

# Dynamics 365 Contact Center Design and Build Reporting

## Architecture Services

**Duration:** 4 Days [ Remote | Onsite ]

**Difficulty Level:** 300 - Advanced

### Description

This offering is designed to provide administrators and business stakeholders with the knowledge to report based on data stored in Dynamics 365 Contact Center and Dataverse. You will examine reporting techniques to edit the out-of-the-box historical and real-time analytics dashboards, and also the option to customize the data models of both analytics reports, using the extensibility feature in Microsoft Power BI to add your own KPIs.

### Objectives

- Learn about the techniques, best practices, and tools used to extend and customize out-of-the-box reports using Power BI, Dynamics 365 Contact Center or Omnichannel, and Dataverse.

### Outcomes

- Gain an understanding of Dataverse, Power BI and Dynamics 365 Contact Center or Omnichannel and how to customize the historical and real-time reports.

### Methodology

#### Review and Analysis

Work with a Microsoft expert to review a configuration aligned with the eight critical design areas for an Enterprise Scale Landing Zone.

#### Configure Design

Document the requirements needed to integrate the Enterprise Scale Landing Zone into your Azure environment. Capture the design settings that can be used for the Cloud Adoption Framework Enterprise Scale Landing Zone Implementation.

### Scope

The scope is limited to learning to use Dynamics 365 Contact Center or Omnichannel out-of-the-box historical and real-time analytics dashboards, where all the environments are present in a single tenant – Dynamics 365 Contact Center or Omnichannel, Dataverse and Power BI.

Delivery will be scoped to one historical and one real-time analytics dashboard.

### Agenda

#### Day 1

- Configure and Review Real-time and Historical data and reports

#### Day 2

- Review the case forecasting, agent forecasting and AI topic clustering
- Review security roles, user access, and setting for Power BI templates

#### Day 3

- Customize the out-of-the-box data model and add new metrics.
- Bring in your own custom entities from Dataverse or any other source and extend the Power BI data model.

#### Day 4

- Bring in your own custom entities from Dataverse or any other source and extend the Power BI data model.

# Delivery Outline

## Requirements

### Participants

- Administrators and staff of Dynamics 365 Contact Center or Omnichannel and/or Dataverse who plan to develop, configure, customize, and administer reports.

### Skill Requirements

- Experience with Dynamics 365 Contact Center or Omnichannel dashboards, Dataverse, and PowerBI.

### Time Commitment

- Four full-day engagement with relevant roles

### Delivery Requirements

- Dynamics 365 Contact Center or Omnichannel environment already installed and running and full access to Dataverse.
- Microsoft Fabric Capacity for all reports users to access the reports.
- PowerBI Premium per user license for report authors, developers and administrators to build PowerBi reports and extend out-of-the-box PowerBI data model.

## Detailed Agenda

### Scoping

Welcome Call

- Scope the engagement and define roles and responsibilities.

### Architecture Design Review

Day 1

- Configure both reports to provide your contact center with a combination of BI Analytics and AI insights, using the out-of-the-box KPIs provided by Microsoft.
- Review all the options for Historical such as Summary, conversation, queue, voice, voicemail, agent, bot, conversation topics, unified routing.
- Review all the options for Real-time analytics reports such as summary, voice, agents, ongoing conversations

Day 2

- Review the case forecasting and agent forecasting for conversation dashboards
- Review the AI topic clustering for cases, conversation, sentiment and knowledge articles
- Review security roles, user access, and settings for PowerBI templates

Day 3

- Customize the out-of-the-box data model and add new metrics.
- Bring in your own custom entities from Dataverse or any other source and extend the Power BI data model.

Day 4

- Bring in your own custom entities from Dataverse or any other source and extend the Power BI data model.

***If you are interested in this engagement for your organization, contact your Microsoft Account Representative.***