

Using a BI-DataMall® to get the most out of a MS Dynamics AX System

Business Intelligence in a Manufacturing Environment

“Our new MS Dynamics AX system was much easier to use than our old ERP system, but our business users still needed the flexibility to create their own reports when they needed them and in the format they needed them.” IT Manager



Situation

The customer recently implemented a Microsoft Dynamics AX ERP to replace their legacy ERP system. This solved many issues associated with the legacy system but the business users still needed a way to create ad hoc reports and analyze business information.

Although the IT department could produce reports using various Microsoft tools, users wanted the ability to generate their own reports, however, the tools used by IT were too technical for business users. In addition, the information model in Dynamics AX is designed to be most efficient as a transactional system. Transactional systems are designed for transaction updating. They are not designed to support management reporting, decision support or business intelligence systems. Data descriptors can be cryptic and unclear and the data structures are not grouped the way a business user wants the data to be modeled.

Customer Concerns

The customer knew that there were several risk factors:

- Dissipation of scarce budget resources if the benefits were not captured
- Loss of user confidence if the information was incorrect or difficult to retrieve
- Dissemination of wrong information would adversely affect business decisions

The customer had spent a substantial amount of their budget implementing their new system and couldn't afford to consume the remainder of the budget unless they were sure of success. They were also concerned that they had to choose a vendor that would be a long time player in the reporting tools arena that would keep their tools updated with new features and industry standards.

The Customer was concerned about the mapping process; specifically that the mapping and labeling of data, if done incorrectly, would result in erroneous business process reporting when accessed by the users. Although each division used the same basic ERP application, each system was implemented differently; i.e., how the data was labeled and stored depended on how the software was originally configured. So, they required support from someone who had the business expertise to find and interpret the information stored in the ERP systems – someone who had done it before.

The business users knew what information they wanted, but they needed someone that could create the proper data models that would be most efficient for each department or workgroup. They needed data models that would associate information in a business sense that would facilitate powerful reporting and analysis.

Solution

After reviewing multiple vendors that were selling their own tool sets, the customer brought in AccessIG, Inc., a Microsoft Certified Partner, as a member of the team to help mitigate the risks and to accelerate the capturing of the benefits. Because AccessIG had ex-

The business users were still asking for an ability to create and disseminate their own reports with easy to use, industry standard tools. Users were expecting an easy to use solution, delivered in a web browser, using the Microsoft desktop tools with which they already were familiar.

The customer is a leading, hi-tech manufacturer with multiple product lines and multiple market segments.



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tensive business experience the customer did not have to script each step. AccessIG personnel could easily discuss business situations and information requirements with the users as well as make suggestions that better leveraged the solution. And, based on their extensive experience, they brought valuable “best practices” experience that their customer could draw upon.

As a result, the customer gained faster benefits at a lower cost due to:

- the acceleration of the process improvements/prototyping phase
- the acceleration of the identification of the cost/benefit
- the acceleration of the identification of avoidable risk

AccessIG recommended using Microsoft technologies as a BI solution for their Dynamics systems. Since Microsoft is a recognized major provider of BI and reporting tools the customer agreed that that was their best path to assure success now and in the future. Not only was the customer assured of industry standard, feature rich tools sets and enhancements for years to come, the solution was less expensive than proprietary tools sets that were offered by the other vendors.

Using AccessIG, the customer implemented a BI-DataMall® solution, (a separate relational database implementation where information from disparate systems can be stored in a format that is easily accessed by users) based on Microsoft SQL Server technologies. Data was automatically extracted from the Dynamics ERP system on a scheduled basis and combined into a single BI-DataMall. Information was labeled with a common identifier in order to eliminate the problems associated with individual ERP configurations. Now users could analyze information for either a single division or across the entire business unit.

The BI-DataMall, through NT authentication, provided multiple levels of security with a single sign on so the security implementation was transparent to the users and required no additional training.

With their extensive business experience, AccessIG helped the customer create several data models that were easily understood and highly valued by the business users. AccessIG was able to suggest and implement useful designs that would support business requirements the customer had not anticipated.

The BI-DataMall automatically monitored data updates and if failure occurred users were presented with “updated as of” times so they were always informed as to the timing of the information. This helped users to have confidence in the integrity of the reports. Critical personnel were notified by email if failure did occur.

A SharePoint site was established for publishing and sharing the information. Microsoft Office SharePoint provides a single, integrated location where employees can efficiently collaborate with team members, find organizational resources, search for experts and corporate information, manage content and workflow, and leverage business insight to make better-informed decisions

Benefits

- The business users were able to create ad hoc reports when they needed them and in the format they needed
- The customer enjoyed a low risk, low cost path that ensured fast benefits
- Selecting Microsoft as the tools supplier ensures that the customer’s investment is protected and the value will grow
- Information is consolidated and structured in a business model for easy reporting and analysis
- Customer has multiple options for creating and distributing reports; i.e., automatically generated, one time, published, e-mailed, etc.