

Resources for

Blackbaud CRM + Microsoft Power BI Best Practices

Blackbaud CRM

Blackbaud Infinity Technical Reference:

<https://www.blackbaud.com/files/support/guides/infinitytechref/infrefversions-developer-help.htm>

Blackbaud Community Developer Discussions: <https://community.blackbaud.com/forums/viewcategory/511>

URL Section: In the CRM SDK installation, a document called **UrlSection.doc** is added to the folder **SDK\Documentation**. This describes the parameters that can be passed to the Power BI embed URL for filtering.

Power BI General

Microsoft's Learn Power BI: <https://docs.microsoft.com/en-us/learn/browse/?products=power-bi>

Microsoft's Build 2021 session "Power BI for BI pros and Data Engineers": <https://docs.microsoft.com/en-us/events/build-may-2021/power-platform/breakouts/od488/>

Licensing Options:

Licenses Explained: <https://docs.microsoft.com/en-us/power-bi/admin/service-admin-licensing-organization>

Pricing for Per-User and Premium Capacity: <https://powerbi.microsoft.com/en-us/pricing/>

Power BI Premium: <https://powerbi.microsoft.com/en-us/power-bi-premium/>

Power BI Embedded: <https://powerbi.microsoft.com/en-us/power-bi-embedded/>

Office 365 E5: <https://www.microsoft.com/en-us/microsoft-365/enterprise/office-365-e5>

Power BI Desktop

Star schema model: <https://docs.microsoft.com/en-us/power-bi/guidance/star-schema>

MS documentation on two types of **roll playing dimensions**: <https://docs.microsoft.com/en-us/power-bi/guidance/star-schema#role-playing-dimensions>

Roll playing dimensions explained by Guy in a Cube: <https://www.youtube.com/watch?v=2BxaUXlx3K4>

DAX quick start guide: <https://docs.microsoft.com/en-us/power-bi/transform-model/desktop-quickstart-learn-dax-basics>

Web URL links - option to display icon or hotlink text: <https://docs.microsoft.com/en-us/power-bi/create-reports/power-bi-hyperlinks-in-tables>

Slicers and how to sync slicers across pages: <https://docs.microsoft.com/en-us/power-bi/visuals/power-bi-visualization-slicers>



Retractable slicer panel by Guy in a Cube: <https://www.youtube.com/watch?v=xy9nmSQeUWg>

Power BI Desktop themes (colors and fonts): <https://docs.microsoft.com/en-us/power-bi/create-reports/desktop-report-themes>

Power Query

M Query reference guide: <https://docs.microsoft.com/en-us/powerquery-m/>

Power BI Service

Power BI Gateway: <https://powerbi.microsoft.com/en-us/gateway/>

Organizing Content and Work: <https://docs.microsoft.com/en-us/power-bi/collaborate-share/service-new-workspaces>

Dataset sharing: <https://docs.microsoft.com/en-us/power-bi/connect-data/service-datasets-across-workspaces>

Embed code structure for filtering by parameters: <https://docs.microsoft.com/en-us/power-bi/collaborate-share/service-url-filters>

Power BI Artificial Intelligence

A tour of Power BI AI from our partner Bluegranite: <https://www.bluegranite.com/blog/artificial-intelligence-features-in-power-bi>