

BI4Dynamics – POC Implementation Process

Last update: April 2022

Version: 1.1

1 IMPLEMENTATION

1.1 Prerequisites

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

D365	On-Premises
FO	AX/FO
BC: Azure VM ; Local Server	BC/NAV

1.2 Installation and configuration

After we receive your request, we will open for you an **unrestricted license**. The license will contain **all business modules** from our portfolio and our unique **Customization Wizard** for a full Data Warehouse Automation experience.

Reserve 2 hours on any particular date to schedule one of our experienced support team members, to ensure you meet the system requirements. The **installation** of BI4Dynamics will be performed **on your server** without interfering with your ERP, neither having access to your data.

There are 3 options to choose from for deploying the Analytical layer to which you're connecting with either Power BI or Excel:

- **On-Premises** Analysis Services - Best option when you have hardware available. Only Local Access to dashboards.
- **Azure** Analysis Services - Accessible from any device and anywhere. Can be switched of when not in use.
- **Power BI Premium** – Best performance, best flexibility for 20\$/user/month.

We will be happy to **assist and advise you** in the choice procedure and with this eliminate your doubts and leave you solely with confidence for the choice you are about to make.

The very next day after installation you will have **access to your Data Warehouse** with more than a **million rows of code**, a **Tabular model with 2.000 BI fields** that are ready to be accessed.

1.3 Power BI desktop and Excel reports

The following step is connecting **Power BI & Excel Dashboards/reports** to your data, transformed by BI4Dynamics.

BI4Dynamics application is an out-of-the-box solution and includes more than 150 Power BI Dashboards accessible from the web and mobile. These Excel Reports are covering all standard application areas ([Sales](#), [Receivables](#), [Finance](#), [Inventory](#), [Purchase](#), [Payables](#)) and [Retail](#). The selection of predefined reports is [listed in our ebook](#).

When the Power BI & Excel Dashboards are **connected** to your data, you will have **full access** to the insights that BI4Dynamics can extract from your data. Therefore, If you provide us with a **Power BI Pro** account with **your domain**, we can enable access to **anyone** whom you would like to have access to the **Web** and **Mobile reports**. With this, we ensure that the complete organization can monitor and analyze your data across all devices (desktop, mobile, web).

1.4 Power BI Web & Mobile experience

[Direct link to Web Demo>>](#)

Password: *PBIweLOVe* (careful 0=zero)

(Use Incognito - no need to log off from your PBI account)

100 Power BI reports published on the web using Power BI Premium per User.

2 Customizations (OPTIONAL & UPON PAYMENT)

2.1 Supporting your Microsoft Dynamics AX/NAV features

The experience from our diversified customers has already shown us that on average BI4Dynamics supports **more than 80%** of the analytical needs of each customer. Therefore, the main points of discussion are: more often than not the **rest 20%** that are missing, the manner how BI4Dynamics will satisfy this need, and the time needed for fulfilling the need.

BI4Dynamics comes with a fully functional **Development Wizard** that enables changing **existent** content and **further development of new** verticals, cubes, etc. This gives you the power to be in **control** of your BI project and **perform** what's needed using our development wizard by your **internal** resources.

Another alternative is to define the scope with BI4Dynamics and **outsource** the development to **our skilled team** either to finish the whole project or help you with some minor tasks, train you, etc.

2.2 Integration of External sources

The feature of using a **Direct Query** for **Azure Analysis Services** and **Power BI Datasets** existed for almost a year, however, from October 2021 it gained [various improvements](#).

BI4Dynamics copies data from **Microsoft Database** to the BI4Dynamics **Data Warehouse** where the data transformation happens. The **Azure Analysis Services** is used as a business layer to display this information for **Power BI**.

When the connection is changed from **Live** to **Direct Query**, the BI4Dynamics model is copied to a local Power BI file. On the direct query Power BI file, we can extend the model with any other source.

You can as well select a couple of tables from the BI4Dynamics **Analytical model** that consists of 12 application areas, 47 transactional tables, 133-dimensional tables, and 2100 measures.

2.3 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.

3 WORKSHOP

3.1 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).

4 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