

# APAC Partners Bootcamp BI and Analytics

Hands-on Lab Prerequisites

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# Purpose of this workshop

This workshop aims to guide participants through the fundamental setup of Microsoft Fabric for seamless integration with Dataverse while mastering key components of Microsoft Fabric. Throughout the workshop, participants will actively engage in hands-on activities to gain proficiency in the following areas:

- Linking Dataverse with Microsoft Fabric
  - Learn the process of establishing a connection between Dataverse and Microsoft Fabric.
- Microsoft Fabric – Serverless SQL Endpoint
  - Gain practical experience in utilizing Microsoft Fabric's Serverless SQL Endpoint for data management and retrieval.
- Microsoft Fabric – Power BI Semantic Model and Visualization
  - Explore the functionalities of Microsoft Fabric in creating a Power BI Semantic Model and visualization for enhanced data representation.
- Microsoft Fabric – Notebook
  - Familiarize yourself with Microsoft Fabric's Notebook feature, understanding its ETL capabilities.
- Bringing Insights back to Dataverse via Virtual Entity
  - Transferring insights generated in Microsoft Fabric back to Dataverse using Virtual Entity.

## **Prerequisites:**

To ensure a smooth experience during the hands-on workshop, please adhere to the following instructions for setting up a trial instance for CE and Microsoft Fabric trial. Additionally, it is essential to pre-configure the "Linking CE to Microsoft" and "Manage tables exported to Microsoft Fabric Onelake" processes. This pre-configuration initiates the initial synchronization of Dataverse to Fabric, which is expected to take approximately one hour.

Follow the steps below to complete the necessary prerequisites:

1. Set up Trial Instance for CE and Microsoft Fabric Trial:
  - Follow the provided instructions to establish a trial instance for Common Data Service (CE) and initiate the Microsoft Fabric trial.
2. Pre-configure "Linking CE to Microsoft":
  - Ensure that the "Linking CE to Microsoft" process is pre-configured as per the guidelines provided. This step is crucial for the integration process.
3. Pre-configure "Manage Tables Exported to Microsoft Fabric Onelake":
  - Similarly, pre-configure the "Manage tables exported to Microsoft Fabric Onelake" process. This setup is necessary to begin the initial synchronization of Dataverse to Microsoft Fabric, a process expected to take approximately one hour.

By completing these prerequisites, participants will be well-prepared to actively engage in the hands-on workshop, maximizing their learning experience.

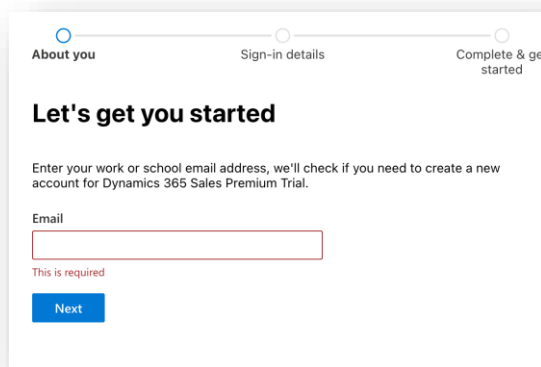
# Prerequisites - Trial CE Setup

## Estimated Time to Complete

15 minutes for the following steps

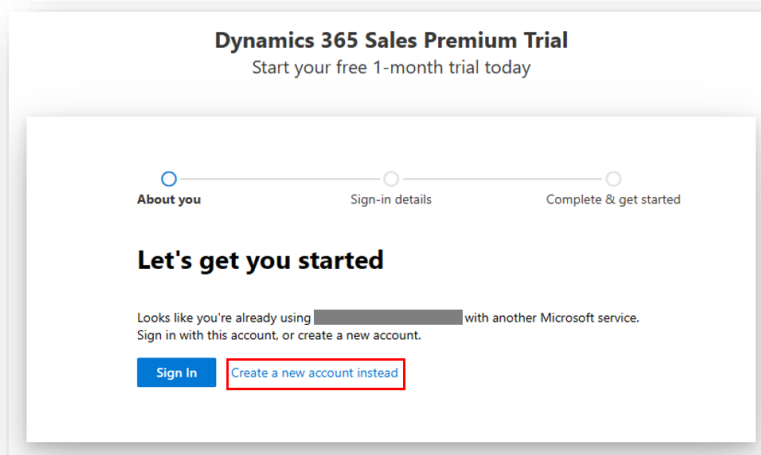
## Steps:

1. Open an InPrivate (Incognito) window.
2. Navigate to <https://go.microsoft.com/fwlink/?LinkId=2139837&clcid=0x409>
3. Enter your work email in the form and click **Next**.



The screenshot shows a web form titled "Let's get you started" with a progress bar at the top indicating three steps: "About you" (active), "Sign-in details", and "Complete & get started". The form asks the user to "Enter your work or school email address, we'll check if you need to create a new account for Dynamics 365 Sales Premium Trial." Below this is an "Email" input field with a red border and a red error message "This is required" below it. A blue "Next" button is at the bottom.

4. Click **Create a new account instead**.



The screenshot shows the same "Let's get you started" form, but now it displays a message: "Looks like you're already using [redacted] with another Microsoft service. Sign in with this account, or create a new account." Below this message are two buttons: a blue "Sign In" button and a red-outlined "Create a new account instead" button.

5. Enter **First Name, Last Name, Business phone number, Company Name Company size, and Country or region**. Click **Next**.

**\*NOTE:** Please select **Hong Kong SAR** as region, this is to make sure your CE and Fabric under the same region.

About youSign-in detailsComplete & get started

## Tell us about yourself

First name \*

Asia

Middle name (Optional)

Last name \*

East

Business phone number \*

This is required

Company name \*

Contoso

Company size \*

1 person

Country or Region \*

Hong Kong SAR

I understand that Microsoft may contact me about my trial.

☐ I would like information, tips, and offers about Solutions for Businesses and Organizations and other Microsoft products and services. To learn more, or to unsubscribe at any time, view the [Privacy Statement](#).

☐ I would like Microsoft to share my information with select partners so I can receive relevant information about their products and services. To learn more, or to unsubscribe at any time, view the [Privacy Statement](#).

Next

6. Input your phone number which you can receive a verification code via text or call. Click **Send Verification Code**.

7. Input the verification code that you received via text and click **Verify**.

8. Enter a unique, fictitious business domain and username then **Next**.

**\*NOTE:** Memo your login credentials.

The screenshot shows a three-step progress bar at the top: 'About you' (completed with a checkmark), 'Sign-in details' (active with a circle), and 'Complete & get started' (pending with a circle). Below the progress bar, the heading 'How you'll sign in' is displayed. A paragraph explains that the username is used for signing in to apps and that the domain name is a suggestion that can be changed later. The form contains three main sections: 1. Username and Domain name: The 'Username' field contains 'AsiaEast'. The 'Domain name' field contains 'contoso202312xx' followed by a dropdown menu currently showing '.onmicrosoft.com'. A 'Save' link is to the right. 2. Password: A 'Password' field with a masked password '.....' and an eye icon to toggle visibility. 3. Confirm password: A 'Confirm password' field with a masked password '.....' and an eye icon to toggle visibility. At the bottom, a line of text states: 'By selecting **Next**, you agree to our [trial agreement](#).' Below this is a blue 'Next' button.

9. Click "**Start using Dynamics 365 Sales Premium Trial.**"

10. You will be directed to the [Power Platform Admin Center](#), or you can access <https://admin.powerplatform.microsoft.com/> and login with the credentials you just created)

11. In the New Environment window, complete the required fields. Choose Trial (subscription-based) for the Type. Click Next.

The screenshot shows the Power Platform admin center interface. On the left, the 'Environments' section is highlighted in the navigation pane. In the center, there is a table titled 'Environments' with columns: Environment, Type, State, Dataverse, and Managed. The table contains three rows: 'Any Name 2' (Trial (subscription-based), Ready, Yes, No), 'Any Name' (Trial (subscription-based), Ready, Yes, No), and 'Contoso (default)' (Default, Ready, No, No). On the right, the 'New environment' dialog box is open. It has a close button (X) in the top right corner. Below the title bar, there is a note: 'This operation is subject to [capacity constraints](#)'. The dialog contains several fields: 'Name \*' (text input with 'Any Name'), 'Region \*' (dropdown menu with 'Asia - Default'), 'Type \*' (dropdown menu with 'Trial (subscription-based)'), 'Purpose' (text area with placeholder 'Describe the environment's purpose'), 'Add a Dataverse data store?' (toggle switch set to 'No'), and 'Pay-as-you-go with Azure?' (toggle switch set to 'No'). At the bottom right, there are 'Next' and 'Cancel' buttons. Red arrows point from the 'New' button in the top navigation bar to the 'New environment' dialog and from the 'Environments' section in the left sidebar to the 'New environment' dialog.

Environment	Type	State	Dataverse	Managed
Any Name 2	Trial (subscription-based)	Ready	Yes	No
Any Name	Trial (subscription-based)	Ready	Yes	No
Contoso (default)	Default	Ready	No	No

12. Choose a Language and Currency. Under Security Group, click “+Select” then choose **Open access/None**.

13. Under **Enable Dynamics 365 apps?** choose **Yes**

14. Under **Automatically deploy these apps**, select **Sales Premium Trial**



←

Add Dataverse

×

i

This operation is subject to [capacity constraints](#)

Language \*

English (United States) ▾

Default language for user interfaces in this environment


Currency \*

HKD (\$) ▾

Reports will use this currency

Security group \*

Restrict environment access to members of a security group or select None to opt for open access across your tenant. [Learn more](#)

None 

(All users across your tenant will have access to the environment)

URL

A unique domain name will be generated.  
Click [here](#) to enter a custom domain

Enable Dynamics 365 apps?

In addition to Power Apps. [Learn more](#)

☒ No

If not enabled, you won't be able to install Dynamics 365 apps on this environment. This decision is irreversible

Automatically deploy these apps

Sales Premium Trial ▾

Select None if you want to enable D365 apps but plan to install them later

Save

Cancel

15. Choose **Save**

# Prerequisites - Trial Microsoft Fabric Setup

## Estimated Time to Complete

5 minutes for the following steps

## Steps:

1. Access <https://app.fabric.microsoft.com/> \*Login with the credentials you just created
2. Click **Continue**

## You've selected Microsoft Fabric free

### 1 Let's get you started

You are signed in with ContosoTrial@mr1130.onmicrosoft.com

Select **Continue** to get started.

**Continue**

[Logout and create new account instead](#)

### 2 Create your account

### 3 Confirmation details

3. Input **Country or Region**, **Business Phone Number** then click **Get Started**.

\***NOTE:** Please select **Hong Kong SAR** as region, this is to make sure your CE and Fabric under the same region.

# You've selected Microsoft Fabric free

1 Let's get you started

2 Create your account

Hi **Asia**,

We need just a little more information before you get started

Email

AsiaEast@contoso202312xx.onmicrosoft.com

Country or Region

Hong Kong SAR

Business phone number

I understand that Microsoft may contact me about my trial.

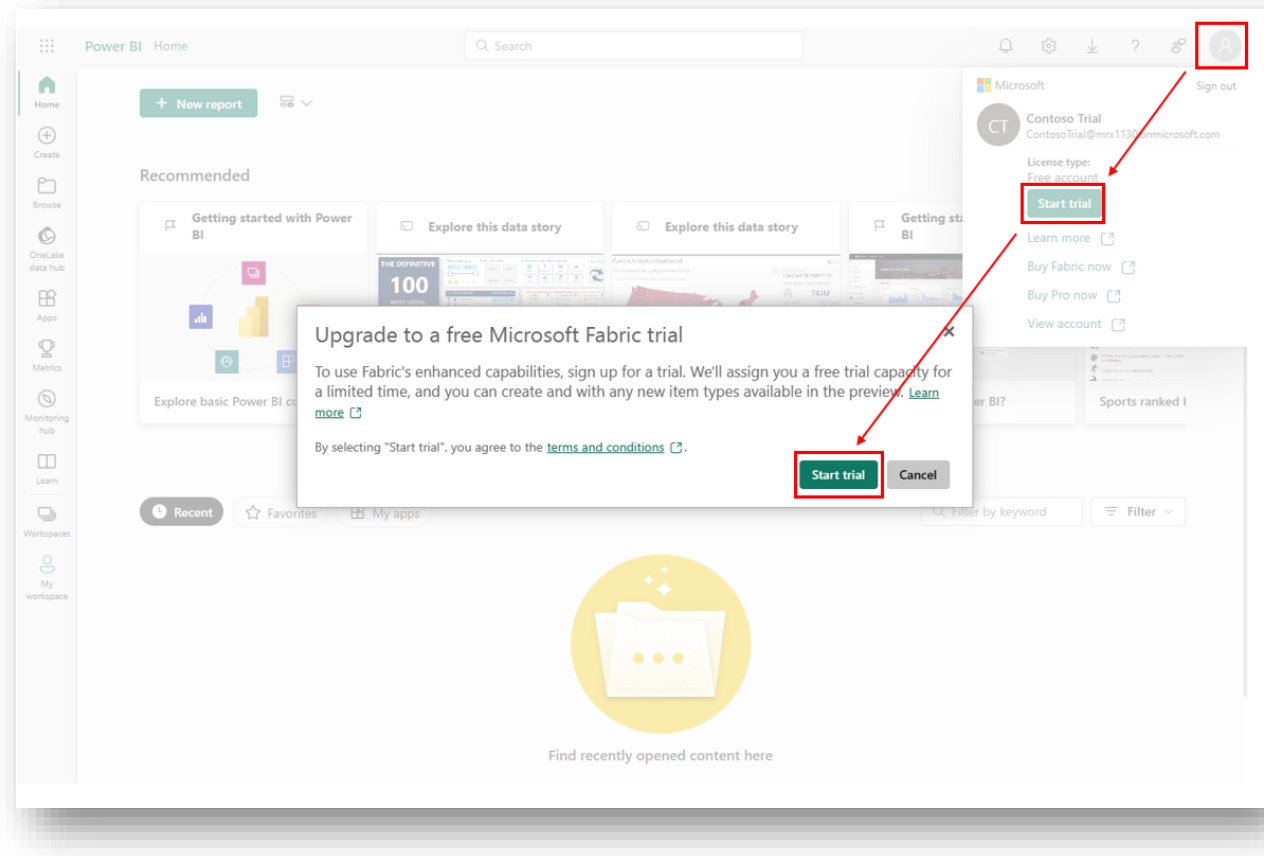
- ☐ I would like information, tips, and offers about Power BI, Solutions for Businesses and Organizations, and other Microsoft products and services. To learn more, or to unsubscribe at any time, view the [Privacy Statement](#).
- ☐ I would like Microsoft to share my information with select partners so I can receive relevant information about their products and services. To learn more, or to unsubscribe at any time, view the [Privacy Statement](#).

By choosing **Get Started**, you agree to our [terms and conditions](#) and [Privacy Statement](#).

**Get Started**

3 Confirmation details

4. Click **Get Started** in the confirmation details page or navigate to <https://app.fabric.microsoft.com/>
5. Start Trail from Account manager.



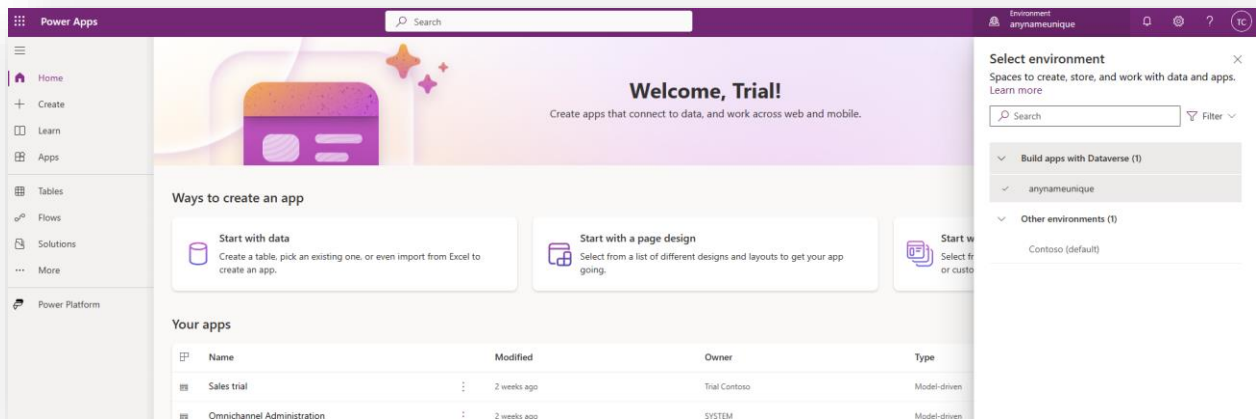
## Prerequisites - Link CE to Microsoft Fabric

### Estimated Time to Complete

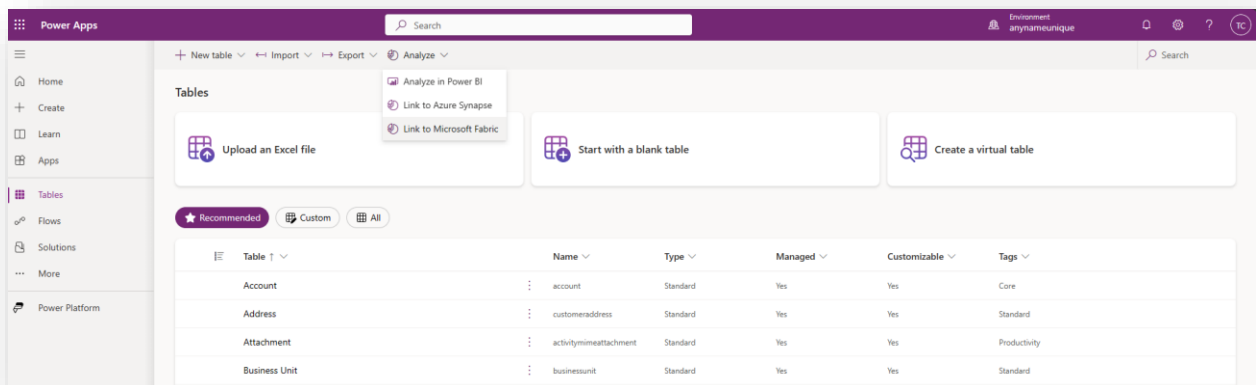
10 minutes for the following steps

### Steps:

1. Navigate to <https://make.powerapps.com/>
2. Select Environment which you had created in the Trial CE Setup.



3. Click **Table** then **Analyze**->**Link to Microsoft Fabric**



4. Copy the environment domain and input to **Environment domain**, then click **Sign in**.

←

Validate Configuration

●

Validate Configuration

○

Choose Workspace

○

Review & Create

Direct Link your Dataverse Tables with Microsoft Fabric and get real-time insights. [Learn More](#)

✔

Access to Power BI and Fabric capacity

①

Connection to Microsoft Fabric

Copy the environment domain below

orgcf80eb8e.crm5.dynamics.com

Connection settings

Environment domain ⓘ

orgcf80eb8e.crm5.dynamics.com

Connection credentials

Connection

Create new connection

Connection name

orgcf80eb8e.crm5.dynamics.com

Authentication kind

Organizational account

You are not signed in. Please sign in.

Sign in

Back

Next

Cancel

5. Click **Save Connection** then **Next**.

←

Validate Configuration

●

Validate Configuration

○

Choose Workspace

○

Review & Create

Direct Link your Dataverse Tables with Microsoft Fabric and get real-time insights. [Learn More](#)

✔

Access to Power BI and Fabric capacity

✔

Connection to Microsoft Fabric

Back

Next

Cancel

6. Click **Create new workspace**.

← Choose Workspace

Validate Configuration

Choose Workspace

Review & Create

Direct Link your Dataverse Tables with Microsoft Fabric and get real-time insights. [Learn More](#)

Microsoft Fabric workspace \*

Create new workspace

You can only choose workspaces in the same region.

We will link all tables so that you don't have to choose. You may incur additional storage charges. [Learn More](#)

Back Next Cancel

7. Input **Workspace Name** then **Next**.

← Choose Workspace

Validate Configuration

Choose Workspace

Review & Create

Direct Link your Dataverse Tables with Microsoft Fabric and get real-time insights. [Learn More](#)

Microsoft Fabric workspace \*

Create new workspace

Your environment is located in the AS region. You can only choose workspaces in the same region.

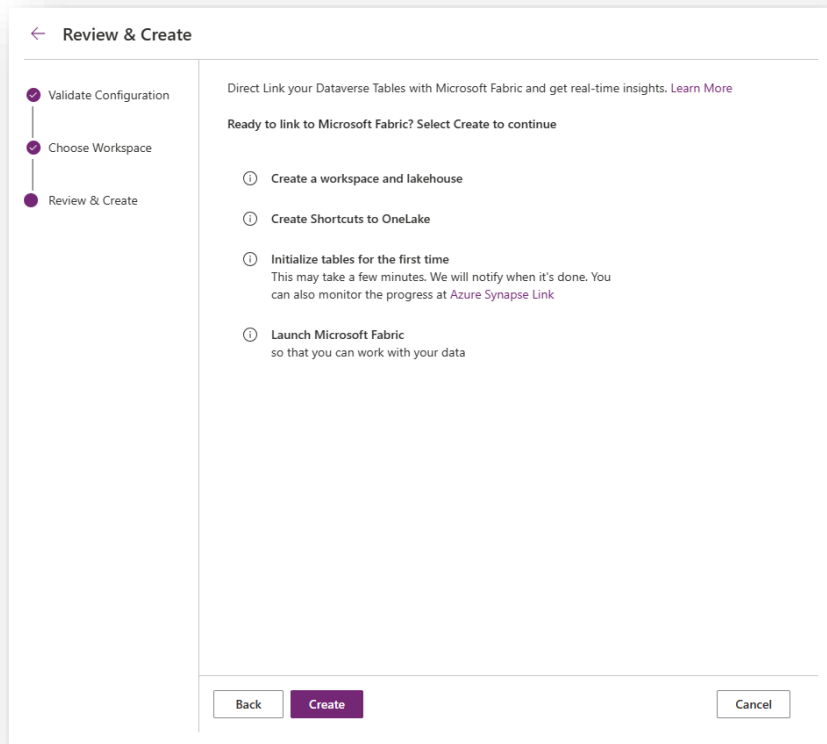
Workspace name \*

Contoso

We will link all tables so that you don't have to choose. You may incur additional storage charges. [Learn More](#)

Back Next Cancel

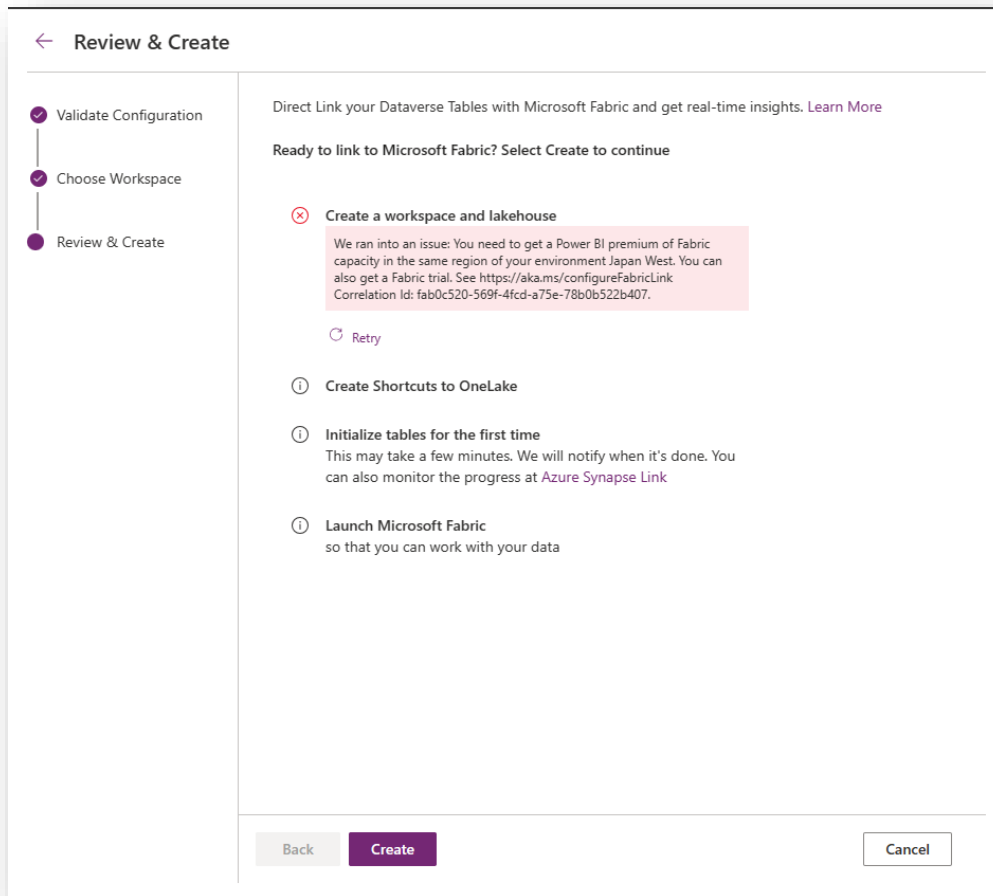
8. Click **Create** to complete.



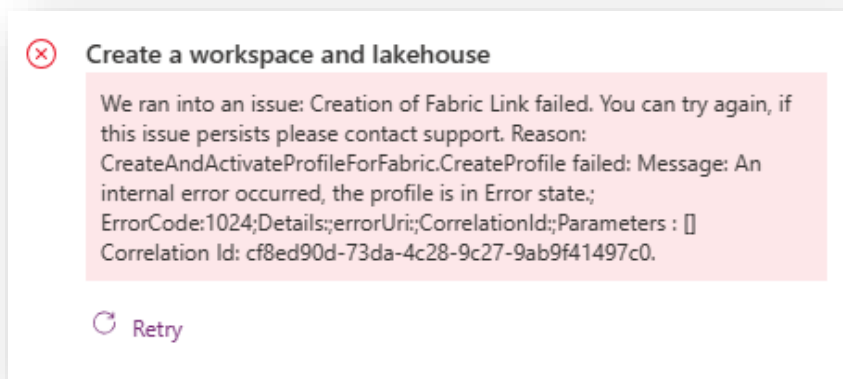
**Remarks:**

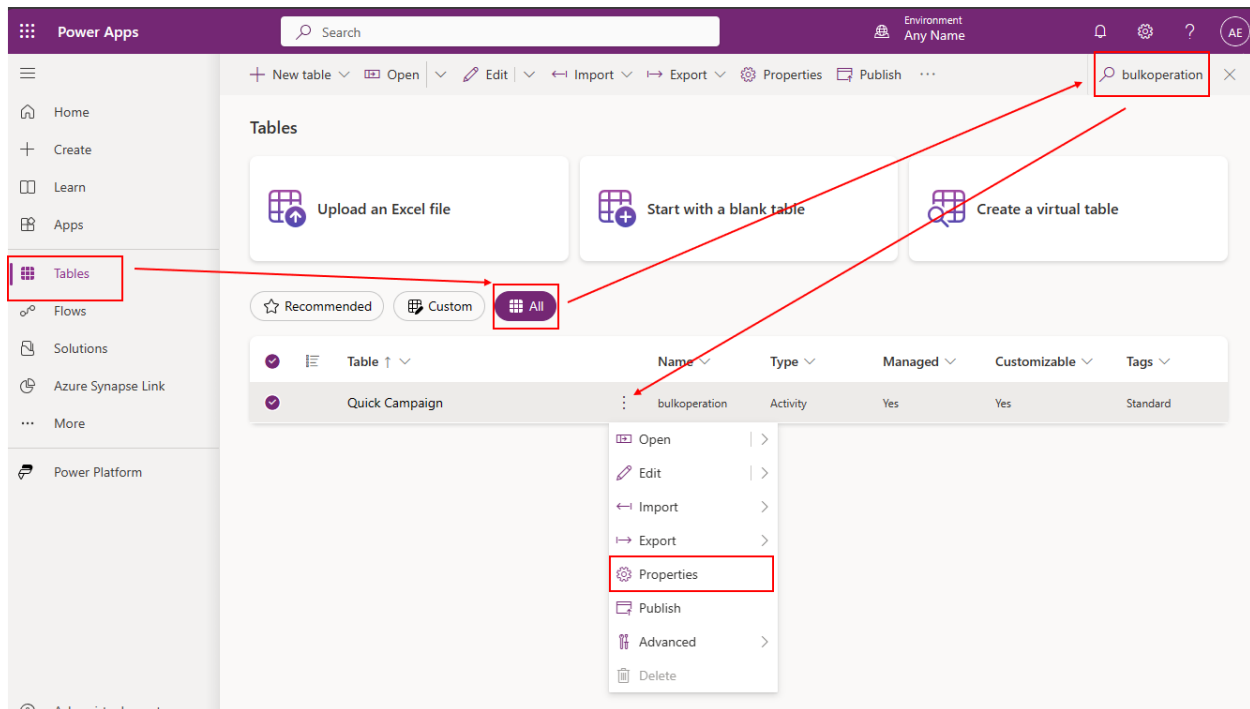
- If you see the following error, please make sure you select "Hong Kong SAR" during CE and Fabric trial setup. If no you need to restart from the beginning.





- If you see the following error, please navigate to **Table**, search for **bulkoperation** table and make sure in the **Advanced options** the **Track changes** is enabled for this table.





**For this table**

<input type="checkbox"/> Apply duplicate detection rules ⓘ	<input type="checkbox"/> Audit changes to its data ⓘ
<input checked="" type="checkbox"/> Track changes <sup>1</sup> ⓘ	<input type="checkbox"/> Leverage quick-create form if available ⓘ
<input type="checkbox"/> Allow knowledge management ⓘ	<input type="checkbox"/> Enable long term retention ⓘ
<input type="checkbox"/> Provide custom help ⓘ	

[Help | URI](#)

## Prerequisites - Manage Tables export to Microsoft Fabric Onelake

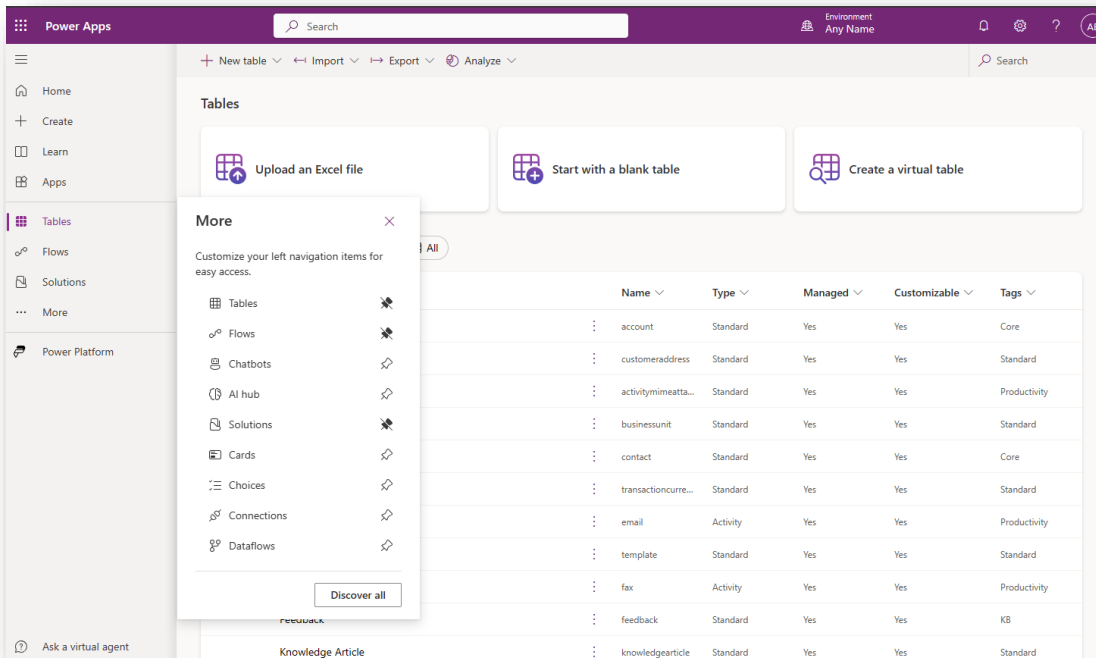
### Estimated Time to Complete

10 minutes for the following steps

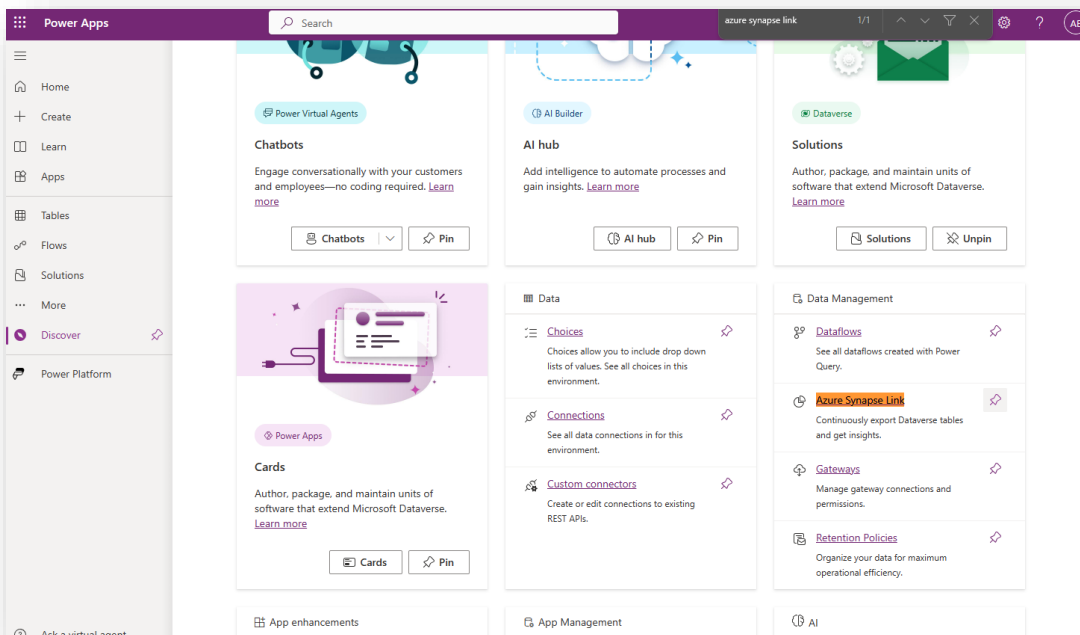
### Steps:

1. Navigate to <https://make.powerapps.com/>
2. Select Environment which you had created in the Trial CE Setup.

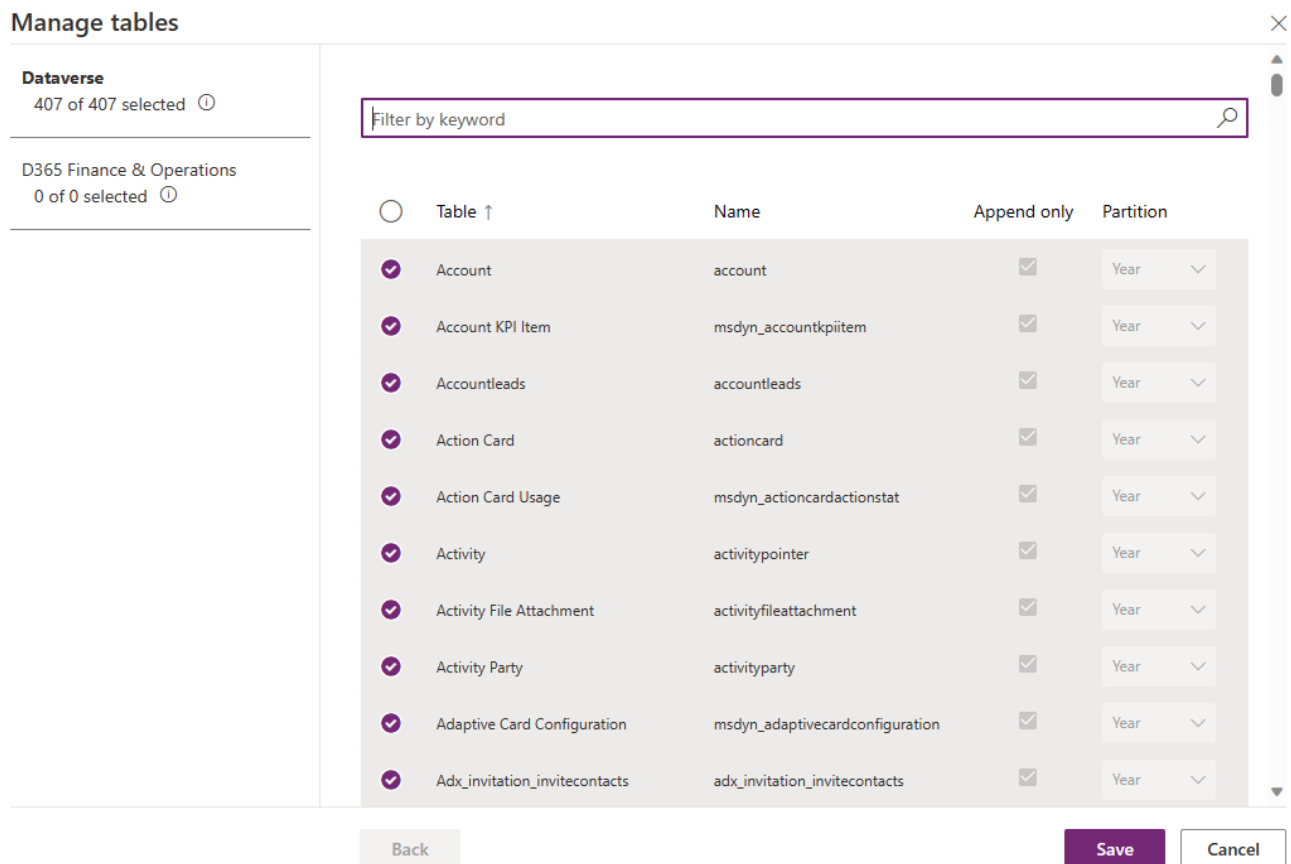
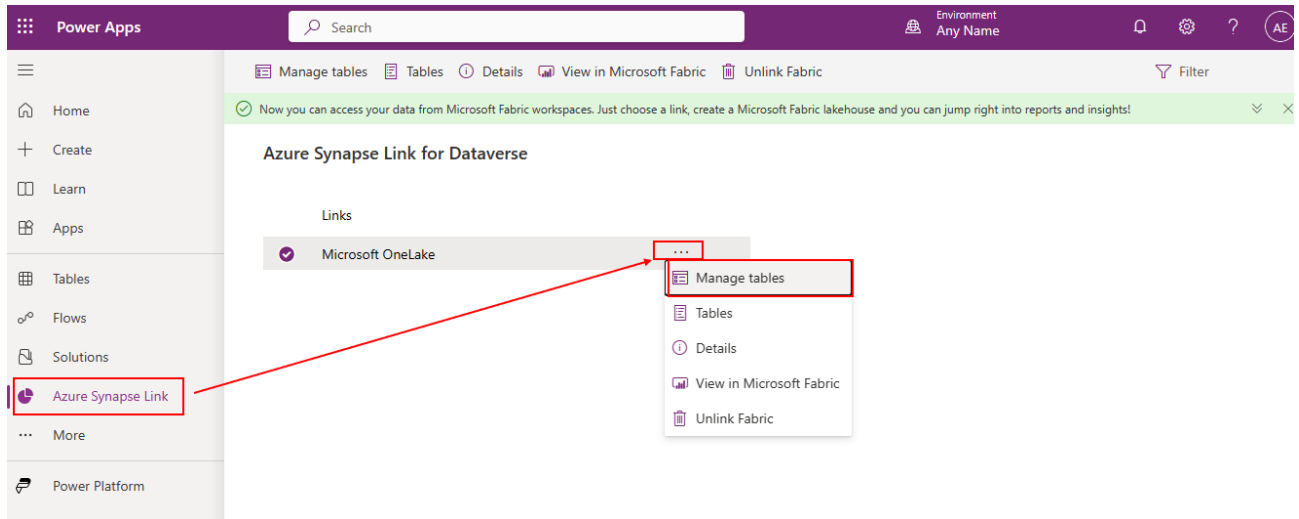
3. Click **Tables** then **Discover all**.



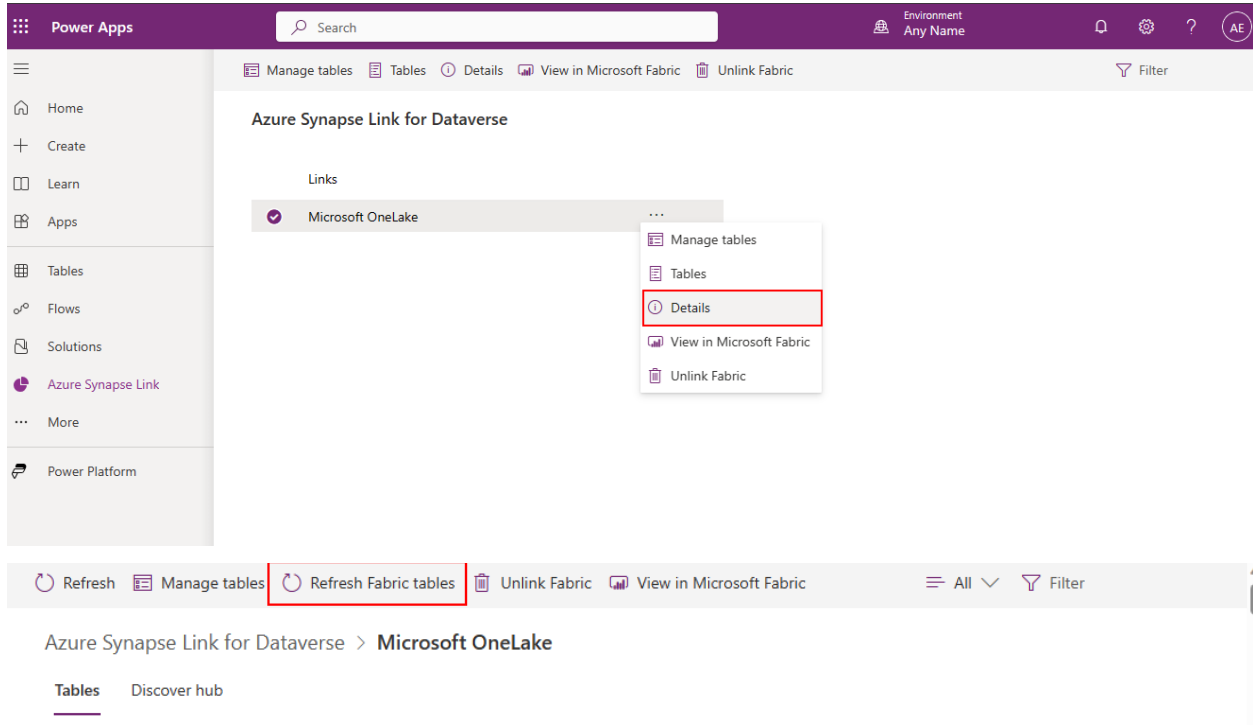
4. Search for **Azure Synapse Link**.  
**Hint:** Pin Azure Synapse Link for better discovery later.



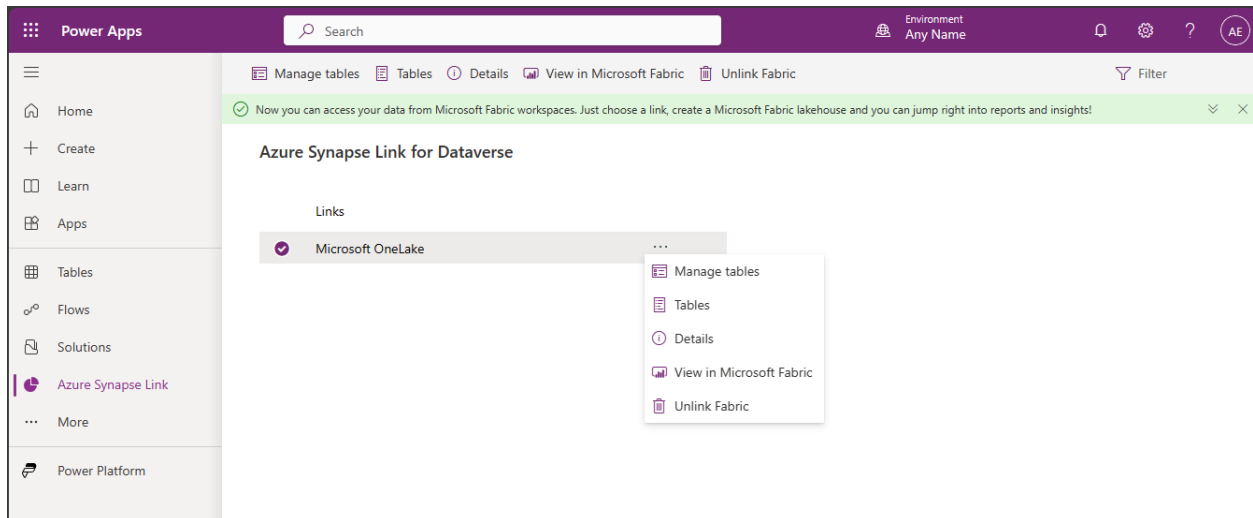
5. Click **Azure Synapse Link** -> **Manage Tables**, In the Manage tables window click **Save**.



**Hint:** If the tables are not showing in the “Manage tables” window. Please retry after click **Details** then “**Refresh Fabric tables**”



9. Click **View in Microsoft Fabric** to navigate to Fabric.



NOTE: Depending on the size of data, initialization might take up to 60 minutes to complete. Subsequent updates to data might also take up to 60 minutes to update. When you open Fabric Lakehouse you'll see the links as unidentified until the initial sync is completed.

