

2016 Spring Lunch & Learn Business Intelligence

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Silver Enterprise Resource Planning Silver Customer Relationship Management Silver Independent Software Vendor (ISV)





• What is BI

- Microsoft BI Building blocks
- Dynamics GP BI
- Dynamics CRM BI
- Successful BI project attributes

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- a set of techniques and tools for the acquisition and transformation of raw data into meaningful and useful information for <u>business</u> <u>analysis</u> purposes – Wikipedia
- simplifies information discovery and analysis, making it possible for decision-makers at all levels of an organization to more easily access, understand, analyze, collaborate, and act on information, anytime and anywhere – Microsoft

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Types of BI in your business

- Personal
 - End users quick analysis in Excel
 - Exploratory analysis without IT involvement
 - Spreadsheet based output
- Team
 - Store and Share workbooks to enable collaboration
 - Shared analysis in dashboards
 - Secured access to the files
- Organizational
 - Organizational planning / budgeting / forecasting / consolidating
 - IT provides defined data views with business user roles / metrics
 - Business users create "guided analytics" experience with structured data



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• Isn't BI just a fancy name for reporting?



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- How do all the components fit together?
- How do they apply to my organization and my ERP?
- Where are things heading in the future?
 - Put the power of data in the hands of every business and person on the planet. Serve over a billion users with Microsoft BI platform Microsoft



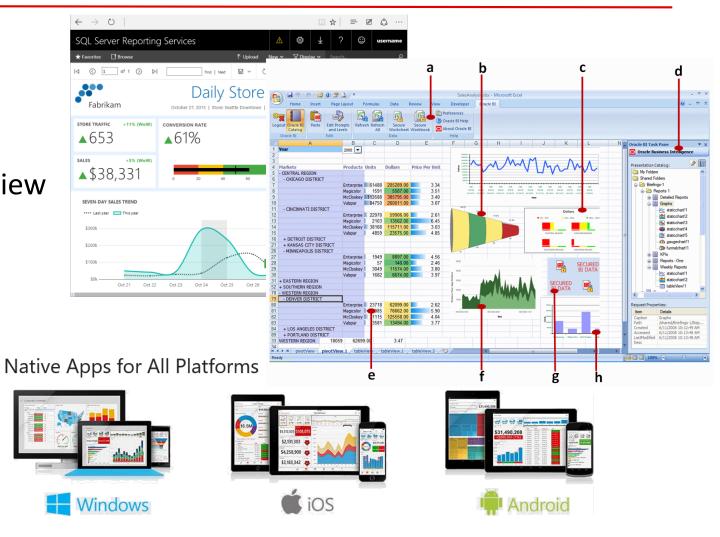


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Harmonizing Report types

- Paginated Reports
 - Operational / day to day
- Interactive Reports
 - Power BI Desktop / Power View
 - Visual Data discovery
- Mobile Reports
 - Datazen
 - Mobile presentation
- Analytical Reports / Charts
 - Excel Services / Analysis



CRM

Microsoft

Dvnamics

Microsoft

Dynamics

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Paginated

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- SSRS
- Report Writer

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- Crystal Reports
- JetReports

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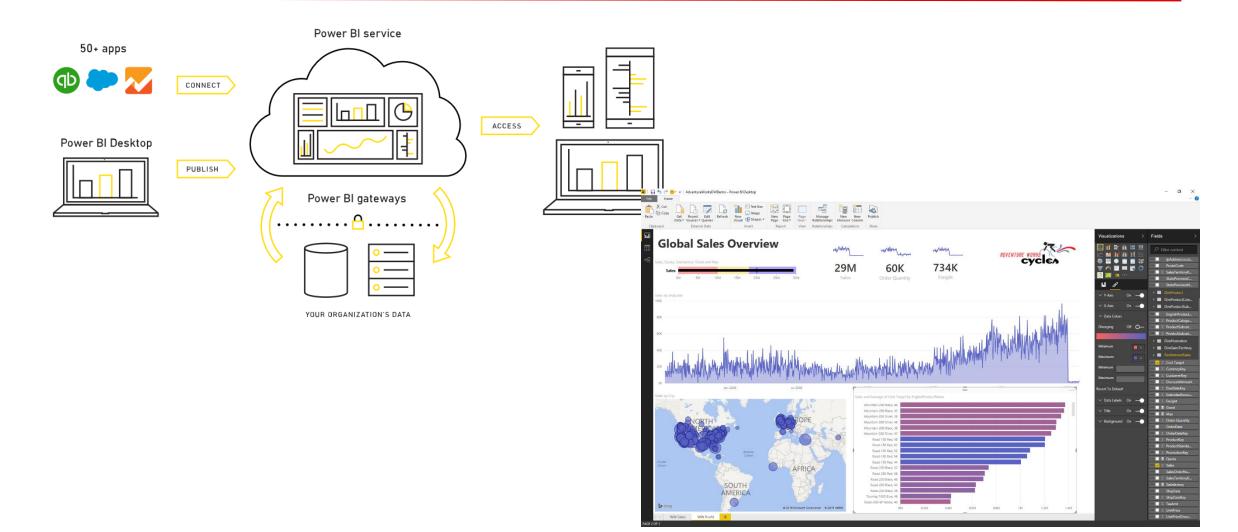


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Interactive Reports - Power BI Desktop



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Joesoftware.com

GP CRM Microsoft Dynamics Dynamics



Mobile Bl

• Microsoft acquires **Datazen** 2015

Native Apps for All Platforms







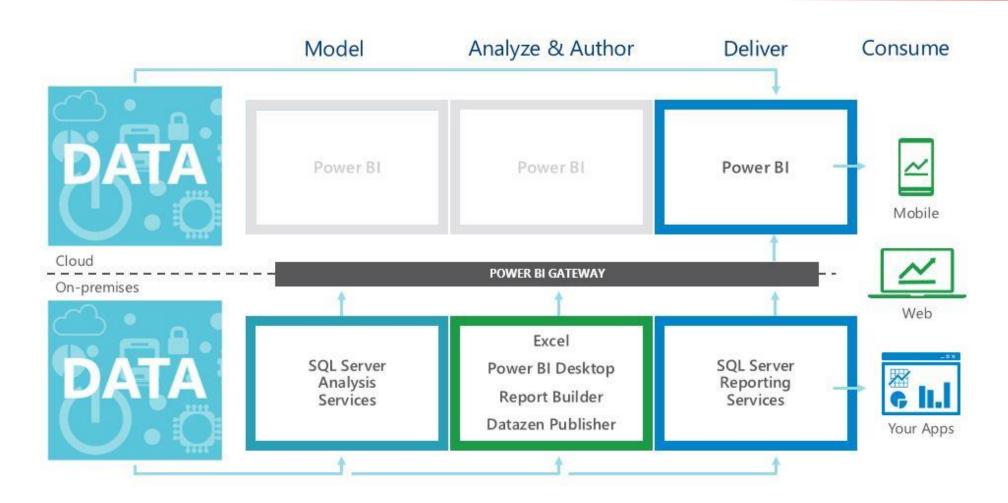
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Symmetry across on-prem and cloud



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Dynamics GP

- Paginated Reports
 - Report Writer
 - SSRS
 - Legacy (e.g. Crystal)
 - JetReports (Express)
 - Management Reporter
- Interactive
 - Smartlist / Smartlist Builder
 - Excel Reports / Power Query
 - JetReports
 - Power BI Desktop

- Mobile
 - Business Analyzer
- Analytical
 - SQL Analysis Services
 - Excel Pivot Tables
 - Prophix



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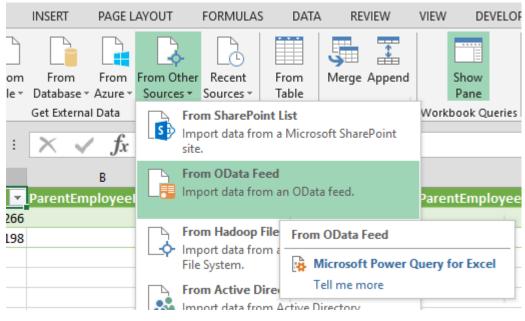
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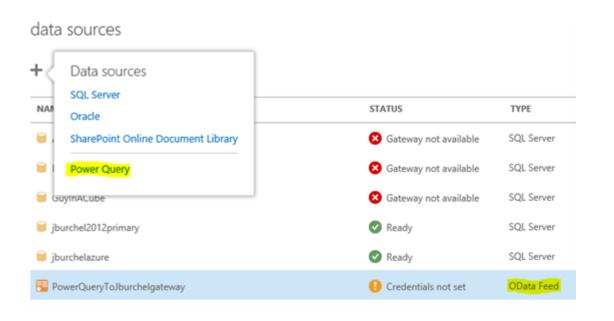


GP 2016 OData Support

• What is OData?

• How to use OData feeds (in Excel)













- MR Moving to maintenance status
- Microsoft announces Jet Express for Excel free for Dynamics GP customers (May 2016)
 - Free download (Jun 2016 from JetReports website)
 - Will include pre-built reports, tutorial videos, online community
 - Users can upgrade to Jet Essentials (across databases and companies) or Jet Enterprise (BI tool from Jet Reports)

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- Jet Express (free to MS Dynamics GP customers)
 - <u>GL Function</u> 5 min
 - <u>Building a financial statement</u> 4 min
- Jet Essentials (Automated report delivery with scheduling)
- <u>Jet Enterprise</u> (80 pre-built reports, 7 customizable cubes, data warehouse, Jet Mobile
- Rapid deployment
- Why would Microsoft make this announcement?
- What might this mean for my Dynamics MR strategy?



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Dynamics CRM

- Paginated Reports
 - SSRS
 - Views
- Interactive
 - Advanced Finds
 - Dashboards
 - Excel Power Query
 - Power BI Desktop (Content pack)
 - Jet Reports

• Mobile

- Dashboards
- Power BI Mobile / Datazen
- Jet Reports Mobile
- Analytical
 - Excel Pivot Tables
 - SQL Analysis Services



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Power BI CRM Content Pack

Ask a question about the data on	this dashboard					
Revenue LAST 12 MONTHS	Win Rate LAST 12 MONTHS	Open Opportunities CLOSINO NEXT 90 DAYS	New Opportunities Trend BY MONTH-YEAR, RATING	Sales Pipel BY SALES STA		
26.16M	75 %	53	Rating Cold Warm	Qualify Develop Propose Close		
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- Correct timing in ERP implementation life cycle
- Cultural need
 - Manage by information
 - Proactive vs. Reactive
- Strong understanding of Data Modeling
- Strong training in BI visioning tools
 - Excel or bi360
- Evolutionary approach
- Organizational awareness of skill sets / roles

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- Ensure a C-Level Sponsor (Not CIO)
- Create common business language
 - Choose 10-20 KPIs to start and create standards and governance to match
- Properly assess the current state (data quality, systems, resources, etc)
- Create a storage plan (physical or virtual)
- Understand the user Need (Strategic, Tactical, Operational)
- Decide to Buy or Build your analytical data model
- Consider all BI components
- Choose a systems integrator (\$5-\$7 per \$1 of software)
- Think "actionable" and "baby steps" Evolve
- Start with low lying fruit (Simple, large return)

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Agenda

- 11:00 Welcome
- 11:10 What is BI
- 11:50 Lunch
- 12:00 Round Tables
- 12:45 Break
- 1:00 GP 2016
- 1:30 BPO
- 2:00 Break
- 2:15 Going beyond with CRM
- 3:15 Wrap up / Draws

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