#_Toc70621799)

[c. Add “Telco Geographic Address” Power BI embedded Dashboard. 3](#_Toc70621800)

[d. Share “Telco Geographic Address” Dashboard 3](#_Toc70621801)

[e. Select Team with which Dashboard required to be shared 3](#_Toc70621802)

[f. Give permissions to Team: 3](#_Toc70621803)

[g. Add “Telco Network Resources” Power BI embedded Dashboard 3](#_Toc70621804)

[h. Share “Telco Network Resources” Dashboard 3](#_Toc70621805)

[V. **Power BI Report data refresh On-demand and Scheduled** 3](#_Toc70621806)

[a. Open browser and login to https://app.powerbi.com/ . 3](#_Toc70621807)

[b. On-demand data refresh 3](#_Toc70621808)

[c. Scheduled data refresh 3](#_Toc70621809)

# **Publish Power BI Report from Power BI Desktop**:

## Open “Telco Analytics.pbix” file in Power BI Desktop.

Graphical user interface, application

Description automatically generated

## Click on “Sign-in” on Top-Right corner.

Enter email address of a User having access to Power-BI. Click “Continue” and follow the screens to login.Graphical user interface, application

Description automatically generated

## Click on Publish as Highlighted.

Choose the “Workspace” from the list in which Power BI Report shall be Published.

Graphical user interface, application

Description automatically generated

## Click on “Select” to start publishing the Report to Power BI.

Graphical user interface, application

Description automatically generated

## Below Screen will appear once the Report is successfully Published to Power BI.

Graphical user interface, application

Description automatically generated

# **Create Power BI Dashboards**

## Open browser and login to <https://app.powerbi.com/> .

Go to Workspaces and Open the Workspace where Report is Published.

Graphical user interface, application

Description automatically generated

## Open “Telco Analytics” report from the List.

Select “Geographic Address” from the Pages Option. Now Click on “…” option and click on “Pin to a Dashboard”.

Graphical user interface, map

Description automatically generated

## Choose “New Dashboard” option.

Name the Dashboard as “Telco Geographic Addresses”. Click on “Pin live”.

Graphical user interface, application, Word

Description automatically generated

## Select “Network Resources” from the Pages Option.

Click on “…” option and click on “Pin to a Dashboard”.

Graphical user interface, application, map

Description automatically generated

## Choose “New Dashboard” option.

Name the Dashboard as “Telco Network Resources”. Click on “Pin live”.

Graphical user interface, application, Word

Description automatically generated

## Go back to Workspace and select “Content”.

Two new Dashboards will be available.

Graphical user interface, application

Description automatically generated

# **Update Environment URL**

## Go to “Datasets + dataflows”.

A Dataset with name “Telco Analytics” will be available.

Graphical user interface, text, application, email

Description automatically generated

## Select “…” on the Dataset and go to “Settings”.

Graphical user interface, application

Description automatically generated

## In Parameter section:

Change the “EnvironmentURL” to the CRM instance URL from which data is required in Report.

Graphical user interface, text, application

Description automatically generated

## In Data Source Credentials section:

Click on “Edit Credentials” and follow the screens to Sign-in with Authenticated User to the CRM instance URL from which data is required in Report

Graphical user interface, text, application, email

Description automatically generated

# **Create personal Power BI Dashboards in Telco Apps**

**Note**: **Power BI visualizations** must be enabled at an organizational level. To do this, go to Settings > Administration > System Settings > Reporting > **Allow Power BI visualization embedding**. Administrator-level access is required.

## Open **browser** and login to <https://make.powerapps.com/> .

Select the CRM Instance in which Power BI dashboards are required to be available.

## Open an app in which you want to see the Power BI dashboard.

Go to “Apps”. Open an app (e.g.: “PlaceManagemnt”) and go to Dashboards.

Select New and then select Power BI Dashboard.

Graphical user interface, chart

Description automatically generated

## Add “Telco Geographic Address” Power BI embedded Dashboard.

In the opened window, select:

**Power BI Workspace**: Workspace where dashboard is created

**Power BI Dashboard**: Telco Geographic Address

Click on “Save”.

A personal dashboard will be created.

Graphical user interface, application

Description automatically generated

## Share “Telco Geographic Address” Dashboard

To share Dashboard, Click on “Share Dashboard” buttonGraphical user interface, map

Description automatically generated

## e. Select Team with which Dashboard required to be shared

Click on “**Add User/Team**”. Selectà**Look for**: Teams.

Select the Team with which you want to share the Dashboard. (**Note**: To share with all the Users. Select the Team having the same names as Organization)

Click on “**Select”**.

Click on “**Add**”.

**Note**: You can restrict to different Teams & Users according to requirement.

Graphical user interface, application

Description automatically generated

## f. Give permissions to Team:

Minimum permission required to see the Dashboard is “**Read**”.

As per requirement ‘Users’ and ‘Teams’ can be given other permissions too.

Graphical user interface

Description automatically generated

## g. Add “Telco Network Resources” Power BI embedded Dashboard

Select New and then select Power BI Dashboard.

**Power BI Workspace**: Workspace where dashboard is created.

**Power BI Dashboard**: Telco Network Resources

Click on “**Save**”.

A personal dashboard will be created.

Graphical user interface, text, application

Description automatically generated

## h. Share “Telco Network Resources” Dashboard

Follow same Steps  **4 d. to 4 f.** to share this dashboard with Team.

Map

Description automatically generated

# **Power BI Report data refresh On-demand and Scheduled.**

## Open browser and login to <https://app.powerbi.com/> .

Go to Workspaces and Open the **Workspace** where Report is Published.

Go to “**Dataset + Dataflows**”.

A Dataset with name “Telco Analytics” will be available.

Graphical user interface, text, application, email

Description automatically generated

## On-demand data refresh

To refresh immediately, Click on “Refresh now” Icon as shown below:

:Graphical user interface, application

Description automatically generated

## Scheduled data refresh

To schedule the data refresh, click on “Schedule refresh” Icon as shown below.

In “Scheduled refresh” section, frequency can be set for data refresh.

For more information on scheduling data refresh, refer [Data refresh in Power BI - Power BI | Microsoft Docs](https://docs.microsoft.com/en-us/power-bi/connect-data/refresh-data)

Graphical user interface, application

Description automatically generated