

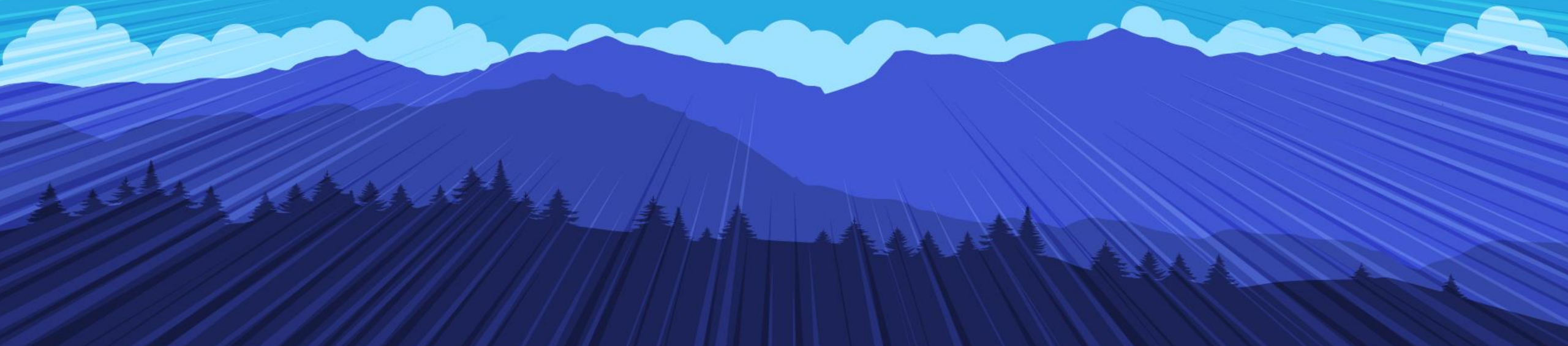


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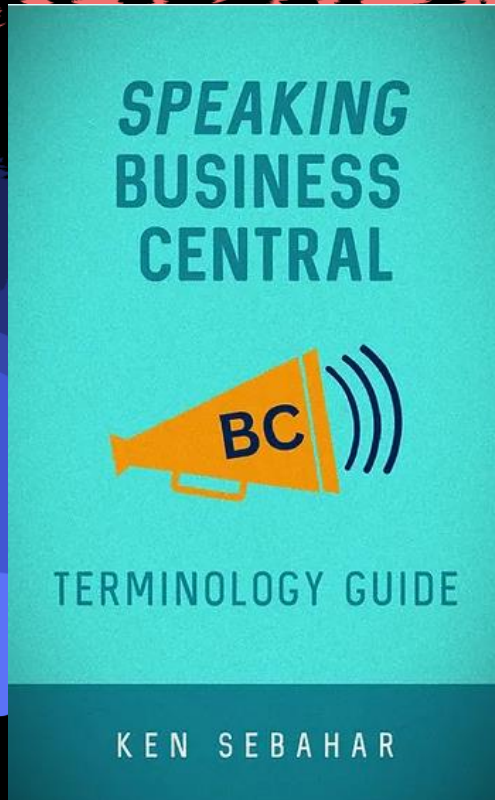
DYNAMICS CON LIVE

MAY 2024

Feast on the cornucopia of BC reporting options



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Feast on the **cornucopia** of BC reporting options

Cornucopia: ABUNDANCE



Session guidance acknowledgement

- Kennie Nybo Pontoppidan
 - Principal Program Manager, Microsoft
 - Data Analytics



Session Description

In this session, we will review the wide variety of ways that data analysis and reporting can be accomplished in Business Central. Long-gone are the days when a traditional Report or Dataport needed to be developed to get at the data. The latest version of Business Central includes many new options and methods that can be used to get the data you need, how you want it, when you want it!

See what's possible and get started when you leave the session!



Session Agenda – Reporting “Tools” in your Toolbox: **BC Online with 0365*

- Standard Reports
- Financial Reports
- Analysis Reports
- Role Center Pages
- List Pages
- Power BI
- Web Services
- Suggestions, Tips, & Tricks: Design → Build → Deploy



Housekeeping...

Throughout this presentation, slides contain “Learn Links”. Each of these links directly to detailed Microsoft Learn information pertaining to each specific topic.

BC Reporting Overview (Sample) – [Learn Link](#)

Green = potential upside/pros, **Red** = potential downside/cons

These slides will be shared by DynamicsCON after the conference. Turn in a business card and I will directly send you this PPT today.

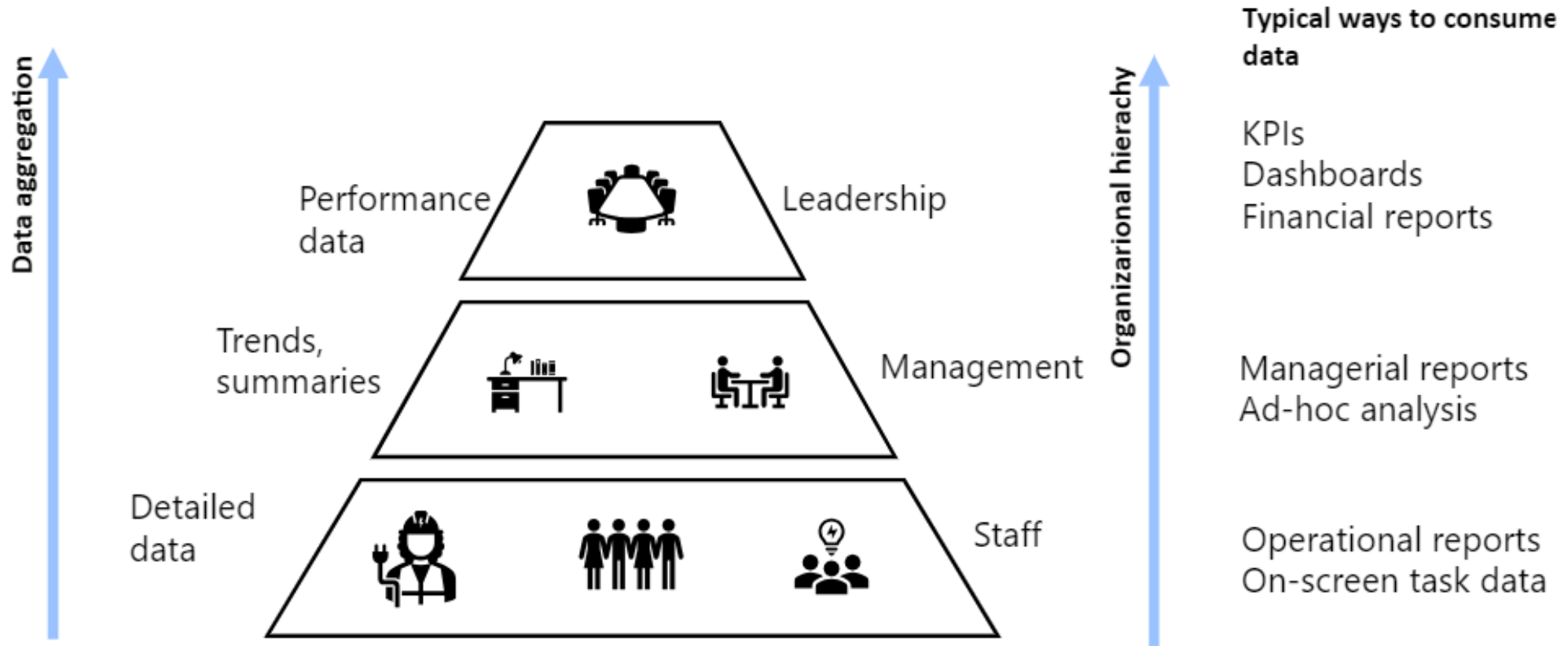


Introduction

- Reporting = Data Analytics = Business Intelligence (?)
 - Data Analytics: *the process of collecting, processing and analyzing large sets of data to extract meaningful insights and patterns that can help make business decisions easier. (more general)*
 - Business Intelligence: *a set of technologies and practices used to analyze and interpret data and further transform it into meaningful information that can be used to inform business decisions. (more specific, forward looking)*
 - Reports: *shows you what has happened so far and what the status of that thing is. Reports often use standard or well-known formats to help people do their jobs better or more easily on a daily (or weekly, monthly, etc.) basis. (even more specific)*



The "BI Triangle" – Learn Link



Reporting Options

- Standard Reports – [Learn Link](#)
 - 100s of standard reports available (Search, Report Explorer)
 - High performance
 - Run from the BC user interface
 - Multiple output options (Preview, PDF, Excel, Excel Data Only, Printer)
 - Schedule Reports on the Job Queue – [Learn Link](#)
 - Fixed Format (* except for the “Excel Data Only” option)
 - BC Developer required to change format or logic
 - Develop Reports [Learn Link](#)



Reporting Options

- Financial Reports (formerly “Account Schedules”) – [Learn Link](#)
 - Built-in financial reporting design tool
 - Define an unlimited number of Row Definitions
 - Define an unlimited number of Column Definitions
 - View data in real-time with drill-down to source transactions
 - Compare actual financial results to budgeted amounts
 - Quickly change views, filters, and/or date ranges to update financial data extremely fast
 - Output data to Excel
 - Printed Report output may not meet presentation requirements
 - No automated generation or distribution of a “report stream”



Reporting Options

- Analysis Reports – [Learn Link](#)
 - Built-in analysis tools for analysis of sales, purchasing, and inventory data
 - Define an unlimited number of Row Definitions
 - Define an unlimited number of Column Definitions
 - View data in real-time with drill-down to source transactions
 - Compare actual results to budgeted values (Qty or \$)
 - Quickly change views, filters, and/or date ranges to update data extremely fast
 - Output data to Excel
 - Rows need to be re-generated to include new records (Cust, Vend, Item)
 - No Printed Report output option
 - No automated generation or distribution of a “report stream”



Reporting Options

- Role Center Pages
 - KPI tile = each is a virtual real-time “report” with drill-down
 - Cue tile = each is a virtual real-time “report” with drill-down
 - Access to Power BI reports
 - Report Inbox
 - Detailed visual reports (charts)
 - Developer needed to build new KPI and Cue tiles and add to Role Centers



Reporting Options

- List Pages

- The capabilities below make each Page a virtual *real-time* “report”
- Filtering (+ Saved Filtered Lists) – [Learn Link](#)
- Sorting
- Share (Excel, Teams, Copy Link) – [Learn Link](#)
- Analyze Mode – [Learn Link](#)
 - Edit and Save multiple Analysis views
 - Excel
 - Copilot
- Requires access to BC and some level of knowledge on working with Pages



Reporting Options

- Power BI – [Learn Link](#)
 - Microsoft's flagship Business Intelligence solution, providing rich data visualizations and analysis capabilities.
 - For extensive dashboard with visualizations and real-time “slice and dice” functionality, Power BI is the best option.
 - Built-in and deployed with BC Online
 - “Power BI Report Packs” available on AppSource
 - Power BI Pro License required if an administrator is to design and deploy reports to users that are automatically refreshed and shared to a group of users.
 - Copilot features for Power BI?
 - Training and technical skills required to build dashboards and reports.



Reporting Options

- Web Services – [Learn Link](#)
 - Page
 - Query
 - Codeunit
- Create a New Data Set
- Consume via any app that supports the use of oData Feeds to supply the data (Excel, Power BI, other)
- *Is it possible to build a New Data Set and Power BI report in 5 minutes?*
 - *Not at this conference!*
 - Recorded video demonstrating the steps: <https://www.youtube.com/watch?v=qFpUWfgUCno>



Suggestions, Tips, & Tricks

- Be open to new ways to accomplish the same goal
 - Always ask “Why” when approaching a reporting requirement to drive the design of the report
- Leverage different reporting options for different requirements
 - Everything is not a nail, and a hammer is not our only tool.
- Use the Page “Inspect” tool to assist with designing reports
- Take advantage of the vast collection of training and demonstration videos available online



Suggestions, Tips, & Tricks

- Designing Reports

- Start with the “Why” and design the report to most quickly provide the key value within the output.
- Create a mockup manually in Excel to design the layout and calculations
- Include real data from BC in your Excel mockup to use for testing
- Include design notes, descriptions in the mockup and use Excel’s formulas to calculate values as needed in the actual report



Suggestions, Tips, & Tricks

- Building Reports

- Start simple, build as you go
- Trial and error in report building is OK
- But still, do all development and testing in a Sandbox environment first
- Include design notes, descriptions in the mockup and use Excel's formulas to calculate values as needed in the actual report
- Test by comparing mockup data to actual data



Suggestions, Tips, & Tricks

- Deploying Reports

- Build short user training videos instructing users on how to set up and use a new report. (make it easy to learn)
- Build a virtual “report library” (list quickly becomes unwieldy)
- Test and verify new reports by comparing mockup data to actual data
- Only deploy a new reporting solution to the Production environment after it has been tested and accepted in a Sandbox. (avoids potential issues and also saves a lot of time)



THANK YOU!

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