

User Manual

Aptean Food and Beverage ERP

PowerBI

Product Documentation



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Power BI Setup

Article • 5/22/2023 • 7 min read

This document describes the setup of the OData sources in Power BI to make use of the Foodware 365 reports.

Change data source, edit permissions and credentials

Pre-requisites:

- Power BI Desktop is installed
- The PBIX-file can be opened
- Web services in Dynamics 365 Business Central are created and published
- User Card in Dynamics 365 Business Central contains a Web Service Access Key

Open the PBIX-file in Power BI Desktop.

1. Click **File**.
2. Click **Options and settings**.
3. Click **Data source settings**.
4. Select the OData source. The text behind the last slash in the URL shows which object from Dynamics 365 Business Central is used in the OData feed, which is "Packaging_Entries" in this example.
5. Click **Change Source**.
6. Fill the URL with the OData V4 URL copied from the Web Services in Dynamics 365 Business Central for the object Packaging Entries (in this example).
7. Click **OK**.
8. Select the same OData source as in the previous step.
9. Click **Edit Permissions**.
10. Click **Edit**.
11. Click **Basic**.
12. Fill the **User name** with the User Name from the User Card in Dynamics 365 Business Central.
13. Fill the **Password** with the Web Service Access Key which can be created in Dynamics 365 Business Central on the User Card.
14. Click **Save**.
15. Click **OK**.



16. Repeat all the steps for every available Data Source in Power BI.

17. Click **Close**.

Load OData feeds for manually created Web Services

Some OData feeds that are present as data source in the Power BI-file must be manually created as Web Service in Dynamics 365 Business Central. These Web Services are not automatically created when the extension is installed because the objects the OData feed refers to are part of the standard functionality of Dynamics 365 Business Central.

When adding data from a new Dynamics 365 Business Central object and entering the Web Service OData URL, it is possible that Power BI will return an error. Power BI caches data from OData feeds, meaning it will hold the data from the first time an OData feed is consumed. This error occurs because according to the cached data, the newly added object doesn't exist. Follow these steps to solve this error.

1. Click **File**.
2. Click **Options and settings**.
3. Click **Options**.
4. Click **Data Load**.
5. Click **Clear Cache**.

Refresh all the tables in the report

Click **Refresh** to get the latest data by refreshing all the tables in the report.

The setup OData sources is now completed, continue with "**Setup workspace and publish app**".



Setup OData sources

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The setup OData sources is now completed, continue with "**Setup workspace and publish app**".



Setup workspace and publish app

Article • 5/22/2023 • 5 min read

Create app workspace

In Power BI, you can create workspaces, places to collaborate with colleagues to create and refine collections of dashboards and reports. Then you bundle the collection together into apps that you can distribute to your whole organization or to specific people or groups.

1. Click **Workspaces**.
2. Click **Create app workspace**.

Open the site <https://docs.microsoft.com/en-us/power-bi/service-create-workspaces> to get more information about creating an app workspace.

Publish from Power BI Desktop

When you publish a Power BI Desktop file to the Power BI service, the data in the model and any reports you created in Report view are published to your Power BI workspace. You'll see a new dataset with the same name, and any reports in your Workspace navigator.

Open the PBIX-file in Power BI Desktop.

1. Click **File**.
2. Click **Publish**.
3. Click **Publish to Power BI**.
4. Select the app workspace.
5. Click **Select**.

Open the site <https://docs.microsoft.com/en-us/power-bi/desktop-upload-desktop-files> to get more information about publishing from Power BI Desktop.

Publish app with reports in Power BI

When the dashboards and reports in the workspace are ready, choose which dashboards and reports must be published, then publish them as an app.

1. Click **Open "Report" in Power BI** or open **Power BI** in the browser.



2. Go to Workspaces and open the app workspace.
3. Click **Reports**.
4. Check if **Included in app** is set to **YES**.
5. Click **Update app**.
6. Add a **Description** and click on **Update app**.
7. Click **Update**.

Open the site <https://docs.microsoft.com/en-us/power-bi/service-create-distribute-apps> to get more information about publishing the app.

The setup workspace and publish app is now completed, continue with "Add Power BI report in Microsoft Dynamics 365 Business Central".



Add Power BI Report in Microsoft Dynamics 365 Business Central

Article • 5/22/2023 • 1 min read

Open a Role Center in Dynamics 365 Business Central that includes a Power BI Chart.

1. Click **Power BI Reports**
2. Click **Select Report**.
3. Click **Get Reports**.
4. Click **Refresh List**.
5. Select the **Report Name**.
6. Click **Manage**.
7. Click **Enable**.
8. Click **OK**.

The Power BI Report is now shown on the Role Center.

