**Business Intelligence in NAV 2018**

**Module 1: Introduction to Business Intelligence**

**Module 2: NAV Reporting Capabilities**

**Module 3: Creating Operational and Tactical Reports with NAV**

**Module 4: From Operational Reporting to Tactical and Strategical Dashboarding**

**Module 5: The Mobile Revolution**

**Module 1: Introduction to Business Intelligence**

What is Business Intelligence

BI mean analytics solution for whole organization.

BI is umbrella term

Software and practice

Better insight and decision

Facts Visualizations

Dashboard & Reports

Dashboard

Combine information from multiple reports, with using specific view (sale, purchase, warehouse and so on)

Report

Static Report

Static report are very in detail and technical

Adhoc Report

Adhoc report are created by used at runtime usging by drag & drop.

Operational, Tactical and Strategical report

Operational

Current ongoing operation of organization. Daily basis work.

Tactical

Tactical involve actual / physical carrying out the plan. Involve project for short term like one week by little timing

Strategical

Strategy involve planning for next company move. Used of future dates like months and years

How to determine what information to show

What information is required in report

Plan to create dashboard & reports

Obtaining data

**Module 2: NAV Reporting Capabilities**

Operational Overview

When we start NAV, we end on RoleCenter 🡪 RoleCenter is main point of enter in NAV. It’s all about RoleCenter.

Setting up Cues

Make cues in RoleCenter 🡪 click setup cues 🡪 search for cue setup 🡪 setup as a administrator 🡪

Operational information in NAV

Tactical reports in NAV

Projection for short term 🡪 G/L Balance / Budged

Summary and aging report

Balance to data report

Other tactical report

Strategical reports in NAV

**Module 3: Creating Operational and Tactical Reports with NAV**

Analyzing and exporting data

Send to Excel

Save view As

**Module 4: From Operational Reporting to Tactical and Strategical Dashboarding**

Jet Report Express

What is Jet Report Express

Creating in Report / Dashboard using Jet Report

Download and Modify pre-built report

**Setup**

Go to https://www.jetglobal.com/downloads/🡪 download JET Express for NAV

Setup the data source 🡪 Download the NAV webservice codeunit from jetrport 🡪 import in developer mode 🡪 then establish connection based on that in excel 🡪 we have some pre-built report which we can run in report player.

Power BI

What is Power BI

BI is suite of analytic tools to analys data and share with others. It also allow you to monitor business with rich dashboards available on any devices.

Steps

1. Connect to data ( usually multiple data sources)
2. Shape / Transform and Clean data from Source
3. Complete Analytics life cycle / Use the model to create reports
4. Design Once, View anywhere

Power BI Desktop Designer

To create dashboard 🡪 first we need to create many reports and display then on dashboard 🡪 to create report we require dataset 🡪 same dataset can be used in multiple reports 🡪

Setup 🡪 Sign Up on Power BI site 🡪 then sign in to website 🡪 click on download arrow at top 🡪 click Power BI desktop 🡪 run the setup to install 🡪

Or we can directly download the Power BI desktop without the registration and then install 🡪

To get data from NAV 🡪 Click Get Data 🡪 click OData 🡪 enter URL () 🡪 We can get the URL from web services 🡪 check the OData URL column 🡪 Power BI will fatch the data from NAV 🡪 Click load to load the data in BI 🡪 make sure all the number columns are in number datatype 🡪 by select the colunmn then click on modeling tab 🡪 data type change to decimal from text 🡪

Create relationship between tables

Diagram View

Star Shema (To analyze by customer & items)

Fact Table (Invoices table)

Measures

Dimension

Attribution

How to connect Power BI and get Data?

Creating Relationship

Enriching the Data Model with DAX

DAX is special expression language used for data analysis expression.

Used for:

Calculated column

Measures

Navigate relationships

Dynamics calculation

Table valued functions

Time Intelligence

Power BI Content Pack for NAV

We need to first configure power bi content pack. Go to power bi website -> click Click Get Data 🡪 Click on Services 🡪 Select Microsoft Dynamics NAV 🡪 provided username & password🡪 check in Dashboard 🡪

SQL Reporting Services

What is SSRS

It’s completely free, it’s come with SQL server

We can report in SSRS

Creating report in SSRS

Tools

Report Builder it free, we can work on one report at time

SQL Server Data Tools (SSDT-BI)

Creating Report using Report Builder

If report builder is not installed 🡪 download from Microsoft website and install on system 🡪 run the report builder 🡪 Wizard will start automatically 🡪 select table or Matrix wizard 🡪create dataset 🡪