2016 Spring Lunch & Learn
Business Intelligence

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

GP
Microsoft
Dynamics

CRM
Microsoft
Dynamics

Business Intelligence

- *What is BI*

- Microsoft BI Building blocks

- Dynamics GP BI

- Dynamics CRM BI

- Successful BI project attributes

What is BI

- a set of techniques and tools for the acquisition and transformation of raw data into meaningful and useful information for business analysis 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

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

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

Business Intelligence

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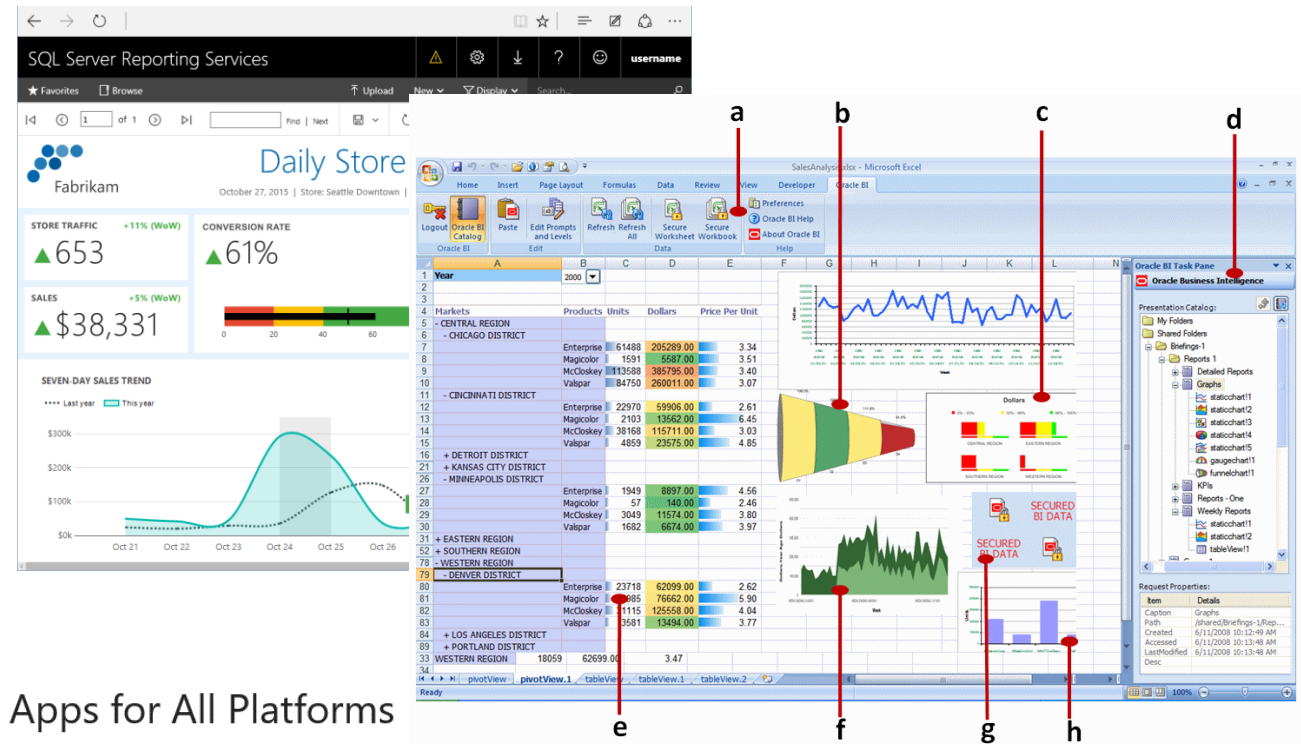- Successful BI project attributes

Microsoft BI Roadmap

- 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

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

Native Apps for All Platforms

Windows   iOS   Android

Joesoftware.com

Paginated

- SSRS
- Report Writer
- Crystal Reports
- JetReports

Interactive Reports - Power BI Desktop

- Microsoft acquires [Datazen](#) 2015

Native Apps for All Platforms

Windows

iOS

Android

Symmetry across on-prem and cloud
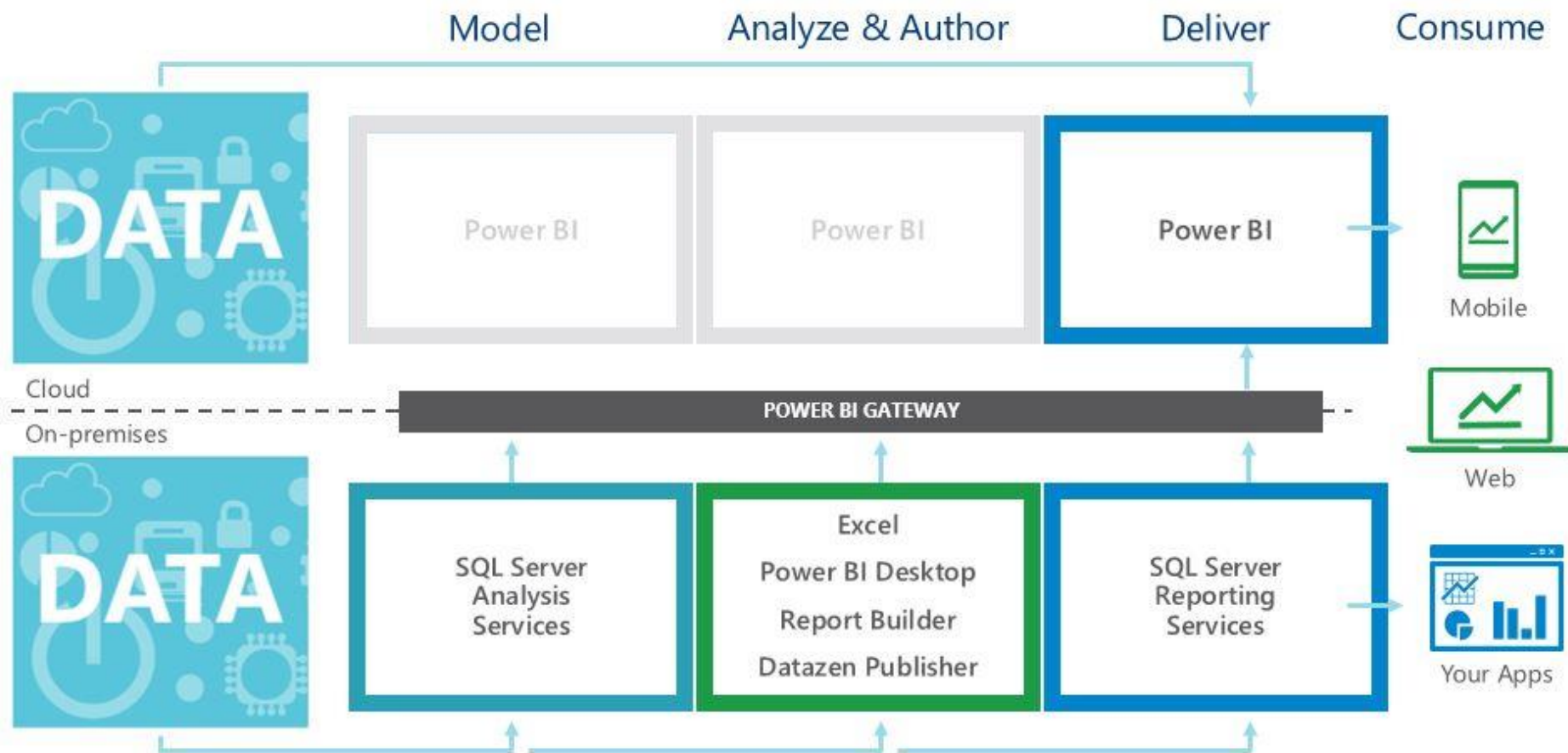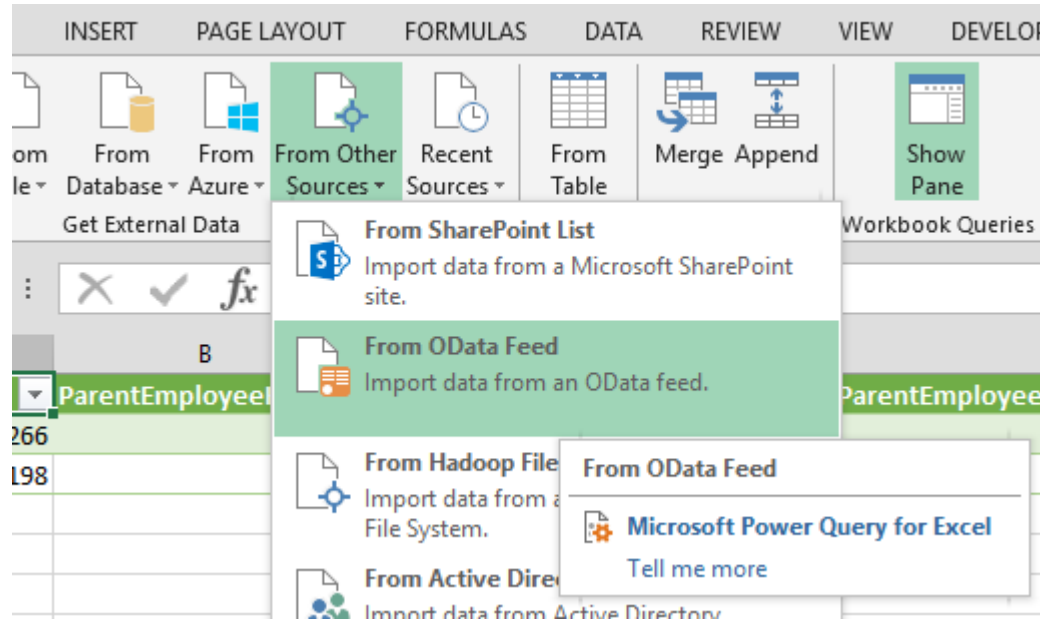
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Dynamics GP

- 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

GP 2016 OData Support

- What is OData?

- How to use OData feeds (in Excel)

MR Roadmap

- 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)

Jet Reports

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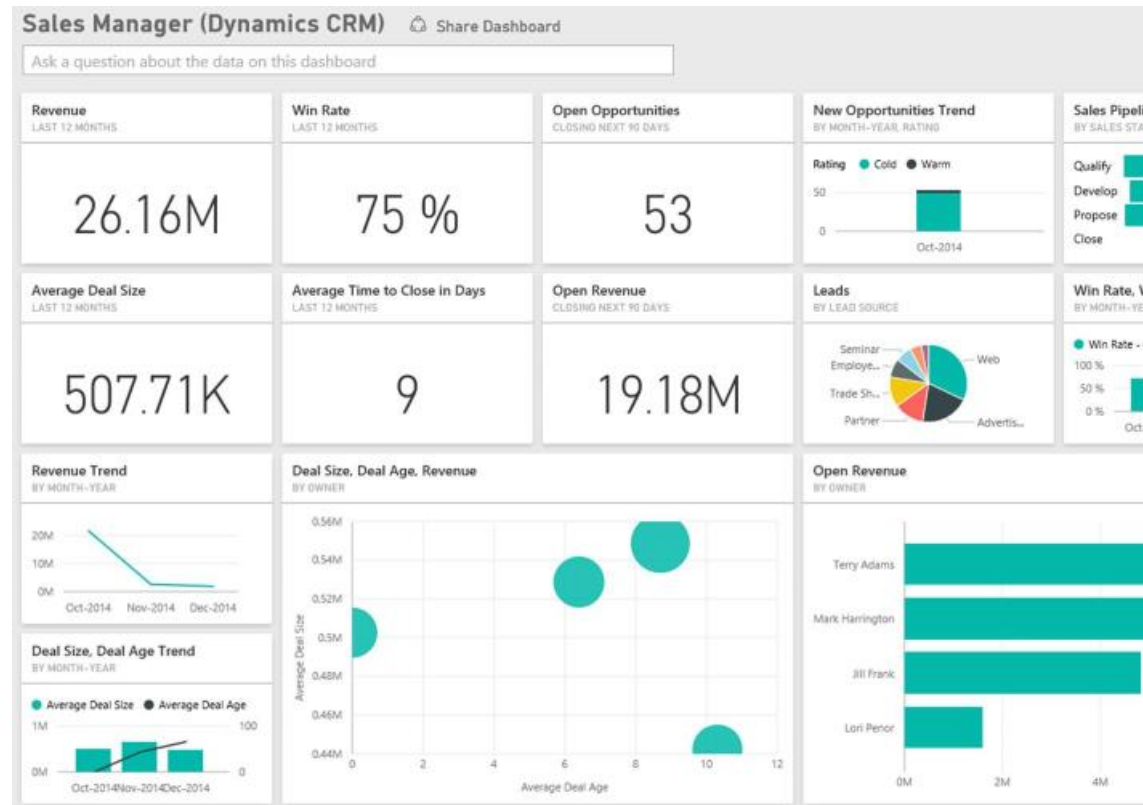- What might this mean for my Dynamics MR strategy?

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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

Power BI CRM Content Pack

Joesoftware.com

GP
Microsoft Dynamics

CRM
Microsoft Dynamics

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Successful BI Projects

- 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

10 keys to BI success

- 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)

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