Microsoft Dynamics 365

Introducing: Analyze data on lists and queries

Agenda

- The world is changing
- Analyze Data on list pages
- Analyze Data on queries
- Share an analysis definition with a co-worker
- Turn off the feature with a new permission
- Learning resources
- Go-dos

The world is changing

The word *Reporting* in Dynamics 365 Business Central means three things

Analytical reports

Chart of Account

Purchase statistics

Customer - Top 10 list

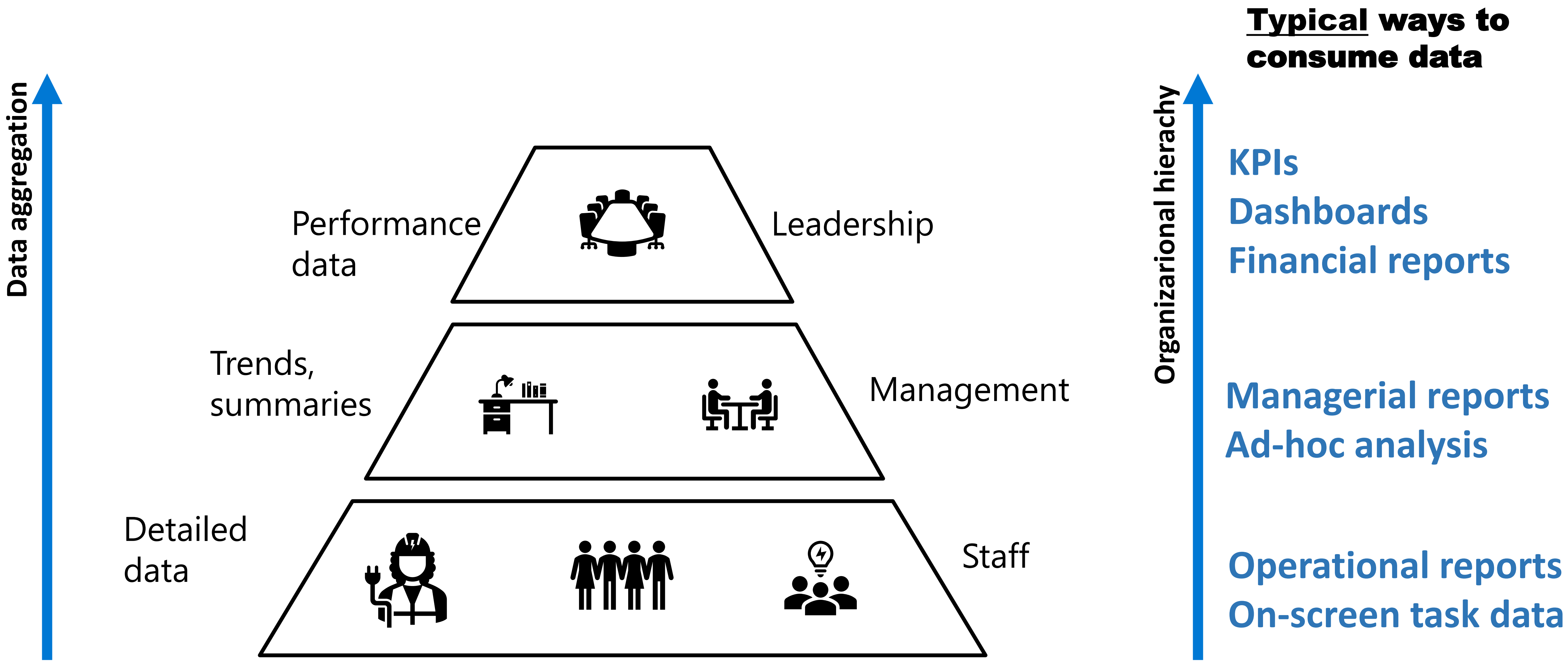
…

Processing only reports (AL code with a request page)

Printable documents (e.g. invoices)

Not covered in this presentation

Typical *analytics* needs in organizations



Vision: all analytics/reporting is designed for online consumption (not print)

1. Consume data: Core business scenarios have **out-of-the-box reporting/analytics**
2. Enable: Most user analytics needs covered with **nocode/lowcode** solutions
3. Enable: Customers have **easy access to data** – for advanced BI and analytics

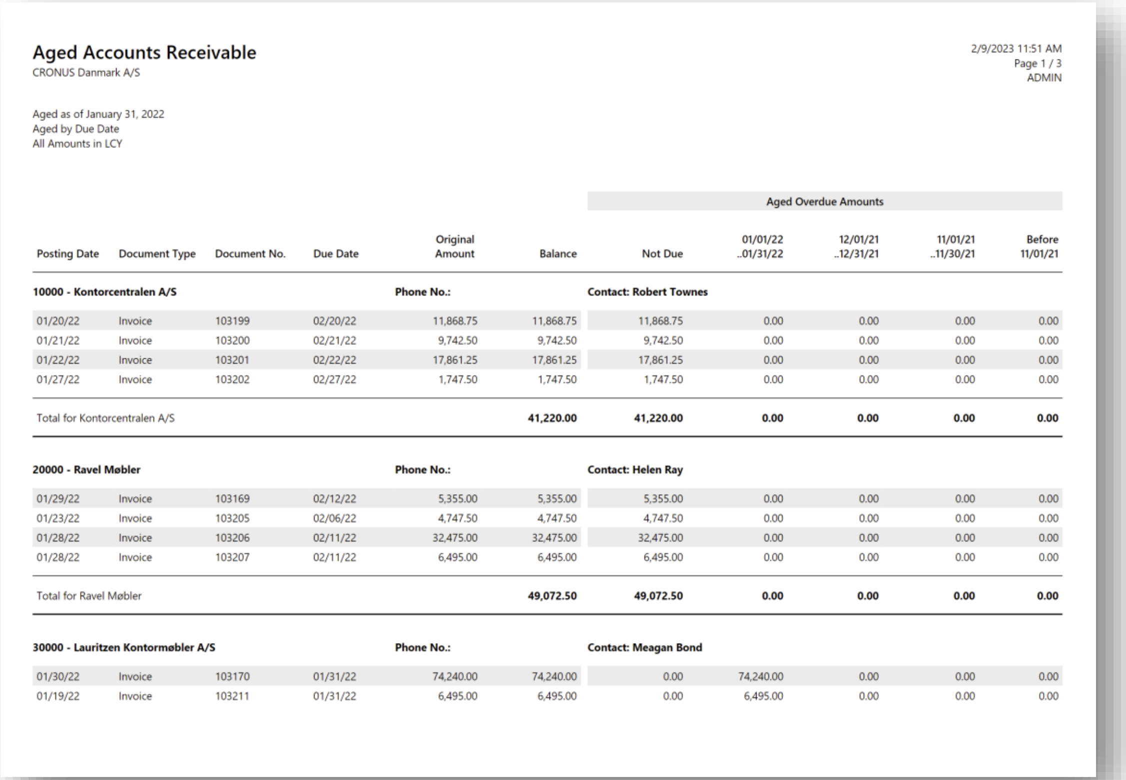
ISVs can deliver analytics as well

There is also document reporting (not part of this presentation)

Analyze Data on list pages

Analyse Data on List Pages in a nutshell…

Before (run a report, get a PDF)



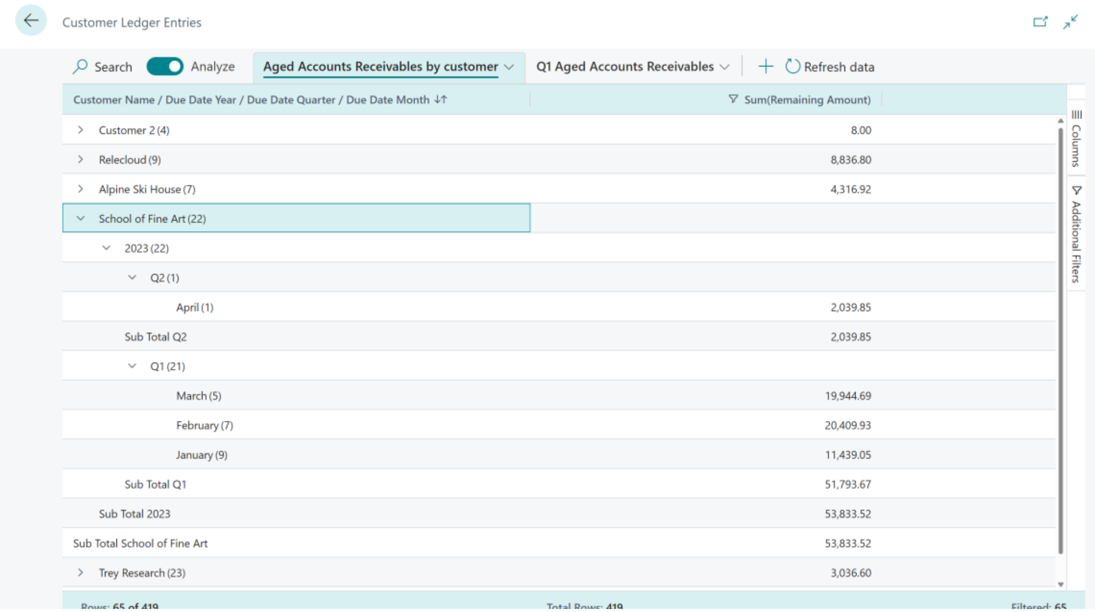
Aged Accounts Receivable
CRONUS Danmark A/S

2/9/2023 11:51 AM
Page 1 / 3
ADMIN

Aged as of January 31, 2022
Aged by Due Date
All Amounts in LCY

						Aged Overdue Amounts				
Posting Date	Document Type	Document No.	Due Date	Original Amount	Balance	Not Due	01/01/22 ..01/31/22	12/01/21 ..12/31/21	11/01/21 ..11/30/21	Before 11/01/21
10000 - Kontorcentralen A/S				**Phone No.:**		**Contact: Robert Townes**				
01/20/22	Invoice	103199	02/20/22	11,868.75	11,868.75	11,868.75	0.00	0.00	0.00	0.00
01/21/22	Invoice	103200	02/21/22	9,742.50	9,742.50	9,742.50	0.00	0.00	0.00	0.00
01/22/22	Invoice	103201	02/22/22	17,861.25	17,861.25	17,861.25	0.00	0.00	0.00	0.00
01/27/22	Invoice	103202	02/27/22	1,747.50	1,747.50	1,747.50	0.00	0.00	0.00	0.00
Total for Kontorcentralen A/S					**41,220.00**	**41,220.00**	**0.00**	**0.00**	**0.00**	**0.00**
20000 - Ravel Møbler				**Phone No.:**		**Contact: Helen Ray**				
01/29/22	Invoice	103169	02/12/22	5,355.00	5,355.00	5,355.00	0.00	0.00	0.00	0.00
01/23/22	Invoice	103205	02/06/22	4,747.50	4,747.50	4,747.50	0.00	0.00	0.00	0.00
01/28/22	Invoice	103206	02/11/22	32,475.00	32,475.00	32,475.00	0.00	0.00	0.00	0.00
01/28/22	Invoice	103207	02/11/22	6,495.00	6,495.00	6,495.00	0.00	0.00	0.00	0.00
Total for Ravel Møbler					**49,072.50**	**49,072.50**	**0.00**	**0.00**	**0.00**	**0.00**
30000 - Lauritzen Kontormøbler A/S				**Phone No.:**		**Contact: Meagan Bond**				
01/30/22	Invoice	103170	01/31/22	74,240.00	74,240.00	0.00	74,240.00	0.00	0.00	0.00
01/19/22	Invoice	103211	01/31/22	6,495.00	6,495.00	0.00	6,495.00	0.00	0.00	0.00

Now (self-service data analysis)



Customer Name / Due Date Year / Due Date Quarter / Due Date Month	Sum(Remaining Amount)
Customer 2 (4)	8.00
Relecloud (9)	8,836.80
Alpine Ski House (7)	4,316.92
School of Fine Art (22)	
2023 (22)	
Q2 (1)	
April (1)	2,039.85
Sub Total Q2	2,039.85
Q1 (21)	
March (5)	19,944.69
February (7)	20,409.93
January (9)	11,439.05
Sub Total Q1	51,793.67
Sub Total 2023	53,833.52
Sub Total School of Fine Art	53,833.52
Trey Research (23)	3,036.60

With *Analyse Data on List Pages*, you can

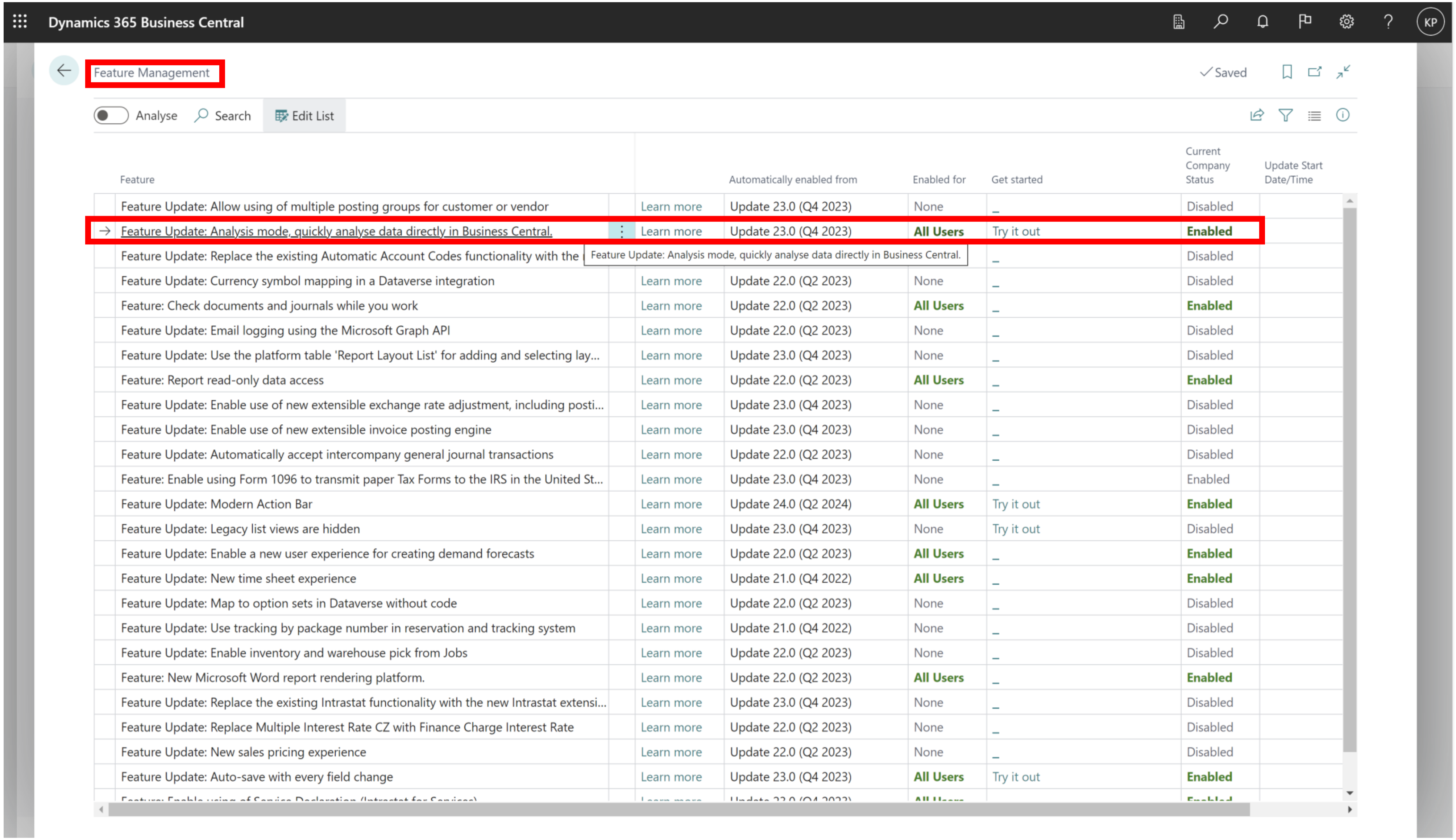
Quickly extract insights from your data directly in Business Central with no need to involve developers.

Design data your way: For each analysis,

- Pick columns, reorder them, freeze left/right
- Set additional data filters
- Group and pivot
- Mark cells and do some quick fact checking
- Copy some/all data, import to Excel/PowerPoint/…

Save your analysis for repetitive use.

Public preview in 2023 release wave 1:
Enable under Feature Management



Feature		Automatically enabled from	Enabled for	Get started	Current Company Status	Update Start Date/Time
Feature Update: Allow using of multiple posting groups for customer or vendor	Learn more	Update 23.0 (Q4 2023)	None	_	Disabled	
Feature Update: Analysis mode, quickly analyse data directly in Business Central.	Learn more	Update 23.0 (Q4 2023)	All Users	Try it out	Enabled	
Feature Update: Replace the existing Automatic Account Codes functionality with the				_	Disabled	
Feature Update: Currency symbol mapping in a Dataverse integration	Learn more	Update 22.0 (Q2 2023)	None	_	Disabled	
Feature: Check documents and journals while you work	Learn more	Update 22.0 (Q2 2023)	All Users	_	Enabled	
Feature Update: Email logging using the Microsoft Graph API	Learn more	Update 22.0 (Q2 2023)	None	_	Disabled	
Feature Update: Use the platform table 'Report Layout List' for adding and selecting lay...	Learn more	Update 23.0 (Q4 2023)	None	_	Disabled	
Feature: Report read-only data access	Learn more	Update 22.0 (Q2 2023)	All Users	_	Enabled	
Feature Update: Enable use of new extensible exchange rate adjustment, including posti...	Learn more	Update 23.0 (Q4 2023)	None	_	Disabled	
Feature Update: Enable use of new extensible invoice posting engine	Learn more	Update 23.0 (Q4 2023)	None	_	Disabled	
Feature Update: Automatically accept intercompany general journal transactions	Learn more	Update 22.0 (Q2 2023)	None	_	Disabled	
Feature: Enable using Form 1096 to transmit paper Tax Forms to the IRS in the United St...	Learn more	Update 23.0 (Q4 2023)	None	_	Enabled	
Feature Update: Modern Action Bar	Learn more	Update 24.0 (Q2 2024)	All Users	Try it out	Enabled	
Feature Update: Legacy list views are hidden	Learn more	Update 23.0 (Q4 2023)	None	Try it out	Disabled	
Feature Update: Enable a new user experience for creating demand forecasts	Learn more	Update 22.0 (Q2 2023)	All Users	_	Enabled	
Feature Update: New time sheet experience	Learn more	Update 21.0 (Q4 2022)	All Users	_	Enabled	
Feature Update: Map to option sets in Dataverse without code	Learn more	Update 22.0 (Q2 2023)	None	_	Disabled	
Feature Update: Use tracking by package number in reservation and tracking system	Learn more	Update 21.0 (Q4 2022)	None	_	Disabled	
Feature Update: Enable inventory and warehouse pick from Jobs	Learn more	Update 22.0 (Q2 2023)	None	_	Disabled	
Feature: New Microsoft Word report rendering platform.	Learn more	Update 22.0 (Q2 2023)	All Users	_	Enabled	
Feature Update: Replace the existing Intrastat functionality with the new Intrastat extensi...	Learn more	Update 23.0 (Q4 2023)	None	_	Disabled	
Feature Update: Replace Multiple Interest Rate CZ with Finance Charge Interest Rate	Learn more	Update 22.0 (Q2 2023)	None	_	Disabled	
Feature Update: New sales pricing experience	Learn more	Update 22.0 (Q2 2023)	None	_	Disabled	
Feature Update: Auto-save with every field change	Learn more	Update 23.0 (Q4 2023)	All Users	Try it out	Enabled	

In 2023 release wave 2 (GA)

Feature is enabled for all users (no need to use Feature Management)

Feature can be turned off

- on pages (by the AL developer)
- for a user (using a permission)

Users can share an analysis tab with a co-worker

- get a share link

In 2023 release wave 2 (GA) (continued…)

Improvements to the UI

- first time you enter analysis mode, analysis menus are open
- users last choice of analysis menus (open/closed) are persisted per analysis tab

No limitations on data volume to analyze

If you analyze more than 100k rows, platform shifts to more efficient way to load data

Analyze data from query objects

Demo

Analyze Data on list pages

New Data Analysis UI on queries

New Data Analysis UI on queries

Open query URL

/?query=<query object id>

New: *Analysis* toggle button – opens new UI

Demo

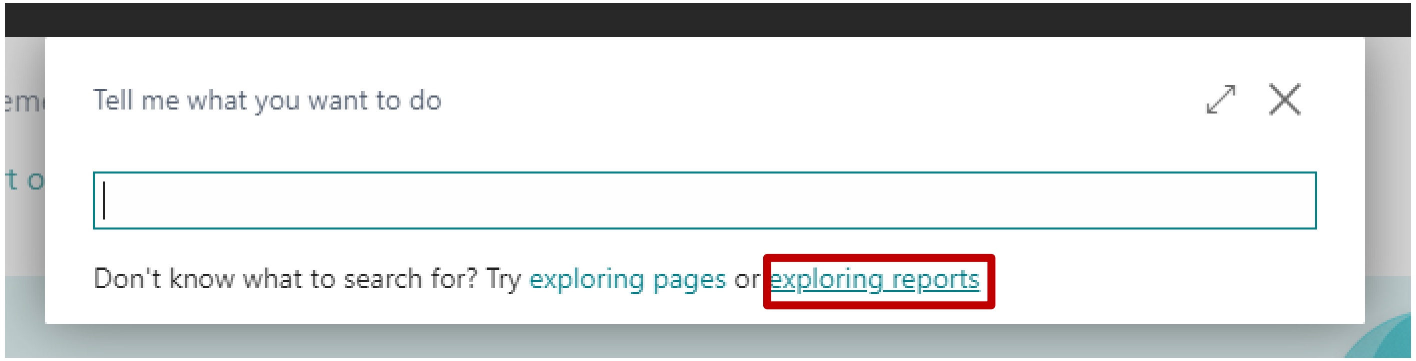
New Data Analysis UI on queries

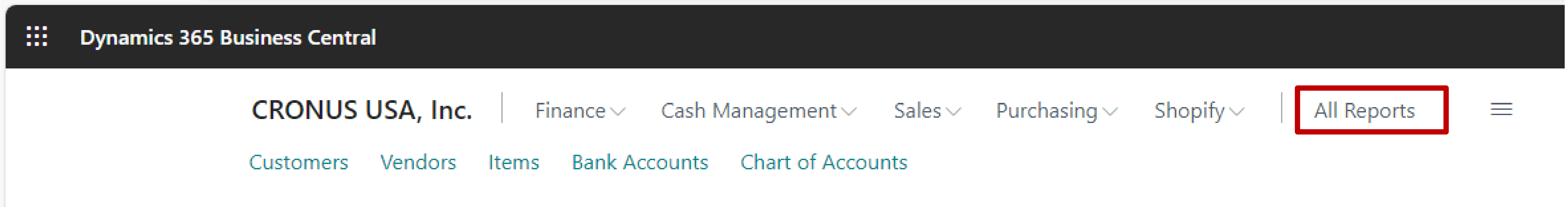
Queries can be discovered by users (23.1)

Show up in Report/Role explorer

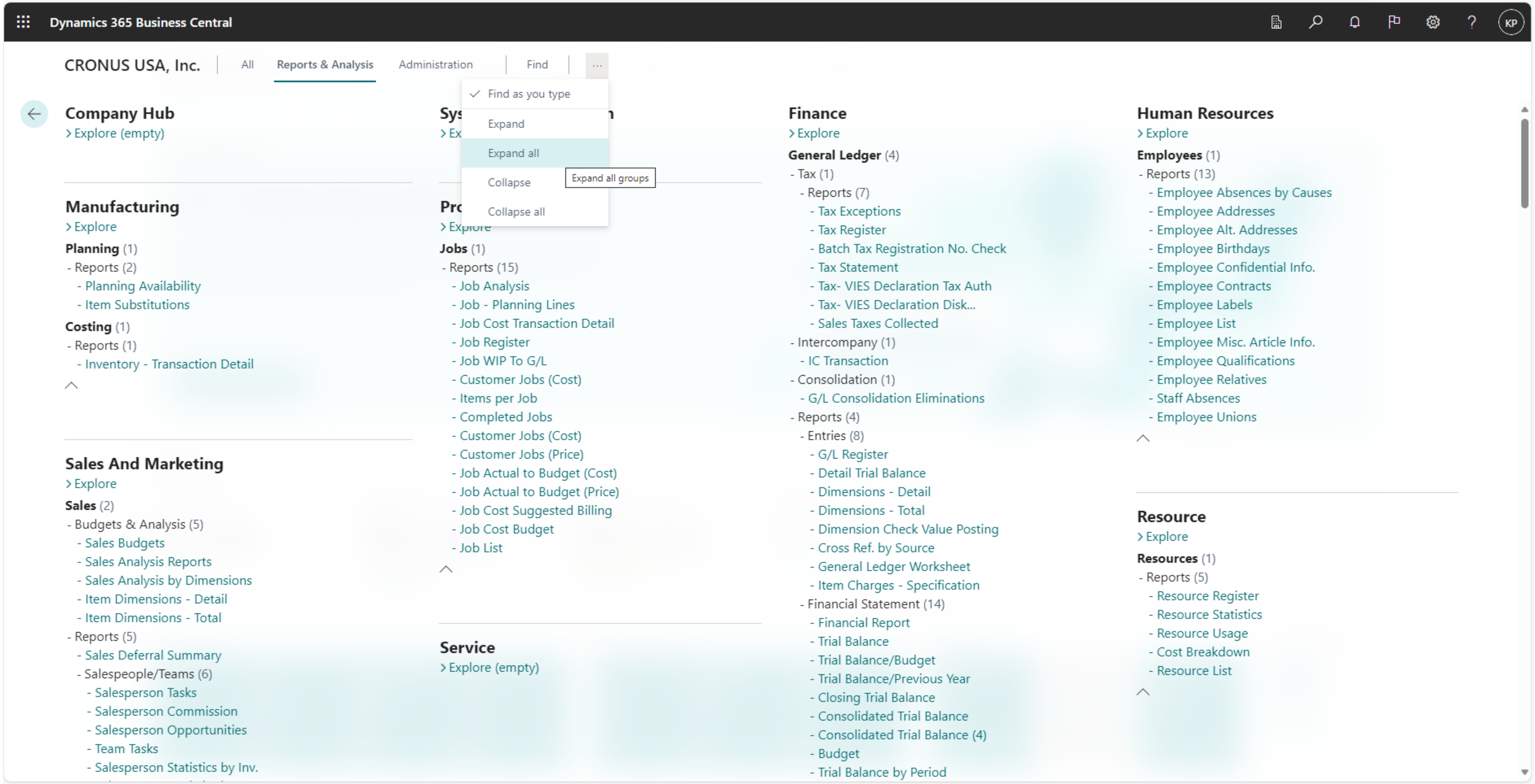
Searchable in Tell me

What are these new links???





Report Explorer – shows all analytical capabilities

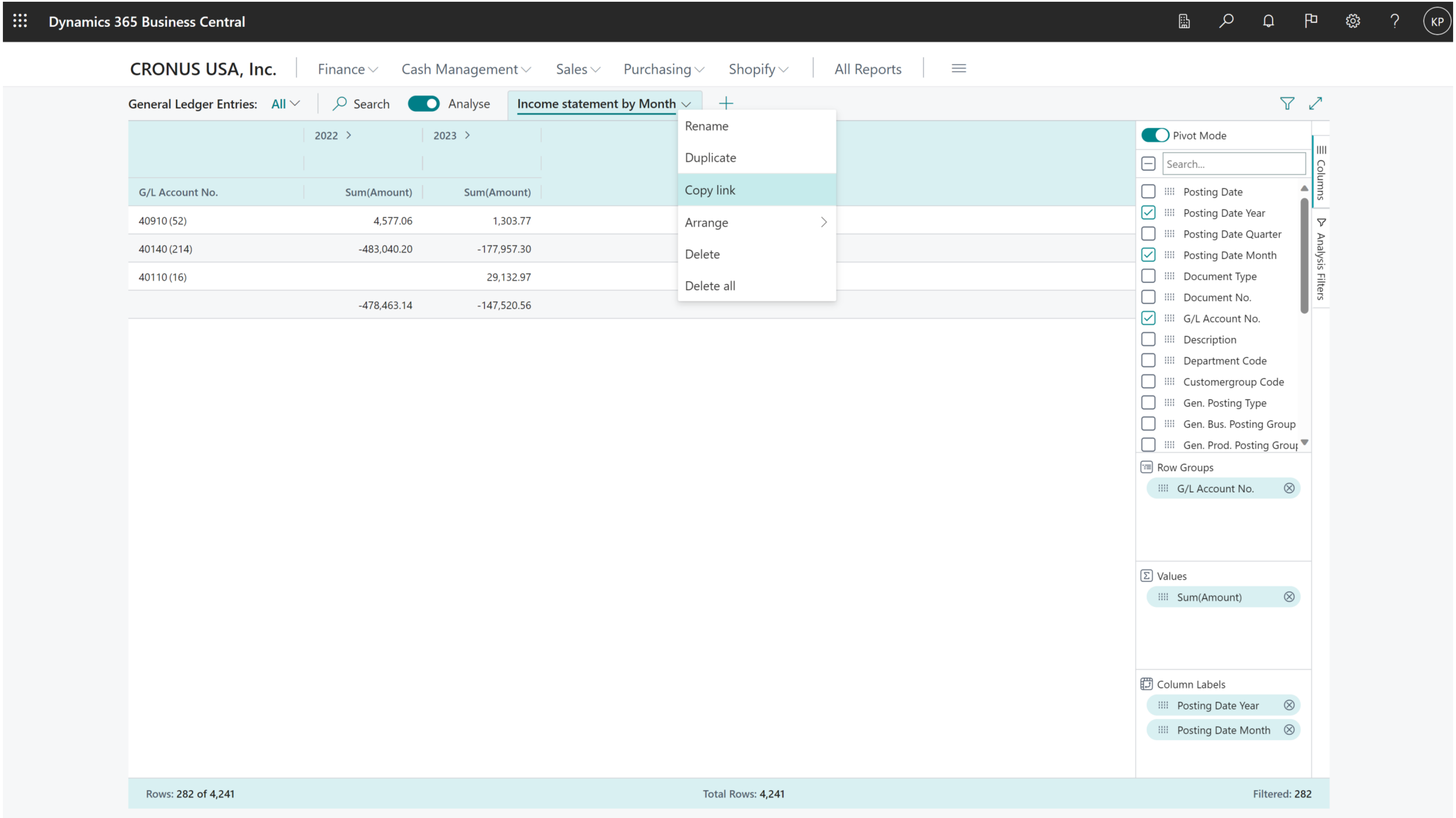


Share an analysis definition with a co-worker

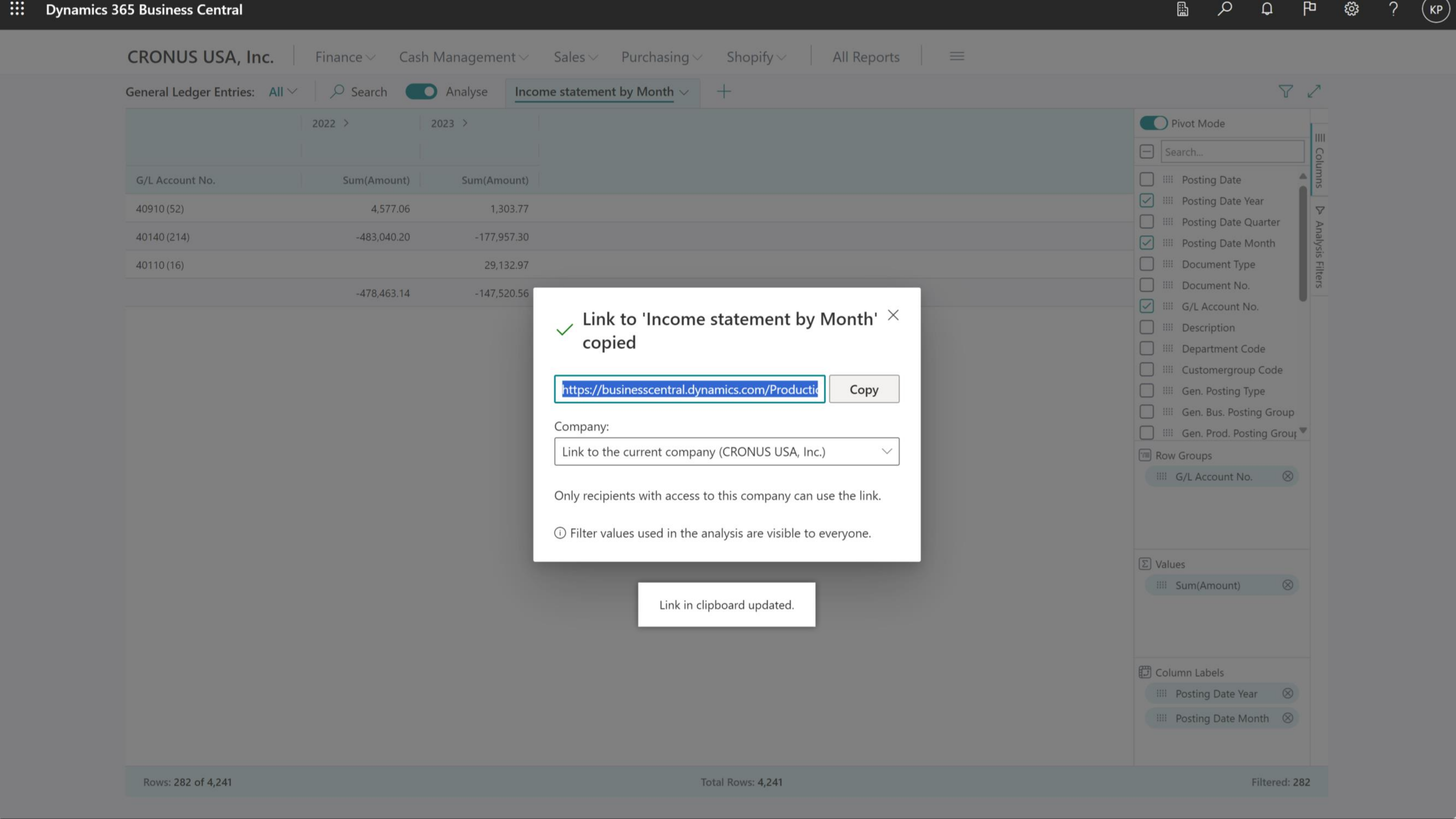
Share an analysis with a co-worker

Users can get a share link from the analysis tab.

Tip: Links can be used for click-once-install analysis.



Dynamics 365 Business Central
KP
CRONUS USA, Inc.
Finance
Cash Management
Sales
Purchasing
Shopify
All Reports
General Ledger Entries:
All
Search
Analyse
Income statement by Month
Rename
Duplicate
Copy link
Arrange
Delete
Delete all
2022
2023
G/L Account No.
Sum(Amount)
Sum(Amount)
40910 (52)
4,577.06
1,303.77
40140 (214)
-483,040.20
-177,957.30
40110 (16)
29,132.97
-478,463.14
-147,520.56
Pivot Mode
Search...
Posting Date
Posting Date Year
Posting Date Quarter
Posting Date Month
Document Type
Document No.
G/L Account No.
Description
Department Code
Customergroup Code
Gen. Posting Type
Gen. Bus. Posting Group
Gen. Prod. Posting Grou
Columns
Analysis Filters
Row Groups
G/L Account No.
Values
Sum(Amount)
Column Labels
Posting Date Year
Posting Date Month
Rows: 282 of 4,241
Total Rows: 4,241
Filtered: 282


Dynamics 365 Business Central
KP
CRONUS USA, Inc.
Finance
Cash Management
Sales
Purchasing
Shopify
All Reports
General Ledger Entries: All
Search
Analyse
Income statement by Month
2022
2023
G/L Account No.
Sum(Amount)
Sum(Amount)
40910 (52) 4,577.06 1,303.77
40140 (214) -483,040.20 -177,957.30
40110 (16) 29,132.97
-478,463.14 -147,520.56
Link to 'Income statement by Month' copied
https://businesscentral.dynamics.com/Productio
Copy
Company:
Link to the current company (CRONUS USA, Inc.)
Only recipients with access to this company can use the link.
Filter values used in the analysis are visible to everyone.
Link in clipboard updated.
Pivot Mode
Search...
Posting Date
Posting Date Year
Posting Date Quarter
Posting Date Month
Document Type
Document No.
G/L Account No.
Description
Department Code
Customergroup Code
Gen. Posting Type
Gen. Bus. Posting Group
Gen. Prod. Posting Grou
Columns
Analysis Filters
Row Groups
G/L Account No.
Values
Sum(Amount)
Column Labels
Posting Date Year
Posting Date Month
Rows: 282 of 4,241
Total Rows: 4,241
Filtered: 282

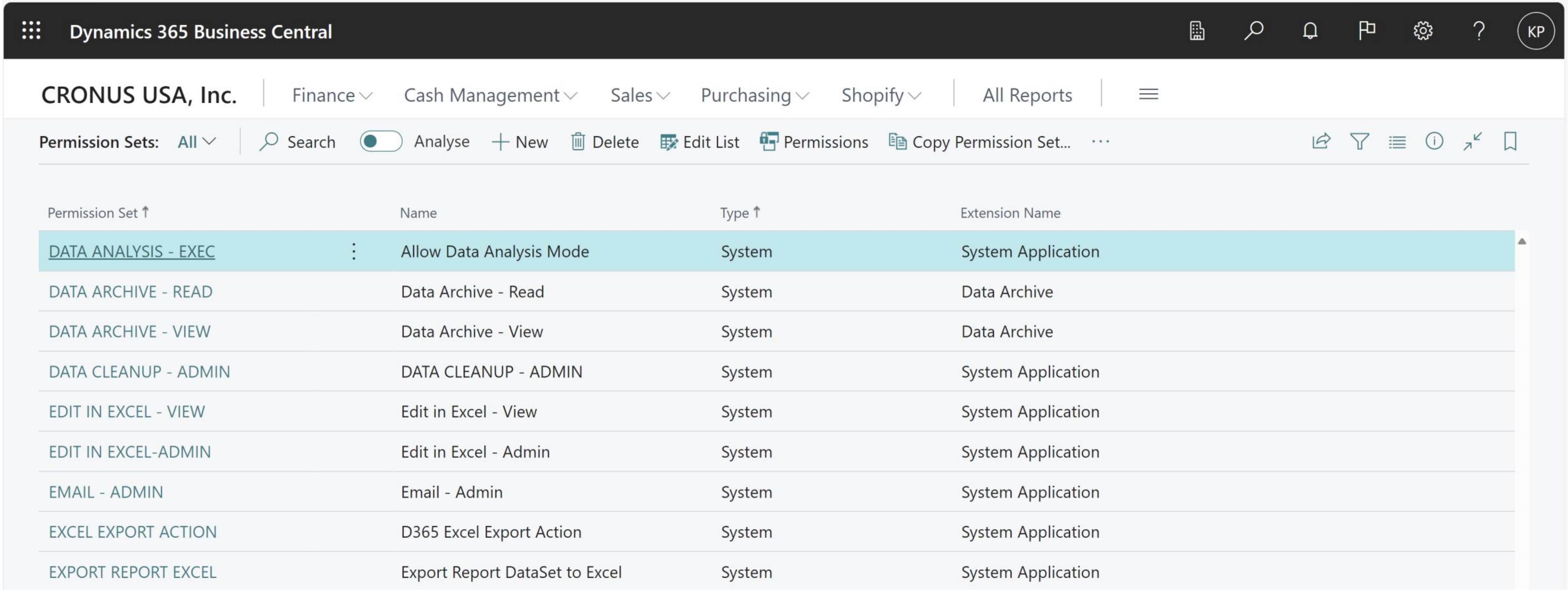
Turn off the feature with a new permission

Administrators can turn Data Analysis off

New system permission

DATA ANALYSIS - EXEC

New system permission: DATA ANALYSIS - EXEC



Resources

aka.ms/bcdataanalysis

master BCTech / samples / AnalyzeData /

How can I use Data Analysis?

Data Analysis is meant for quick fact checking and ad-hoc analysis when you don't want to run a report, if a report for your specific needs does exist, or if you want to quickly iterate to get a good overview on part of your business.

In the following table, you'll find examples of usage scenarios for each main area in the Business Central application.

Area	Scenario	How Data Analysis can help	Data Foundation	Fields to get you started	Built-in report(s)	Try in Business Central (new in 2023w2)
Finance (Accounts Receivables)	See what your customers owe you, maybe broken down into time intervals for	Open the Customer Ledger Entries list and switch on Analyze. Go to the Columns menu and remove all columns (click the box next to the *Search* field). Turn on *Pivot* mode (located directly above the *Search* field). Now, drag the *Customer Name* field to the *Row Groups* area and drag *Remaining Amount* to the *Values* area. Finally, find the *Due Date Month* field and drag it to	Customer Ledger Entries	*Customer Name*, *Due Date*, and *Remaining Amount*.	Aged Accounts Receivables Customer	Click here to create (CTRL+click to open in a new browser

Click to try scenarios in your environment

The world is changing (in reporting)

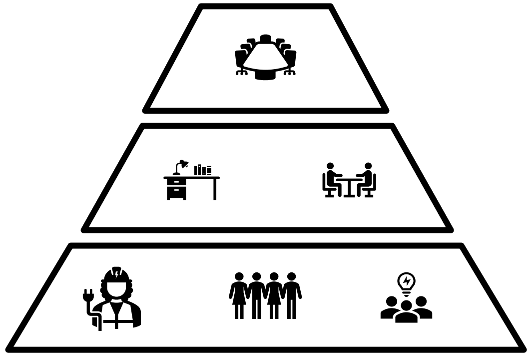
Customer asks, "Can you build me a report?"

STOP asking "Sure. How should it be formatted?"

INSTEAD ask "What do you need to analyze and for what?"

THEN choose the tool of choice

- Power BI (and embed), or
- Query/List page with Data Analysis, or
- AL report with Excel layout



Go dos

Understand analytics requirements

Stop developing reports.

Start supporting analytics needs.

Learn about Power BI

Business Intelligence (BI) is closely related to ERP.

Power BI is here to stay and is the suggested platform for BI on Business Central data.

Learn about AL queries

AL queries are not only for performance tuning anymore.

Queries are a powerful tool to implement data mashups for self-service data analysis.

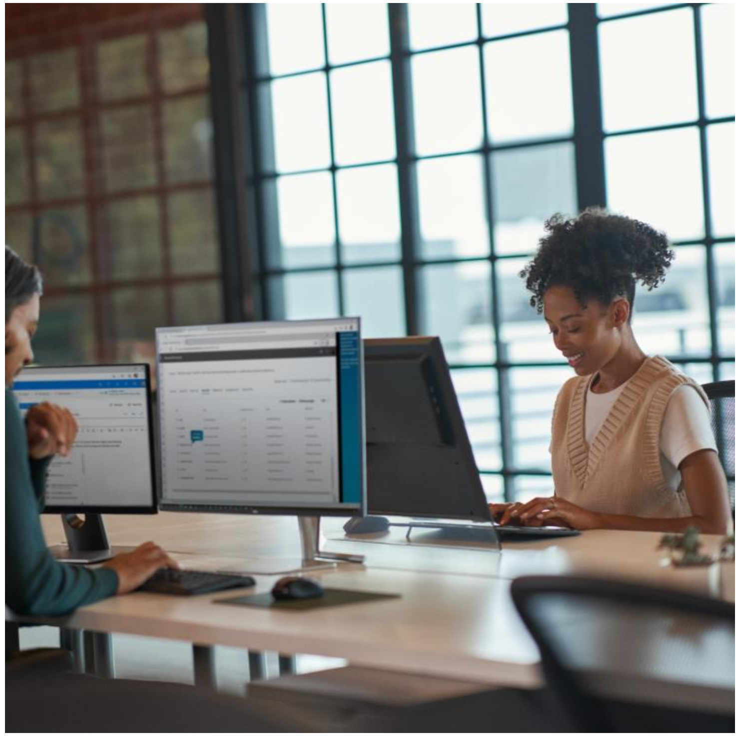
“Build me a report” might just mean “Build me a query.”

Learn how to design report datasets for Excel layouts

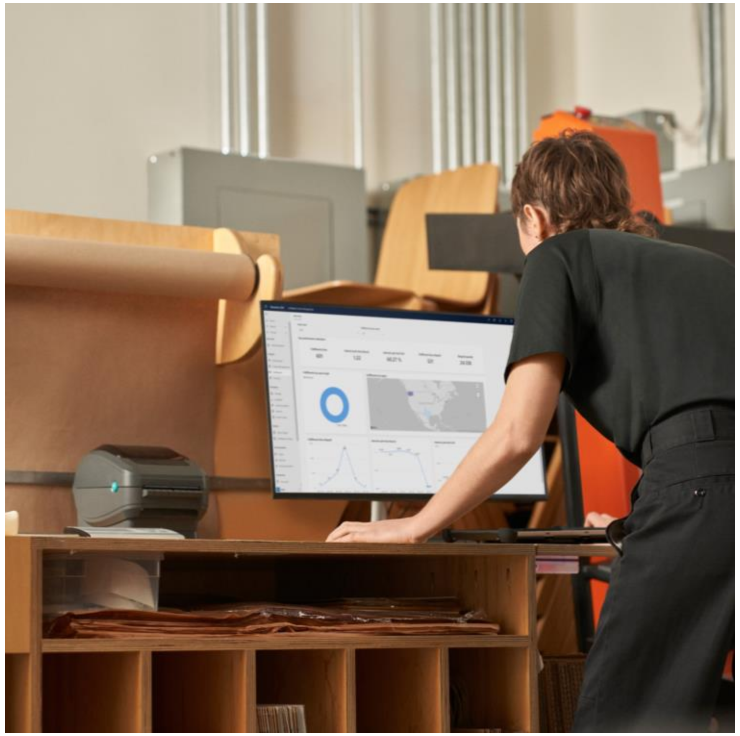
The job as an AL report developer is changing. In many cases, a good report dataset is enough to unblock the customer.

“Build me a report” might just mean “Build me a report dataset.”

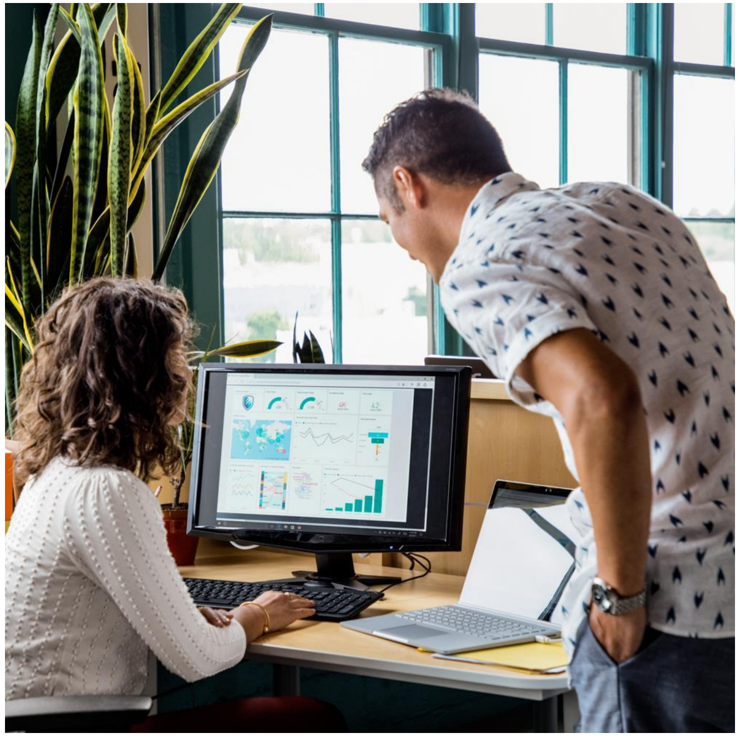
Watch other relevant launch event sessions



New productivity features in the Web client



What's new: add existing table fields to optimize your pages.



What's new in Power BI and reporting (for developers)

General Business Central resources, learn more!

Have a question?
aka.ms/BCYammer

Join the conversation
twitter.com/MSDyn365BC

Looking for resources?
aka.ms/BCAll

Submit your ideas
aka.ms/BCIdeas

Join the office hours
aka.ms/BCOfficeHours

Thank you