Business Intelligence (BI) & Microsoft Dynamics NAV

EXECUTIVE SUMMARY

The driving force behind Business Intelligence (BI) solutions is that companies have an incredible amount of data living in transaction-based, distributed systems and databases: payroll data, financial data, customer data, vendor data, and so on. The main goal for business intelligence solutions is to provide:

- The ability to view data from multiple sources in a single view, such as seeing sales information correlated to marketing expenses or Google analytics

- The ability to quickly see summaries of data from different places - such as the total payroll spent, along with the total sales, for a given time period

- The ability to see data over time, comparing data from last week, last month, the past three quarters or the past 3 years, to see how things have changed over time

- The ability to ask "what if" questions and have answers generated based on historical data; for example, you might want to know if raising sales by 15% for a sustained period of time will necessitate a raise in payroll or travel expenses and the impact on gross margins

HOW THE RIGHT BI SOLUTION CAN HELP

There's little question that a business intelligence solution can help your company understand performance, identify trends, and make strategic decisions to drive the organisation forward, and there's plenty of incentive for overcoming today's business information challenges. The right BI solution can provide self-service convenience for the average user with a range of flexible options for generating, viewing, analysing, and distributing information.

The Microsoft vision for business intelligence is to help drive businesses to better performance by enabling all decision makers - essentially empowering all employees throughout the organisation - to make better decisions. Microsoft plans to achieve this vision by providing crossproduct integration,

delivering business intelligence capabilities within Microsoft Office and making its business intelligence offerings scalable so that everyone in the organisation is empowered with business intelligence tools. Whether they are working on the strategic, the tactical, or the operational level, Microsoft Business Intelligence applications are to help make more informed decisions a natural part of the everyday work experience for all employees.

Microsoft Dynamics NAV is a good example of this cross-product integration and offers a range of business intelligence capabilities - spanning from built-in reports and wizards, to advanced tools allowing users to gain the insight required to optimise performance across the entire organisation. This complete, flexible solution meets the requirements of both small businesses that need easy-to-use, yet effective tools as well as the requirements of larger organisations that need the most technically advanced business intelligence capabilities.

To highlight how Microsoft Dynamics NAV business intelligence capabilities equip organisations to make smart decisions, it is helpful to organise these capabilities around three core business needs:

- **Reporting** - To keep business on track, it's essential to monitor current activity and compare it to historical performance and plans. The user needs easy access to specific data related to their task or role, the ability to perform repetitive business processes and have formatted grouped data - all as part of the standard application and setup.
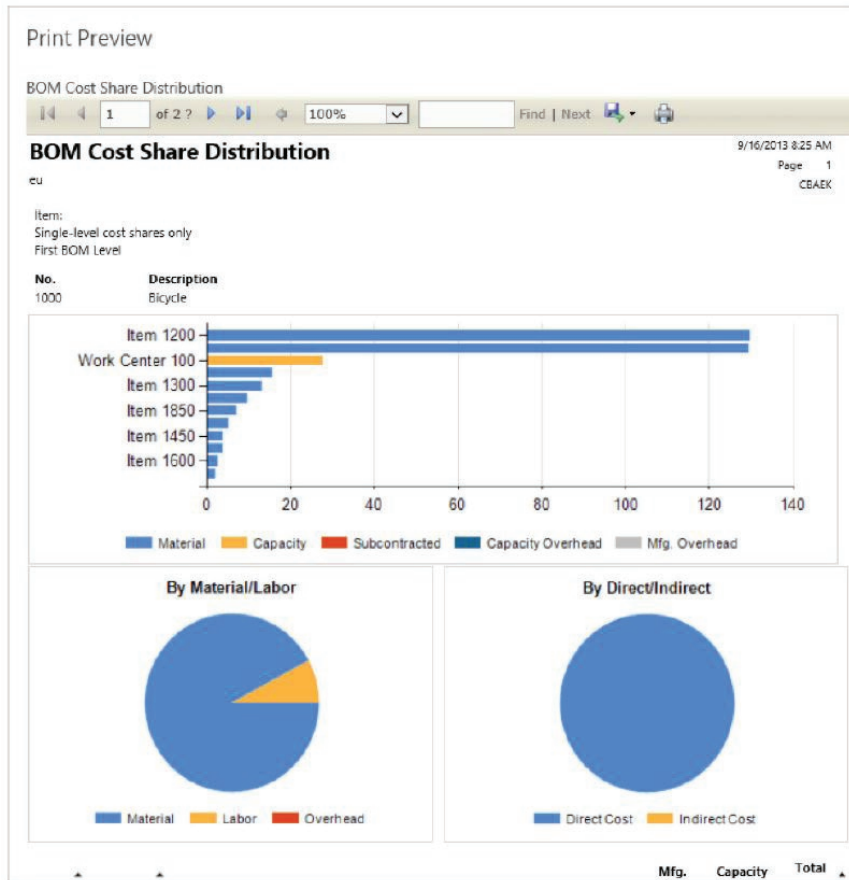
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DELIVERED SERVICES:

IT SERVICES

Gain greater insight with Microsoft Dynamics NAV and SQL Reporting Services

- **Charts and KPIs** - Monitoring organisation performance and drilling into more detail when trends are spotted provides more insight into how the business is performing. The user needs access to simple, easily identifiable business drivers to see the organisation at a glance.

- **Ad-hoc Query and Analysis** - Robust analysis capabilities within an easy and familiar tool like Microsoft Office Excel enable the actionable insight required to change the direction of a negative trend or take advantage of a positive trend. To remain competitive, companies must be able to compare plans to actuals, analyse that information, make the necessary adjustments, and then take action to move forward. In this scenario, the user needs to address specific business questions and problems and perform data calculations.

REPORTING

Business performance depends on the ability to track activities that span from financial transactions and performance reports to compliance records. Accurate monitoring requires a wide range of integrated capabilities. Microsoft Dynamics NAV delivers monitoring capabilities to provide organisations with the comprehensive view of the information they need through Microsoft SQL and native reporting capabilities.

Document Reports and Standard Reports

With Microsoft Dynamics NAV, you can monitor the state of the business in both generic and predefined ways within the application.

Data Lists provides the end user with the ability to make targeted data overviews through filterable lists of business data. Each list can be customised to the individual depending on roles and needs.

Document reports enable a precision layout of data with emphasis on presentation of data as well as distribution.

Take advantage of the new Microsoft Word layout option in Microsoft Dynamics NAV 2015 where users can quickly create well-designed invoices and other customer and partner-facing documents that draw information directly from Microsoft Dynamics NAV, and email them with personalised messages.

Users can create or customise reports in Microsoft Word, save them back into Microsoft Dynamics NAV and decide which layout option is preferred.

Microsoft Dynamics NAV also provides a set of predefined reports supporting all business processes within your organisation. This gives the user a consistent overview of the business.

Microsoft SQL Server Reporting Services Reports

In addition to the traditional reporting available within Microsoft Dynamics NAV, it is possible to integrate to Microsoft SQL Server Reporting Services to support needs for interactive, Web-based reports.

Direct access to Microsoft SQL Server enables efficient and powerful reporting. Microsoft SQL Server Reporting Services is a comprehensive, server-based solution that enables the creation, management, and delivery of both traditional, paper-oriented reports and interactive, Web-based reports. Microsoft SQL Server Reporting Services supports the full reporting lifecycle, including report authoring, management, delivery, and security.

Microsoft Dynamics NAV 2015 leverages Microsoft SQL Server Reporting Services 2012 Report Builder 3.0. The Report Builder is a report authoring tool that features a Microsoft Office-like authoring environment. New features such as new spark-line, data bar, and indicator data visualisations, the ability to save report items as report parts, a wizard for creating maps, aggregates of aggregates, and enhanced support for expressions are all part of the tool.

CHARTS & KPIs

Monitor the status of the organisation at a glance with charts and KPIs. Charts and KPIs make it possible for you and your employees to spot trends faster.

Charts and Graphs

Microsoft Dynamics NAV provides a large number of built-in charts and graphs rendered in various forms based on role preferences. The user is also provided with the ability to drill down into various levels of detail. Charts are available in the Windows, Web and Tablet client for Microsoft Dynamics NAV 2015 on any list place and can be customised to display the information the customer is looking for.

Cues

Cues are special tiles that apply custom formatting to any computed numerical value such as the number of open sales invoices. They can also show an indicator that changes color based on the data values that the tile reflects. This enables users to get visual insight of the status of the data based on conditions for favorable and unfavorable thresholds.

Advanced Visualisation

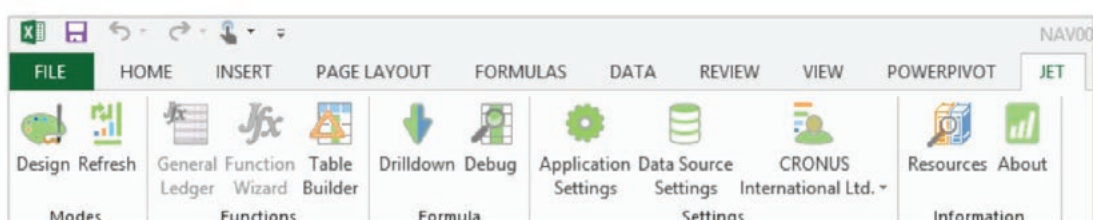Microsoft Dynamics NAV also offers advanced visualization capabilities

AD HOC QUERY & ANALYSIS

Businesses need robust analytic tools to turn information into forward-thinking insight, such as the insight needed to change the direction of a negative trend or take advantage of a positive trend. Microsoft Dynamics NAV provides simple but powerful analysis and reporting tools that enable this kind of business intelligence.

Account schedules

Analyse data from the General Ledger, Sales and Purchase, and Inventory. Compare data to budgets across time, departments, projects, campaigns, and other dimensions. The easily defined line and column layout provides users with a comprehensive and tabular form of analysis. Results can be presented in print, in a window from which users can easily navigate to original entries and documents, and/or in Microsoft Office Excel for further processing.

Intuitive and simple analysis features in Jet Reports Express

Analysis views

Gain a comprehensive understanding of the business and its activities with this multilevel and multidimensional business insight capability. Create analysis views for different purposes. For example, users can see an analysis view relating to sales in a particular area for a particular time period and for a particular group of customers. The views can easily be sent to Microsoft Office Excel, where the automatic creation of relevant PivotTable® views enables users to drag fields and use additional measures, dimensions and criteria.

Power BI

Power BI for Office 365, a self-service business intelligence solution delivered through Excel and Office 365. Use OData and Queries in Microsoft Dynamics NAV 2015 for easy integration into Microsoft Excel for leveraging the tools in the PowerBI suite like PowerPivot, PowerView and PowerMaps.

CONCLUSION

Whether or not a company has business intelligence capabilities can mean the difference between real success and mediocre performance. More and more business owners are now realising the important role business intelligence plays in the success of their business. The company who can exploit its own data and information to gain insight and make smarter decisions will have a clear competitive advantage.

Microsoft Dynamics NAV helps enable better business insight for your entire company. With Microsoft Dynamics NAV, you and your employees can get the answers you need to your specific business questions – fast – through high-impact reports, charts and simple analysis.

Microsoft Dynamics NAV offers a Business Insight platform based entirely on the Microsoft stack through Microsoft SQL Server, Microsoft CRM, Microsoft Office and Microsoft SharePoint as a platform for collaboration and distribution. This enables you and your employees to take full advantage of your investments in your Microsoft applications, get more out of the tools you have on your desktop and get your business insight needs covered.

LEARN MORE

Learn more about how getsix® Group can help you make the most of your Microsoft Dynamics NAV investment with business intelligence solutions that help you optimise your operations and provide business insights to your team that can take you to the next level. ■

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Item Code: E4001 (Oct.15)

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