

BI4Dynamics

POC IMPLEMENTATION PROCESS

Last update: June 2019

Version: 3

IMPLEMENTATION

Implementation services cover standard software installation with configuration and reports connection.

Prerequisites

System requirements that need to be met before starting the installation are described on:

<https://www.bi4dynamics.com/dl/nav/BI4Dynamics-Requirements-NAV.pdf>

<https://www.bi4dynamics.com/dl/ax/BI4Dynamics-Requirements-AX.pdf>

Installation and configuration

New installation and configuration of the latest BI4Dynamics version will be done on your server.

The solution will be configured to use requested:

- Microsoft Dynamics AX/NAV companies
- Microsoft Dynamics AX/NAV global dimensions
- BI4Dynamics modules.

Power BI desktop and Excel reports

After the installation, the predefined Power BI desktop and Excel reports will be connected to BI4Dynamics. The connection string will be changed from generic to POC so that all information will be immediately available in template reports for Power BI and Excel.

Power BI Web experience

Customer can provide one Power BI Pro account with customer domain that will be used to publish Power BI desktop report to Power BI service. This user will be able to analyze BI4Dynamics data with a web browser. Additional users (with Power BI Pro account) can be invited too.

Please check availability of 60 days Power BI Pro free trial period that is usually available from Microsoft: <https://powerbi.microsoft.com/en-us/power-bi-pro/>

Power BI Mobile experience

One mobile dashboard for selected application area will be created. Customer will be able to add more mobile dashboards.

This will ensure that **you** can monitor and analyze your data across all devices (desktop, mobile, web).

CUSTOMIZATIONS (OPTIONAL AND UPON PAYMENT)

Supporting your Microsoft Dynamics AX/NAV features

This phase depends on the requirements of which customizations from Dynamics AX/NAV you would like to bring into BI4Dynamics. Whether you want to add Item attribute or create a new Payroll cube that is not a part of standard BI4Dynamics this can be done in a very efficient way. In the POC phase, you can test, change, add or delete data that are already there or that are missing. Larger tasks are done after POC. We can do an estimation of time and effort needed to bring your AX/NAV customizations to BI4Dynamics.

Integration of External sources

BI4Dynamics supports the integration of external sources in two phases:

- Loading external data to BI4Dynamics staging area with Data Tools (SQL server SSIS)
- Modeling these data into BI4Dynamics data warehouse as separate or integrated into cubes/measure groups

This project is always specific and requires a specific approach.

Optimization for larger databases

Optimization of loading for larger databases (few TB) usually requires:

- Dropping BI4Dynamics functionality that is not needed
- Adding indexes on Microsoft Dynamics AX/NAV tables
- Optimizing the loading process and SQL code

It is understood that customer would provide best infrastructure by following BI4Dynamics recommendations.

WORKSHOP

Orientation business user “Walkthrough data” workshop

The workshop will give the users in-depth information about Microsoft Dynamics AX/NAV, BI4Dynamics, Power BI, and Excel reports before deciding on implementation. The workshop will include some examples made on your data in your IT environment.

A senior BI4Dynamics consultant with Microsoft Dynamics AX/NAV experience will guide the workshop. The workshop will be interactive. You may ask business questions related to BI4Dynamics or Microsoft Dynamics AX/NAV.

This can be an eye-opening session by finding unexpected events and trends in your Microsoft Dynamics AX/NAV or convergence of business and IT user with understanding roles for each user profile.

This session usually takes from 2 to 4 hours. If a larger organization would like to evaluate BI4Dynamics then this session can take 2 days (upon payment).

SUPPORT IN POC PERIOD

During the POC period BI4Dynamics will offer reasonable support to the customer. We will be available to answer your questions free of charge such as:

How to use predefined Power BI reports?

- Power BI reports are already made by BI4Dynamics and can be used on top of BI4Dynamics.
- What are best practices of analyzing data in the report and in the dashboard?

How to use different source of data for reporting?

- Comparison of different data sources (SQL tables, data warehouse, cubes).
- What is data size limitation and what needs to be done to establish a connection?
- What needs special attention? Are there any licensing issues?

How to manage user access?

- How to refresh data? How to manage user access?
- How to distribute reports and dashboards?

How to make changes to Microsoft Dynamics AX/NAV to better utilize BI?

- Setting up global dimension in Microsoft Dynamics AX/NAV
- Using budgets from Microsoft Dynamics AX/NAV or Excel
- How to use financial reporting (Financial statements or Account schedules) to better control reconciliation of general ledger with sub ledger
- How to use BI for company group consolidations