



Building Dashboards in Microsoft Dynamics GP: KPIs, Charts, Graphs, and General Reporting

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What are these?

- **Dashboards, KPIs, Charts, Graphs, and Reports are all Business Intelligence (BI).**
- **Business intelligence (BI) is the set of techniques and tools for the transformation of raw data into meaningful and useful information for business analysis purposes.**
–Wikipedia 09/30/2014 10:27 AM PST



Development Tools Used

- Report Builder v3
- Excel Reports (Excel Report Builder)

Presentation Tools Used

- SQL Reporting Services Website
- Excel Reports
- Business Analyzer
- GP Homepage
- GP Navigation Lists
- GP Report Trigger Points



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Development Tools

- **Report Builder**
 - Accessed from SSRS website
 - “Light” version of Business Intelligence Development Studio (BIDS)
 - Path can be found from within GP.
 - Administration > Setup > System > Reporting Tools Setup
 - Usually: <http://sqlserver/reports>
 - Report Builder link
 - Fast install
 - Robust tool (v3)



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Development Tools

- **Excel Reports**

- Path can be found from within GP.
 - Administration > Setup > System > Reporting Tools Setup
- Custom reports can be built using Excel Report Builder



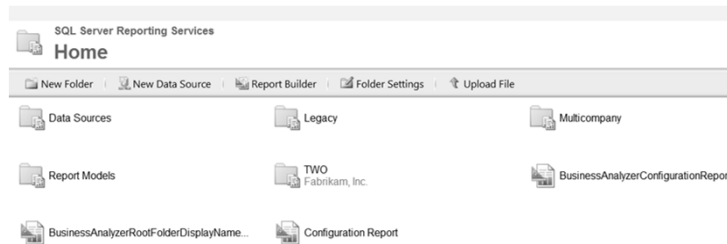
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Presentation Tools

- **SQL Reporting Services Website**

- Path can be found from within GP.
 - Administration > Setup > System > Reporting Tools Setup
 - Usually: <http://sqlserver/reports>
- Organized by Company and Module along with Charts and KPIs



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Presentation Tools

- **Excel Reports**

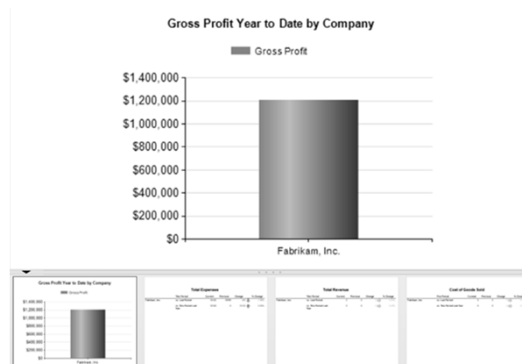
- Path can be found from within GP.
 - Administration > Setup > System > Reporting Tools Setup
- Custom reports can be built using Excel Report Builder

Customer Number	Customer Name	Address 1	Address 2	City	State	Zip	Phone 1
AARONFIT0001	Aaron Fitz Electrical	One Microsoft Way		Redmond	WA	98052-6399	42555501010000
ADAMPARK0001	Adam Park Resort	Suite 9876	321 Chestnut Drive	Indianapolis	IN	46206-1391	31755501020000
ADVANCED0001	Advanced Paper Co.	456 19th Street S.		Chicago	IL	60603-911	31255501030000
ADVANCED0002	Advanced Tech Satellite System	8765 66 Ave.		Toronto	ON	M8D 7R5	41655501040000
ALTONMAN0001	Alton Manufacturing	P.O. Box 3343		Detroit	MI	48233-3343	31355501050000
AMERICAN0001	American Science Museum	789 North Carlton Place		St. Louis	MO	63115	31455501060000
AMERICAN0002	American Electrical Contractor	3456 North Calumet Avenue		Iowa City	IA	52240-1827	31955501070000
ASSOCIAT0001	Associated Insurance Company	321 Garden Mall		Lincoln	NE	68502-3090	40255501080000
ASTORSUI0001	Astor Suites	987 West Alaska Ave		Gary	IN	46401-3455	21955501090000
ATMORERE0001	Atmore Retirement Center	567 W 7th St.		Bloomington	IL	61701-9392	30955501100000
BAKERSEM0001	Baker's Emporium Inc.	789 University Ave		Fort Wayne	IN	46802-3918	21955501110000
BERRYMED0001	Berry Medical Center	Suite 123	1234 West Oak	Fond Du Lac	WI	54935-9990	41455501130000
BLUEYOND0001	Blue Yonder Airlines	P.O. Box 1234		Wichita	KS	67201	31655501610000

Presentation Tools

- **Business Analyzer**

- Installed from the GP install media, commonly saved on the network in the "GP Share"



Presentation Tools

- **GP Homepage**
 - Displays SSRS reports deployed to the "Charts and KPIs" folder on the SSRS website.
 - Reports generally 3.15 X 4.15 inches

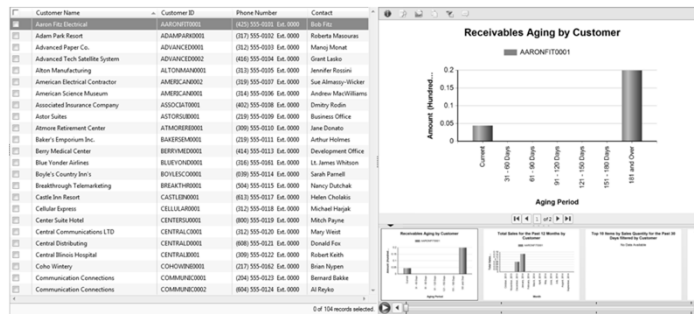


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Presentation Tools

- **GP Navigation Lists**
 - Displays SSRS reports deployed to the "Charts and KPIs" folder on the SSRS website.
 - Reports generally 3.15 X 4.15 inches

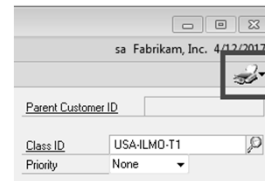


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Presentation Tools

- **GP Report Trigger Points**
 - Available on records to trigger reports:
 - Item
 - Customer
 - Vendor
 - Leverages SSRS
 - Parameter must equal the key field from the trigger window
 - Customer = CUSTNMBR
 - Vendor = VENDORID
 - Item = ITEMNMBR



Notes

- **All reports and related SQL will be available online from TRG (link will be sent).**
- **Please complete your evaluations for a chance to win a fabulous prize!**

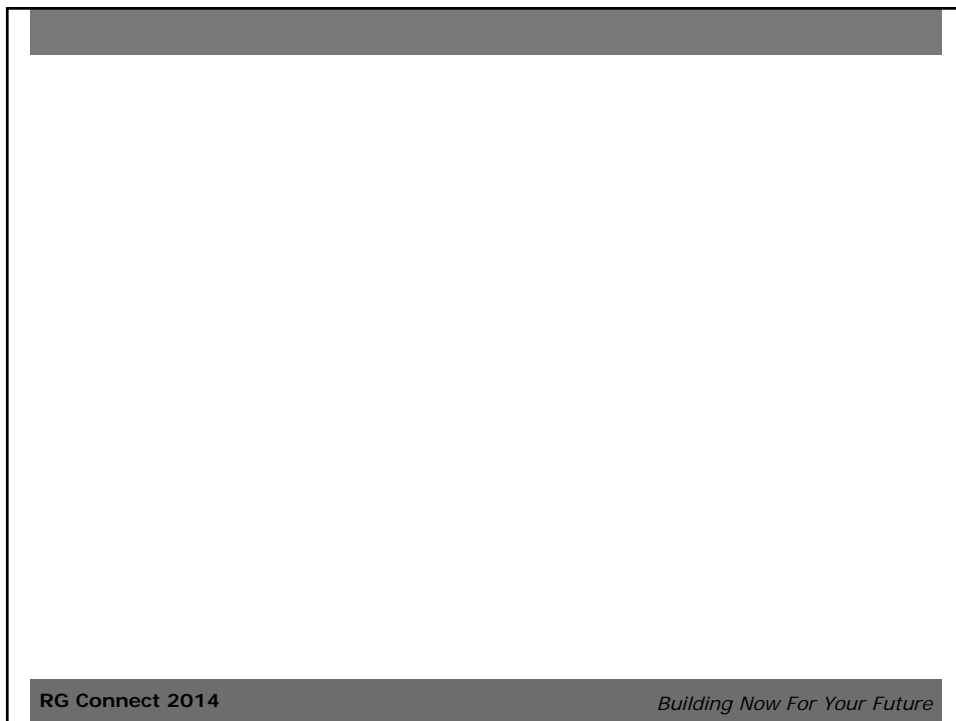


The Resource Group

The Resource Group Leaders
Marty Schillaci, CEO
Denise Schillaci, COO

Questions?

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