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## PowerBI OVERVIEW

PRESENTED BY  
TYLER LONG

# OVERVIEW

- PowerBI Desktop – Launching and connecting to the Dataverse
- Key use cases and capabilities
- Visualizations
- Filters
- Measures

# PowerBI DESKTOP – LAUNCHING AND CONNECTING TO DATAVERSE

- PowerBI Desktop can be found [here](#)
  - A free application anyone can download
  - Connecting to your akoyaGO CRM is possible through your single sign on through Microsoft
- Posting your dashboard to akoyaGO for consumption does require a PowerBI license (you are provided a single license with akoyaGO)
- Sign into PowerBI Desktop, and use the Dataverse Icon to connect to your akoyaGO tenant

# PowerBI – COMMON TABLES TO KNOW

Contact:	contact
Constituent:	account
Request:	akoya_request
Payment/Requirement:	akoya_requestpayment
Fund:	akoya_fund
Gift:	akoya_gift
Gift Payment:	akoya_giftpayment

The full table list and columns can be found at [make.powerapps.com](https://make.powerapps.com)  
(if you have the System Customizer or Admin Role in akoyaGO)

# PowerBI – VISUALIZATIONS

- PowerBI contains a wide range of visualizations to utilize from Bar Charts, Graphs, Tables, and Gauges
- Visualizations can be formatted with a wide range of colors and options, including custom colors
- They can also be filtered by specific criteria on a page basis, or each item separately
- Walkthrough of visualizations

# PowerBI – FILTERS AND SLICERS

- Filters are applied on a page level to help narrow down your dataset ahead of time
- PowerBI offers more sophisticated filter options, such as top N, bottom N and conditional filters
- Slicers are a type of visualizations that allows a user consuming the dashboard to live update their results using a dropdown or a date range,
- Walkthrough of Slicers and Filters

# PowerBI – PUBLISHING TO akoyaGO

- Once your dashboard is ready to post, you can select Publish in the header to publish this dashboard to your PowerBI environment
- In the dashboards section of akoyaGO, press Create New PowerBI Dashboard
- Find your published dashboard and pin this to your newly created Dynamics Dashboard
- Full example walkthrough of Publishing



# Q&A / LIVE BUILDING

# THANK YOU

Presented By

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Manager of Technical Services



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