

MICROSOFT DYNAMICS 365 REPORTING, ARTIFICIAL INTELLIGENCE AND INSIGHTS (55297)

Course Code: 821445

This course is designed for citizen developers and technical users, providing the skills required to create reports, custom visualizations and implement the AI features of Dynamics 365.

Attendees of this course will gain an in-depth understanding of how to configure and set up a reporting and analytics environment that integrates with Dynamics 365 data, build custom reports, create stunning dashboards by integrating PowerBI with Dynamics 365 and configure and deploy the AI features of Dynamics 365.

What You'll Learn

Students will learn,

- How to configure and set up a reporting and analytics environment that integrates with Dynamics 365 data
- Build custom reports
- Create stunning dashboards by integrating PowerBI with Dynamics 365
- Configure and deploy the AI features of Dynamics 365

Who Needs to Attend

Citizen developers and technical users, providing the skills required to create reports, custom visualizations and implement the AI features of Dynamics 365.

Prerequisites

Students should have an existing working knowledge of Microsoft Dynamics 365. As a minimum, students should attend the prerequisite course 'Introduction to Microsoft Dynamics 365'.

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CLASSROOM LIVE

\$2,095 CAD

4 Day

Classroom Live Outline

Module 1: Introduction

This module introduces the concept of building an analytics environment for Microsoft Dynamics 365 and Power Apps. You will learn about the tools and resources that are available as well as best practice methodologies and fundamentals.

Lessons

- Objectives
- Analytics Overview
- Tools and Possibilities
- SQL Reports
- Power BI
- Dynamics 365 Artificial Intelligence
- The Power Apps AI Builder

Module 2: Analytics Options

This module presents the various options available in Dynamics 365 and Power Apps for analyzing data.

Lessons

- Objectives
- SQL Reports and the Dataverse
- Connecting Power BI to the Dataverse
- Dynamics 365 AI - Sales Insights
- Dynamics 365 AI - Customer Service Insights

- The Power Apps AI Builder

Module 3: SQL Reports with Dataverse Data

In this module you will learn about the process to create custom reports, how to configure your reporting environment and how to use the different tools available for building custom SQL reports that connect to data in the Dataverse.

Lessons

- Objectives
- Introduction to custom Reporting
- The TDS Endpoint
- Setting up the environment
- Building custom Reports in SQL

Module 4: Power BI Reports and Dashboards

In this module you will learn how to connect Power BI to Dynamics 365, bring data in the Dataverse into a Power BI dataset, build custom Power BI reports and dashboards, and surface Power BI Dashboards inside Dynamics 365 Model-driven Apps.

Lessons

- Objectives
- Introduction to Power BI
- Connecting Power BI to the Dataverse
- Building a dataset in Power BI
- Creating Power BI Dashboards
- Sharing and surfacing Power BI Dashboards in Dynamics 365

Module 5: Dynamics 365 Artificial Intelligence

This module introduces you to the AI features of Dynamics 365. You will learn how to configure Customer Insights, Sales Insights and Customer Service Insights in Dynamics 365.

Lessons

- Objectives
- Introduction to Dynamics 365 Insights
- Configuring Customer Insights
- Configuring Sales Insights
- Configuring Customer Service Insights

Module 6: The AI Builder

This module introduces you to the AI Builder in Power Apps. You will learn how to configure the AI Builder by building AI Models that showcase practical

implementation of Form processing, Object Detection, Prediction, Text Classification and Entity Extraction.

Lessons

- Objectives
- Introduction to the AI Builder
- Form Processing
- Object Detection
- Prediction
- Text Classification
- Entity Extraction

Classroom Live Labs

Lab 1: Analytics Orientation

- Set up your Lab
- Configure your Analytics environment

Lab 1: Exploring analytics in Dynamics 365

- Explore Reporting capabilities
- Explore Insights
- Explore the Power BI integration
- Explore the AI Builder in Power Apps

Lab 1: Set up your Reporting Environment

- Configure the Environment
- Connect to the Dataverse using the TDS Endpoint

Lab 2: Create a custom Report

- Create a custom SQL report from Dataverse data

Lab 1: Set up your Power BI Environment

- Configure Power BI and connect to the Dataverse

Lab 2: Build a Power BI dashboard

- Build your Power BI Dataset
- Create a custom dashboard
- Share and surface in Dynamics 365 Model-driven App

Lab 1: Set up Sales Insights

- Configuring the Sales Insights Dashboards

Lab 2: Set up Customer Service Insights

- Configuring the Customer Service Insights Dashboards

Lab 1: Implement Form Processing

- Configuring the AI Builder
- Build a Form Processing AI Model

Lab 2: Implement Object Detection

- Configuring the AI Builder
- Build an Object Detection AI Model

Lab 3: Implement Prediction

- Configuring the AI Builder
- Build a Prediction AI Model

Lab 4: Implement Text Classification

- Configuring the AI Builder
- Build a Text Classification AI Model

Lab 5: Implement Entity Extraction

- Configuring the AI Builder
- Build an Entity Extraction AI Model

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VIRTUAL CLASSROOM LIVE

\$2,095 CAD

3 Day

Virtual Classroom Live Outline

Module 1: Introduction

This module introduces the concept of building an analytics environment for Microsoft Dynamics 365 and Power Apps. You will learn about the tools and resources that are available as well as best practice methodologies and fundamentals.

Lessons

- Objectives
- Analytics Overview
- Tools and Possibilities
- SQL Reports
- Power BI
- Dynamics 365 Artificial Intelligence
- The Power Apps AI Builder

Module 2: Analytics Options

This module presents the various options available in Dynamics 365 and Power Apps for analyzing data.

Lessons

- Objectives
- SQL Reports and the Dataverse
- Connecting Power BI to the Dataverse
- Dynamics 365 AI - Sales Insights
- Dynamics 365 AI - Customer Service Insights

- The Power Apps AI Builder

Module 3: SQL Reports with Dataverse Data

In this module you will learn about the process to create custom reports, how to configure your reporting environment and how to use the different tools available for building custom SQL reports that connect to data in the Dataverse.

Lessons

- Objectives
- Introduction to custom Reporting
- The TDS Endpoint
- Setting up the environment
- Building custom Reports in SQL

Module 4: Power BI Reports and Dashboards

In this module you will learn how to connect Power BI to Dynamics 365, bring data in the Dataverse into a Power BI dataset, build custom Power BI reports and dashboards, and surface Power BI Dashboards inside Dynamics 365 Model-driven Apps.

Lessons

- Objectives
- Introduction to Power BI
- Connecting Power BI to the Dataverse
- Building a dataset in Power BI
- Creating Power BI Dashboards
- Sharing and surfacing Power BI Dashboards in Dynamics 365

Module 5: Dynamics 365 Artificial Intelligence

This module introduces you to the AI features of Dynamics 365. You will learn how to configure Customer Insights, Sales Insights and Customer Service Insights in Dynamics 365.

Lessons

- Objectives
- Introduction to Dynamics 365 Insights
- Configuring Customer Insights
- Configuring Sales Insights
- Configuring Customer Service Insights

Module 6: The AI Builder

This module introduces you to the AI Builder in Power Apps. You will learn how to configure the AI Builder by building AI Models that showcase practical

implementation of Form processing, Object Detection, Prediction, Text Classification and Entity Extraction.

Lessons

- Objectives
- Introduction to the AI Builder
- Form Processing
- Object Detection
- Prediction
- Text Classification
- Entity Extraction

Virtual Classroom Live Labs

Lab 1: Analytics Orientation

- Set up your Lab
- Configure your Analytics environment

Lab 1: Exploring analytics in Dynamics 365

- Explore Reporting capabilities
- Explore Insights
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- Explore the AI Builder in Power Apps

Lab 1: Set up your Reporting Environment

- Configure the Environment
- Connect to the Dataverse using the TDS Endpoint

Lab 2: Create a custom Report

- Create a custom SQL report from Dataverse data

Lab 1: Set up your Power BI Environment

- Configure Power BI and connect to the Dataverse

Lab 2: Build a Power BI dashboard

- Build your Power BI Dataset
- Create a custom dashboard
- Share and surface in Dynamics 365 Model-driven App

Lab 1: Set up Sales Insights

- Configuring the Sales Insights Dashboards

Lab 2: Set up Customer Service Insights

- Configuring the Customer Service Insights Dashboards

Lab 1: Implement Form Processing

- Configuring the AI Builder
- Build a Form Processing AI Model

Lab 2: Implement Object Detection

- Configuring the AI Builder
- Build an Object Detection AI Model

Lab 3: Implement Prediction

- Configuring the AI Builder
- Build a Prediction AI Model

Lab 4: Implement Text Classification

- Configuring the AI Builder
- Build a Text Classification AI Model

Lab 5: Implement Entity Extraction

- Configuring the AI Builder
- Build an Entity Extraction AI Model



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PRIVATE GROUP TRAINING

4 Day

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