



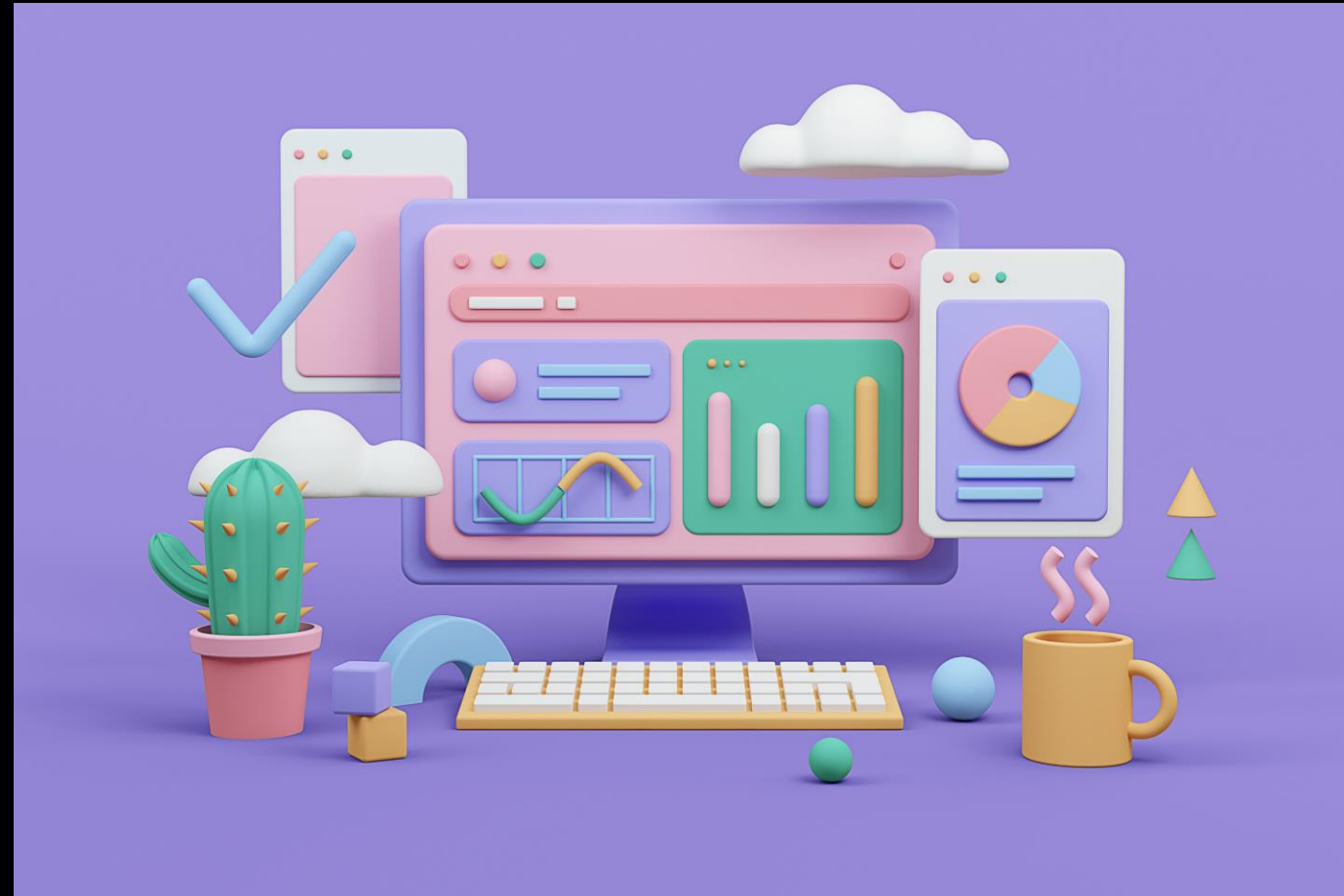
## Business performance analytics

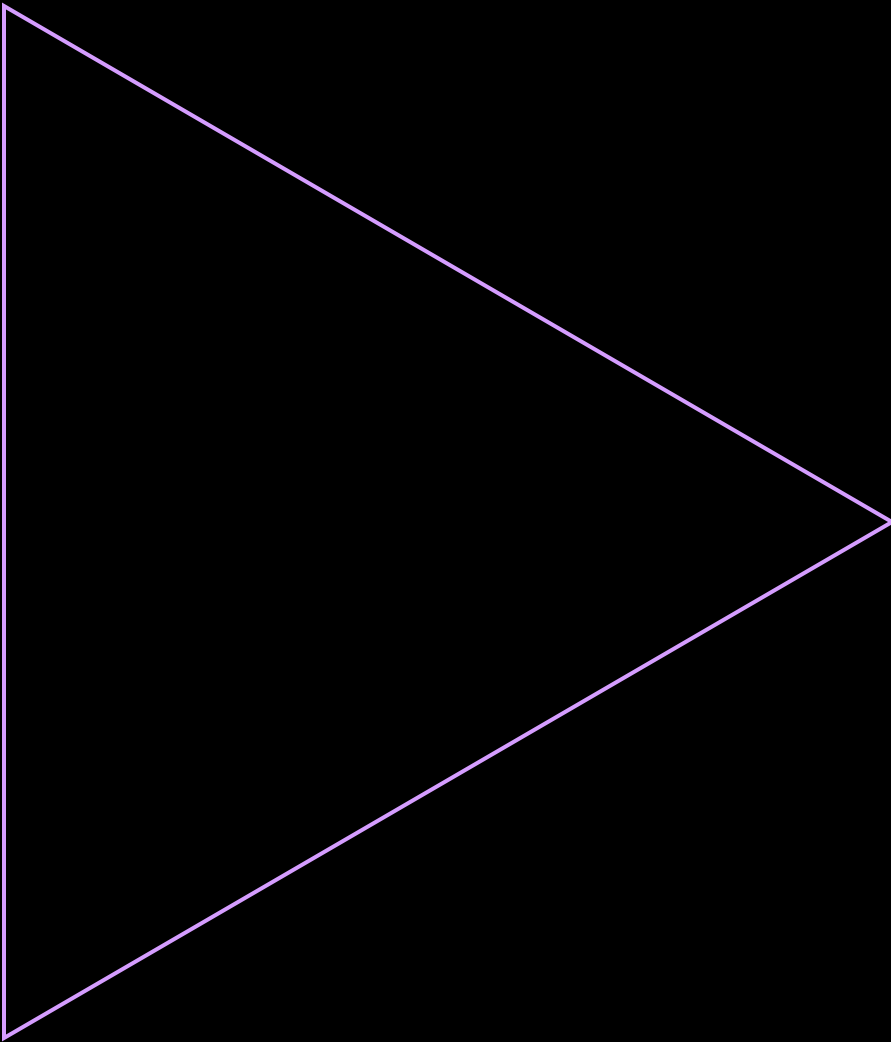
**Presenter(s):**

Jinnie Wong – PRINCIPAL PRODUCT MANAGER  
Rishabh Agarwal – SR. SOFTWARE ENGINEERING MANAGER

**Co-Presenter(s)/Q&A:**

Severin Bock – SR. R&D SOLUTION ARCHITECT  
Veselina Eneva – SR. PROGRAM MANAGER





**Introduction**

**Process architecture**

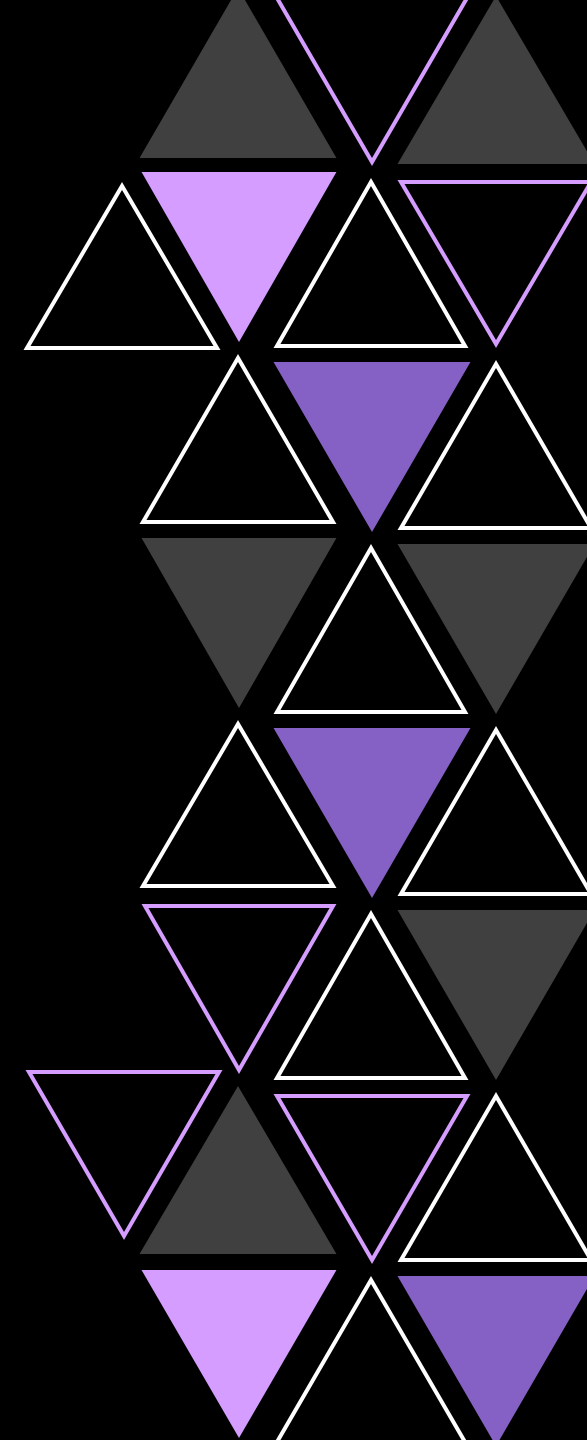
**Data architecture**

**Demo**

**Q&A**

# Introduction

Jinnie Wong



# Business case



**Data is spread across disparate systems**



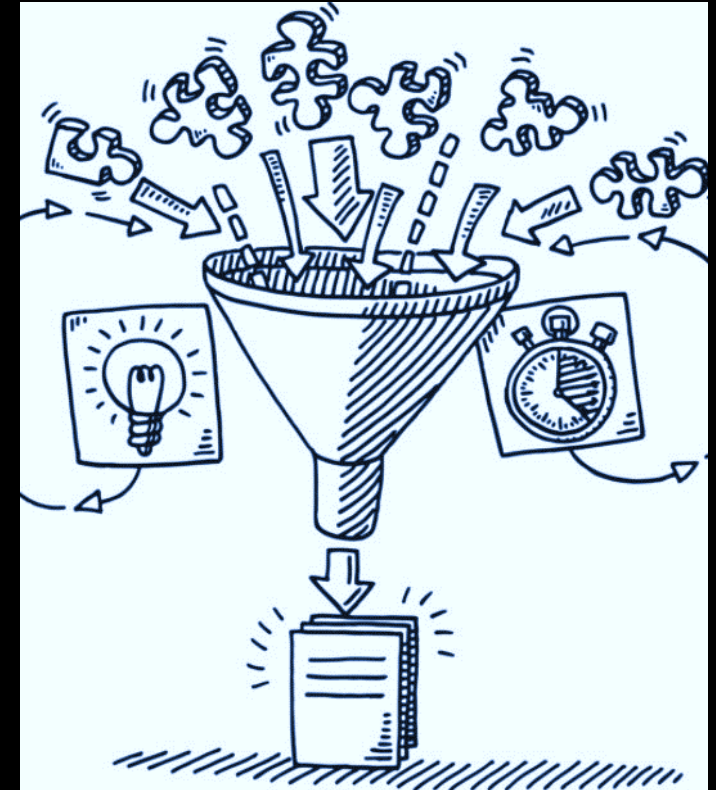
**Hard to get to data, correlate, and create reports**



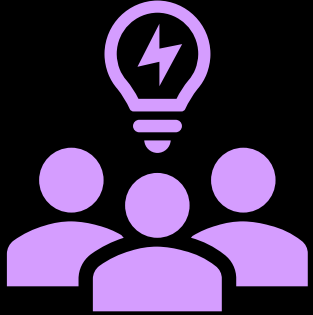
**Analytics & Reporting require developer support**



**Finding insights in data is time consuming**

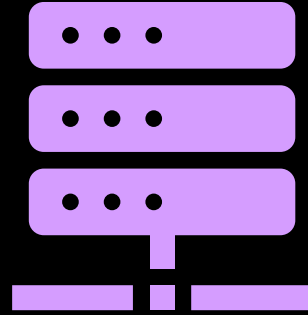


# Guiding principles



## Delightful

- Prioritize intuitive user experience
- Easy deployment
- Simple to create reports in Excel and Power BI
- Enable collaboration



## Data Driven & Trustworthy

- Data is current
- Secured by role-based access control
- Empower users to make data-driven decisions

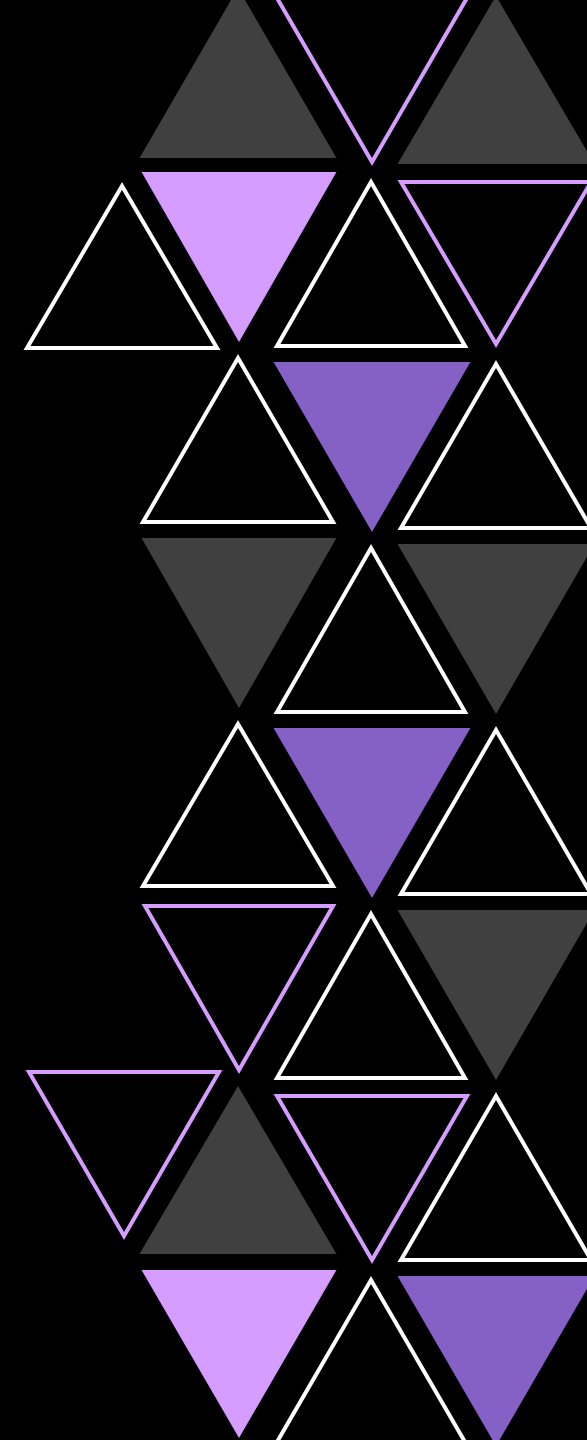


## Extensible

- Add/remove/extend data models
- Enable ISV and partner solutions
- Upgradable

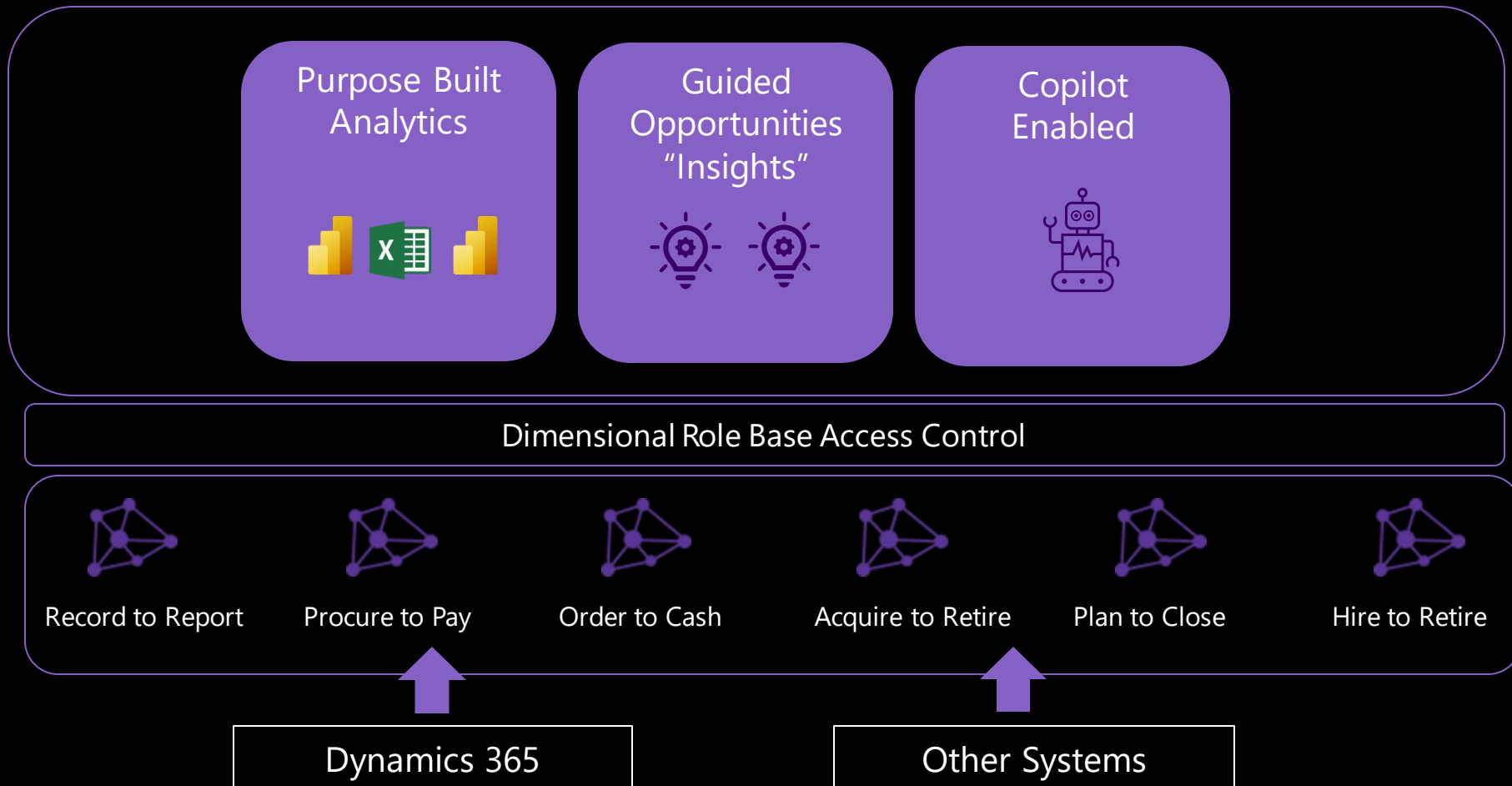
# Process architecture

Jinnie Wong

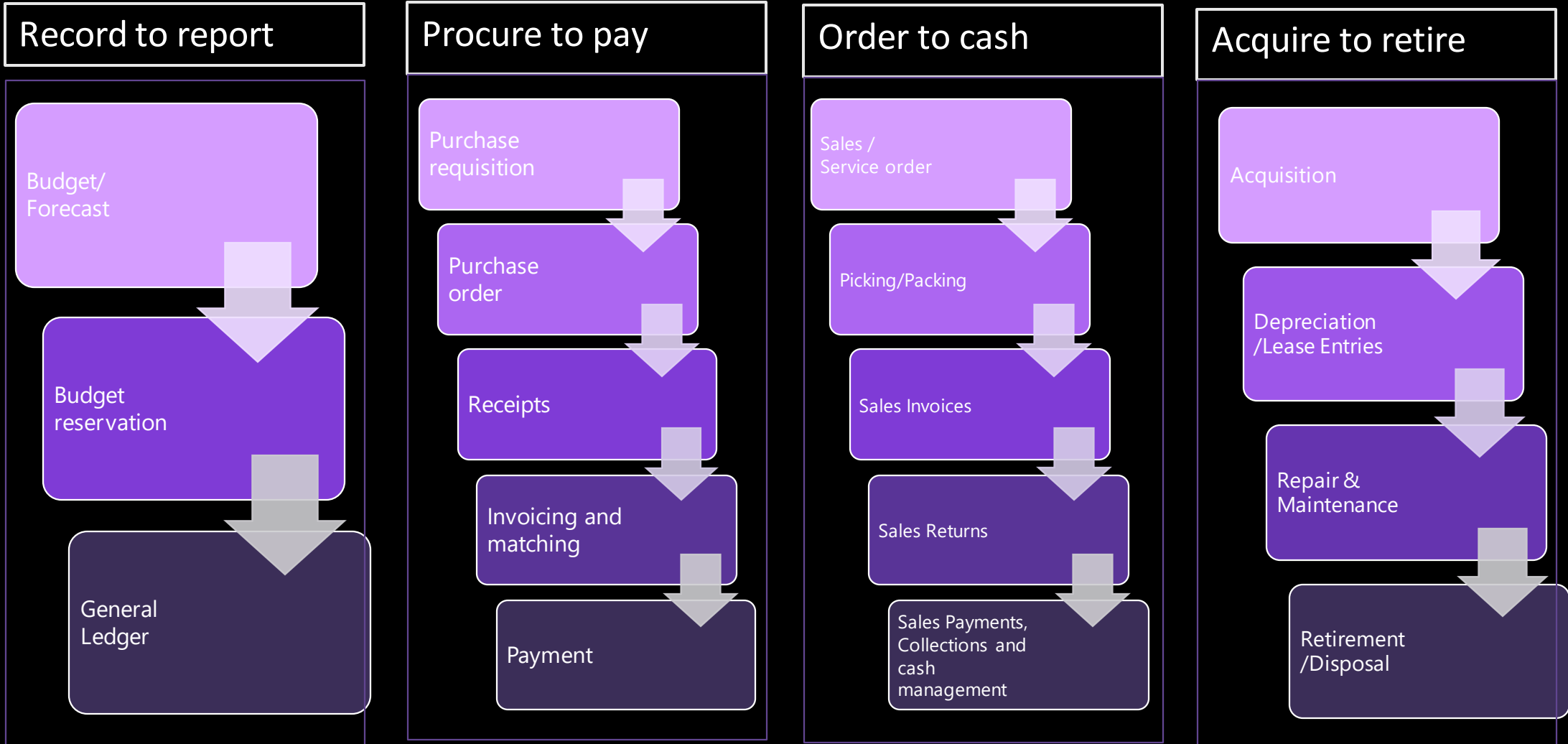


# Value Chain Model

Your data takes the center stage.



# Data Value Chains



# Order to Cash

Business process	Fact	Grain	AccountingDateDim	BankAccountDim	GeneralLedgerAccountDim	LedgerDim	DateDim	NumberDim (RPD)	PartyDim	BuyingPartyDim	ProductDim	ProjectDim	PotalAddressDim	ReportingDimensionsDim	StorageLocationDim	SubledgerNumberDim	SalesCategory	WorkerDim	DeliveryModeDim
Sales Order	SalesOrderFact	1 row per sales order line				X		X	X	X	X	X	X	X	X	X			
Service Order	ServiceOrderFact	1 row per sales order line				X		X		X	X	X	X	X		X		X	
Picking Slip	PickingSlipFact	1 row per item picked				X		X		X	X				X			X	X
Packing Slip	PackingSlipFact	1 row per item on packing slip	X			X		X		X	X		X		X	X	X		X
Sales Contract Billing	SalesContractBillingFact	1 row per sales billing line per contract period				X		X		X	X	X		X	X				
Deferred Revenue	DeferredRevenueFact	1 row per revenue line billed per contract period	X		X	X													
Sales Invoice	SalesInvoiceFact	1 row per Sales Invoice line	X			X		X		X	X	X	X		X	X	X		
Sales Returns	SalesReturnsFact	1 row per order line returned				X		X		X	X		X		X		X		
Sales Payments	SalesPaymentFact	1 row per payment	X	X		X		X	X	X			X	X		X			
Sales Payments Matching	SalesPaymentMatchingFact	1 row per payment matched to invoice	X			X		X		X			X			X			
Sales Subledger	SalesSubledgerFact	1 row per posted accounting event (voucher)	X		X	X				X			X	X		X			
Sales Distribution	SalesDistributionFact	1 row per term																	
Bank Reconciliation	BankRegisterFact	1 row per bank transaction	X	X		X		X								X			
Bank Reconciliation	BankStatementFact	1 row per bank statement transaction		X		X		X								X			

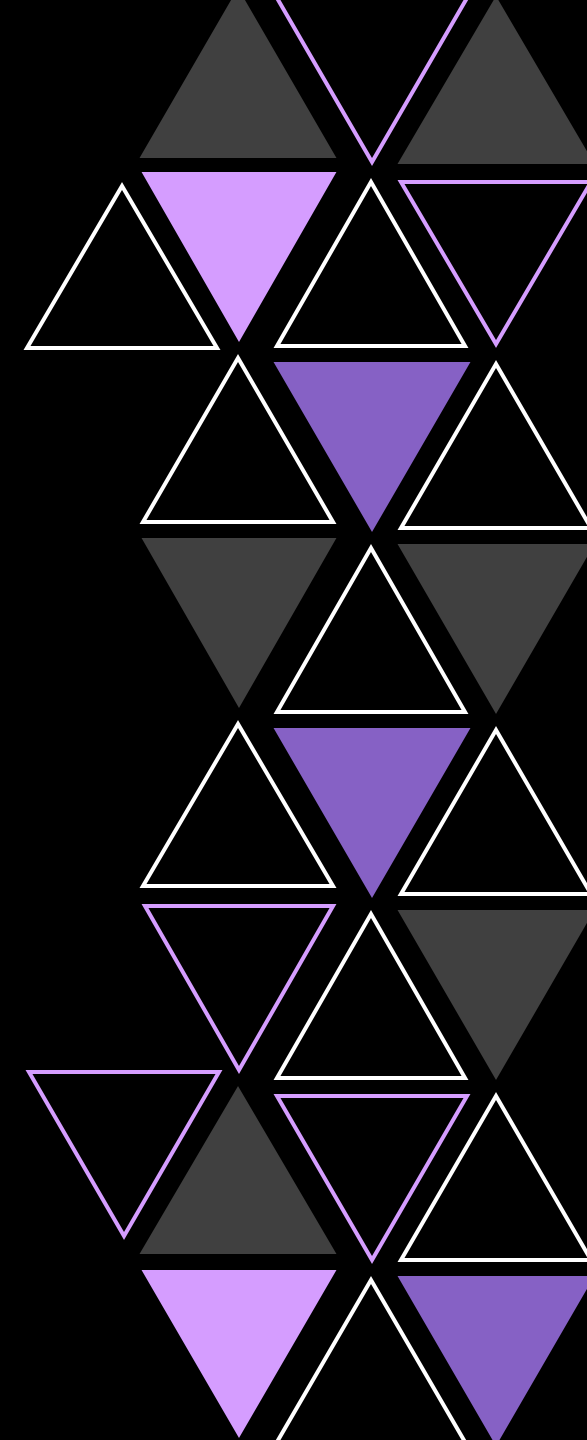
# Cost & BPA at GA

BPA is part of the Finance license and therefore there is no additional cost to install

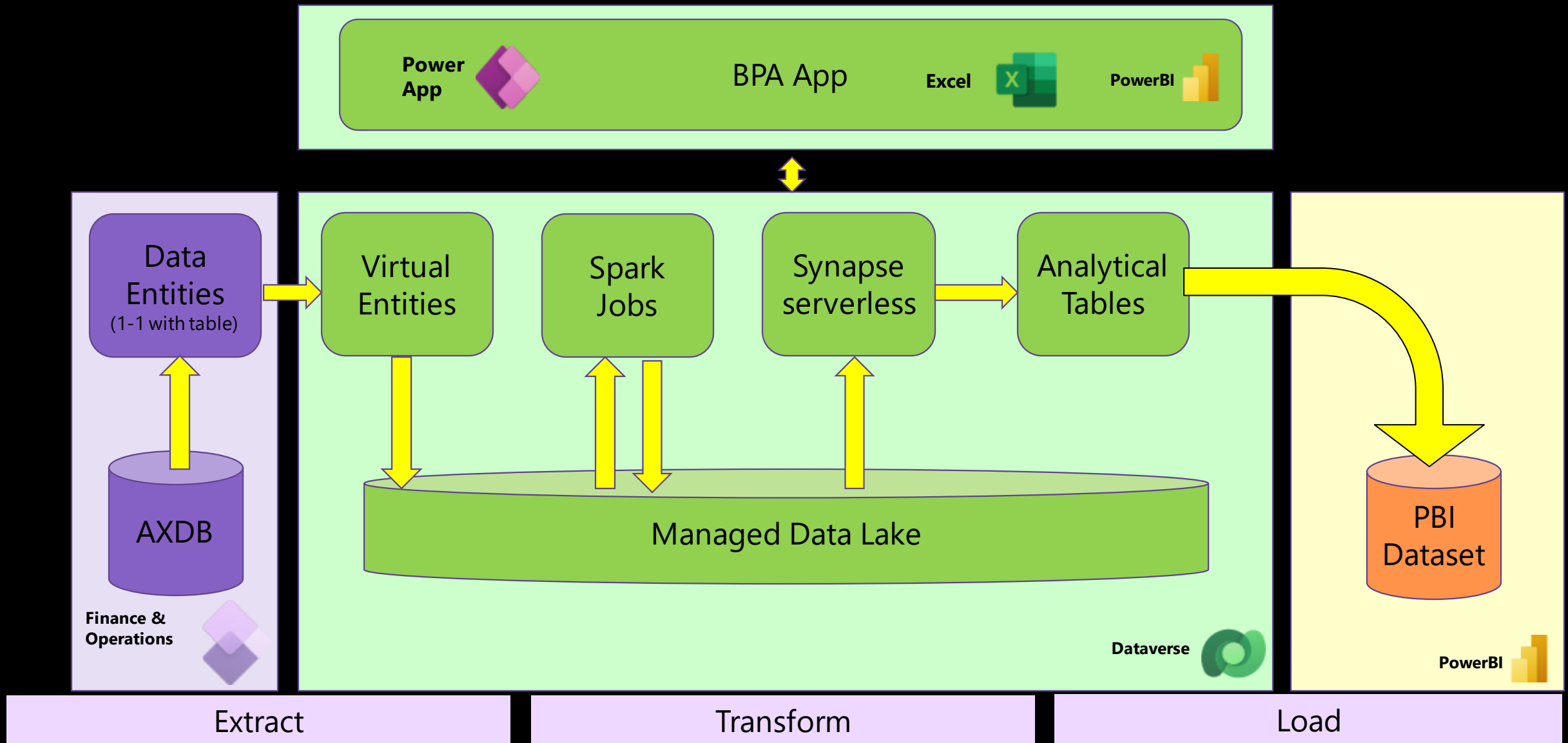
- Data: 3 years of history + current year (rolling 4 years)
- 2 data refreshes a day (12 AM and 12 PM GMT)
- Extensibility – using links into the customers own Fabric environment (\$\$ Customer's cost)
- Ability to view/edit the data model in Excel (after GA)

# Data architecture

Rishabh Agarwal

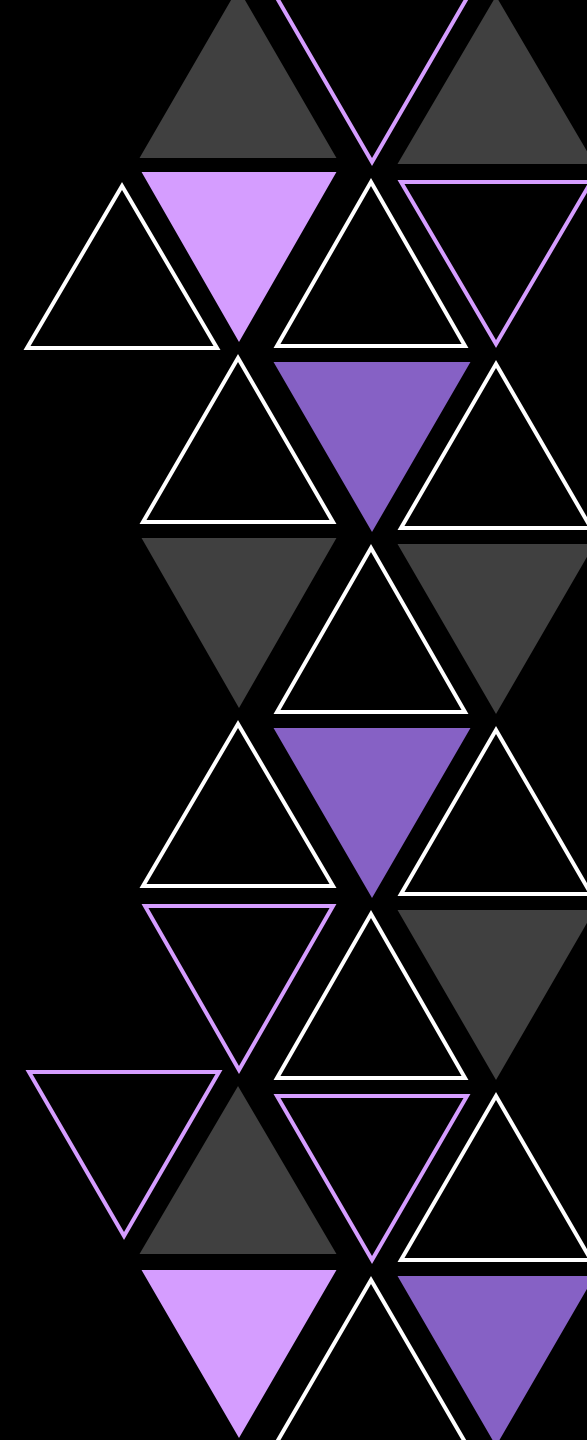


# Architecture



# Extensibility scenarios

Severin Bock



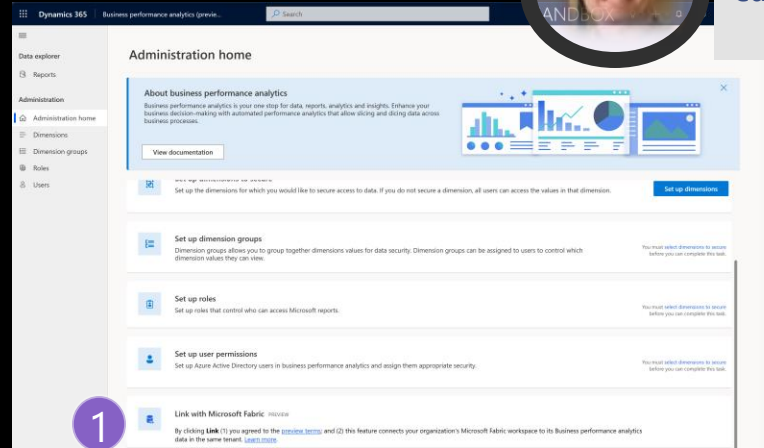
Scenario 1:

**Integrate BPA data into your own or your customer's data warehouse – BPA in your own Fabric environment**

# Scenario 1 (Iteration 1)

## Link with Microsoft Fabric

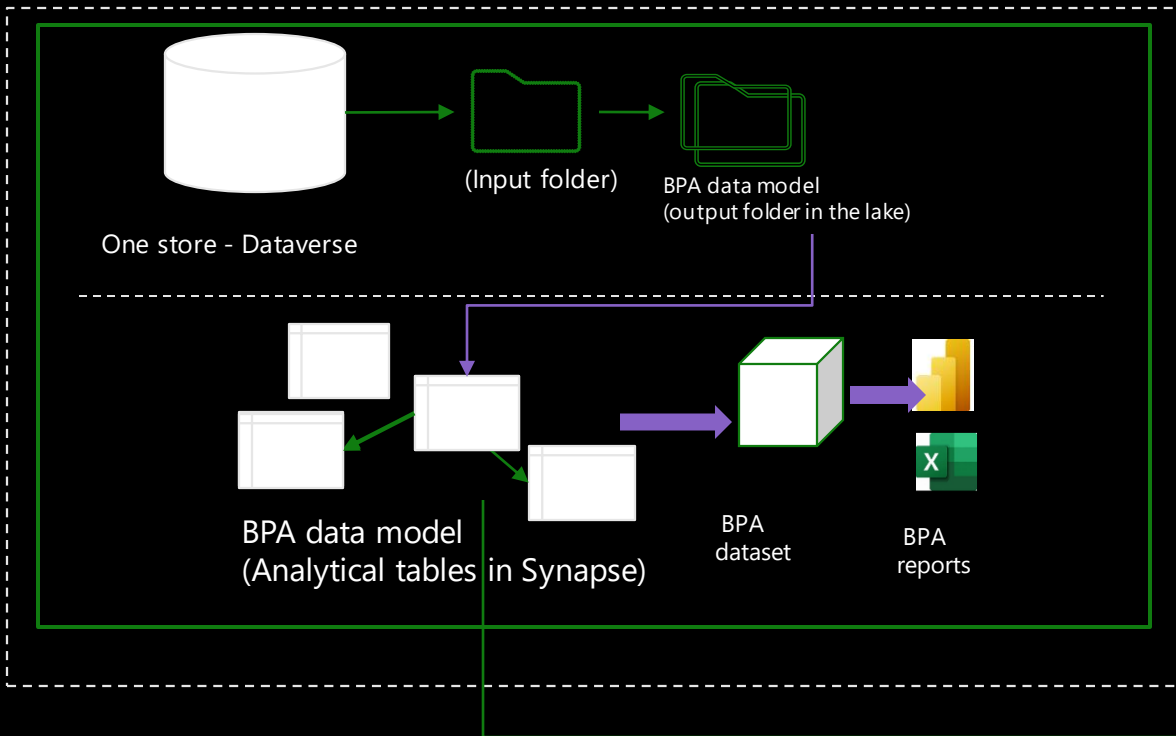
- 1 • By a power user gesture, Simon (Admin) can create Fabric shortcuts and link Business performance analytics data in their customers Fabric workspace.



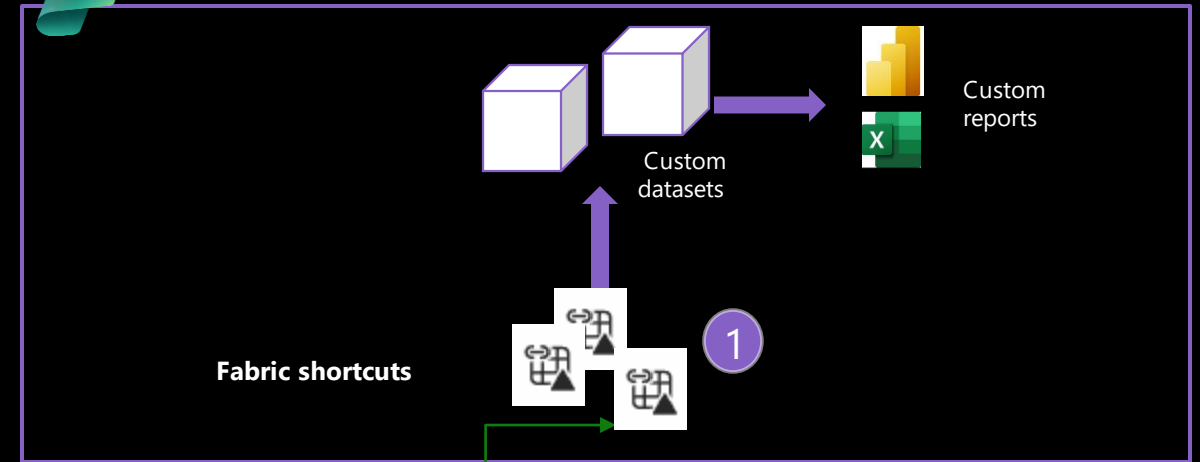
Simon (Admin) can link BPA dimensional model in customers Fabric workspace

- Customers can create their own datasets & reports.
- Datasets & reports needs to be secured by customers.
- Customer can bring their own data in Fabric.

## Microsoft Managed power platform



## Customers Fabric Subscription



- Data explorer
- Reports
- Administration
  - Administration home
  - Dimensions
  - Dimension groups
  - Roles
  - Users



## Turn data into action

Enhance your decision-making with automated performance analytics that allow slicing and dicing across business processes.

[Learn more](#)

### Admin home

#### Recommended



#### Link with Microsoft Fabric PREVIEW

By clicking Link (1) you agreed to the [preview terms](#); and (2) this feature connects your organization's Microsoft Fabric workspace to its Business performance analytics data in the same tenant. [Learn more.](#)

[Manage](#)

#### Security



#### Dimensions

Dimension security lets you control which data is visible on a report. Select the dimensions for which you want to secure data.

[Set up](#)

### Integrate BPA data in your Microsoft Fabric

[Preview](#)

Create Fabric shortcuts for BPA data in your Fabric workspace

[Learn more](#)

Provide your Microsoft Fabric workspace Id

Ok

Cancel

# BPA data starts appearing in your warehouse

The screenshot shows the Microsoft Fabric Lakehouse Explorer interface. On the left, a sidebar lists various workspace components. The main area is divided into an Explorer pane on the left and a data preview pane on the right. The Explorer pane shows a list of tables under a specific workspace, with 'Entity\_dmo\_accountingdatedim' selected. The data preview pane shows the first four rows of this table, with columns representing various accounting dimensions and attributes. A red arrow points from the text below to the 'Entity\_dmo\_accountingdatedim' table in the Explorer pane.

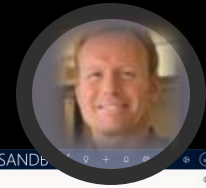
**Entity\_dmo\_accountingdatedim** Showing 1000 rows

	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dmo_accou...	dm
1	c486e647-1...	729508843...	1.0807776E9	225654211...	4/1/2004 1...	Yes	Fiscal 4	No	1	Period 1	No	Yes
2	83d4e9b4-...	147646968...	1.080864E9	225654211...	4/2/2004 1...	No	Fiscal 4	No	1	Period 1	No	No
3	4564f62d-8...	295585430...	1.0809504E9	225654211...	4/3/2004 1...	No	Fiscal 4	No	1	Period 1	No	No
4	78d6ecaf-7...	631587714...	1.0810368E9	225654211...	4/4/2004 1...	No	Fiscal 4	No	1	Period 1	No	No

*BPA data in dimensional shapes start appearing here, no data copy, no ETL pipelines to maintain*

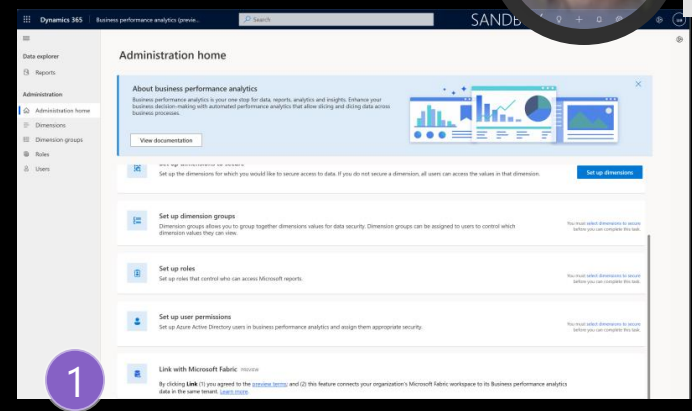
# Scenario 1 (Iteration 2)

## Link with Microsoft Fabric



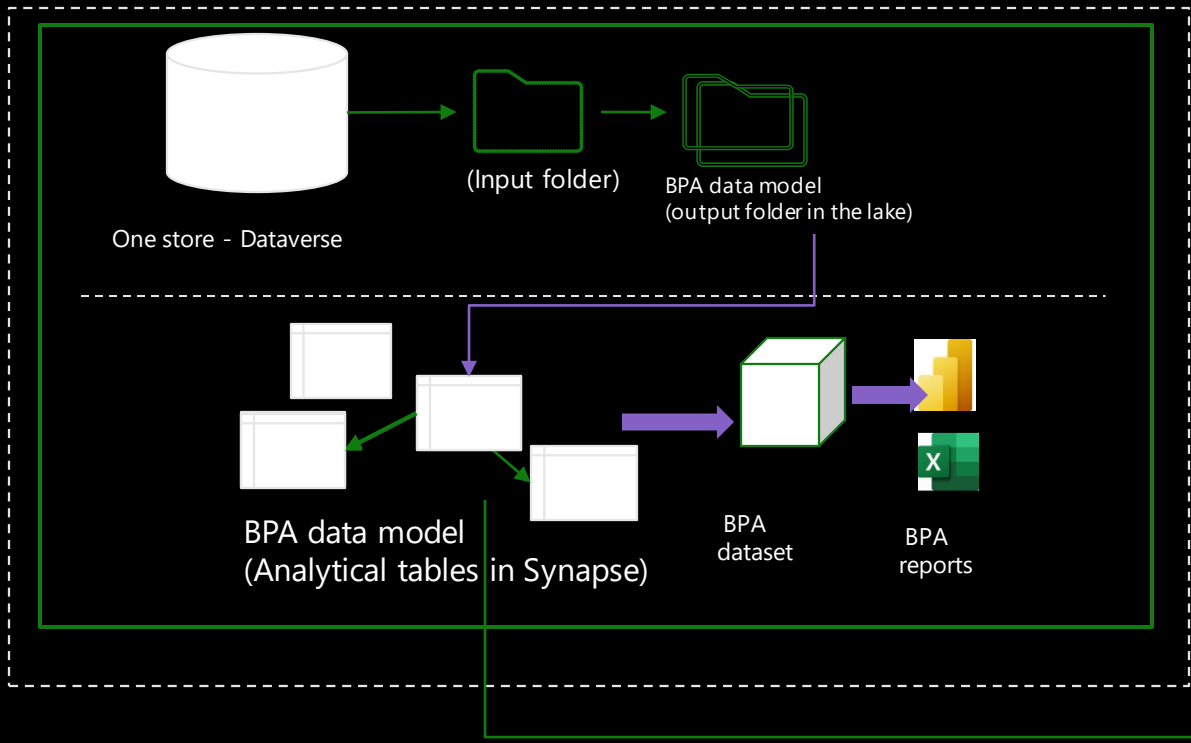
Simon (Admin) can link BPA dimensional model in customers Fabric workspace

- 1 • By a power user gesture, Simon (Admin) can create Fabric shortcuts and link Business performance analytics data in their customers Fabric workspace.

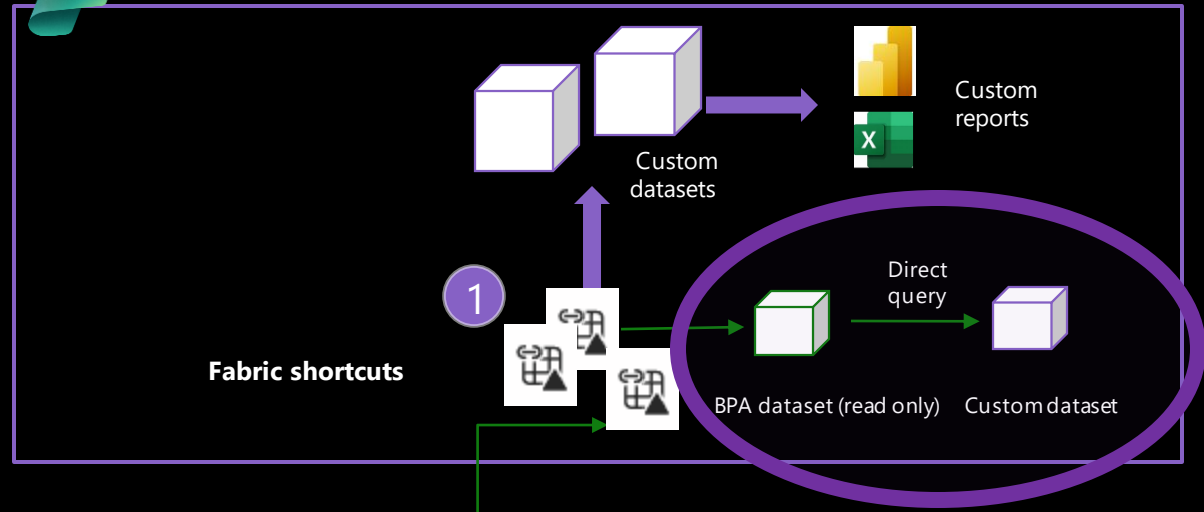


- Customers can create their own datasets & reports.
- Datasets & reports needs to be secured by customers.
- Customer can bring their own data in Fabric.

Microsoft Managed power platform



## Customers Fabric Subscription



# Bring the BPA dataset into a workspace in your Fabric environment

Power BI

Search

Trial: 59 days left

Home

Create

Browse

OneLake data hub

Apps

Metrics

Monitoring hub

Workspaces

+ New

Upload

Create deployment pipeline

Create app

Manage access

Filter by keyword

Filter

Name	Type	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
dataverse_bpajanval_far_workspace_insightsoutput_unq7d3...	Lakehouse	Test User 1	—	—	—	—	
dataverse_bpajanval_far_workspace_insightsoutput...	Semantic model (...)	bpa-scale2-fabric	3/31/24, 11:56:24 PM	N/A	—	—	
dataverse_bpajanval_far_workspace_insightsoutput...	SQL analytics end...	bpa-scale2-fabric	—	N/A	—	—	
dataverse_bpascale2_far_workspace_insightsoutput_unqcf4...	Lakehouse	Test User 1	—	—	—	—	
dataverse_bpascale2_far_workspace_insightsoutput...	Semantic model (...)	bpa-scale2-fabric	3/8/24, 10:26:50 PM	N/A	—	—	
dataverse_bpascale2_far_workspace_insightsoutput...	SQL analytics end...	bpa-scale2-fabric	—	N/A	—	—	
FnoDataset	Report	bpa-scale2-fabric	3/8/24, 10:51:34 PM	—	—	—	<input type="checkbox"/> No
FnoDataset	Semantic model	bpa-scale2-fabric	3/8/24, 10:51:34 PM	N/A	—	—	
FnoDataset.pbix	Dashboard	bpa-scale2-fabric	—	—	—	—	<input type="checkbox"/> No

# Create reports and insights!

FnoDataset

Search

Trial: 59 days left

File View Reading view Mobile layout Open data model

Copilot Explore this data Data/drill Text box Shapes Buttons Visual interactions Refresh Save Pin to a dashboard Chat in Teams

[Report name]

Currency Accounting currency

Legal entity All

Fiscal period All

Visualizations

Build visual

Filters

Values

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

Data

Search

- Accounting date dimension
- Aging report age as of date dimension
- Aging report balance as of date dimension
- Aging report interval param (Preview)
- Aging report interval size param
- Aging report status param (Preview)
- Asset dimension
- Bank account dimension
- Budget fact
- Delivery method dimension
- Delivery postal address dimension
- General ledger account dimension
- General ledger currency parameter (Preview)
- General ledger fact
  - General ledger account string
  - General ledger accounting amount
  - General ledger amount
  - General ledger book
  - General ledger currency
  - General ledger debit or credit
  - General ledger description
  - General ledger document date
  - General ledger intercompany group
  - General ledger journal number
  - General ledger period type
  - General ledger posted by
  - General ledger posting number
  - General ledger posting timestamp utc
  - General ledger posting type
  - General ledger reporting amount

Page 1 of 1

101%

Scenario 2:

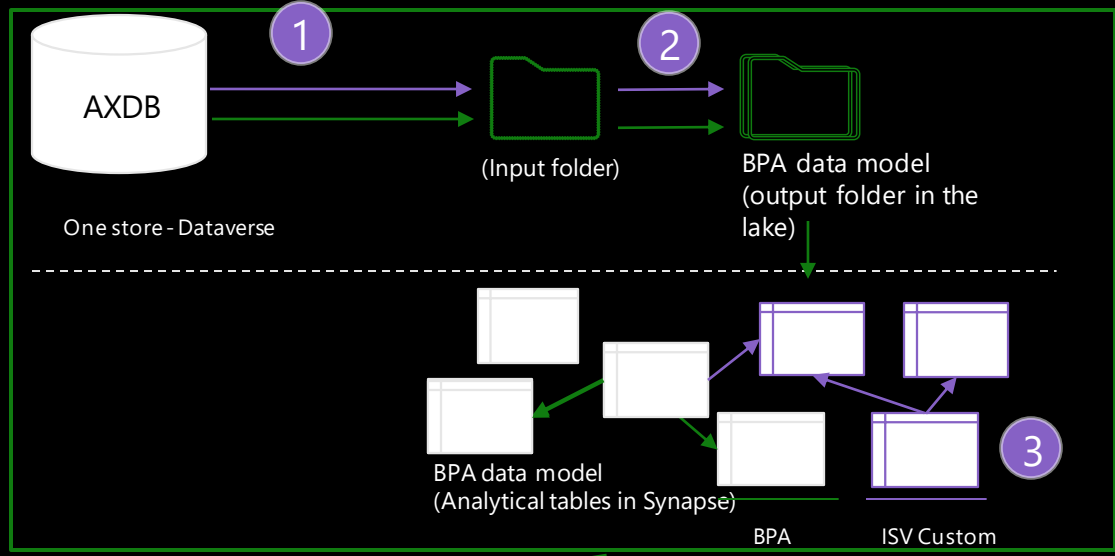
**F&O extensions (or complex Dynamics ISV integrations) flow through BPA – End users use BPA**

# Scenario 2:



**Simon (pro dev)** extends BPA data model with ISV entities/fields & sells it as packaged solution.

- 1 Simon can add a field from ISV solution to BPA F&O data entities and DV virtual tables.
- 2 Simon can add ISV fields/TABLES to the transform output schema. Simon's transforms are executed with BPA schedule, both initial sync and incremental.
- 3 Simon can add ISV fields/tables to analytical tables.
- 4 Simon can add ISV fields/tables to datasets tables and define relationships.
- 5 Simon can use BPA security with ISV tables and columns. Simon can build new Power BI and Excel reports using extended dataset.



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Scenario 3:

**Integrate data from third-party systems (like SAP)**  
**– End users use BPA**

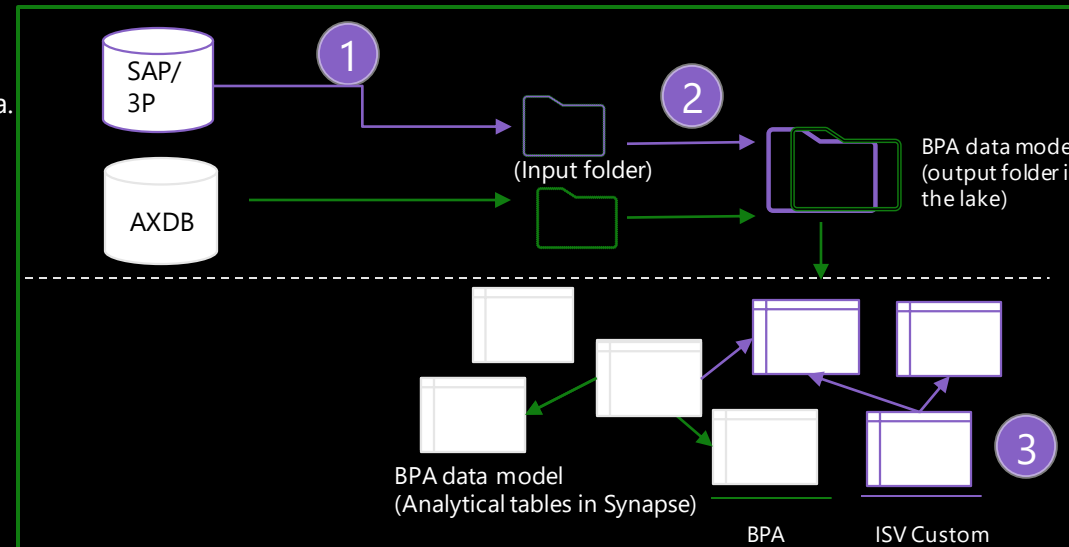
# Scenario 3

Enable customers to augment BPA with data from 3<sup>rd</sup> party systems (like SAP)



Simon (pro dev) extends BPA to augment BPA with data from 3<sup>rd</sup> party systems (like SAP).

## One store - Dataverse

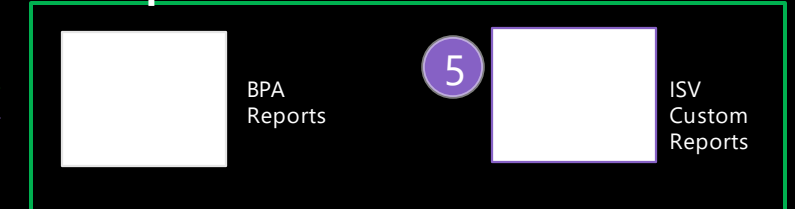


- 1 Simon can bring 3P schema, metadata and raw data to DV managed data lake using a scheduled data flow and add fields and tables to virtual entities.
- 2 Simon can add 3P fields and tables to the transform output schema. Simon's transforms are executed with BPA schedule, both initial sync and incremental.
- 3 Simon can add 3P fields/tables to analytical tables.
- 4 Simon can add 3P fields/tables to datasets tables and define relationships.
- 5 Simon can use BPA security with 3P tables and columns. Simon can build new Power BI and Excel reports using extended dataset.

## Power BI datasets



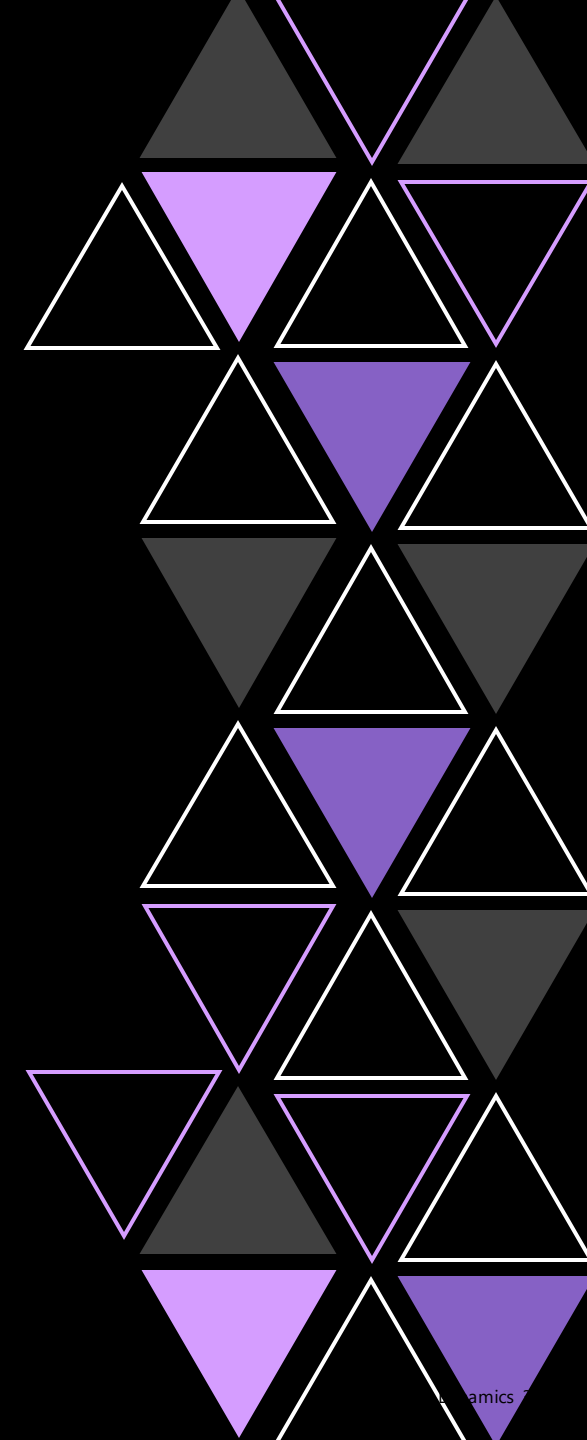
## BPA reports



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# Demo: Installing and configuring Business performance analytics

Rishabh Agarwal



# Process steps

Please ensure that you are on a Tier-2 environment (multi-box) and on Dynamics 365 Finance version 10.0.38 (Application version 10.0.1777.72) later.

These steps must be completed:

01

Configure Microsoft Power Platform Integration

02

Configure the Azure AD tenant

03

Enable Power Apps users

04

Setup required configurations in D365 Finance

05

Setup required configurations in Power Platform Admin Center

06

Request install link



## Business performance analytics (preview)

by Microsoft Dynamics 365

[Get it now](#)[☆ Save to my list](#)[Overview](#)[Ratings + reviews](#)[Details + support](#)

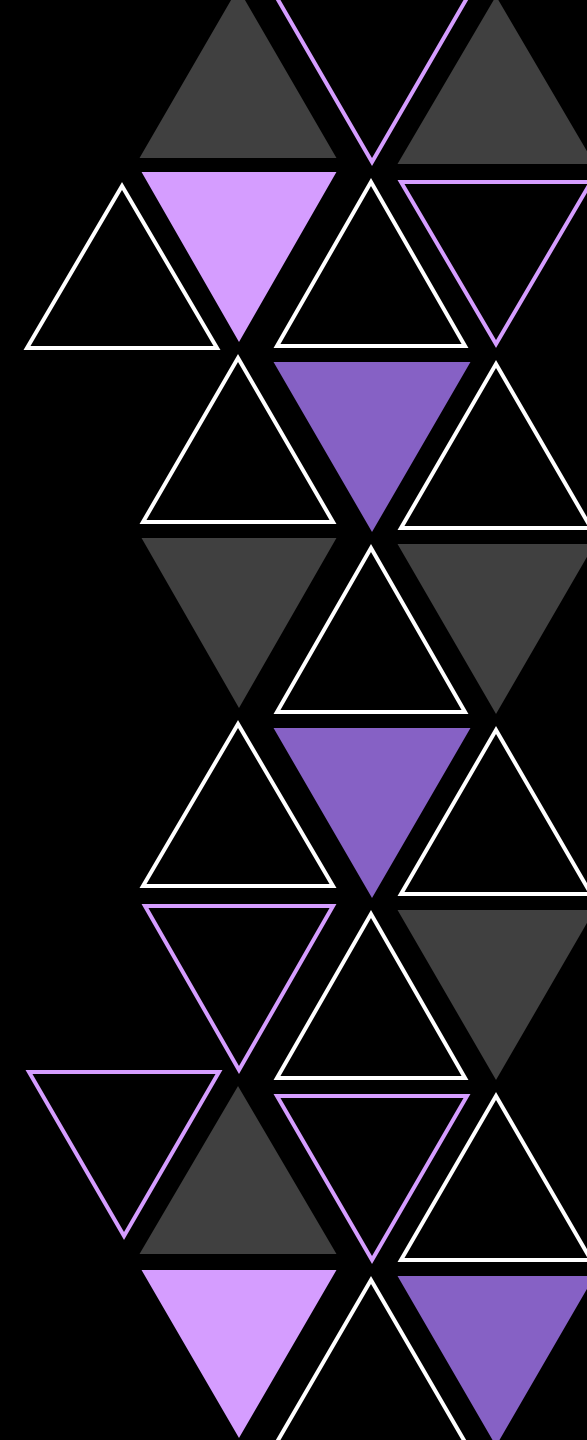
**Utilize the full context of D365 data and bring insights closer to the point of decision.**

Business performance analytics is a new capability in Dynamics 365 Finance that streamlines financial reporting by centralizing data from multiple business processes, including record to report, order to cash, acquire to retire, and procure to pay, presenting it in an easy-to-use interface. Powered by Dataverse, Business performance analytics includes a web-based hub that enables end users to create and share reports through familiar tools like Excel and Power BI. With Business performance analytics, users get secure and near real-time access to critical financial information, empowering non-technical users to access and analyze data easily. With improved visibility into valuable financial data, finance teams can make informed decisions and streamline financial reporting to free time to focus on high-value initiatives.

With Business performance analytics, customers can:

# Demo of Business performance analytics

Jinnie Wong





**QUESTIONS**

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria  
Děkuji **Tak** Dank u **Tānan** Kiitos **Merci** Danke Ευχαριστώ A dank  
Mahalo הודות. **Dhanyavād** Köszönöm Takk **Terima kasih** **Grazie** Grazzi

# Thank you!

감사합니다 Paldies Choukrane Aċiū **Благодарам** ありがとうございます  
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga  
Ďakujem **Tack** Nandri **Kop khun** Teşekkür ederim Дякую **Хвала** Diolch



Microsoft Dynamics 365