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- To ask a question during the meeting, launch the Q&A Manager located on the toolbar at the top of your screen
- To download a copy of today’s presentation, click on the Handouts icon located on the toolbar at the top of your screen
  - The presentation and link to the event recording will be sent to all participants following the event
- Today’s presentation will be recorded
Agenda

- What is Actionable Data?
- Creating Actionable Data
- Reminders
- ERP Export Solutions
- Excel Refreshable Reports
- Excel Refreshable Reports – Dashboards
- SSRS Reports
- Business Analyzer
What's your familiarity with Microsoft Dynamics GP?

- Installed on version GP 2013
- Installed on version 2010 or earlier
- Evaluating it for my next ERP solution
- None

[ Poll 1 ]
What is Actionable Data?

- It’s accurate information that is reliable, valid and relevant
- It is data that has been collected for a clear purpose
- It’s data collection using the right tools
- It answers the question for which it was intended
- It’s data that is interesting but the data must contribute meaningfully to understanding whether something is working or not, and how to make improvements, course changes or corrections, or innovations
- To be effective it requires Stakeholders or Decision makers to grant themselves the time and energy to consider and use it
What should I consider when creating Actionable Data?

- Who will be using the Actionable Data?
- Discuss with the end-user(s) how the data will be used
- What does the end product look like? Is it a spreadsheet, a graph or a chart?
- Where is it going to be delivered? Email, Sharepoint site, ERP, on Business Analyzer, or published to a Shared folder
- How can I leverage the data I already have?
- When creating a project plan around deployment don’t forget to include a TESTING phase?
- Finally, what tools do I have in my ERP system to create Actionable Data?
How do your executives access KPIs and metrics today?

- Polls are open.
- Within our ERP system
- Using Microsoft Excel
- Paper reports
- Other
- All of the above
- Don't know

[ Poll 2 ]
Reminders for the Dynamics GP User

- Leverages a popular tool included in Dynamics GP called Smartlist
- Set up actionable items right from your Dynamics GP home screen
- Great tool for someone who spends limited time within the ERP system
Dynamics GP Reminders

DEMO
ERP Export Solutions

- Leverages a popular tool included in Dynamics GP is called SmartList
- Use the SmartList Export Solution to export from a SmartList to create an Actionable Pivot Table or Pivot Chart
- Allows you to record a Macro to manipulate SmartList Data quickly
ERP Export Solutions

DEMO

ERP Export Solutions
Excel Refreshable Reports

- Excel Refreshable Reports include a 'live' connection to Dynamics GP that you do not have to be in Dynamics GP to update.
- You can open your excel report and refresh at any time.
- Save with your own modifications and maintain the ability to refresh.
- Available out of the box with Dynamics GP2010 or later.
- User does not need a Dynamics GP License to view.
Excel Refreshable Reports

DEMO

Excel Refreshable Reports
Excel Refreshable Reports – Dashboards

- Newly available in Dynamics GP 2013 R2. Requires Office 2013 for drill down capability
- Included with Excel Reports deployment
- Pre-built, refreshable Excel dashboards with drill down to detail in Excel
- Available for Financial, Purchasing, Inventory, and Sales
- Can be modified to add or remove content as you see fit
- User does not need a Dynamics GP license to view
Excel Refreshable Dashboards

DEMO

Excel Refreshable Dashboards
How much do you rely on Microsoft Excel for actionable data?

Polls are open.

- Less than 25% of my reports are in Excel
- 26-50% of my reports are in Excel
- More than 50% of my reports are in Excel
- Don't know

[ Poll 3 ]
SQL Server Reporting Services

- Internet based reports on your Dynamics GP data. (Do not need a Dynamics GP License)
- Create custom reports or modify the existing reports to fit your needs
- Easy export to Excel
- User does not need a Dynamics GP license to view
SQL Server Reporting Services

DEMO
Business Analyzer

- **Gross profit**
  - **Actual cost**: $118,667
    - Previous value: +1.11%
    - Forecast: +2.02%
  - **Actual gross profit**: $66,750
    - Previous value: +5.87%
    - Forecast: +2.67%
  - **Actual revenue**: $185,417
    - Previous value: +36.74%
    - Forecast: +36.28%

- **McGladrey**
What is it?

- Part of the Dynamics GP 2013 home page
- Stand alone Dynamics GP 2013 app
- Windows 8 Companion application
- iPad app?
- Business Intelligence for Dynamics GP
- Window to SSRS Charts/KPI's
- User doesn’t need a Dynamics GP license to view
Business Analyzer

DEMO
Are you planning to move to a now-generation business application?

Polls are open.

- Yes, within six months
- Yes, six months to one year
- Yes, more than a year
- No plans
- Don't know

[ Poll 4 ]
Q & A

- Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the “Ask” button.
- The slides and recording of this call will be sent to attendees for today’s program.
Learn how new technology platforms can change how you do business

- Now-generation business application series continues
  - Collaboration in the cloud on Nov 18
  - Automating exception management on Nov 20
- Register at www.mcgladrey.com/events
Thank you for attending

- The presentation slides and a link to the call recording will be sent to all participants within a few days of the webinar

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