

How to create Dynamics 365 Dashboards

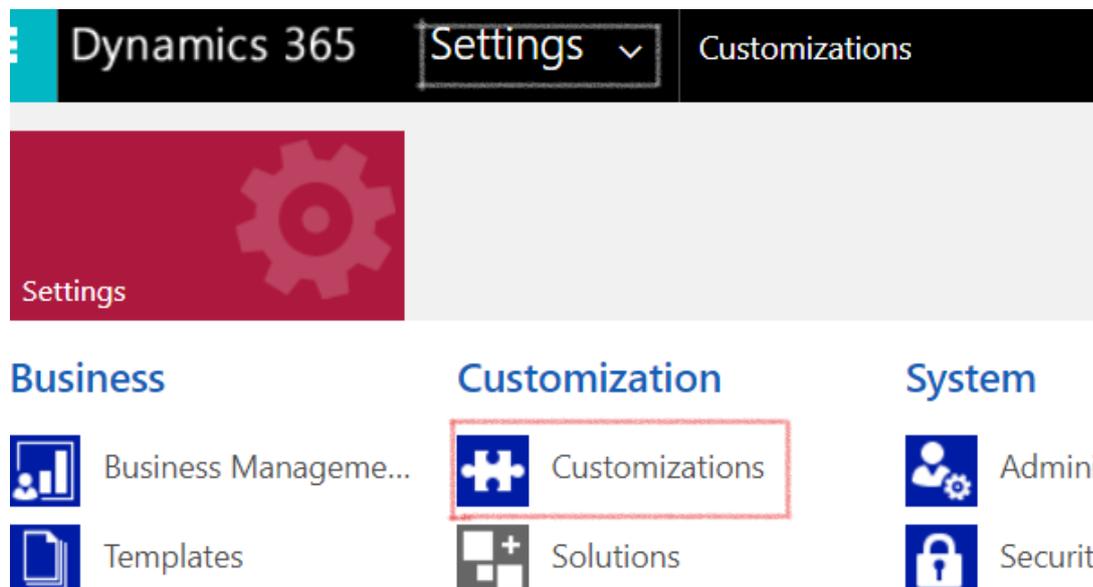
There are two types of dashboards: -

1. System Dashboards
2. Personal Dashboards

Creating System Dashboards

There are two ways to create system dashboards within Dynamics 365: -

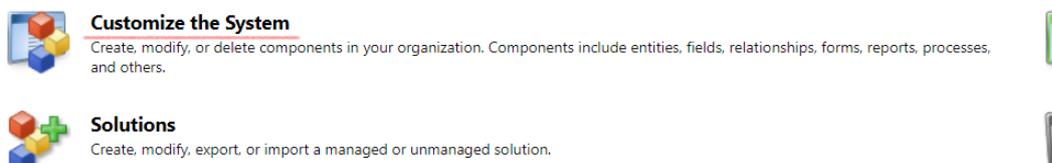
1. The old way, via administration and the settings area



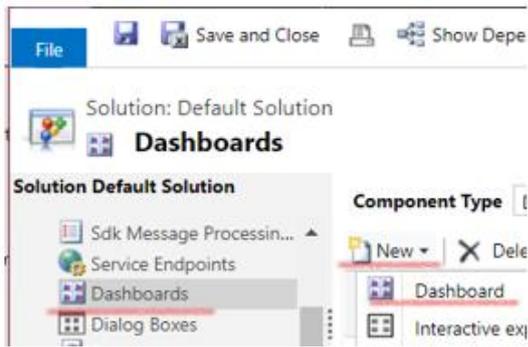
Navigate to the customisations by selecting the 'Settings' and then selecting 'Customizations'.

Customization

Which feature would you like to work with?



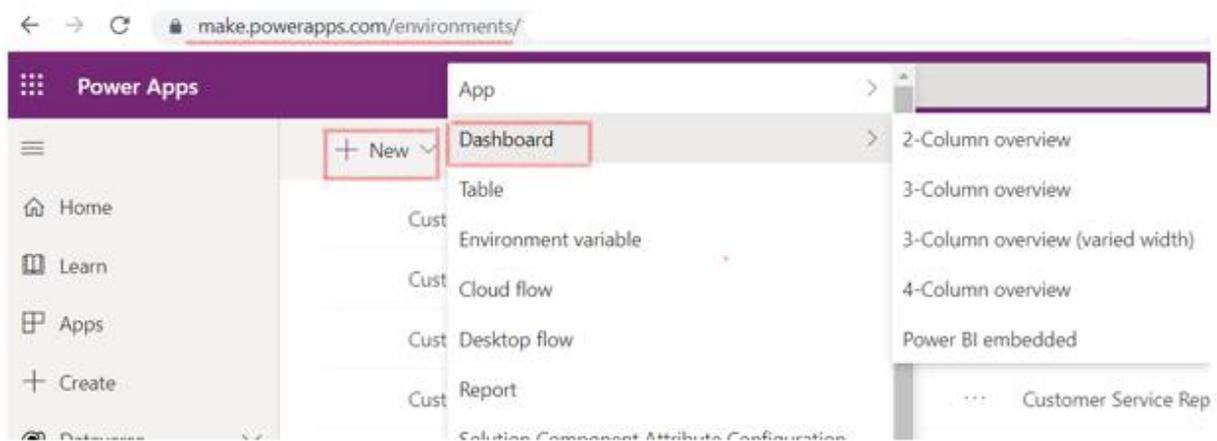
Then click on 'Customize the System'. This will pop out a new customization area, now scroll down to 'Dashboards'.



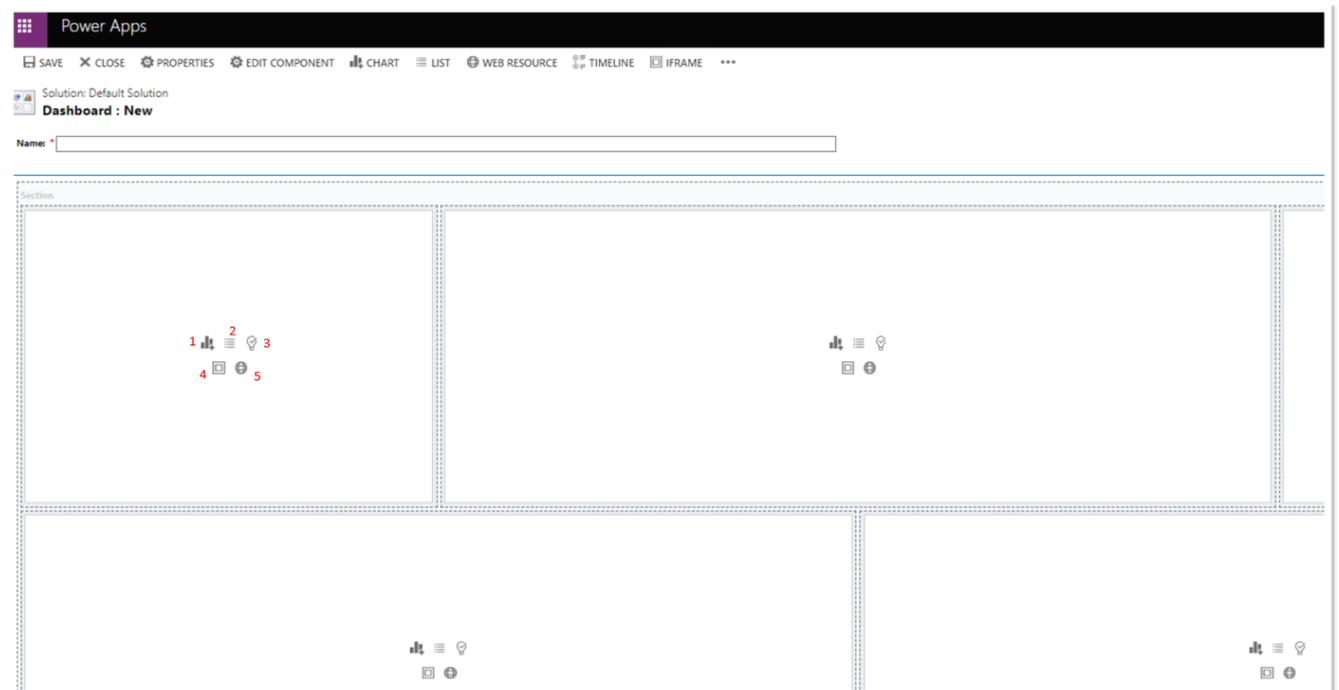
Then on the right-hand pane select 'New' and then 'Dashboard'.

2. The new 'Make Power Apps' customization area

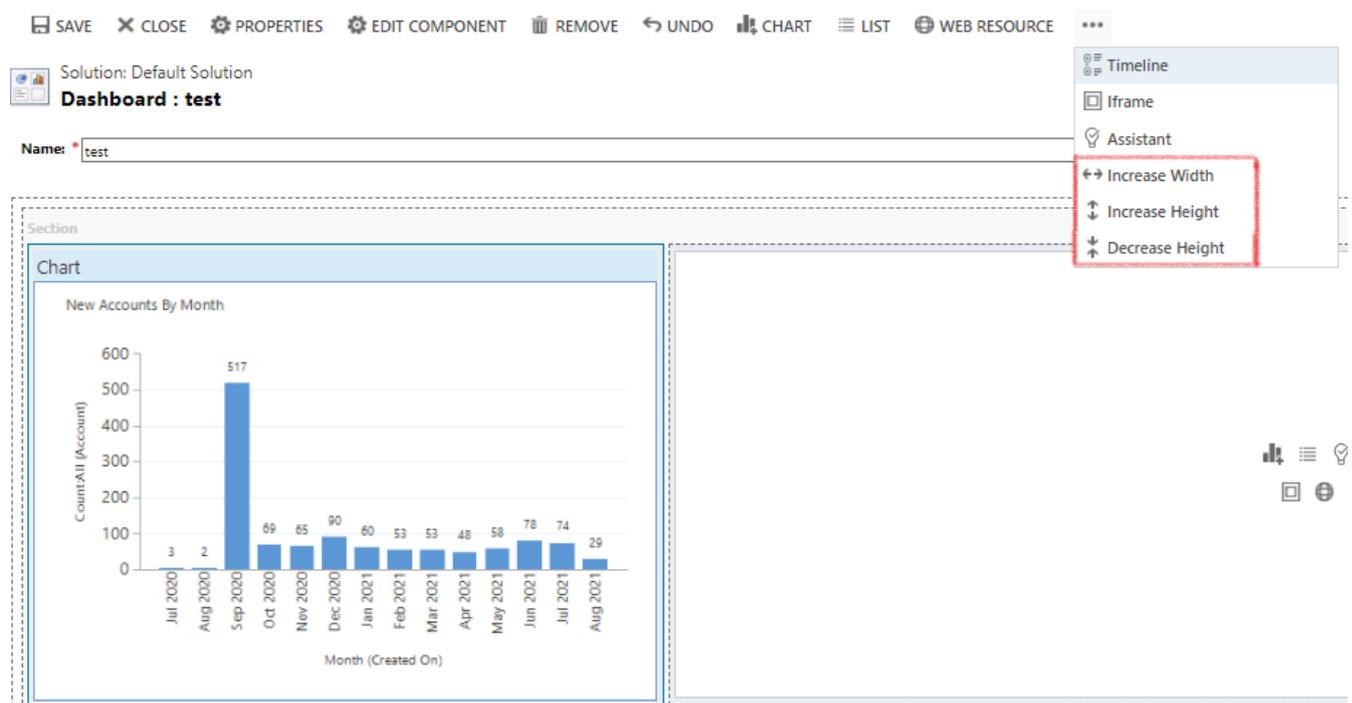
Browse to <https://make.powerapps.com>



Click on the 'New' button then select 'Dashboard'. Then choose the type of dashboard to create.



- 1 – Charts can be added using this button. Several charts are already in the system, additional charts can be created in the “Charts” area on the right of any list page, or under any entity in the “Customization” area. Select the entity you wish to display a chart for, select the view from which the chart should be drawn, and finally select the chart you require.
- 2 – List components are used to display a view directly on the dashboard. This can be a personal or system view on personal dashboard but can only be system view on a system dashboard. Personal Views can be created from any filtered list page or from the Advanced Find. System views are created under the respective entities in the “Customization” area. Select the entity and then the view you wish to display.
- 3 – This allows you to host the “Relationship Assistant” on your dashboard, a machine learning based business intelligence which will attempt to predict what you should do next.
- 4 – An Iframe can be used to show a separate web page within this page. This is achieved by providing the URL of the page you wish to reach. Functions with more complexity can be achieved through this with some programming wizardry.
- 5 – Web resources are used to access add-ins and customisations. It is unlikely this will be used.



These options highlighted red only appear when you have a section selected and allows you to change their width and height. This is limited by the decision earlier when choosing the layout.

Once a system dashboard is saved, find the dashboard, publish and then add the security role to allow access. You may also need to add the dashboard to the Dynamics App or Apps that are being used.



Power Apps Search

Edit Delete from this environment Publish Managed properties Enable security roles

Solutions > Default Solution

Display name	Name	Type	Managed
App for Outlook Dashboard	App for Outlook Dashboard	Dashboard	Yes
Connected Customer Service Dashboard	Connected Customer Service Dashboard	Dashboard	Yes
Customer Service Agent Dashboard	Customer Service Agent Dashboard	Dashboard	Yes
Customer Service Manager Dashboard	Customer Service Manager Dashboard	Dashboard	Yes
Customer Service Operations Dashboard	Customer Service Operations Dashboard	Dashboard	Yes
Customer Service Performance Dashboard	Customer Service Performance Dashboard	Dashboard	Yes
Customer Service Performance Dashboard (original ver...	Customer Service Performance Dashboard (orig	Dashboard	Yes
Customer Service Representative Dashboard	Customer Service Representative Dashboard	Dashboard	Yes
Customer Service Representative Social Dashboard	Customer Service Representative Social Dashb	Dashboard	Yes
Customer Service Representative Social Dashboard (ori...	Customer Service Representative Social Dashb	Dashboard	Yes
Estimators Dashboard	Estimators Dashboard	Dashboard	Yes

This looks different in the old interface, but it is the same process.

Solution: Default Solution

Dashboards

Solution Default Solution

Component Type: Dashboard View: Customizable

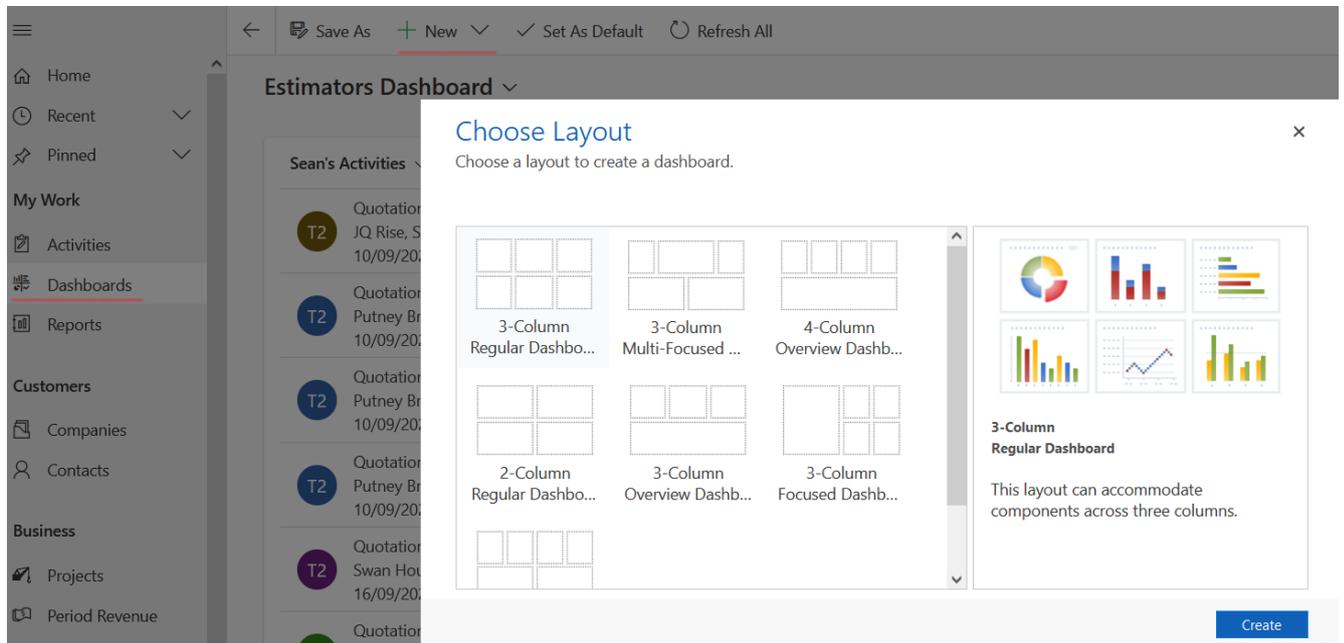
New Delete Publish Show Dependencies Solution Layers Managed Properties Enable Security Roles Set As Default

Save As

Display Name	Name	Type	State	Customizable	Description
App for Outlook Dashboard	App for Outlook Dash...	Dashboard	Managed	True	
Compliance Dashboard	Compliance Dashboard	Dashboard	Unmanaged	True	
Connected Customer Service D...	Connected Customer ...	Dashboard	Managed	True	Dashboard for Connect
Customer Service Agent Dashb...	Customer Service Age...	Dashboard	Managed	True	

Creating Personal Dashboards

Go to Dashboards -> click on 'New'



To design the personal dashboard, refer to the skills learnt creating a system dashboard. Once saved a 'Personal Dashboard' can then be shared with a team or a user.

