Dynamics 365 Reporting with Power BI Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In the era of Digital Transformation and Data-Driven Decision Making, organizations leveraging Microsoft Dynamics 365 need more than just transactional data; they demand Actionable Insights. Dynamics 365 Reporting with Power BI Training Course is designed to bridge the gap between your comprehensive Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) data within Dynamics 365 and powerful, interactive visualizations. By mastering the integration of Dynamics 365 and Microsoft Power BI, participants will unlock real-time Business Intelligence, moving beyond static reports to dynamic, visually immersive dashboards. This is a crucial step in maximizing Return on Investment (ROI) from your Dynamics 365 platform and fostering a culture of Self-Service BI.

This intensive course focuses on the practical, end-to-end development of sophisticated reporting solutions. Key skills covered include Power Query (M Language) for robust data transformation, DAX (Data Analysis Expressions) for advanced calculations and metrics, and best practices for report design and Data Storytelling. We will utilize Real-World Scenarios and case studies across Finance, Sales, and Operations, ensuring immediate applicability. Participants will learn how to connect securely to various Dynamics 365 environments and deploy reports via the Power BI Service, implementing essential Data Governance and Role-Level Security (RLS). This is the definitive path to becoming a Certified Power BI Data Analyst specialized in the Microsoft Dynamics ecosystem.

Programme Curriculum

Dynamics 365 Reporting with Power BI Training Course

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Course Duration

5 days

Course Objectives

1. Master Dynamics 365 Dataverse and Connector security.
2. Implement robust ETL Processes using Power Query for data transformation.
3. Design and optimize scalable Data Models using Star Schema best practices.
4. Develop complex custom metrics and calculations using DAX.
5. Create visually compelling and accessible Interactive Dashboards and Reports.
6. Apply advanced techniques for Time Intelligence and comparative analysis.
7. Publish and manage reports within the Power BI Service and Workspaces.
8. Embed Power BI reports directly into Dynamics 365 Apps for seamless user experience.
9. Implement Role-Level Security for secure and compliant data sharing.
10. Optimize report and query performance for Large Datasets.
11. Leverage AI Visuals and Copilot features for augmented analytics.
12. Conduct Financial Reporting and Sales Pipeline Analysis using D365 data.
13. Establish processes for Data Refresh, scheduling, and Data Governance.

Target Audience

1. Business Analysts (BA)
2. Data Analysts and BI Developers
3. Dynamics 365 System Administrators and Consultants
4. IT Professionals supporting ERP/CRM systems
5. Departmental Managers
6. Power Platform Developers and Architects
7. Financial Accountants seeking automated reporting
8. Decision-Makers requiring Self-Service BI capabilities

Course Modules

Module 1: Connecting Power BI to Dynamics 365 Data

- Overview of the Dynamics 365 ecosystem and its data sources
- Connecting Power BI Desktop using the Dynamics 365 Connector.
- Securing data access and understanding entity relationships.
- Case Study: Connecting to D365 Sales entities
- Understanding the difference between DirectQuery and Import Mode.

Module 2: Data Transformation with Power Query

- Fundamentals of Power Query Editor and M Language.
- Applying data cleaning, shaping, and merging techniques
- Handling complex data types and transforming nested records.
- Case Study: Transforming raw D365 Finance ledger data for a P&L statement.
- Creating reusable functions and Dataflows for efficiency.

Module 3: Data Modeling and Star Schema

- Principles of effective data modeling
- Creating and managing relationships
- Implementing a robust Date/Calendar Dimension Table for time intelligence.
- Case Study: Building a Star Schema for D365 Supply Chain/Inventory analysis.
- Optimizing model performance and troubleshooting circular dependencies.

Module 4: Advanced DAX (Data Analysis Expressions)

- Understanding Row Context and Filter Context in DAX.
- Creating explicit Measures using the CALCULATE function.
- Implementing essential Time Intelligence functions
- Case Study: Calculating rolling averages and complex Sales Funnel conversions.
- Developing calculated columns and measures and best practices.

Module 5: Report Design and Data Visualization

- Principles of effective Data Storytelling and visual design.
- Choosing the right visualization for different data types
- Utilizing Filters, Slicers, and Bookmarks for interactivity.
- Case Study: Designing a single-page Executive Sales Dashboard from D365.
- Best practices for accessibility and mobile-optimized reports.

Module 6: Publishing, Sharing, and Governance

- Introducing the Power BI Service and Workspaces.
- Publishing reports and configuring scheduled Data Refresh.
- Implementing Role-Level Security (RLS) based on D365 user roles.
- Case Study: Securing regional D365 Sales reports so managers only see their data.
- Creating Apps and distributing content to large user groups.

Module 7: Power BI Integration with Dynamics 365

- Embedding Power BI Dashboards and Reports within Dynamics 365 pages.
- Using the Power BI tile on D365 dashboards.

- Passing contextual filters from Dynamics 365 to Power BI.
- Case Study: Embedding a Power BI Customer Service report on the D365 Case form.
- Troubleshooting integration and licensing issues.

Module 8: Advanced Analytics and Future Trends

- Leveraging AI Visuals
- Introduction to using Power Automate for data-driven alerts and actions.
- Exploring the impact of Microsoft Fabric on D365 reporting.
- Case Study: Using the Q&A Visual for natural language querying of D365 data.
- Best practices for continuous Performance Tuning and scalability.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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