

# FORVIS



## Utilizing Power BI With Dynamics GP

July 18, 2023

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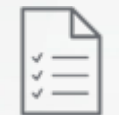
**Please use the Questions feature to ask questions.**



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- Tax
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# Business Technology Solutions

FORVIS' Business Technology Solutions can help support digital transformation across your organization with enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

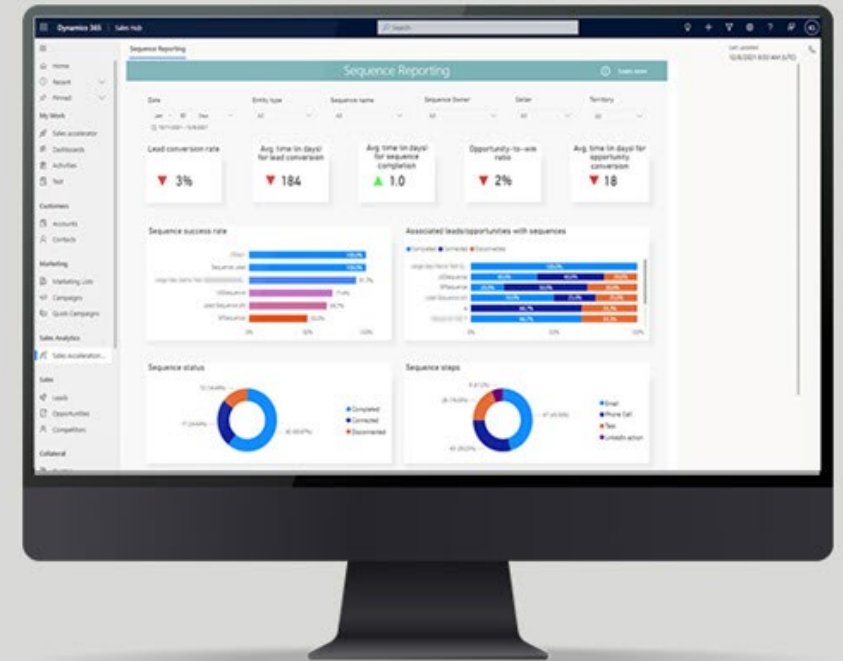
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From sales forecasting to financial reporting,  
learn what CRM and ERP technologies can do.

# Presenter



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# Objectives

- Describe how Power BI Desktop can connect to GP data
- Discuss how to create visualizations
- Explain the purpose of measures & calculated columns

# AGENDA

9:00 am ● Connecting Power BI to GP

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9:15 am ● Creating Power BI Reports

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9:35 am ● SSRS, Power BI, or Both!

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9:45 am ● Displaying Power BI in GP

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# Connecting Power BI to GP

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# Connecting to Data

- SQL Server
- OData

# SQL Server

- Connect directly using Power BI Desktop
- Use the On-Premises Data Gateway from Power BI Online
- Windows or SQL Authentication
- Direct Query or Import Connectivity

# OData

- Filtering is done server-side
- Pre-aggregate data server-side
- Requires additional GP & system setup
- Security can be managed from GP

# GP OData FAQs

- Users connect using Windows authentication
- 64-bit support
- GP Desktop client

# GP OData Security

- Security is managed within GP
- Security roles are available from GP

View the Microsoft Dynamics GP 2016 – OData Feature document for details

- [How to configure OData in Microsoft Dynamics GP 2016](#)
- [On-Demand Learning: OData feature in Microsoft Dynamics GP 2016](#)

# Import Mode

- Most common
- Fast
- Data compression
- Supports all of DAX & Power Query M formula languages

# Direct Query

- Import model size limits don't apply
- No scheduled refreshes needed
- Dashboard titles can update every 15 minutes



# Direct Query

- Power Query/Mashup expressions restrictions
- DAX formula restrictions
- Quick Insights not supported



**Show Me!**

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# Creating Power BI Reports

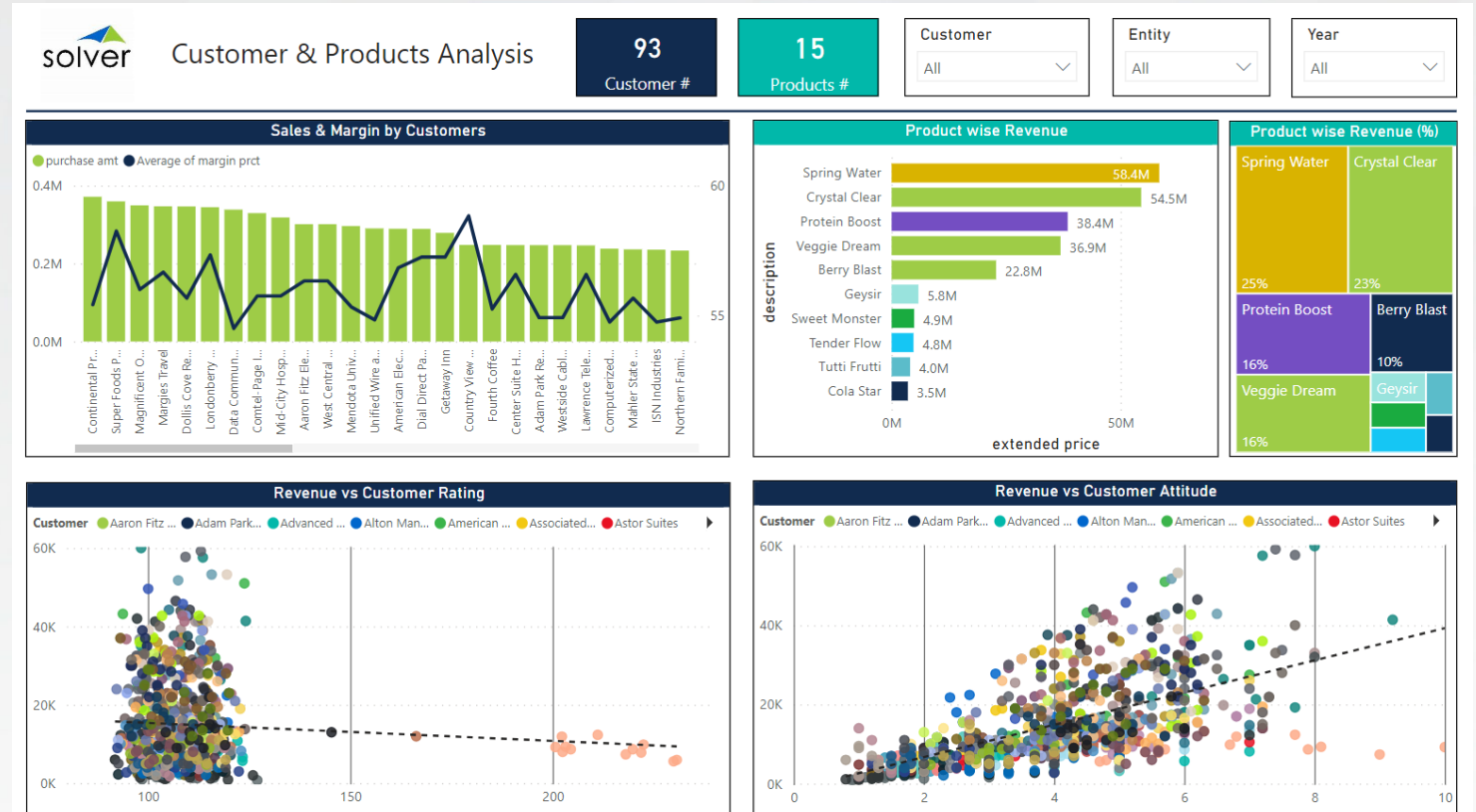
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# Power BI Primer

- **Interactive** reports
- **Multiple** tenants
- **Disparate** data sources



# Power BI Licensing

- Power BI Desktop – FREE
- Power BI Pro – \$10/user/month
- Power BI Premium – \$20/user/month

# Creating Power BI Reports

Connect to the data



Create the data model



Build reports



Publish to the cloud



# Connecting GP Data to Power BI

- Select Get Data
- Select OData Feed or SQL Server Database

*Note:* SQL Server Analysis Cubes is also supported



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# SSRS, Power BI, or Both!

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# SSRS



REPORTS AVAILABLE  
FOR GP



REPORT BUILDER



MULTI-PAGE  
REPORTING

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# Power BI



INTERACTIVE REPORTS  
WITH VISUALIZATIONS



DRILL-THROUGH



PAGINATED REPORTS



ACCESS AVAILABLE  
OUTSIDE THE  
CORPORATE NETWORK

## FORV/S

# Displaying Power BI in GP

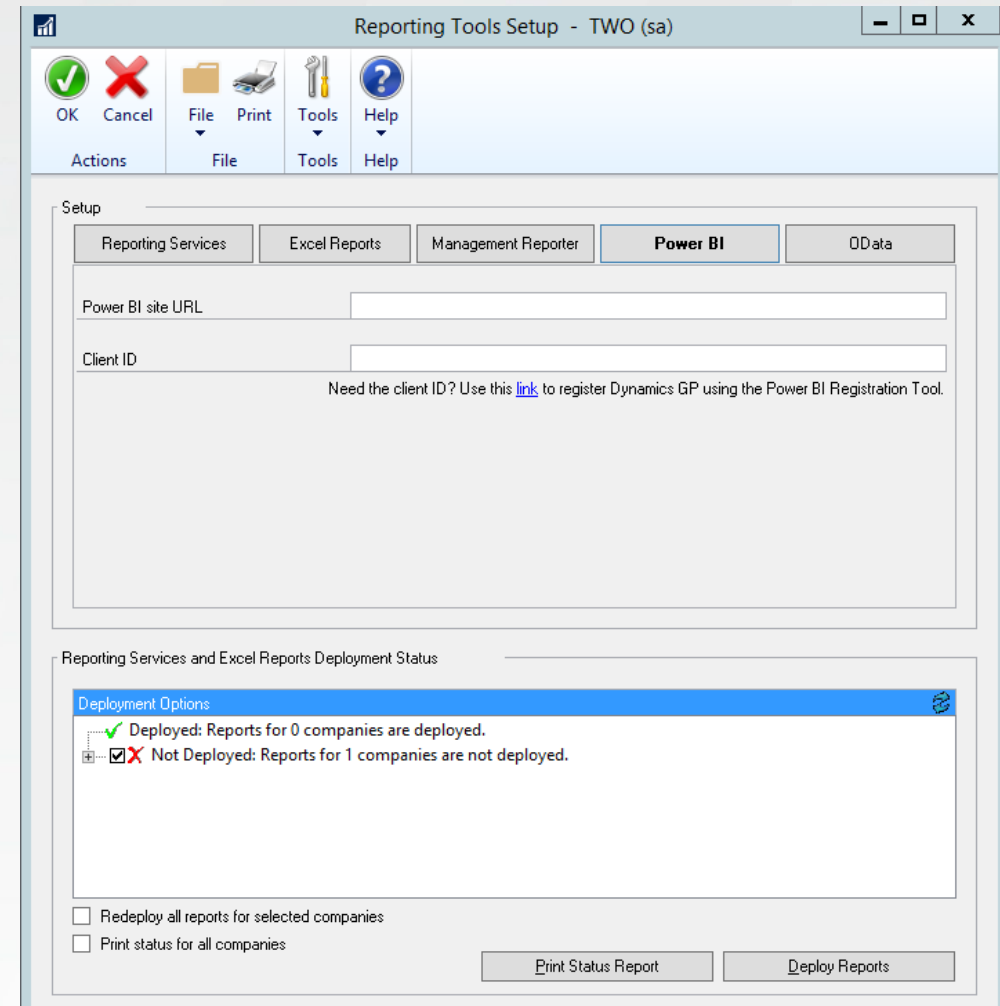
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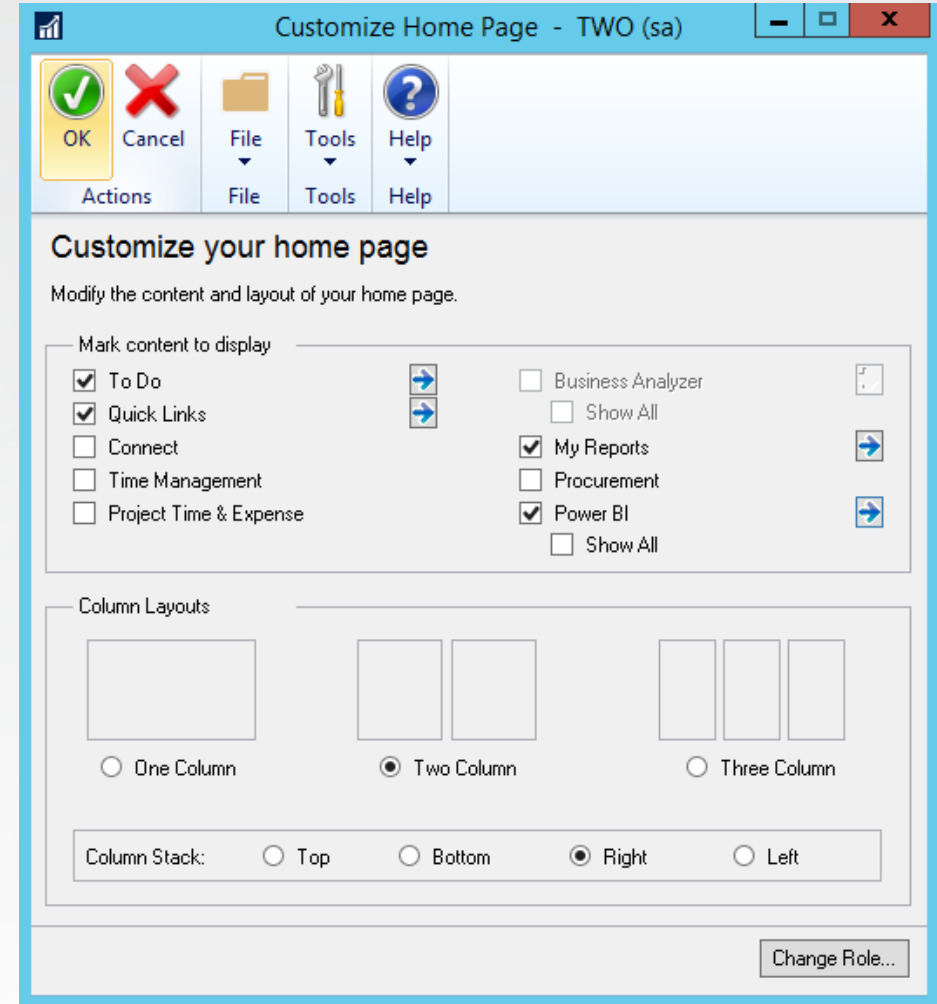
# Reporting Setup

- Use Reporting Tools Setup
- Enter the Power BI URL from Power BI online



# Home Page Customization

- Select Power BI from the list
- (Optionally) Select Show All







**Show Me!**

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# What's Next?

Financial Reports in Solver & Power BI

August 22

9:00 – 10:00 a.m. CT

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