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REPORTING AND BUSINESS INTELLIGENCE

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Reporting and business intelligence – from Excel to excellence

This paper will introduce you to the primary success factors in running a Business Intelligence (BI) project that results in competitive value for your organisation.

Introduction

When it comes to reporting, business leaders often struggle to create meaningful reports. In order to create a report that makes sense, they first have to pull data out of Excel spreadsheets and a variety of other formats and systems. Then, like a jigsaw puzzle found in the attic – manually and painstakingly – they go about the business of piecing it all together into a picture that makes sense for their business.

FROM EXCEL TO EXCELLENCE

This has driven many a company towards a Business Intelligence (BI) project in an effort to develop an effective common platform for organisation-wide reporting and analytics. Here too, however, many companies have met challenges resulting in unsuccessful projects piling up like a mountain of wasted resources. It is true that a focus on using Big Data is making it easier to become a data-driven company, but there are still many pitfalls along the way.

In order to achieve success, a BI project must be approached – first and foremost – as a business discipline and not a technical one. Once your strategy is in place, then you can consider how to implement it and which technology to use to see it come to life in the optimal way. This paper will outline some of the principles that will help you get the most out of your BI project.

A reporting strategy is the starting point

SETTING UP THE PROJECT THE RIGHT WAY

Have you heard about the man who ordered the fanciest, latest model sports car with retractable headlights, a sunroof and a voice-controlled digital dashboard? The only problem was that when the car was delivered, he could not figure out how to start the engine. But it did not matter, because on further reflection, he realised that it was cheaper and faster to get around by train in the city where he lived.

It is a little bit similar with reporting and BI. People tend to want to focus on front-end features right from the start because they think they already know what their BI solution should look like. However, this often results in a project which takes on a character of a technical nature, and does not support the business goals.

FOCUS ON WHAT YOUR BUSINESS NEEDS

In order to get the best return on your technology investments, you need to make sure that you can turn the data you collect into the business knowledge you need to be competitive. With this in mind, it is important in the early strategic planning phase of your project to avoid talking about data and instead focus on business analysis.

When you have defined your goals, then you can go about identifying what to measure and which business data will add the most value. A thorough analysis of basic, relevant business entities like regions, customers, items and employees and how they relate to your overall goals are your seeds for growth. This will help ensure that the project is rooted in a place that will blossom into answers that your business actually needs.

Is the goal to improve decision-making, to raise productivity, control growth, reduce costs, or a combination of these? Understanding the strategic reporting and analytics potential does not have to become a whole project in itself. There is no need to build an ocean liner when a surfboard would be sufficient. It does not take more than a day or two to get a good overview of the possibilities and set the right direction for your next big achievement. Ultimately, this will empower your employees with the information and knowledge they need to make informed decisions.

A COMMON LANGUAGE AND METHODOLOGY

Another important aspect to the basic business entities is making sure you use them to define a common reporting language. Have you ever sat in a meeting scratching your head because two participants came with different versions of the truth about the same business entity? A common problem in many companies is that users tend to measure things in different ways.

Different reports, which supposedly refer to the same attributes of the business, use different filters, for example, or users calculate their measurements based on different methodologies. The result is that the reports are inconsistent. A reporting strategy based on consistent measurements that are important to your business will set the scene for a fruitful BI project.

THE BOTTOM LINE

Starting on a neutral ground and focusing on business insight strategy as opposed to technology will save you a good deal of time, frustration and money in the long run.

TIP - It does not take more than a day or two to get a good overview of the strategic reporting and analytics possibilities and to create the direction for your next big achievement.

Practical considerations

TOWARDS A REPORTING
DATABASE THAT WORKS IN THE REAL WORLD

Once you have established your reporting strategy, it is time to focus on using the data you have defined as significant to your business. If you have reports that join tables or merge multiple data sources, then you will typically benefit from modelling this data for effective use in a reporting database. The most important goal of a reporting database is that end users can quickly extract the information they need to answer important business questions and share the results.

Because you have already done the strategic work, you have what you need to establish an effective reporting database. You can map the conceptual goals in your reporting strategy to the actual user roles in your organisation. A reporting database should match the logic of the business. It should match how data is built and organised in a structured way that enables prompt reporting and easy user navigation. It therefore should only contain the tables required for reporting. Building intelligence and consistency into the system

– possibly using a cube – enables users to create better reports faster.

In addition to matching your reporting database model to your BI strategy, it is important that you have a flexible and pragmatic approach to the reporting database. It should match both the level of sophistication of the users and take into consideration the tools at their disposal.

BUILD FLEXIBILITY
INTO YOUR PROJECT PLAN

One-hundred percent structured data is not realistic in a world where user needs are changing and a variety of tools are being used. Microsoft Dynamics NAV users, for example, normally need to use data from external data sources. Moreover, if Microsoft Dynamics NAV is not the only data source, then obviously performing Business Intelligence directly on the NAV database with NAV tools would not make much sense.

In the case of Microsoft Dynamics 365 for Finance and Operations (previously Microsoft Dynamics AX), there is some flexibility built into the solution. As your business requirements change, you can customise the content of your BI solution by using the model-driven

development approach adopted by Microsoft Dynamics 365 for Finance and Operations. The BI solution is modeled within the Application Object Tree (AOT) and supports Microsoft Dynamics 365 for Finance and Operations development concepts, such as layer-based customisation, application models, configuration, and crossreferencing.

Keep in mind, however, that you will need in-house, ISV, or partner developers who are already familiar with previous versions of Microsoft Dynamics 365 for Finance and Operations and will be able to undertake most of the customisation and/or upgrades, which can help reduce costs to your organisation.

ADVANCED USERS NEED DIFFERENT TOOLS TO BASIC USERS

Another consideration is the level of sophistication of your users. Most business users do not have the skills needed to work with advanced features. If we look once again at Microsoft Dynamics NAV tools as an example, and consider all the possibilities available for working with transactional data, it is clear that it would be quite a complex undertaking for ordinary users. Traditional filtering opportunities require power users to establish the kind of consistency in reports that builds confidence and useful predictive insight.

The situation is similar if we consider a situation where a company uses the internal business intelligence features of Microsoft Dynamics 365 for Finance and Operations as their primary reporting framework. Although Microsoft Dynamics 365 for Finance and Operations might contain the BI functionality the company needs within the system, they would still need to make sure they have users with skills related to the Microsoft BI development tools, like Business Intelligence Development Studio, for example.

THE BOTTOM LINE

Model your reporting database in a way that enables prompt answers to relevant business questions.

In order to avoid the pitfalls of a BI project, it is important to start from a strong foundation based on a conceptual strategy before discussing technology. As the project moves on, however, it is equally important to map your strategic goals to your users, their level of sophistication and the tools they are currently using. Your ultimate goal is to end up with a flexible solution that allows your people to get the business answers they need fast and efficiently.

TIP - The most important goal of a reporting database is that end users can quickly extract the information they need.

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ANEGIS has extensive experience helping international organisations turn data into knowledge. We can help empower your employees with the information they need to make informed decisions. If you would like to learn how we could help you use reporting to raise performance, control growth and reduce costs, then let's have a talk about how we can assist. Contact **info@anegis.com**

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