



Dynamic Ship Analysis

Quick Start Guide

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1 Overview

This documentation provides summary information for installing and configuring the Dynamic Ship Analysis app for Power BI. Please ensure that you are using Dynamic Ship version 2.4+ before continuing, as the analysis app is not compatible with older versions of Dynamic Ship.

The Dynamic Ship Analysis app also requires that you install a compatibility extension for Business Central to allow Power BI to access your Dynamic Ship data.

Before you can use Dynamic Ship Analysis, the following tasks must be completed:

Step	Task
1.	Ensure you are using Dynamic Ship version 2.4+
2.	Install the Dynamic Ship: Power BI Compatibility extension for Business Central.
3.	Publish the necessary queries via Web Services in Business Central.
4.	Install and configure the Dynamic Ship Analysis app in Power BI.

2 Installing Dynamic Ship: Power BI Compatibility

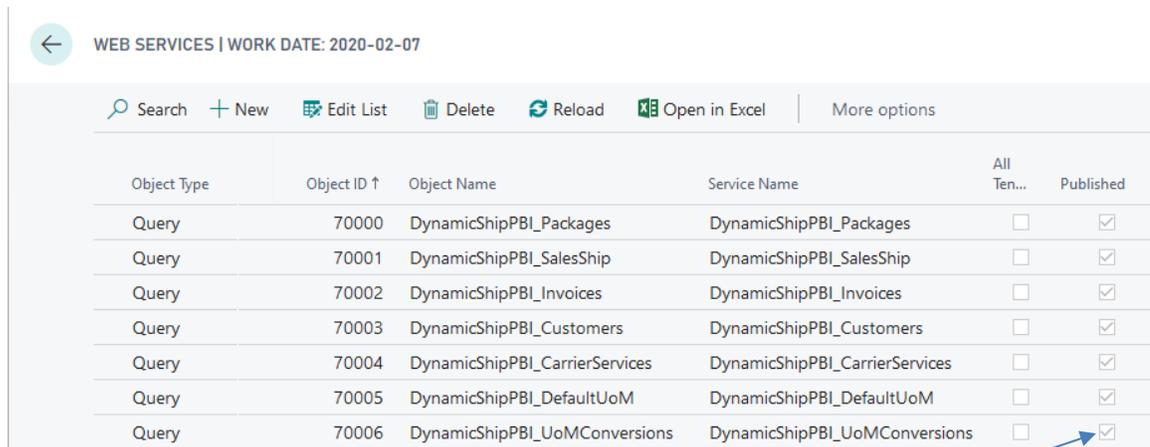
2.1 Installation

The Dynamic Ship: Power BI Compatibility extension for Business Central is required to enable Power BI reporting and is available from Insight Works on request. Please contact Insight Works support for help with completing this step.

2.2 Publishing the Queries

The Dynamic Ship: Power BI Compatibility extension enables seven queries that must be published via Web Services in Business Central.

1. Navigate to the Web Services page in Business Central and add the seven queries as shown in the table below. Use the Object Name as the Service Name when naming the queries. The Object Name and Service Name must be identical.



← WEB SERVICES | WORK DATE: 2020-02-07

Search + New Edit List Delete Reload Open in Excel More options

Object Type	Object ID ↑	Object Name	Service Name	All Ten...	Published
Query	70000	DynamicShipPBI_Packages	DynamicShipPBI_Packages	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Query	70001	DynamicShipPBI_SalesShip	DynamicShipPBI_SalesShip	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Query	70002	DynamicShipPBI_Invoices	DynamicShipPBI_Invoices	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Query	70003	DynamicShipPBI_Customers	DynamicShipPBI_Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Query	70004	DynamicShipPBI_CarrierServices	DynamicShipPBI_CarrierServices	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Query	70005	DynamicShipPBI_DefaultUoM	DynamicShipPBI_DefaultUoM	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Query	70006	DynamicShipPBI_UoMConversions	DynamicShipPBI_UoMConversions	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Make sure that the "Published" checkbox is checked.

You are now ready to install and configure the Dynamic Ship Analysis app in Power BI.

3 Installing and Configuring Dynamic Ship Analysis

3.1 Install & Prerequisites

The Dynamic Ship Analysis app is provided as a template app that can be installed from Microsoft AppSource. Here are the requirements for installing, customizing, and distributing a template app:

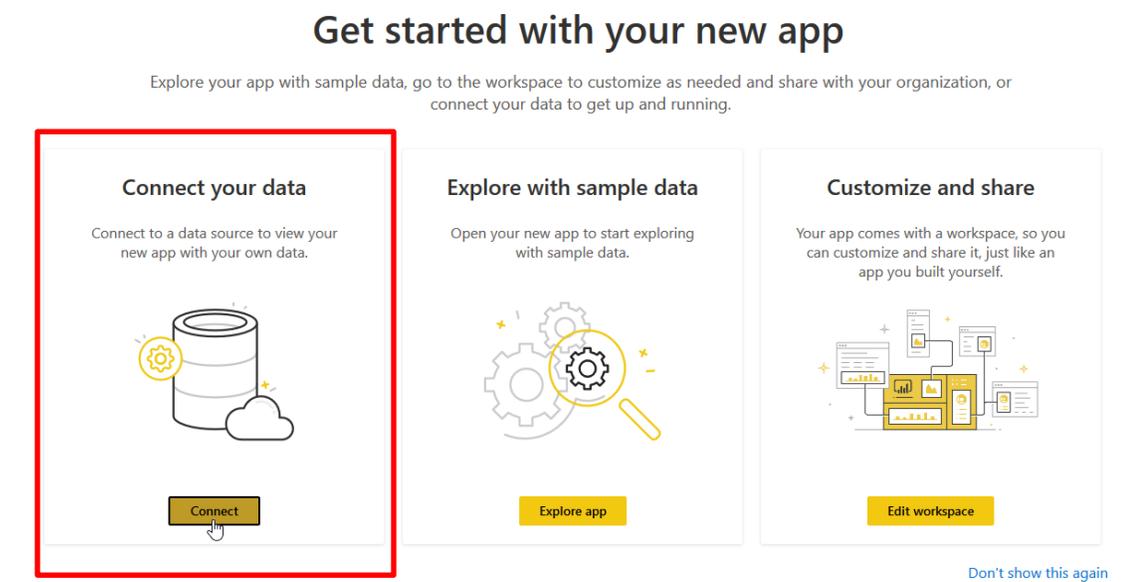
- A Power BI pro license
- Familiarity with the basic concepts of Power BI
- Valid installation link from the template app creator or AppSource
- Permissions to install template apps.

Visit <https://www.dmsiworks.com/dynamic-ship-analysis> to download and install the app.

Detailed instructions for installing Power BI template apps and sharing them with others can be found here: <https://docs.microsoft.com/en-us/power-bi/service-template-apps-install-distribute>.

3.2 Configure

When opening the app for the first time you will be presented with the following screen:



1. To connect to your own data select "Connect."

2. You will be prompted to enter four parameters as show here:

Connect to Dynamic Ship Analysis

Before connecting to your data, you must update the required parameters (*).

Company Name
Enter the name of the company you want to connect to. (This parameter is Case Sensitive)

CRONUS Canada, Ltd. *

Environment
Enter the name of the environment you want to connect to. (This parameter is Case Sensitive)

PRODUCTION or SANDBOX *

Calendar Year or Fiscal Year
Do you want the report to be based on the CALENDAR YEAR (Jan. 1 - Dec. 31) or on a FISCAL YEAR? (This parameter must be entered using ALL CAPS)

CALENDAR YEAR or FISCAL YEAR *

First Month of Fiscal Year
Enter the first month of your Fiscal Year. Enter JANUARY if you use the Calendar Year. (This parameter must be entered using ALL CAPS)

JANUARY or FEBRUARY or MARCH etc. *

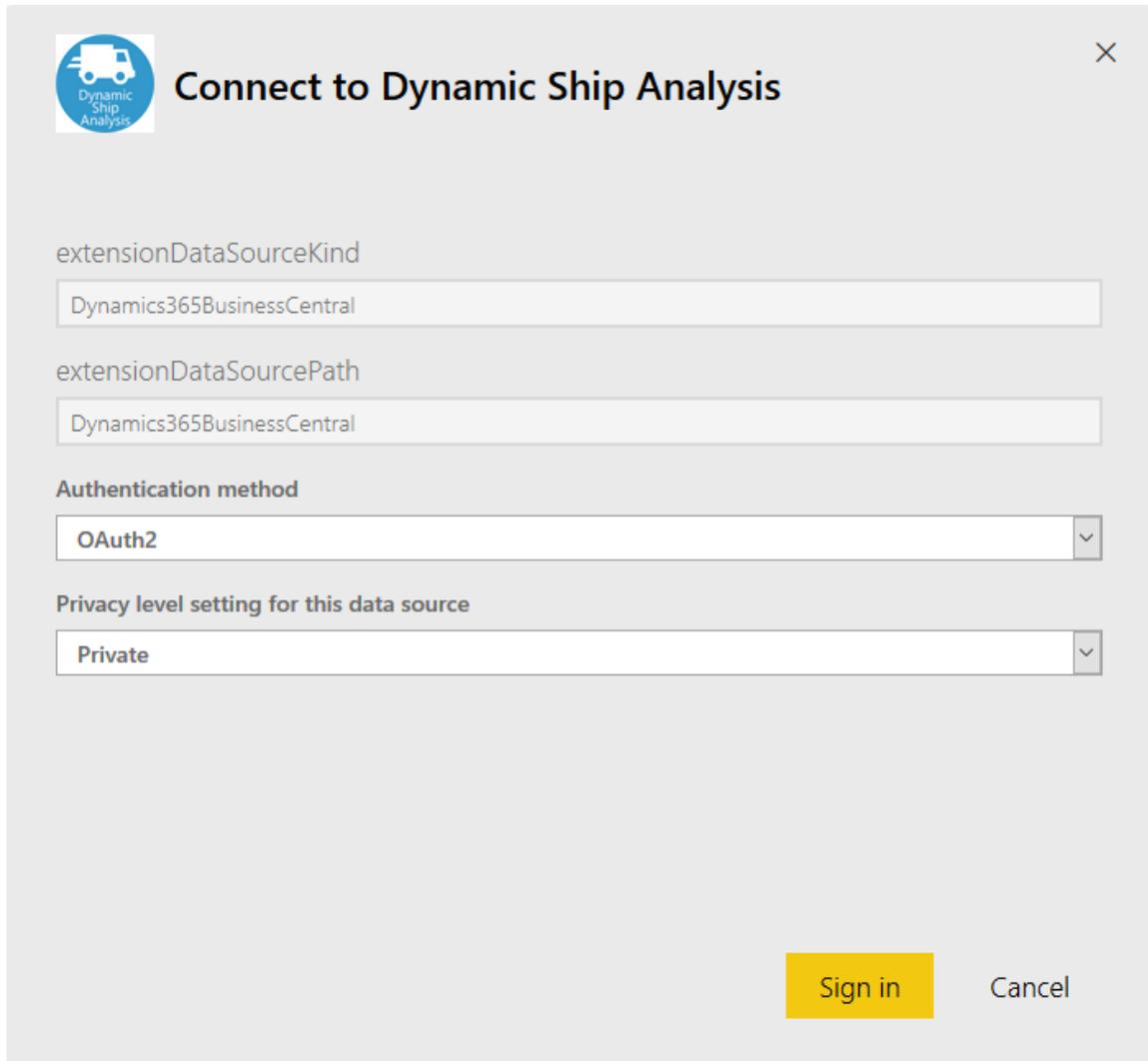
Next Cancel

Parameter	Description
Company Name	Enter your company name. This parameter is Case Sensitive.
Environment	Enter the name of your environment. This parameter is Case Sensitive.
Calendar Year or Fiscal Year	Specify whether you want report information to be based on the CALENDAR YEAR (Jan. 1 – Dec. 31) or on a FISCAL YEAR. This parameter must be entered using ALL CAPS.
First Month of Fiscal Year	Specify the first month of your Fiscal Year. If you use the CALENDAR YEAR enter JANUARY. This parameter must be entered using ALL CAPS.

3. Set the privacy level setting for this data source. If you are unsure about which privacy level to use select "Private." This setting can be changed later if necessary.

For more information regarding Power BI privacy levels visit:

<https://powerbi.microsoft.com/en-us/blog/privacy-levels-for-cloud-data-sources/>



Connect to Dynamic Ship Analysis

extensionDataSourceKind
Dynamics365BusinessCentral

extensionDataSourcePath
Dynamics365BusinessCentral

Authentication method
OAuth2

Privacy level setting for this data source
Private

Sign in Cancel

4. Click "Sign in" and follow the prompts to sign in using the same username and password you use to sign in to Business Central.

It may take a few minutes for your data to become available in Power BI. You can now view the report and share it with others in your organization.