

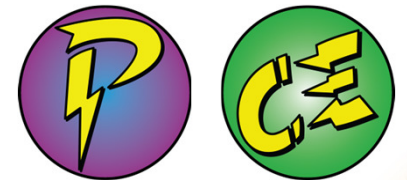
2025 DYNAMICS CON



dynamicscon.com

Unveiling Power BI Magic: Filtered Reports in D365

Lokesh Patel



Session Agenda

- Introduction
- Final Product
- Tools
- Process
- Demo
- Questions & Answers



Introduction

- Senior Manager, Enstoa
- 6+ years working with D365 and Power Platform
- Atlanta, GA D365 User Group Chapter Leader
- DUG User Group – AEC Industry Leader



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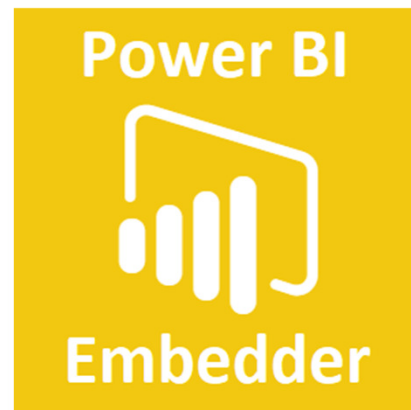
Power BI | Power Apps | Power Automate



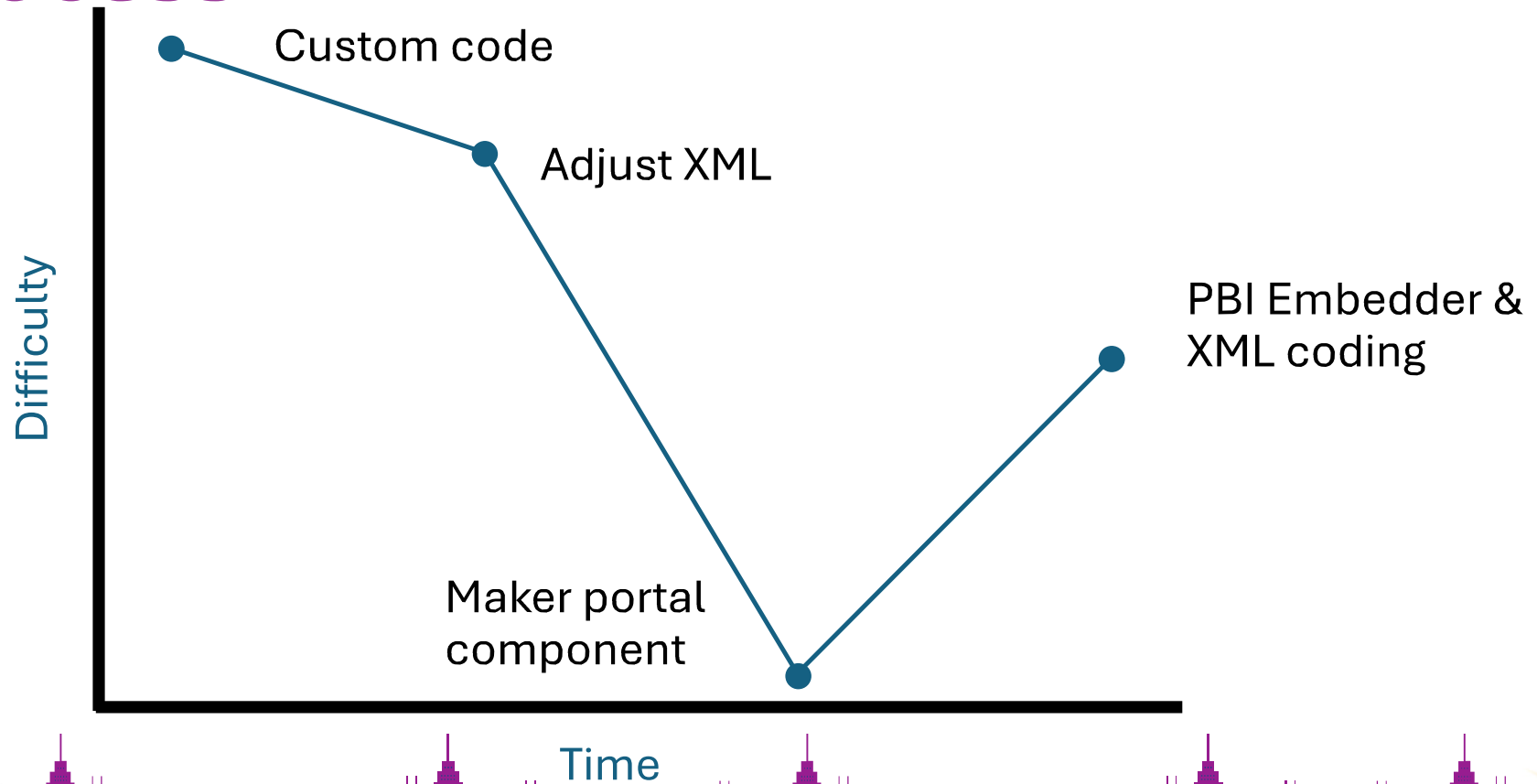
Final Product



Tools



Process




Process





Develop Power BI report



Publish Power BI report to PBI Service

 Power Platform admin center

Enable Power BI visualization embedding

 Solutions 

Create and configure a solution

Power BI



Embedder

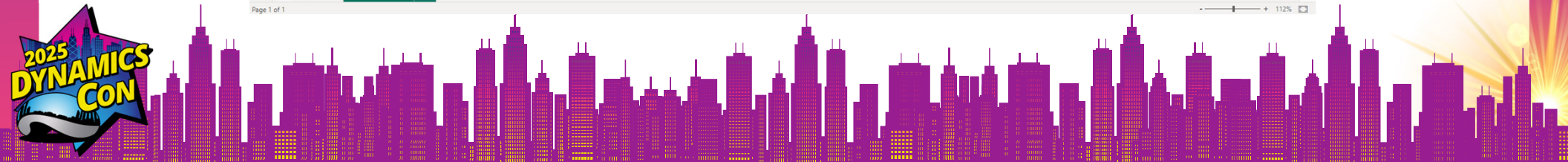
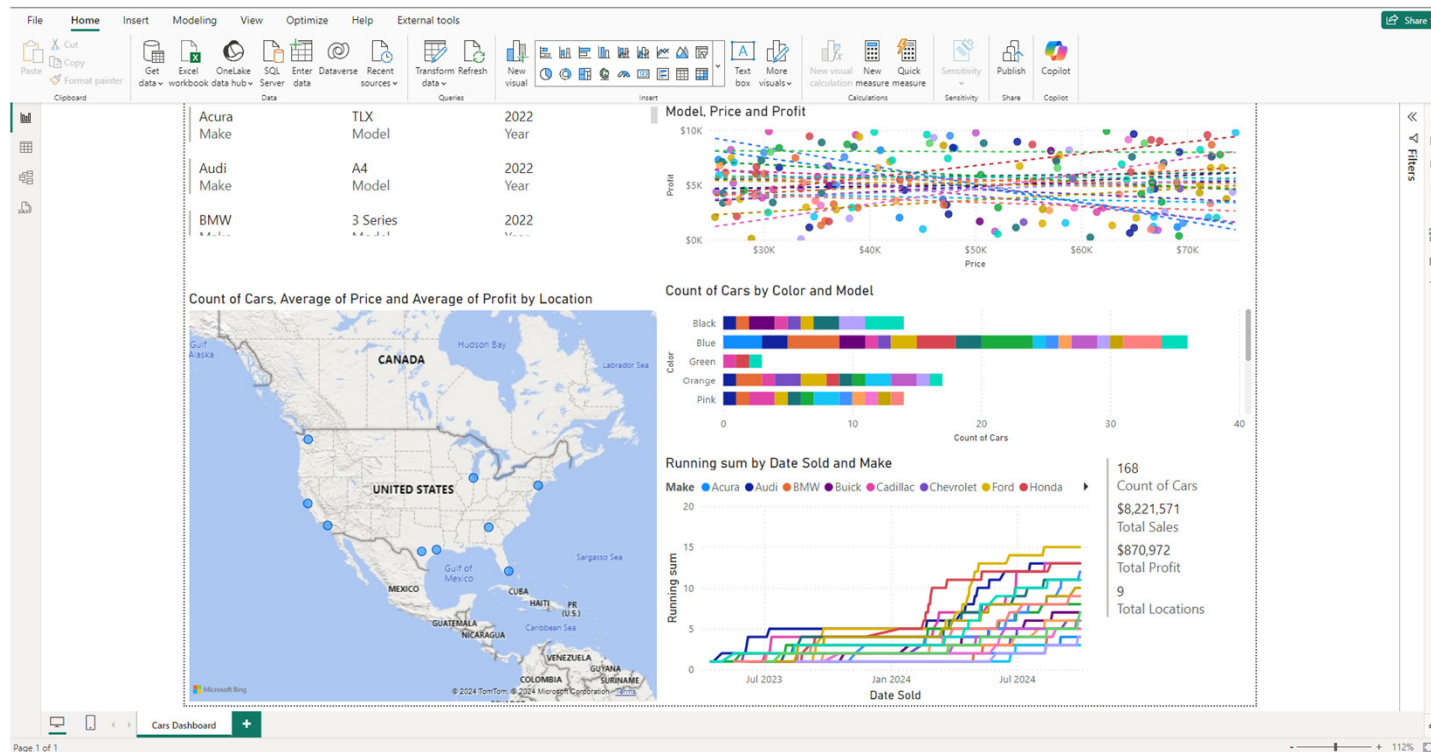
PBI Embedder and/or solution adjustment






Demo



Develop Power BI Report






Publish Power BI Report to PBI Service

|  | Name | Type | Task | Owner |
|---|----------------|----------------|------|-----------|
|  | Cars Dashboard | Report | — | LokeshDev |
|  | Cars Dashboard | Semantic model | — | LokeshDev |



Enable Power BI Visualization Embedding

|  | Name | Type | Task | Owner |
|---|----------------|----------------|------|-----------|
|  | Cars Dashboard | Report | — | LokeshDev |
|  | Cars Dashboard | Semantic model | — | LokeshDev |



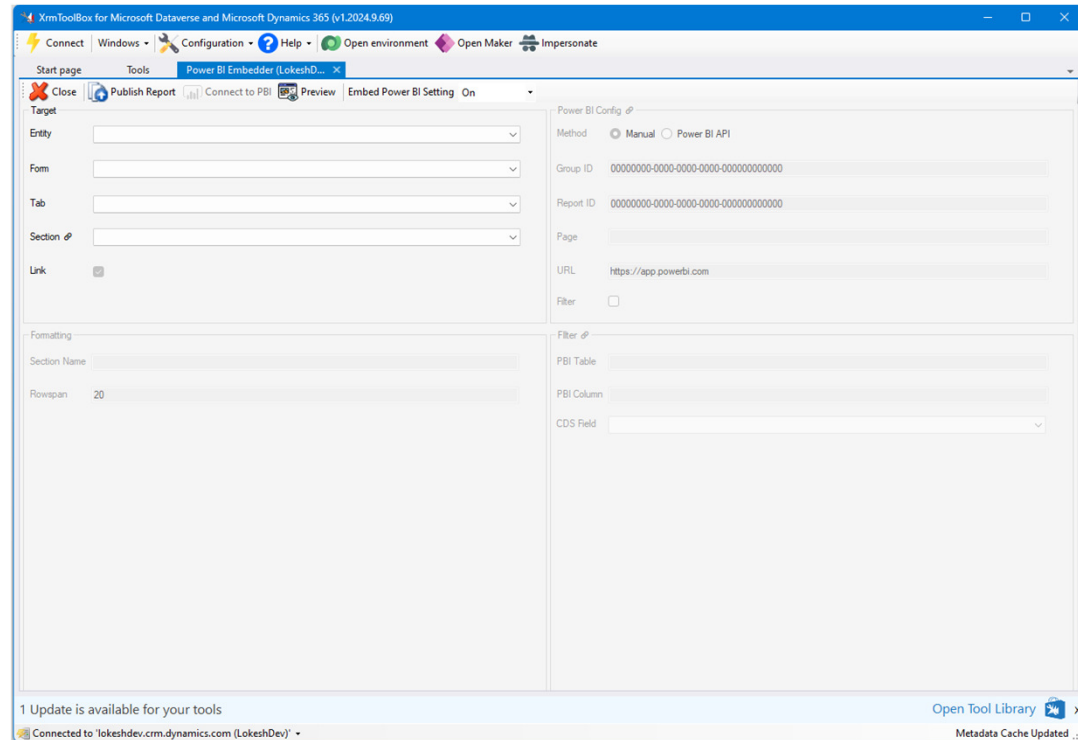
Create and Configure a Solution

The screenshot displays the Microsoft Dynamics 365 configuration interface for a solution named 'New Cars'. The interface is divided into several sections:

- Table columns:** A sidebar on the left showing a list of columns for the 'Cars' table. Columns include 'Make', 'Model*', 'Engine', 'Fuel Efficiency', 'Fuel Type', 'Horsepower', 'Torque', 'Transmission', 'Year', and 'Owner*'. The 'Owner*' column is currently selected, and the user 'Lokesh Patel' is associated with it.
- General:** The main configuration area for the 'Cars' table. It includes a 'Cars Dashboard' section with a world map titled 'Count of Cars, Average of Price and Average of Profit by Location'. The map shows data points for various regions including North America, Europe, Asia, South America, Africa, Australia, and Antarctica.
- Model, Price and Profit:** A chart area showing a line graph of 'Price' over time. The y-axis ranges from \$0 to \$10, and the x-axis ranges from 0 to 10.
- Count of Cars by Color and Model:** A chart area showing a bar graph of 'Count' over time. The y-axis ranges from 0 to 10, and the x-axis ranges from 0 to 10.
- Running sum by Date Sold and Make:** A chart area showing a line graph of 'Running sum' over time. The y-axis ranges from 0 to 10, and the x-axis ranges from 0 to 10.
- Filters:** A sidebar on the right showing filter settings. It includes a search bar and two filter sections: 'Filters on this page' and 'Filters on all pages'. The 'new_carsid' filter is set to 'is (All)' for the page and 'is (Blank)' for all pages.



PBI Embedder and/or Solution Adjustment



Suggested Resources

- [Enable Power BI visualization embedding](#)
- [XrmToolBox](#)
- Embedding Learn articles
 - [Embed a Power BI report in a model-driven app main form](#)
 - [Use filters in a Power BI embedded analytics report](#)
- DO NOT USE THIS
 - [Power BI content management in Power Apps solutions](#)



Thank you

