

# Business Intelligence

## Microsoft Dynamics GP Business Intelligence

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## ***Introduction***

The ability to extract and present information in a meaningful way is vital to business success. Regardless of where they sit within an organization, people need the ability to transform data into actionable insight. Executives need aggregated data that captures a complete view of the company and its operations if they are to measure performance and respond proactively to changes in the marketplace and the industry. Managers, teams, and individuals need the ability to find, share, and use information from across all areas of the business to perform tasks effectively and monitor business operations. Finally, in this era of regulatory scrutiny, effectively managing compliance activities across the company requires a continuous flow of information and streamlined reporting activities.

Simply put, if companies are to make smart, fast decisions, they need business intelligence tools that deliver the right information to the right people at the right time. This white paper discusses how business intelligence capabilities available with Microsoft Dynamics™ GP can make informed decision making a natural part of people's everyday work experience, whether they are working on the strategic, the tactical, or the operational level.

Microsoft Dynamics GP can provide organizations with a wide range of reporting and analysis tools and applications; some are delivered as part of the core Microsoft Dynamics GP solution, while others are offered as additional products that extend Microsoft Dynamics GP. These tools and applications can provide:

- An integrated platform and applications
- A secure and personalized user experience
- A collaborative environment
- A comprehensive, cost-effective solution

To highlight how Microsoft Dynamics GP business intelligence capabilities equip organizations to make smart decisions, we have organized these capabilities around three core business activities:

**Monitor.** Accurately monitoring current activity, comparing it to historical activity or plans, is essential to keeping business on track.

**Analyze.** Looking deeply at the information retrieved during the monitoring phase, with ready access to details, helps businesses understand why data/information/results are what they are. Robust analysis capabilities enable the actionable insight needed to change the direction of a negative trend or take further advantage of a positive trend.

**Plan.** Budgeting, forecasting, and planning are closely tied to monitoring and analysis. To remain competitive, companies need to compare plans to actuals, analyze that information, make the necessary adjustments, and then take action to move forward.

## Monitor

Business performance depends on the ability to track activities that span financial transactions to performance reports to compliance records. Accurate monitoring requires a wide range of integrated capabilities. Microsoft Dynamics GP delivers these monitoring capabilities to provide organizations with the comprehensive view of the information they need.

### Inquiries and Audit Trail Records

Inquiry windows within Microsoft Dynamics GP enable users to review information for several types of records. They can select the record or records they want to view and specify the order for displaying the records. For example, in the General Ledger Detail Inquiry window shown below, users can select a General Ledger account and a year to view information about the account. They can then click the link on the Account field to view the account transaction distributions that have been linked with other distributions.

Detail Inquiry

File Edit Tools View Help sa Fabrikam, Inc. 4/12/2007

Clear Redisplay

Account: 000 - 1100 - 00  
Description: Cash - Operating Account

Year: 2007 Account Balance: \$163,030.49

Date: ☒ All ☐ From:  To:   
Source Document: ☒ All ☐ From:  To:   
Currency ID: ☒ All ☐ From:  To:

Date	Journal Entry	Debit	Credit	Currency ID
2/1/2007	1,201	\$3,263.24		\$0.00
2/1/2007	1,203	\$1,219.49		\$0.00
2/2/2007	1,206	\$1,219.49		\$0.00
2/2/2007	1,207	\$256.59		\$0.00
2/3/2007	1,209	\$406.50		\$0.00
2/4/2007	1,218	\$404.84		\$0.00
2/4/2007	1,220	\$42.70		\$0.00
2/4/2007	1,298	\$0.00	\$78.40	\$0.00
Total		\$275,715.43	\$112,684.94	

by Account Type

Microsoft Dynamics GP also provides an audit trail record that makes it easy to trace a transaction from any point within the system back to the location where it was originally entered. After entering a transaction, users can trace it from its point in Microsoft Dynamics GP to the source document that provided the basis for the transaction—such as an invoice, check, or receipt—as well as obtain a precise record of where the transaction was posted as it made its way through the Microsoft Dynamics GP system.

### Business Alerts

Business Alerts uses Microsoft® SQL Server™ to monitor business data and deliver fast access to business-critical information, which enables your organization to make quicker, more informed decisions to improve your business success.

For example, suppose that a salesperson or manager wants to be notified when a customer's credit limit

has been exceeded. In that case, they can use the Business Alert wizard, shown below, to create a query that compares the credit limit amounts to the current amounts for customers.

**Select Existing Alert**

File Edit Tools Help sa Fabrikam, Inc. 4/12/2007

**Select a Business Alert**  
Which existing business alert do you want to modify?

Select the database for which an existing alert has been created.  
Select the Business Alert from the list box and choose Next to continue.

Databases: TWO Name: Fabrikam, Inc.

Business Alert	Description	Database
ACCT BUDGET 50	Accounts Have Excee	TWO
CHECKBOOK BAL	Checkbook Balance Be	TWO
<b>CREDIT LIMIT</b>	<b>Customer Credit Limit</b>	<b>TWO</b>
CUSTOMER HOLD	Customers On Hold	TWO
IV REORDER	Inventory Reorder	TWO
OVERTIME PAY	Overtime Pay For The I	TWO

<< Back Next >> Cancel

The wizard can also be used to set up the schedule for the alert—that is, when, how often, and for how long a user wants Microsoft Dynamics GP to check whether the conditions defined exist.

**Schedule Alert**

File Edit Tools Help sa Fabrikam, Inc. 4/12/2007

**Schedule Alert**  
When should the system check for the conditions of the Alert?

When: ☒ Daily ☐ Weekly ☐ Monthly  
Daily: Every 1 Day(s)

Occurs: ☒ Once At: 12:00:00 AM ☐ Every: 1 Hour(s)  
Starting At: 12:00:00 AM  
Ending At: 11:59:59 PM

Duration: Start Date: 9/5/1997 End Date: 12/31/9999 ☒ No End Date

☒ Keep Alert History ☐ Enable Business Alert Test Alert

<< Back Finish Cancel

After a business alert has been created and activated, the conditions will be checked according to the schedule the user set up. Whenever the alert condition is found, an e-mail message is sent to people or groups specified by the user, as shown below.

## Microsoft FRx

The standard financial performance management application for Microsoft Dynamics GP. Microsoft FRx® helps organizations control their entire financial reporting process and makes it easy to manage and distribute critical financial reports that businesses depend on to run effectively. Reports built using Microsoft FRx include Balance Sheets, Income Statements, Statement of Cash Flows, budget versus actual reports, or any other financial report that includes amounts from General Ledger.

The key to flexibility in Microsoft FRx is an easy-to-use system of three basic building blocks: row format, column layouts, and reporting trees. Users can define these building blocks to meet specific needs and then can save and re-use them to create business-essential reports. Custom fonts, formatting, and formulas stay with the report, maintaining the professional, boardroom-quality appearance of reports—such as the one shown below—no matter how often they are updated or modified.

Regional Manager: Bob

**Fabrikam Works**  
**Retail Sales-Denver**  
 For the Four Months Ending April 30, 2006

Current Month			YTD	
February	March	April	2006	
<b>Revenue</b>				
\$141,036.32	\$144,299.80	\$147,838.86	Sales 5629,179.84	xxxxxxx 32,516,714.56
3,940.00	4,032.00	4,125.00	Sales Returns 15,947.00	xxxxxxx 63,788.00
13,131.00	13,437.00	13,750.00	Sales Discounts 53,150.00	xxxxxxx 212,600.00
<b>123,965.32</b>	<b>126,830.80</b>	<b>129,763.86</b>	<b>Net Sales 560,081.64</b>	<b>xxxxxxx 2,240,326.56</b>
96,395.00	98,641.00	100,939.00	Cost of Goods Sold 390,175.00	xxxxxxx 1,560,700.00
<b>27,570.32</b>	<b>28,189.80</b>	<b>28,824.86</b>	<b>Gross Margin 169,906.64</b>	<b>xxxxxxx 679,626.56</b>
<b>Operating Expenses</b>				
15,302.00	15,943.00	16,559.00	Salaries and Wages 61,966.00	xxxxxxx 247,864.00
724.00	740.00	757.00	Office Expense 2,929.00	xxxxxxx 11,716.00
1,536.00	1,571.00	1,607.00	Rent Expense 6,213.00	xxxxxxx 24,852.00
2,047.00	2,094.00	2,143.00	Travel Expense 8,284.00	xxxxxxx 33,136.00
<b>19,608.00</b>	<b>20,348.00</b>	<b>21,066.00</b>	<b>Total Operating Expenses 79,392.00</b>	<b>xxxxxxx 317,568.00</b>
<b>7,962.32</b>	<b>7,841.80</b>	<b>7,758.86</b>	<b>Income From Operations 90,514.64</b>	<b>xxxxxxx 362,058.56</b>
<b>7,962.32</b>	<b>7,841.80</b>	<b>7,758.86</b>	<b>Income Before Income Taxes 90,514.64</b>	<b>xxxxxxx 362,058.56</b>
<b>\$7,962.32</b>	<b>\$7,841.80</b>	<b>\$7,758.86</b>	<b>Net Income 90,514.64</b>	<b>xxxxxxx 362,058.56</b>
31,849.28	31,397.20	31,035.44	Net Income X 4 362,058.56	xxxxxxx 1,448,234.24

**Row format.** Working within the General Ledger module, users can select individual accounts, a range of accounts, or a list of noncontiguous accounts to be included in a report. They can also define totals, calculations, and if/then parameters. Wild Cards automatically recognize and include new General Ledger account numbers, ensuring that reports are up to date. They can even create, name, and reuse account sets across multiple reports to simplify creating and maintaining reports.

**Column layout.** Include period information, actual or budget balances, and other types of data in a report—either from General Ledger or another data source such as a spreadsheet. Users can apply calculations across columns, making it easy to identify variances, projections, or percentages.

**Reporting trees.** Create a hierarchical picture of your organization to understand or change your organizational and reporting structures. A powerful auto-build function constructs reporting trees in seconds—directly from your chart of accounts. Drag-and-drop functionality makes it easy to create alternative structures and multiple rollups of various accounts without having to make modifications to your general ledger or chart of accounts. With effective dating, users can apply several different reporting trees for different periods of time—all within a single report. In addition, the Microsoft FRx DrillDown™ Viewer enables users to drill down into the different parts of the organization represented in the reporting tree; for example, they can drill down into unique account balances that make up the summary totals and into the detailed transactions that provide all the necessary data. Finally, security settings enable administrators and others to limit viewing rights at the unit level of your organization, helping ensure that users can view only the information for which they are responsible.

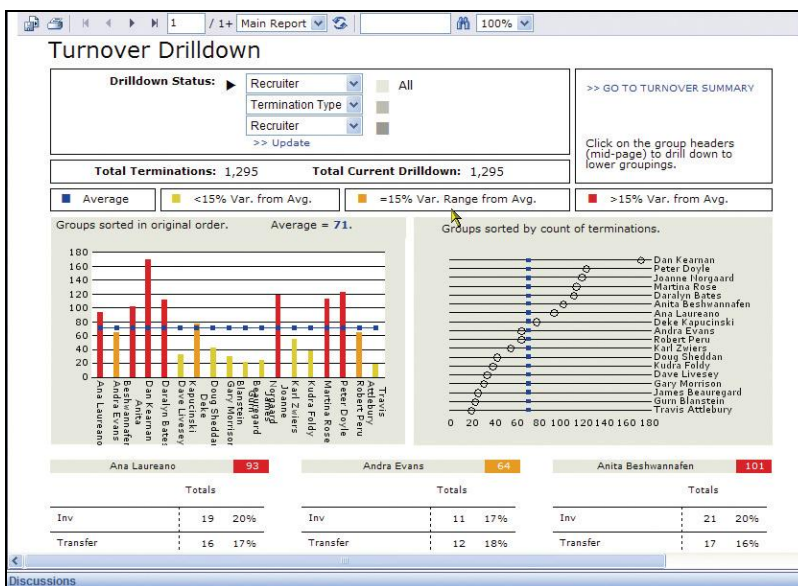
Microsoft FRx reports can be exported to Microsoft Office Excel® PivotTable® and PivotChart® formats, enabling fast, accurate analysis of information. A familiar spreadsheet look and feel makes it easy for anyone with appropriate privileges to create customized reports quickly. Tight integration with Microsoft Dynamics GP helps eliminate time-consuming processes for updating and maintaining reports. Multiple report formats and distribution techniques help ensure that the right financial information is delivered to the right people. Just as important, custom security settings can be established to help ensure that information is accessed only by users with secured rights.

Microsoft FRx gives organizations the control needed to understand where the business stands financially at any time. Your people can make important, proactive decisions to address your economic highs and lows, without having to wait until the books are closed.

With Microsoft FRx, your company can transform the creation, organization, distribution, and consumption of its financial information into a streamlined, comprehensive process. Using Microsoft FRx Report Manager, people can quickly pull together all the various documents needed to deliver customized, comprehensive financial information to recipients across your organization. A clear and simple user interface guides users through the creation of report books, a process that can be accomplished in a few logical steps. With Microsoft FRx Report Server, reports can be scheduled to run automatically during off-peak hours or whenever schedules dictate. Users can choose from a variety of traditional or graphical output options, including Microsoft FRx DrillDown Viewer files, formatted Office Excel or other spreadsheet files, ASCII, online analytical processing (OLAP), or extensible business reporting language (XBRL). They can post their reports to the Web using Microsoft FRx WebPort, send them via e-mail, or print them for manual delivery.

## Crystal Reports

Transform data into interactive Web documents and presentation-quality reports in Office Excel, Microsoft Office Word, and other Microsoft Office system applications. A stand-alone report writer, Crystal Reports in Microsoft Dynamics GP offers user-defined functions that help your organization maintain control over report logic, formatting, and data selection, making it easy to analyze information and foster smart decisions.



**Design reports quickly and easily.** Save time and effort for designing reports—including Gantt charts, cross-tab reports, drill-downs, summaries, Gauge charts, customized views of OLAP grids, and funnel charts—with customizable templates, reusable objects, the Format Painter wizards, and a drag-and-drop



interface.

**Build compelling data views.** Tailor the look of reports by adding logos, pictures, shapes, and colors. Take advantage of customizable templates and more than 100 other formatting options.

**Maintain a smooth flow of data.** Import data from multiple sources, transform it with powerful, easy-to-use tools, and then publish reports to standard formats, including XML, PDF, and ODBC.

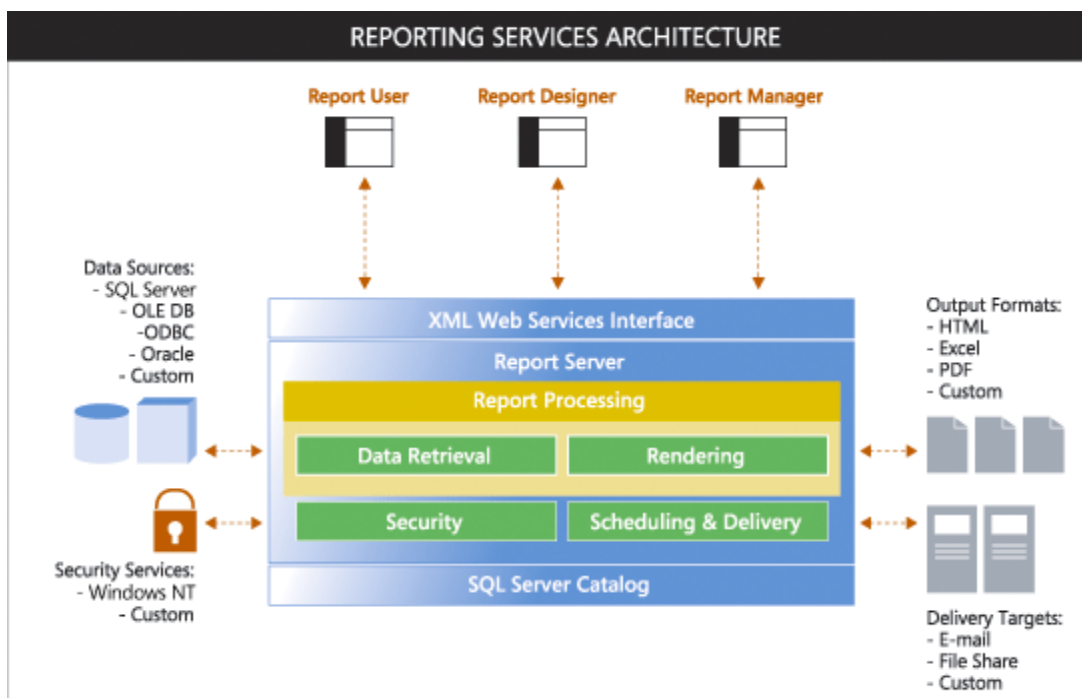
**Write less code.** Integrate dynamic information into Microsoft .NET, Java, and Com Web applications quickly with simplified report application server APIs and a custom Java tag library.

## Microsoft SQL Server Reporting Services

To be successful in today's competitive marketplace, organizations need to extend information beyond the walls of their organization and smoothly interact with customers, partners, and suppliers in real time. Microsoft SQL Server Reporting Services enables organizations to transform valuable enterprise data into shared information for insightful, timely decisions at a lower total cost of ownership. Microsoft Dynamics GP expands report-writing flexibility with more than 75 out-of-the box SQL Server Reporting Services reports. Plus, administrators can deploy SQL Server Reporting Services reports using a straightforward deployment wizard.

SQL Server Reporting Services is a comprehensive, server-based solution that enables the creation, management, and delivery of both traditional, paper-oriented reports and interactive, Web-based reports. An integrated part of the Microsoft business intelligence framework, SQL Server Reporting Services combines the data management capabilities of SQL Server and Windows Server® with familiar and powerful Microsoft Office system applications to deliver real-time information that support daily operations and drive decisions.

**Integrated Architecture.** SQL Server Reporting Services supports a wide range of common data sources, such as OLE DB and ODBC, as well as multiple output formats such as familiar Web browsers and Microsoft Office system applications. Using Microsoft Visual Studio® .NET and the .NET Framework, developers can leverage the capabilities of their existing information systems as well as connect to custom data sources, produce additional output formats, and deliver to a variety of devices.



**Full Reporting Life Cycle Support:** SQL Server Reporting Services supports the full reporting life cycle, including:

- **Report authoring.** Report developers can create reports to be published to the Report Server using Microsoft or other design tools that use Report Definition Language (RDL), an XML-based industry standard used to define reports.
- **Report management.** Report definitions, folders, and resources are published and managed as a Web service. Managed reports can be executed either on demand or on a specified schedule, and are cached for consistency and performance. SQL Server 2005 Reporting Services now enables administrators to use the Management Studio to organize reports and data sources, schedule report execution and delivery, and track reporting history.
- **Report delivery.** SQL Server Reporting Services supports both on-demand (pull) and event-based (push) delivery of reports. Users can view reports in a Web-based format or in e-mail messages.
- **Report security.** SQL Server Reporting Services implements a flexible, role-tailored security model to protect reports and reporting resources. The product includes extensible interfaces for integrating other security models as well.

**Key Reporting Scenarios.** SQL Server Reporting Services combines a single, complete reporting platform with a scalable and extensible architecture to meet a wide variety of reporting needs, including:

- **Enterprise reporting.** Enterprises can use Reporting Services for their operational reporting or business intelligence applications. Using Reporting Services, corporate IT staff can design a variety of reports and deploy them to individual throughout the enterprise.
- **Ad hoc reporting.** SQL Server 2005 Reporting Services includes Report Builder, a new ad hoc reporting tool that enables business users to create their own reports and explore corporate data. Report Builder incorporates a user-friendly business query model that enables users to build reports without deep technical understanding of the underlying data sources.

- **Web-based reporting for partners and customers.** Organizations can deploy interactive Web-based reports to deliver information to customers or partners over extranets of the Internet. Reporting Services isolates report consumers from the complexity of the underlying data sources, while providing personalization and interactivity.
- **Embedded reporting.** Organizations can access predefined or ad hoc reports from third-party applications that use Reporting Services and use these reports as-is, customize them, or create new ones for specific business needs.

### Microsoft SQL Server Reporting Services Report Pack

To make it easy to get started with SQL Server Reporting Services, Microsoft Dynamics GP offers the SQL Server Report Pack, a set of predefined report definition files and sample reports that work with the Microsoft Dynamics GP sample database. The Report Pack can be downloaded at the Microsoft Download Center. Each report can be downloaded and viewed separately; sample reports can be used as templates for designing new reports.

Users can take the report definition files and, with only minor configuration changes, have them work against your existing Microsoft Dynamics GP environment. If people choose to use these reports against your existing Microsoft Dynamics GP application, they should be aware that they bypass the Microsoft Dynamics GP application security layer and will require the user to have SQL access privileges to all views and tables in the Microsoft SQL Server database that contains the Microsoft Dynamics GP data. This sample database is based on the sample database that is included with Microsoft Dynamics GP, with some minor modifications.

The following table describes the sample reports included in the SQL Server Report Pack.

REPORT	DESCRIPTION
Commissions Report	This Receivables Management report shows sales commissions by territory, salesperson, and year. A territory can be expanded to view sales commissions by a salesperson, and a year can be expanded to view quarterly commissions by territory. A sales summary graph displays annual sales by territory.
Customer Profitability Report	This Receivables Management report shows sales, total profit, and gross margin percentage per customer for the year selected. Customer ID can be expanded to view the sales, total profit, and gross margin percentage by document number.
Inventory Value by Site Report	This Inventory Control report shows a bar graph of the value of inventory by site and the total inventory value for the company. Users can then drill through by clicking an inventory site bar to display the Inventory Value by Site and Item Number Report to view items and their total value for that site.
Item Quantity Back Order Report	This Inventory Control report shows the quantity of items that are back ordered, quantities that are allocated to purchase orders, and item quantities available for all sites. Each item number can be expanded to display item quantities for all sites. Users can also drill through by clicking the Qty on PO link to display the Quantity on Purchase Order Report to view information about the items allocated to each purchase order.
Open Purchase Orders Report	This Purchase Order Processing report shows purchase orders that have not been closed or canceled per vendor or for all vendors. The number, status, and date of each purchase order are displayed in a list view, along with the vendor assigned to the purchase order. Each purchase order can be expanded to display the line items and the status of each line item. You can also drill through by clicking on the

	Quantity Shipped link to display the Purchase Order Receipts Report to view the quantity remaining to be shipped.
Open Sales Orders Report	This Sales Order Processing report shows a list of unposted sales orders for a range of customers. The sales order number, the date of each sales order, customer information, the requested ship date, and the amount remaining on the order is displayed in a list view, along with the salesperson assigned to the order. Each purchase order can be expanded to display the line items and specific information about each line item.
Work Center by Weeks - Employee Capacity Report	This Manufacturing report shows the available work centers and the employee capacity of each work center by weeks. Users can drill through by clicking on the weekly graph for each work center to display the Manufacturing Orders for Work Center report, which displays the manufacturing orders assigned to the work center. Customer names, customer priority, and manufacturing priority also are displayed.
Work Center by Weeks - Machine Capacity Report	This Manufacturing report shows the available work centers and the machine capacity of each work center by weeks. Users can drill through by clicking on the weekly graph for each work center to display the Manufacturing Orders for Work Center report to view the manufacturing orders assigned to the work center. Customer names, customer priority, and manufacturing priority also are displayed.

### Microsoft SQL Server Reporting Services Wizard

The Microsoft SQL Server Reporting Services Wizard, shown below, simplifies deployment for additional SQL Server Reporting Services reports. Included with Microsoft Dynamics GP 10.0, this wizard offers step-by-step instructions for connecting to the server containing the Microsoft Dynamics GP data, selecting a database and module(s), and defining the location where reports will be deployed.



SQL Server Reporting Services reports include the following:

<b>FUNCTIONAL AREA</b>	<b>REPORT</b>
<b>Purchase Order Processing (POP)</b>	<ul style="list-style-type: none"> <li>• POP Back Ordered Items Received</li> <li>• POP Received/Not Invoiced</li> <li>• POP Purchase Order Status Detailed</li> <li>• POP Purchase Order History Report – Detailed</li> <li>• POP Receiving Trx History Report – Detailed</li> <li>• POP Expected Shipments by Item</li> </ul>
<b>Receivables Management (RM)</b>	<ul style="list-style-type: none"> <li>• RM Quick Detail Aged Trial Balance</li> <li>• RM Detail Historical Aged Trial Balance</li> <li>• RM Accounts Due Report</li> <li>• RM Sales Summary Report</li> </ul>
<b>Sales Order Processing (SOP)</b>	<ul style="list-style-type: none"> <li>• SOP Inventory Sales History Report</li> <li>• SOP Sales Transaction Detail History Report</li> <li>• SOP Sales Distribution Detail History Report</li> <li>• SOP Document Status Report</li> <li>• SOP Document Analysis Report</li> <li>• SOP Document Analysis Report by Customer</li> </ul>
<b>General Ledger</b>	<ul style="list-style-type: none"> <li>• Trial Balance Detail</li> <li>• Trial Balance Summary</li> <li>• Cross Reference by Journal Entry</li> <li>• Cross Reference by Source Document</li> </ul>
<b>Inventory Management</b>	<ul style="list-style-type: none"> <li>• Inventory Purchase Receipts</li> <li>• Inventory Stock Status Report</li> <li>• Inventory Purchase Advice Report</li> <li>• Inventory Sales Summary History</li> </ul>
<b>Payables Management (PM)</b>	<ul style="list-style-type: none"> <li>• Vendor Summary Analysis</li> <li>• PM Historical Aged TB – Detail</li> <li>• Vendor Cash Requirements</li> <li>• PM Transaction History Detail</li> <li>• PM Aged TB – Detail</li> </ul>
<b>Payroll – US</b>	<ul style="list-style-type: none"> <li>• Earnings Register</li> <li>• Department Wage and Hour Report</li> <li>• Employee Wage and Hour Report</li> <li>• Payroll Summary</li> <li>• Vacation/Sick Time Available List</li> <li>• State Wage Report</li> <li>• Check History Report</li> <li>• Employee Pay History Report</li> <li>• Reprint Check Registry</li> </ul>
<b>Human Resource Management</b>	<ul style="list-style-type: none"> <li>• TA Attendance Detail by Employee</li> <li>• Benefit Enrollment by Employee</li> <li>• TA Employee Attendance Summary</li> <li>• Benefit Enrollment</li> </ul>

<b>Bank Reconciliation</b>	<ul style="list-style-type: none"> <li>• Checkbook Register</li> <li>• Undeposited Receipts Report</li> <li>• Bank Transaction History Report</li> </ul>
<b>Fixed Assets (FA)</b>	<ul style="list-style-type: none"> <li>• FA Depreciation Ledger</li> <li>• FA Depreciation Detail</li> <li>• FA Fixed Assets to General Ledger Reconciliation</li> <li>• FA Additions</li> <li>• FA Retirements</li> <li>• FA Period Projection Report</li> </ul>
<b>Project Accounting (PA)</b>	<ul style="list-style-type: none"> <li>• PA Detailed Trial Balance</li> <li>• PA Projects in Progress</li> <li>• PA Project Cost Breakdown</li> <li>• Pre-Billing Worksheet -CP/FP</li> <li>• PA PBW CP/FP</li> <li>• PA PBW Fee</li> <li>• Pre-Billing Worksheet -T&amp;M</li> <li>• PA PBW T&amp;M</li> <li>• PA Monthly Utilization</li> </ul>
<b>Manufacturing</b>	<ul style="list-style-type: none"> <li>• Picking Report Multi-bin – Item Number</li> <li>• Picking Report – Item Number</li> <li>• MO/PO Links Report Sort by Vendor</li> <li>• Item Standard Cost Changes History</li> <li>• BOM Detail Report</li> <li>• BOM Report with Standard Costs</li> <li>• Job Detail</li> <li>• Traveler Report</li> </ul>

\* Note: This list of SQL Server Reporting Services reports for Microsoft Dynamics GP is subject to change.

## Microsoft Business Portal

Microsoft Business Portal gives employees access to the specific information and tasks they need to do their jobs, based on their roles within your company. Roles are user categories that group users with similar job functions.

Business Portal 4.0 utilizes Windows® SharePoint® Services 3.0 navigation to enable cleaner navigation throughout Business Portal and Windows SharePoint Services. Built on Windows Server 2003, Windows SharePoint Services provides a single workspace for teams to coordinate schedules, organize documents, and participate in discussions both within the organization and over the extranet. Windows SharePoint Services also provides a flexible, scalable foundation platform for building Web-based business applications. Windows SharePoint Services is required for Business Portal and a co-requisite for Microsoft Office SharePoint Server 2007. Several Business Portal features are available when Microsoft Office SharePoint Server 2007 is installed, including two new Sales dashboards, Search, the Business Data Catalog, Reports Center, and any workflow that people choose to create.

Role-center pages within Business Portal serve as navigation to groups of role-related items. People can use each role-center page as a starting point to access role-tailored information and tasks. For example, the Executive Center, shown below, enables key decision makers to obtain high-level information and drill down to details for business metrics.

The screenshot shows the Executive Center interface. The left sidebar contains a 'View All Site Content' link and a 'Recycle Bin' icon. The main content area is titled 'Financials' and displays 'Customer Balances By Aging Period' and 'Payables Turnover' metrics. The 'Customer Balances' table lists various customers and their balances as of 4/12/2017. The 'Payables Turnover' section shows metrics for 'This YR(Fis)', 'This Period', and 'Last Period'.

Customer Name	Customer C...	Receivables ...	Last Aged Date	Cust
Contoso, Ltd.	CONTOSO00...	CONTOSO00...	4/12/2017	\$
Office Design System...	OFFICEDES0001	OFFICEDES0001	4/12/2017	\$
Alton Manufacturing	ALTONMAN00...	ALTONMAN00...	4/12/2017	\$
Vision Inc.	VISIONIN0001	VISIONIN0001	4/12/2017	\$
Vancouver Resort Hot...	VANCOUVE0...	VANCOUVE0...	4/12/2017	\$
Berry Medical Center	BERRYMED00...	BERRYMED00...	4/12/2017	\$
Johnson, Kimberly	JOHNSONK00...	JOHNSONK00...	4/12/2017	\$
Humongous Insurance	HUMONGOU0...	HUMONGOU0...	4/12/2017	\$
World Enterprises	WORLDENT0...	WORLDENT0...	4/12/2017	\$
Place One Suites	PLACEONE0001	PLACEONE0001	4/12/2017	\$

Business Portal entities are generally available through Result Viewer Web parts. Microsoft Office SharePoint Server and Business Portal Web service data surface through Business Data Web parts to present current data from the back office. For example, the Customer Summary page, shown below, delivers fast, organized access to current customer information from across Microsoft Dynamics GP.

The screenshot shows the Sales Center interface. The left sidebar contains a 'View All Site Content' link and a 'Recycle Bin' icon. The main content area is titled 'Customer Summary' and displays 'Customer List', 'Customer Address', and 'Customer Balance' information. The 'Customer List' table lists various customers and their balances. The 'Customer Address' section shows details for 'Bob Fitz'. The 'Customer Balance' section shows metrics for 'This YR(Fis)', 'This Period', and 'Last Period'.

Customer ID	Name
AARONFIT0001	Aaron Fitz Electrical
ADAMPARK0...	Adam Park Resort
ADVANCED0...	Advanced Paper Co.
ADVANCED0...	Advanced Tech Satell...
ALTONMAN00...	Alton Manufacturing
AMERICAN0001	American Science Mus...
AMERICAN0002	American Electrical C...
ASSOCIAT0001	Associated Insurance ...
ASTORSUI0001	Astor Suites
ATMORE000...	Atmore Retirement C...
BAKERSEM00...	Baker's Emporium Inc.
BERRYMED00...	Berry Medical Center
BLUEYOND0001	Blue Yonder Airlines
BOYLES000...	Boyle's Country Inn's
BREAKTHR0001	Breakthrough Telema...
CASTLEIN0001	Castle Inn Resort
CELLULAR0001	Cellular Express
CENTERSU0001	Center Suite Hotel
CENTRALC0001	Central Communicatio...



Query pages within each of the Business Portal role centers provide access to information stored in your back office system. For example, the Finance Center includes the Financial Queries page and the Sales Center includes the Sales Queries page. Business Portal queries can also be modified to include information specific to your organizational needs. Query results can also be exported to Office Excel for further analysis.

Web service data cannot be queried when using the Office SharePoint Server version of the portal. Web service data can only be surfaced via Search results and portal Web parts. For example, a Web part might list all customers. Filters used behind the scenes can be set to list only customers in the state of North Dakota. Every user who opens the page with this Web part sees only customers located in North Dakota. Users can engage additional filters to narrow the list even further—for example, customers in Fargo or in Grand Forks.

Below is an example of a Business Data List Web part with filtering used on Web service data.

Customer List

Company: Dextordinary Inc.

Customer List

Actions

Name contains a

Retrieve Data

Customer ID	Name	Is Active	Is On Hold	Class ID	Corporate Account ID	Salesperson ID	State	Phone Number	Created Date	Modified
573923	You Make The Call	True	False	003FG		CARL	PQ	(418) 536-5722 X0000	1/1/1965 12:00 AM	2/23/2008 12:00 PM
789744	Binder Clip Manufacturer	True	False	003FG		CARL	PQ	(819) 473-5123 X0000	1/1/1965 12:00 AM	2/23/2008 12:00 PM
8302934	Just a number company	True	False	003FG		CARL	PQ	(411) 866-6E+1 X1000	1/1/1965 12:00 AM	2/23/2008 12:00 PM
DAYTON	Dayton Hudson Store	True	False	003FG		CARL	ALB	(403) 424-1888 X0000	1/1/1965 12:00 AM	2/23/2008 12:00 PM

Customer List filter information

By default, the information in the List web part is set to filter by your salesperson ID. If you have rights to view data for other salespeople, you can change the scope using the fields beneath the Actions menu. Enter a scope of **ReturnAll** to return additional records.

## Key Performance Indicators

Respond proactively rather than reactively to business conditions with fast access to business measurements. Key performance indicators (KPIs) in Microsoft Dynamics GP deliver standard business metrics that give managers an easy-to-read assessment of the financial health of the organization. Available through Business Portal, KPIs enable people to make fast decisions based on accurate, current information.

KPIs also can indicate when specified values reach a certain point if warning and critical alert ranges have been defined. An alert range is a range of variation—expressed as a percentage—above or below a target value.

## Business Scorecard Manager

Business Scorecard Manager 2005 is a comprehensive, Web-based scorecard and dashboard application that provides deep contextual insight into business drivers. Business Scorecard Manager helps put information in context and link corporate strategy to line-of-business (LOB) actions, reporting on organizational performance in both financial and non-financial terms. Scorecards are designed to



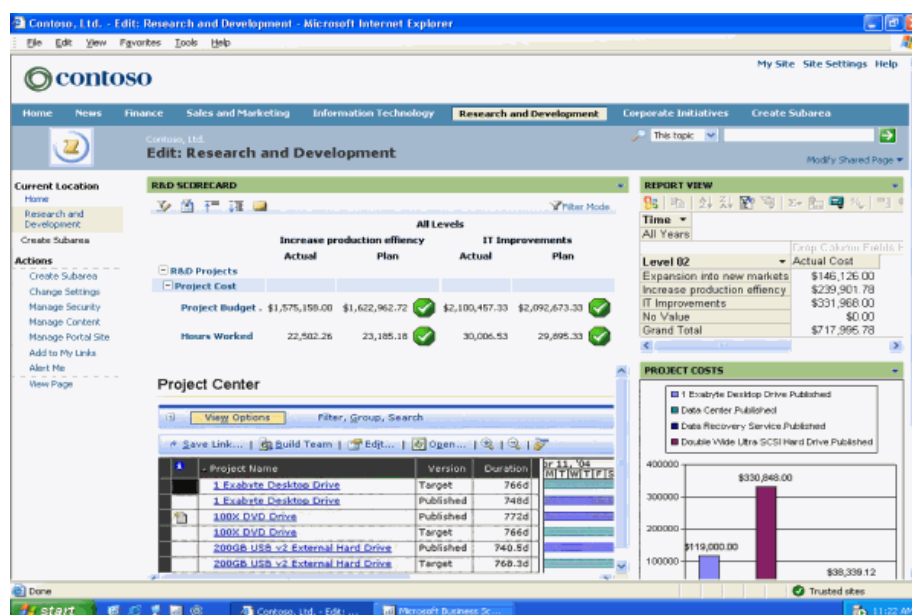
articulate strategy and convert it into specific, measurable goals and to monitor progress towards their achievement. Business Scorecard Manager smoothly integrates with Microsoft Dynamics GP modules to complement existing functionality.

The Business Intelligence Foundation for Microsoft Dynamics GP includes components designed to deepen business insight. Analysis Cubes, a component of the Business Intelligence Foundation, enable out-of-the-box interoperability with Microsoft Dynamics GP Business Scorecard Manager, delivering the benefits of the Scorecard application with a limited level of investment.

Business Scorecard Manager offers a solution that complements Business Portal in Microsoft Dynamics GP. The two solutions are both portal-based business intelligence offerings that provide anytime, anywhere access to business data. They each address different business needs and organizations can use one or both in orchestration.

Both Business Scorecard Manager and Business Portal offer KPI functionality. The solutions were designed for two different purposes, however, so the KPIs in each solution address different needs. The KPIs offered with Business Portal are designed for measuring data hosted in Microsoft Dynamics GP. Therefore, if a business wants to focus on monitoring the data coming only from Microsoft Dynamics GP, Business Portal KPIs are the best choice. The KPIs offered with Business Scorecard Manager are designed with a broader scope in mind. They allow for creation of KPIs that are based on consolidated data from a variety of sources and that can encounter multiple data types, including data from multiple systems or from multiple Microsoft Dynamics GP companies. KPI functionality available with Business Scorecard Manager is ideal for companies that need a more comprehensive solution.

The deciding factor should be what data an organization wants to start with and what it wants to achieve. In many cases, businesses need capabilities offered by both solutions. The interoperability of Microsoft Dynamics GP with Business Scorecard Manager offers the best of both worlds: a streamlined portal experience that encompasses a broad variety of needs. For example, combining and surfacing multi-source Business Scorecard Manager KPIs with Business Portal KPIs help increase portal user penetration. As shown below, KPIs can be delivered to an even broader audience throughout the organization, without jeopardizing the familiar portal look and feel for traditional Microsoft Dynamics GP users.

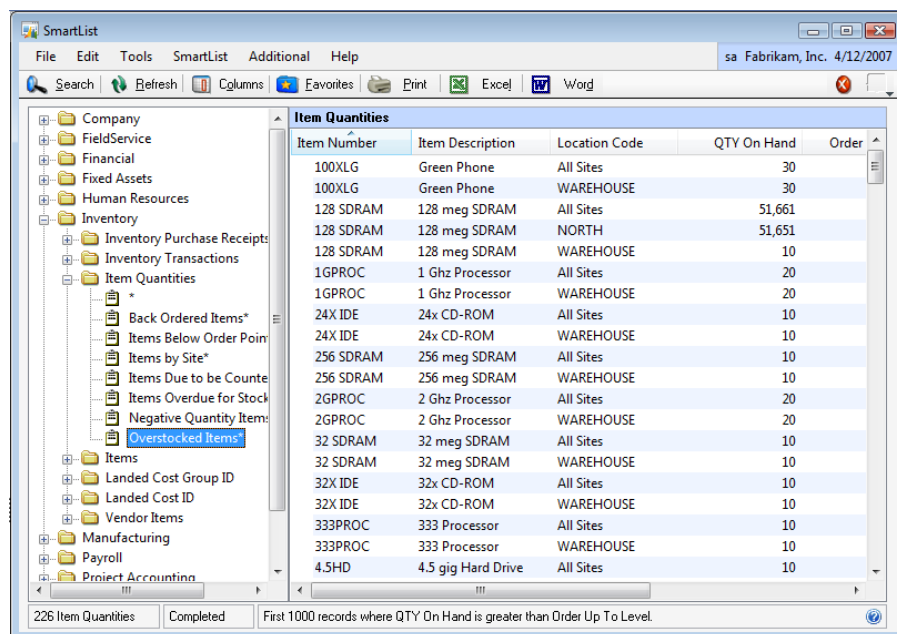


## Analyze

To turn that information into forward-thinking insight—for example, the insight needed to change the direction of a negative trend or take advantage of a positive trend—businesses need robust analytic tools. Microsoft Dynamics GP provides three powerful analysis and reporting tools that fuel this kind of business intelligence.

### SmartList

SmartList in Microsoft Dynamics GP enables people to organize and present data from the accounting system in a way that makes sense to them. They can display lists of records from a specific category, such as Customers or Purchase Orders, as well as apply search criteria to limit results to only the records of interest. They can even determine which columns should be displayed, as well as the order of the columns.



The screenshot shows the SmartList application window. The left pane displays a tree view of the accounting system hierarchy, with 'Inventory' expanded and 'Item Quantities' selected. The main pane shows a table of item quantities with columns: Item Number, Item Description, Location Code, QTY On Hand, and Order. The table lists various items like Green Phone, SDRAM, and Processors across different locations. The status bar at the bottom indicates '226 Item Quantities' and 'First 1000 records where QTY On Hand is greater than Order Up To Level.'

Item Number	Item Description	Location Code	QTY On Hand	Order
100XLG	Green Phone	All Sites	30	
100XLG	Green Phone	WAREHOUSE	30	
128 SDRAM	128 meg SDRAM	All Sites	51,661	
128 SDRAM	128 meg SDRAM	NORTH	51,651	
128 SDRAM	128 meg SDRAM	WAREHOUSE	10	
1GPROC	1 Ghz Processor	All Sites	20	
1GPROC	1 Ghz Processor	WAREHOUSE	20	
24X IDE	24x CD-ROM	All Sites	10	
24X IDE	24x CD-ROM	WAREHOUSE	10	
256 SDRAM	256 meg SDRAM	All Sites	10	
256 SDRAM	256 meg SDRAM	WAREHOUSE	10	
2GPROC	2 Ghz Processor	All Sites	20	
2GPROC	2 Ghz Processor	WAREHOUSE	20	
32 SDRAM	32 meg SDRAM	All Sites	10	
32 SDRAM	32 meg SDRAM	WAREHOUSE	10	
32X IDE	32x CD-ROM	All Sites	10	
32X IDE	32x CD-ROM	WAREHOUSE	10	
333PROC	333 Processor	All Sites	10	
333PROC	333 Processor	WAREHOUSE	10	
4.5HD	4.5 gig Hard Drive	All Sites	10	

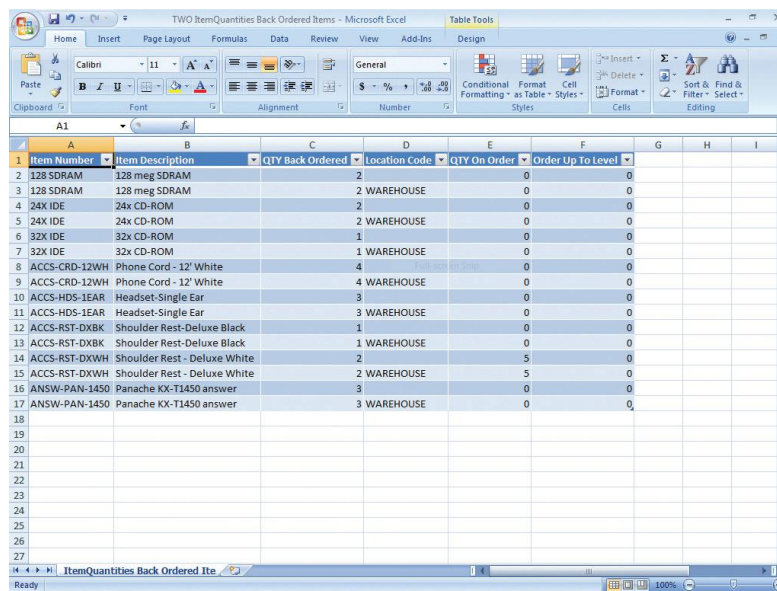
SmartList searches can be added as a SmartList favorite, so that they can easily be rerun. The search results can be exported to Office Excel or Office Word. These features make SmartList an excellent tool for creating ad hoc reports.

Exporting to Office Excel or Office Word is as easy as opening a SmartList favorite and clicking a single button. The data is automatically formatted appropriately so no cleaning up is necessary. Distributing data using the Microsoft Office system, the world's most widely used office productivity suite, ensures that employees who need access to back office data can obtain it easily and reliably and analyze it in an environment that they are already used to. You can include spreadsheets or Office Word documents as attachments to e-mail messages or embed the data within the message.

## Microsoft Office Excel-Based Reports

Decision makers who want to perform ad hoc queries on Microsoft Dynamics GP data without logging into the system can now work with Office Excel report templates, which are based on the data that can be found in more than 200 SmartList favorites. Reports can be stored on Office SharePoint Server 2007 or another shared network location for easy access and instantly refreshed at any time to ensure data is current.

With Office Excel 2007 Services, a component of Office SharePoint Server 2007, all your Excel-based reports, spreadsheets, and pivot tables can be stored in a centralized, Web-based location—helping ensure that people are using and sharing a real-time view of data.



Item Number	Item Description	QTY Back Ordered	Location Code	QTY On Order	Order Up To Level
128	SDRAM	2	2	0	0
128	SDRAM	2	WAREHOUSE	0	0
24X	IDE	2	2	0	0
24X	IDE	2	WAREHOUSE	0	0
32X	IDE	1	1	0	0
32X	IDE	1	WAREHOUSE	0	0
ACCS-CRD-12WH	Phone Cord - 12' White	4	4	0	0
ACCS-CRD-12WH	Phone Cord - 12' White	4	WAREHOUSE	0	0
ACCS-HDS-1EAR	Headset-Single Ear	3	3	0	0
ACCS-HDS-1EAR	Headset-Single Ear	3	WAREHOUSE	0	0
ACCS-RST-DXBK	Shoulder Rest-Deluxe Black	1	1	0	0
ACCS-RST-DXBK	Shoulder Rest-Deluxe Black	1	WAREHOUSE	0	0
ACCS-RST-DXWH	Shoulder Rest - Deluxe White	2	2	5	0
ACCS-RST-DXWH	Shoulder Rest - Deluxe White	2	WAREHOUSE	5	0
ANSW-PAN-1450	Panache KX-T1450 answer	3	3	0	0
ANSW-PAN-1450	Panache KX-T1450 answer	3	WAREHOUSE	0	0

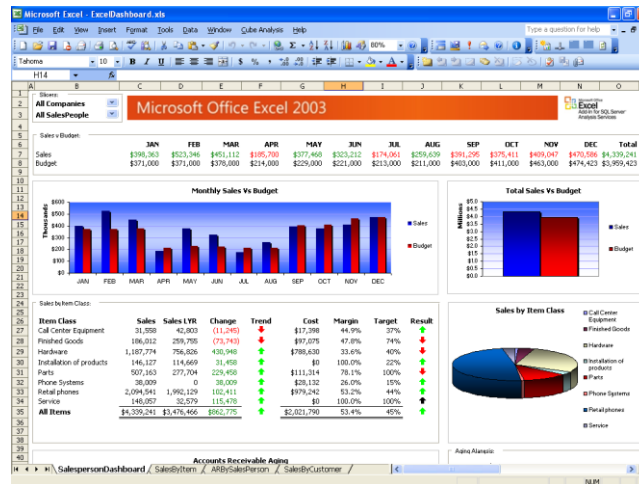
## Analysis Cubes

Analysis Cubes in Microsoft Dynamics GP enables people to take full advantage of SQL Server Analysis Services by providing out-of-the-box preconfigured OLAP cubes. Analysis Cubes provides virtually unlimited ways to look at data with powerful interactive analysis.

Data can be utilized in a number of different ways:

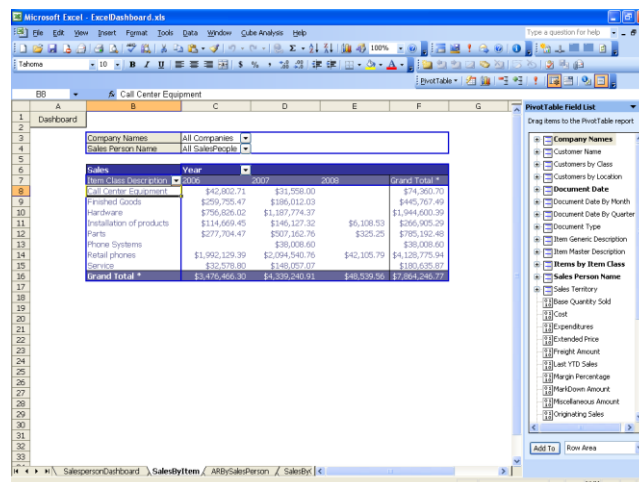
- Office Excel Pivot tables can use a cube as a data source.
- The Office Excel Add-in for Analysis Services can be used to build interactive dashboards as well as tailored reports.
- SQL Server Reporting Services can utilize Analysis Cubes as a data source.
- Analysis Cubes can provide information for Balanced Scorecards.

By leveraging the Office Excel Add-in for Analysis Services, people can build powerful interactive dashboards, such as the one shown below.



This functionality enables users to set a cell within Office Excel to a value in your accounting system. For example, cell C7 in the dashboard above is equal to sales in January. One or more restrictions, such as the Company or Salesperson drop-downs in the top left corner of the dashboard, can be used to recalculate that cell—for example, sales for a specific territory or only sales of a particular item class.

Analysis Cubes also can be used as a data source for pivot tables. Pivot tables can be created using the Pivot Table Creator window in Microsoft Dynamics GP or they can be created directly in Office Excel. The pivot table shown below was configured to automatically open by clicking on the Sales by Item Class graph on the dashboard above.



Analysis Cubes can also be accessed by SQL Server Reporting Services to provide Web-based reporting and analysis, printed reports, or scheduled e-mail distribution of information.

Below is an example of an Accounts Receivable Aging report that can be accessed online or e-mailed to a salesperson, providing aging information for their customers. By clicking on any of the customers listed in

this report, users can drill down to the detailed transactions that make up that customer's outstanding balance.

	121 - 150 Days	151 - 180 Days	181 and Over	31 - 60 Days	61 - 90 Days	91 - 120 Days	Current
Aaron Frit Electrical	\$998.64	\$1,223.68		\$3,050.73	\$19,358.82	\$1,259.64	\$63,422.85
Advanced Tech Satellite System	\$55,885.99	\$11,758.63		\$242,915.26	\$172,032.97	\$15,591.42	\$818,716.99
Baker's Emporium Inc.	\$11,843.29	\$1,015.01		\$16,600.12	\$9,427.87	\$977.13	\$88,509.94
Blue Yonder Airlines			\$120,901.91				
Central Communications LTD	\$5,828.87	\$6,959.84	\$15,882.64	\$100,782.51	\$78,295.67	\$10,671.63	\$938,825.56
Central Distributing	\$2,047.82	\$594.87		\$9,936.07	\$6,706.16	\$1,342.62	\$65,262.99
Contoso, Ltd.			\$17,277.96				
Data Communications Inc.	\$57,171.73	\$8,376.79	\$12,908.70	\$129,658.59	\$124,825.41	\$6,584.13	\$762,873.00
Dial Direct Paging Inc.	\$11,004.52	\$33,214.39		\$99,284.29	\$148,900.41	\$18,226.76	\$806,059.36
Direct Marketers	\$2,386.89	\$1,353.22		\$5,320.12	\$14,513.04	\$3,477.25	\$68,798.30
Dolls Cove Resort			\$711.37				
Getaway Inn			\$262,449.25				
<b>Total</b>	<b>\$182,449.25</b>	<b>\$55,885.99</b>	<b>\$171,113.68</b>	<b>\$300,782.51</b>	<b>\$398,295.67</b>	<b>\$19,495.18</b>	<b>\$1,400,000.00</b>

## Plan

Planning capabilities—budgeting, forecasting, and preparing for the future—are closely tied to monitoring and analysis. The ongoing work of comparing budgets, forecasts, and plans to actual performance is essential to business success, as is making adjustments to existing budgets and forecasts on the basis of new data and analyses. Microsoft Dynamics GP helps businesses stay competitive and move forward with confidence by providing a range of flexible, security-enhanced planning tools.

### Microsoft Forecaster

Microsoft Forecaster is a fast and affordable budgeting and planning application that helps organizations take control of their finances, contain costs, and keep business performance on target. Equipped with Microsoft Forecaster, companies can budget and plan for the future more efficiently and accurately.

With Microsoft Forecaster, frontline managers can build budgets based on their specific objectives and first-hand knowledge of market conditions. The result: improved accuracy and a higher level of commitment to the budget from those responsible for delivering against it. Microsoft Forecaster also makes it much easier to adjust forecasts and budgets given changes in the business climate, enabling these same managers to respond more effectively.

As shown below, a familiar user interface that looks and feels like Office Excel can help new users get up and running quickly. Built-in collaboration capabilities can help your company save time and help improve the quality and accuracy of the final budget. People across your organization can take advantage of collaboration features such as automatic e-mail notification of upcoming deadlines and a centralized location for posting guidelines. Customizable workflow features help budget administrators keep budget contributors on track. Business managers can see at a glance how their departments are progressing with

budget input goals. Predefined security assignments and routings safeguard your data, helping to ensure that sensitive information is provided only to those authorized to view it.

ACCOUNT	Label	Jan Cur Yr	Feb Cur Yr	Mar Cur Yr	Apr Cur Yr	May Cur Yr	Jun Cur Yr	Jul Cur Yr	Aug Cur Yr	Sep Cur Yr
<b>UNITS SOLD</b>										
= SUNITSA	Sales Units - Prod A	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000
= SUNITSB	Sales Units - Prod B	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
= SUNITSC	Sales Units - Prod C	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
<b>REVENUE</b>										
= 4100	Sales	235,000	235,000	235,000	235,000	235,000	235,000	235,000	235,000	235,000
= 4250	Sales Discounts	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)
= 4110	Sales Returns	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)
= TNETREV	Net Revenue	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900
<b>COGS</b>										
= 4500	Raw Materials	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500
= TGMRG	Summary Gross Margin	0	0	0	0	0	0	0	0	0
<b>OPERATING EXPENSES</b>										
= 5200	Office Expense	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200
S 5115	Postage	10,192	9,205	10,192	9,883	10,192	9,883	10,192	10,192	9,883
S 5225	Supplies Expense - Service	1,154	1,154	1,442	1,154	1,154	1,442	1,154	1,154	1,442
S 5240	Maintenance Expense - Service	550	550	550	550	550	550	550	550	550
IS 5260	Other Expense	0	0	0	0	0	0	0	0	0
S 5120	Trade Shows	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
+ 5300	Travel Expense	6,000.00	6,000.00	6,000.00	11,000.00	11,000.00	11,000.00	11,000.00	11,000.00	11,000.00
<b>HR EXPENSE</b>										
= 5000	Salary Expense	23,604	23,604	23,604	23,604	23,604	23,604	23,604	23,604	23,604
= 5060	Bonuses	2,465	2,465	2,465	2,465	2,465	2,465	2,465	2,465	2,465

Through the use of supplemental memos and line-item detail, managers can understand the rationale behind important numbers and assumptions made by other department managers, helping reduce time spent in meetings. Department managers can interact with each other to help ensure that their budgets complement one another. For example, if a department budgets for a new program that impacts other departments, all budgets can reflect the impact of the new program.

Managers can input their own numbers and easily make changes to their cost centers by entering data directly into accounts or by using copy/grow functions, calculated accounts, or spreadback methods. In addition to improving the accuracy of the numbers, Microsoft Forecaster helps improve the quality of the numbers, because totals and consolidated numbers are available for reporting as soon as they are entered. If any problems arise or adjustments are required, changes can be made immediately by users who understand the numbers. Budget administrators can make an adjustment that ripples through the entire plan by entering a dollar or percentage of change. As a result, budgets can be completed quickly, yet allow for additional iterations.

With Microsoft Forecaster, budgeting and planning is time well spent. By accessing up-to-date and historical information from your organization's general ledger and financial reports, employees can budget and plan with accuracy. This helps users and budget analysts save valuable time. In addition, it can help your organization shorten its budget time cycle, reduce printing and mailing costs, and create valid, accurate budgets that tie directly to your strategic plans and help you reach business goals.

## Microsoft Enterprise Reporting

Microsoft Enterprise Reporting for Microsoft Dynamics GP helps your organization gain tighter control of consolidations, financial reporting, and budgeting across the enterprise. Smooth integration across your business solution provides all employees—from CEOs and CFOs to data entry workers—with the information they need—when, where, and how they need it.

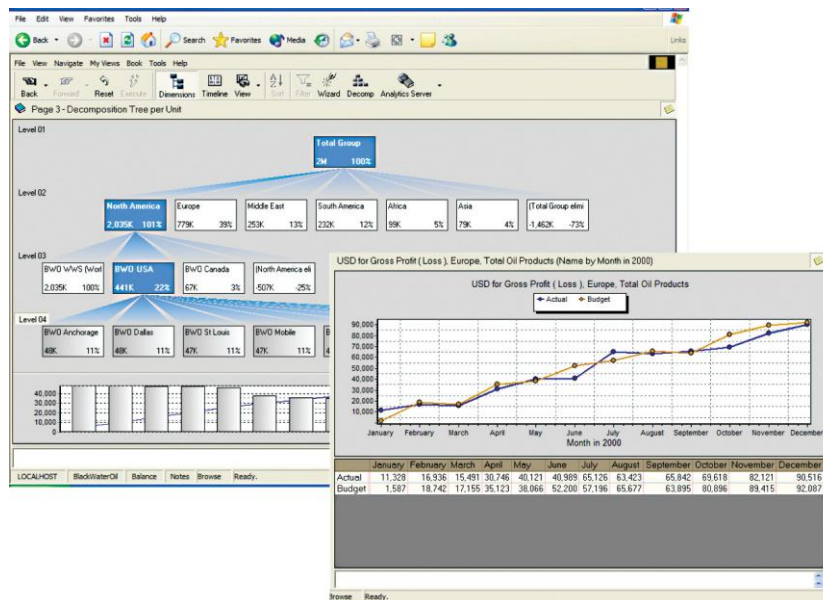


**Access current, consolidated data.** Import data from multiple data sources into the Enterprise Reporting database, reducing the need for redundant data entry. Automated checks for updated data ensure that the information you access is always current.

**Empower decision makers.** Make better decisions by presenting critical business intelligence in a meaningful way. Graphical representations of key performance indicators enable decision makers to visualize trends, patterns, and relationships that impact the bottom line and enhance strategic planning.

**Get information when you need it.** View, modify, and analyze business data anywhere, anytime via a Web browser. Remotely process or schedule report packages for distribution in a variety of formats, including print or e-mail attachments.

**Analyze data more effectively.** Interpret data using a rich set of data analysis tools, including Office Excel and Microsoft Enterprise Reporting Cube Designer for generating OLAP cubes.



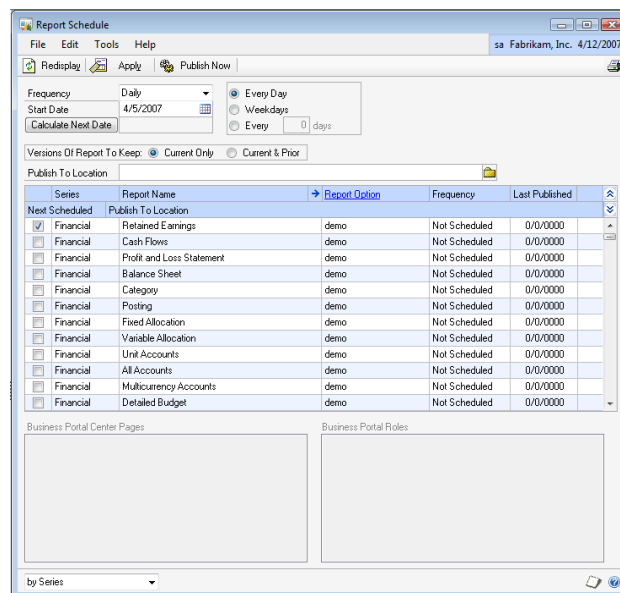
## Report Writer

Report Writer in Microsoft Dynamics GP makes it easy to create and publish customized reports that enable people to analyze every aspect of your business, pinpointing the exact information needed to increase productivity and make effective business decisions. A built-in component of System Manager, Report Writer provides core reporting capabilities and enables easy customization for the 2000+ standard reports included with Microsoft Dynamics GP.

**Stay on top of your business.** Analyze your business issues more effectively, with complete freedom to modify your existing reports or create new ones that pinpoint the information needed to make your business more successful.

**Create compelling data views.** Make reports consistent over your entire organization or create customized versions of reports for specific individuals or groups, with targeted information designed to meet their specific needs.

**Publish reports how and when you need them.** Publish reports immediately, on a recurring basis, or selectively, in a variety of file formats, including HTML and PDF.



**Improve reporting efficiency without interrupting productivity.** Enable your people to work while their reports are being published with automated scheduling, processing, and overdue notification.

**Provide security-enhanced, shared access to information.** Share reports with decision makers throughout the organization by posting them online with role-tailored access.

## Conclusion

Microsoft Dynamics GP delivers a wide range of business intelligence capabilities to foster strategic insight. Some of these reporting and analysis tools are delivered as part of the core Microsoft Dynamics GP application, while others are offered as additional products that extend the Microsoft Dynamics GP solution. The tools your organization selects will depend on your specific business needs and goals. Whatever solution you identify as best for your needs, you can move forward with confidence, knowing that your people are equipped to effectively monitor, analyze, and plan—the three activities essential to making the fast, informed decisions that fuel success today and strengthen your business for the future.



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