



Business Analyzer

Release 2015

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Introduction

Business Analyzer Overview

Business Analyzer in Microsoft Dynamics® SL provides a way for users to view Microsoft Excel spreadsheets in a network location or on a SharePoint site, SQL Server Report Services (SSRS) reports, and Microsoft Dynamics Management Reporter reports without requiring that Microsoft Dynamics SL be installed locally. It provides business decision makers with a dashboard that they can use to gain contextual business intelligence by viewing up-to-date reports pulled from Microsoft Dynamics SL. This dashboard can be accessed from multiple computers and devices, such as Android tablets, and iPad, and Windows Surface.

User's Guide Overview

This user's guide provides information about the setup and use of Business Analyzer. Reviewing the user's guide can help you make informed decisions about the implementation of Business Analyzer in your business.

What is Covered in the User's Guide?

The user's guide consists primarily of procedures and checklists that describe how to perform the various tasks featured in Business Analyzer. The user's guide also contains topics that help you become better acquainted with the capabilities of the module. Topics are arranged in a logical order that builds on information previously presented in other Microsoft Dynamics SL user's guides.

Who Should Use the User's Guide?

The user's guide is designed for readers who are new to Microsoft Dynamics SL. The guide provides the information that you need for making decisions about how to use Business Analyzer to benefit the most from your system.

How to Use the User's Guide

Read the appropriate section of the user's guide before you continue with any system customizations. The user's guide presents the procedures and steps required for completing the various customization processes. To help you locate information, the user's guide contains:

- A table of contents of logically organized activities and tasks.
- An alphabetized "Quick Reference Task List" of frequently performed tasks.
- An alphabetized index of the information that is provided in the user's guide.

Implementation Checklist

The following checklists can be used as a guide when completing a Business Analyzer implementation.

Windows 8/8.1 computers, Windows Surface, iPad, and Android

Implementation Setup Steps	Assigned To	Date Required	Date Completed	Comments
<p>Create <i>at least one</i> type of data that you want to connect to Business Analyzer. You can create all three if you want.</p> <ul style="list-style-type: none"> • SQL Server Reporting Services Reports: Complete the Implementation Checklist in the Microsoft Dynamics SL SQL Server Report Server user's guide to deploy the Microsoft Dynamics SL SSRS reports onto a server. • Microsoft Excel spreadsheets (choose one): <ul style="list-style-type: none"> • Install and configure SharePoint onto a server. Create a document library that will hold Microsoft Excel spreadsheets. • Configure SharePoint Online • Create and share a network folder • Microsoft Dynamics Management Reporter: Install and configure Microsoft Dynamics Management Reporter onto a server. Create and generate reports. 				
Install the Microsoft Dynamics Companion Application Services onto a server.				
Configure the Companion Application Services on the server.				
Install the Business Analyzer app onto each Windows 8\8.1 computer, Windows Surface, iOS, or Android device.				

Windows 7/Windows Server 2008 R1 computers

Implementation Setup Steps	Assigned To	Date Required	Date Completed	Comments
(optional) Install Microsoft Lync 2010 or later versions				
Complete the Implementation Checklist in the <i>Microsoft Dynamics SL SQL Server Report Server</i> user's guide to deploy the Microsoft Dynamics SL SSRS reports onto a server.				
Install and deploy the Business Analyzer client onto the user's computers.				
(optional) Assign Microsoft Lync contacts to reports for discussion purposes				

Task Guidelines

Quick Reference Task List

This list contains tasks that are frequently performed by using the Business Analyzer module. Each task is cross-referenced to a specific page in the user's guide.

How Do I Install...?

- Business Analyzer – see Business Analyzer on page 16.
- Prerequisites – see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.

How Do I Use...?

- Business Analyzer on Windows 8/Windows Server 2012 – see *Microsoft Dynamics Business Analyzer* on MSDN (go.microsoft.com/fwlink/?LinkId=509906).
- Business Analyzer on Windows 7/Windows Server 2008 R2 – see Using Business Analyzer on page 25.

How Do I ... for Business Analyzer on Win7/WS2008R2...?

How Do I Assign...?

- Permissions – see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.
- Microsoft Lync contacts to reports – see Assigning reports to contacts on page 24.

How Do I Associate...?

- Users with Groups – see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.

How Do I Change...?

- The Report Web Service URL – see Changing the Business Analyzer Client Configuration on page 31.

How Do I Create...?

- Roles – see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.
- Custom KPIs – see Creating Custom KPIs on page 29.
- Custom Reports – see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.

How Do I Configure...?

- User Settings – see Selecting user settings for Business Analyzer on page 21.
- Report Settings – see Selecting report settings for Business Analyzer on page 22.

How Do I Import/Export...?

- Import reports into a company – see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.
- Export reports from a company – see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.

Installation

Two distinct ways to connect Business Analyzer to your data are available, depending on the operating system of the user who needs to use Business Analyzer. Apps are available for Windows 8/Windows Server 2012 and later versions, iOS, and Android. A client dashboard is available for Windows 7 SP1/Windows Server 2008 R2. A mixture of the two ways to connect to Business Analyzer across your organization is supported.

Business Analyzer on Windows 8/Windows Server 2012, iOS, and Android

System Requirements

The following is a list of minimum system requirements if you want to use Business Analyzer on a Windows 8/Windows Server 2012 or later computer. These requirements also apply to using Business Analyzer with a device that runs Windows 8, iOS, or Android.

You can use Programs and Features in Control Panel to verify that the required components are installed on your computer. If a component is not installed, you can download the component from www.microsoft.com.

For current system requirements for Microsoft Dynamics SL and Business Analyzer, see mbs.microsoft.com/customersource/northamerica/SL/learning/documentation/system-requirements/.

Item	Requirements
Microsoft® SQL Server®	Microsoft SQL Server 2012 Microsoft SQL Server 2014
SQL Server Reporting Services	Reporting Services 2012 Reporting Services 2014
Report Builder	Report Builder 3.0 or later versions
Operating System	Windows 8 Windows 8.1 Windows Server 2012 Windows Server 2012 R2
SharePoint (optional)	Microsoft SharePoint Foundation 2010 Microsoft SharePoint Server 2010
Web browser (client)	For a complete list of web browsers compatible with SSRS, see technet.microsoft.com/en-us/library/ms156511.aspx
Microsoft Dynamics® SL (server)	Microsoft Dynamics SL 2015 with Windows Authenticated databases
Microsoft Dynamics Management Reporter (optional)	Microsoft Dynamics Management Reporter 2012 CU10
Runtime components	Installing the Microsoft Dynamics Companion Application Services automatically installs the following components, if they are not already on your computer. <ul style="list-style-type: none"> - Microsoft Visual C++ 2012 Redistributable (x86) - 11.0.61030 - Microsoft Visual C++ 2012 Redistributable (x64) - 11.0.61030 - Microsoft SQL Server Compact 4.0 SP1 x64 ENU

Prerequisites

Before you install the Business Analyzer Companion App Services, you must set up the sources that you want to use in Business Analyzer. You can set up all three sources, but the minimum is one source.

Microsoft Excel

- Set up a folder on the server where you will keep the Excel files that you want available in Business Analyzer.

The format should be: *Drive:\SharedFolder\<CompanyFolder>\<Category>\FileName.XLSX*

The UNC path for the share should be: [\\servername\SharedFolder](#)

- *CompanyFolder* is the value that appears in Business Analyzer's Company list. For clarity in Business Analyzer, we suggest that you name this folder something different than your Microsoft Dynamics SL application database name. This is because SSRS already uses the application database name.
 - Business Analyzer does not support files with the .XLS extension, only .XLSX.
- Share this folder with the users that need access to the files.

Management Reporter

- Install Microsoft Dynamics Management Reporter
- Integrate Management Reporter with Microsoft Dynamics SL
- Note the Management Reporter URL, the default is <http://servername:4712>

Note: Create an Inbound Rule in Windows Firewall to allow access to this port number. The Companion App Services will need access through this port number.

- Create reports, give users at least view rights, and then publish the reports.

SQL Server Reporting Services

- Install and configure SQL Reporting Services 2012 or SQL Reporting Services 2014
- Deploy Microsoft Dynamics SL Reporting Services reports
- Set up security for SQL Reporting Services reports by using Reporting Services Configuration Manager. This server must be available for the Business Analyzer clients to connect.

For detailed steps, see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.

Server Computer

The Companion Application Services Configurator must be installed and configured on the server computer, often the same computer where the Microsoft Dynamics SL SSRS reports are deployed.

To install the companion app services configurator, follow these steps:

1. Run the setup.exe file that is located in the \Business Analyzer folder of the Microsoft Dynamics SL installation package.

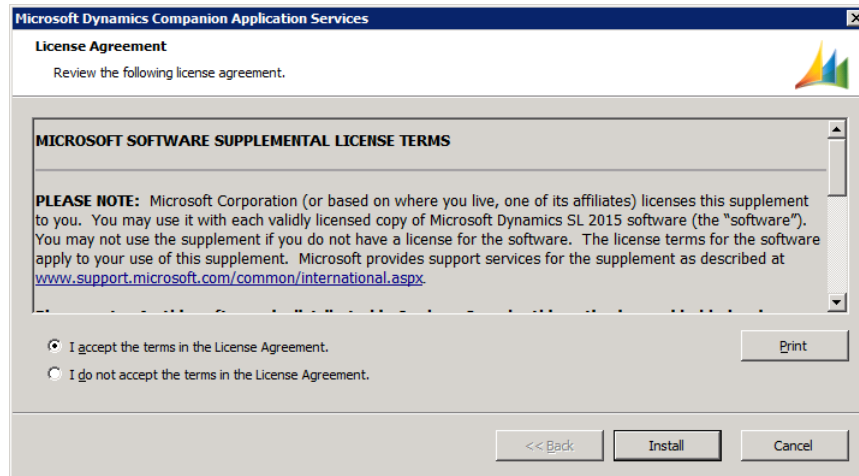


Figure 1: Microsoft Dynamics Companion Application Services, License Agreement

2. License Agreement appears. Select **I accept the terms in the License Agreement**, and then click **Install**.

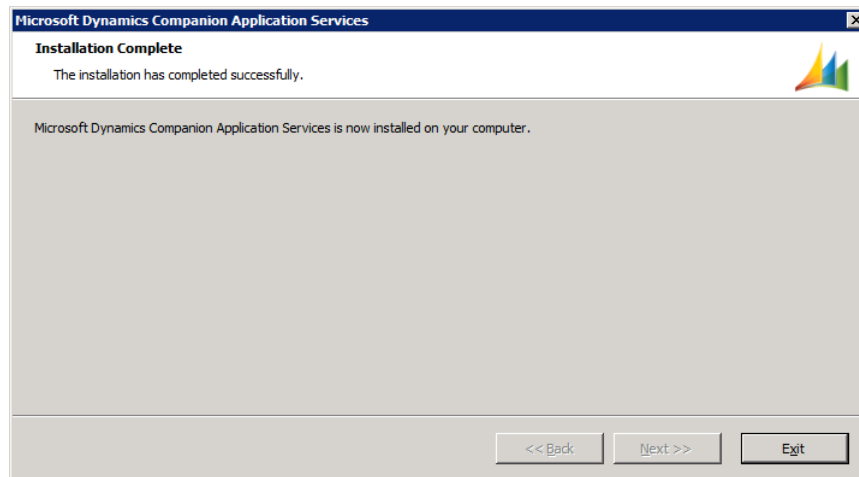


Figure 2: Microsoft Dynamics Companion Application Services, Installation Complete

3. When installation is complete, click **Exit**.

To configure the companion app services configurator, follow these steps:

1. Open **Companion App Services** from the list of installed programs on the computer.
2. *Welcome* appears with the default connection information.

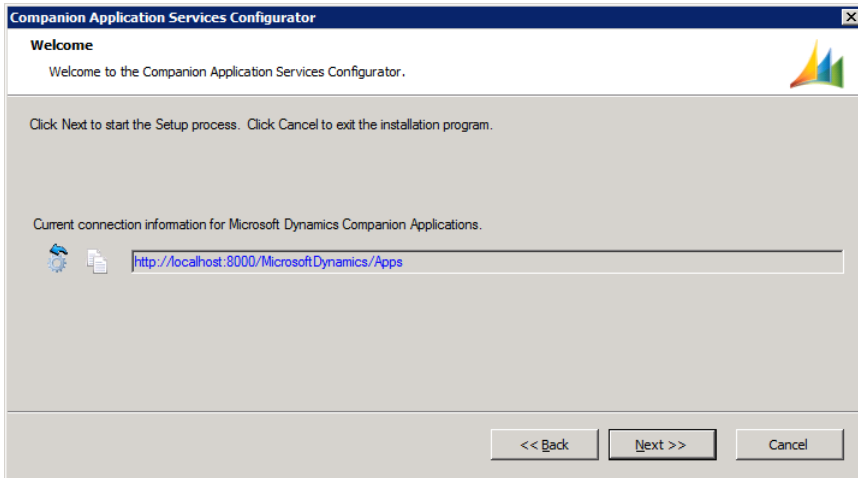


Figure 3: Companion Application Services Configurator, Welcome

3. Click **Next**.
Windows Azure appears, do not change the default.

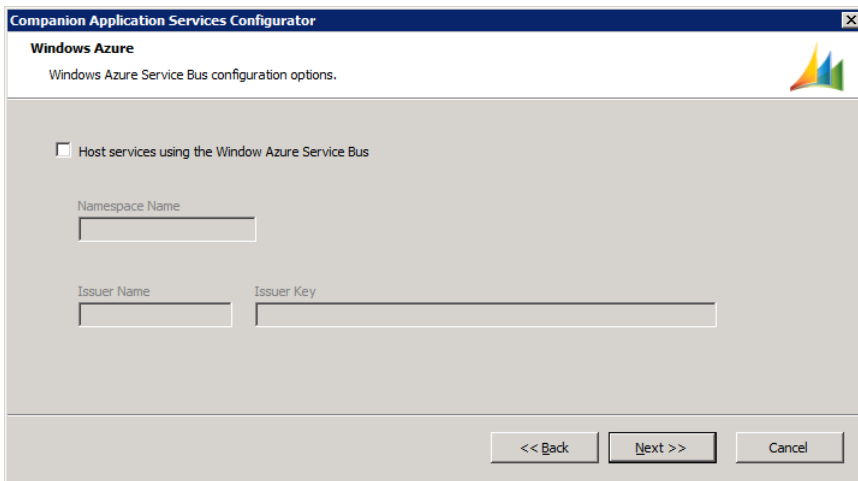


Figure 4: Companion Application Services Configurator, Windows Azure

4. Click **Next**.

Host Configuration appears.

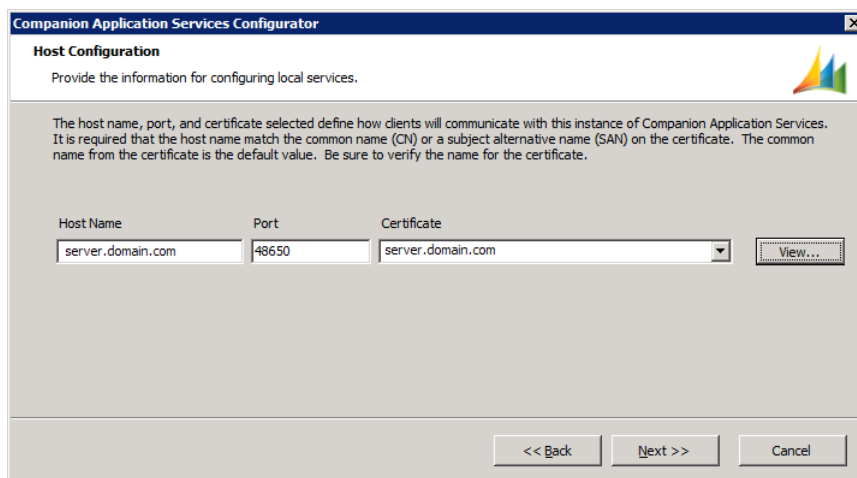


Figure 5: Companion Application Services Configurator, Host Configuration

- a.) In **Host Name**, specify the name of the local server where you are installing the Companion Application Service.
- b.) The **Port** contains a default value. You can change it if you need to.

Note: Make sure to create an Inbound Rule in Windows Firewall to allow access to this port number. The clients that you install later will need access through this port number.

- c.) The **Certificate** contains a default value. Create a certificate in IIS if you do not already have one created.
- d.) Click **Next**.

Select Applications appears.

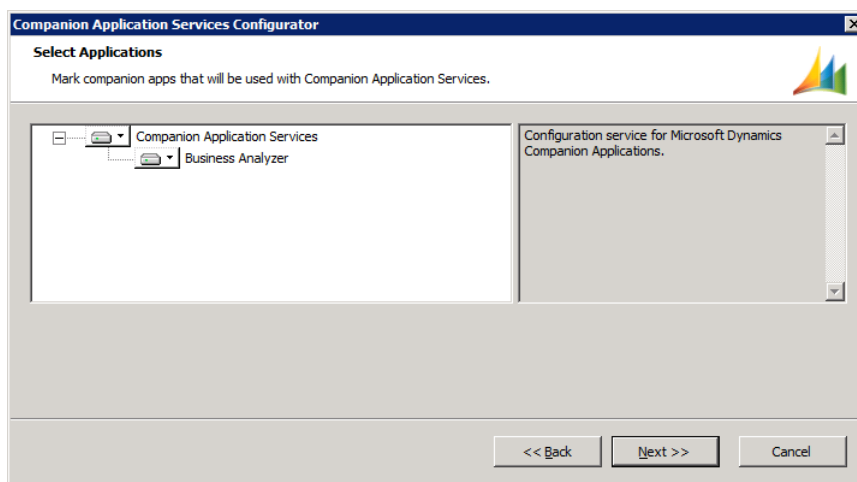


Figure 6: Companion Application Services Configurator, Select Applications

5. Accept the default selections, and then click **Next**.

Data Connections appears.

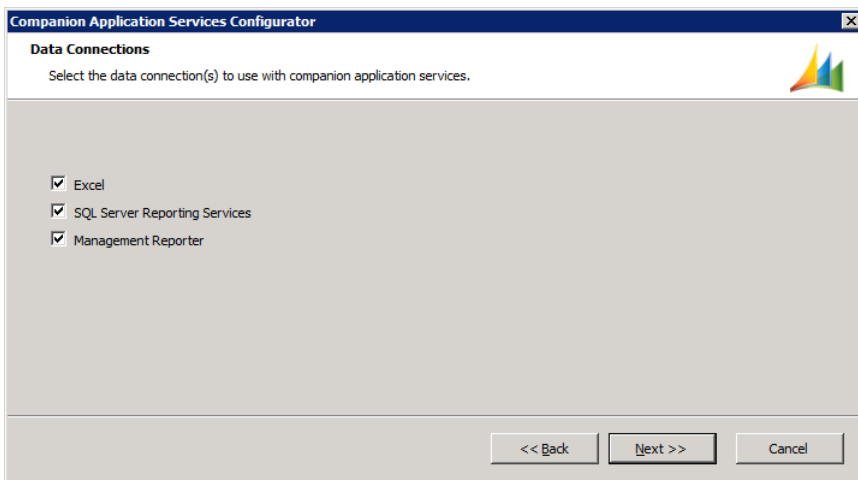


Figure 7: Companion Application Services Configurator, Data Connections

6. You can view and access three types of data within Business Analyzer. Select the check box next to each type of data connection that you want to use. Then, click **Next**.

Microsoft Excel Reports appears.

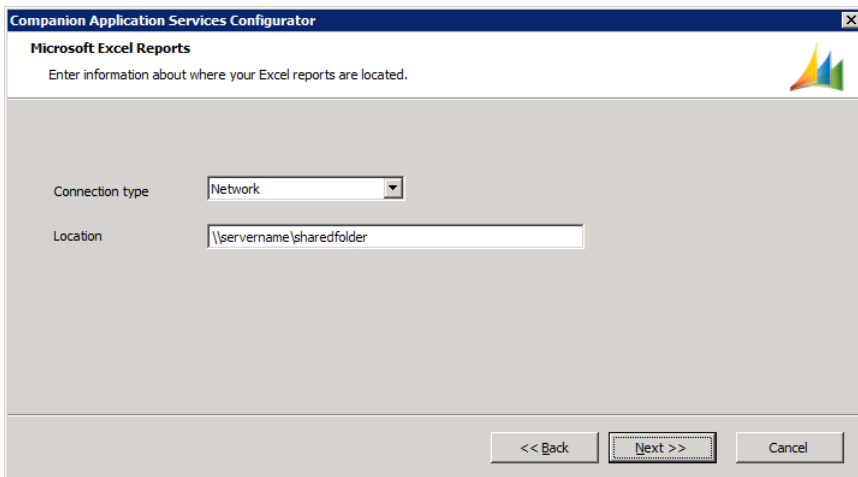


Figure 8: Companion Application Services Configurator, Microsoft Excel Reports, Network

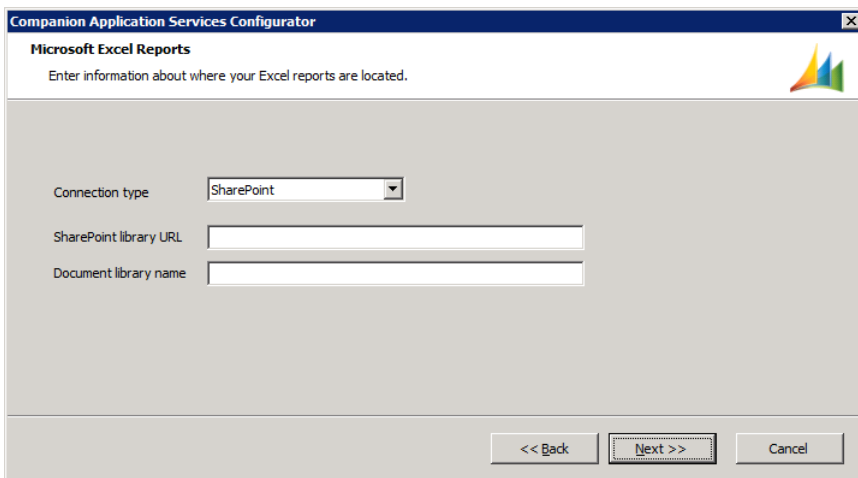


Figure 9: Companion Application Services Configurator, Microsoft Excel Reports, SharePoint

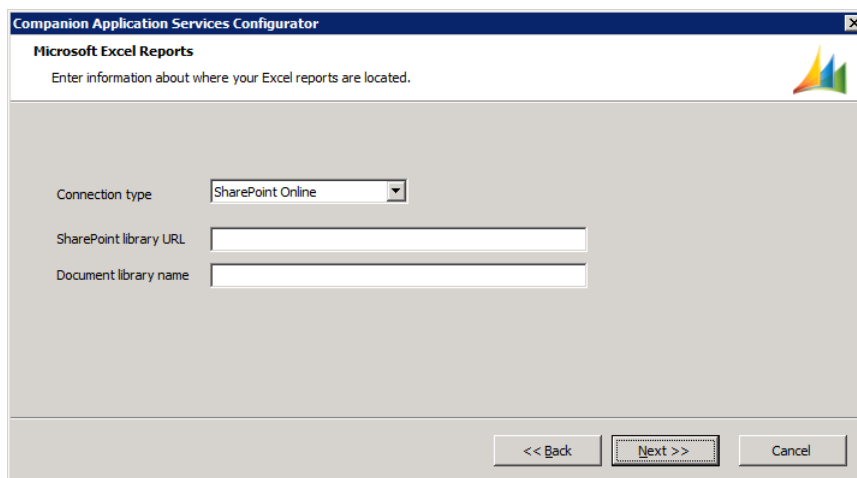


Figure 10: Companion Application Services Configurator, Microsoft Excel Reports, SharePoint Online

7. Select the type of connection to your Microsoft Excel reports and specify the connection information.
 - **Network** – in **Location**, specify the UNC path of a shared directory where you plan to store the Microsoft Excel reports. Use the `\\servername\foldername` format.
 - **SharePoint** – in **SharePoint library URL**, specify the address of the SharePoint library. In **Document library name**, specify the name of the document library.
 - **SharePoint Online** – in **SharePoint library URL**, specify the address of the SharePoint library. In **Document library name**, specify the name of the document library.
8. Then, click **Next**.
SQL Server Reporting Services Server Location appears.

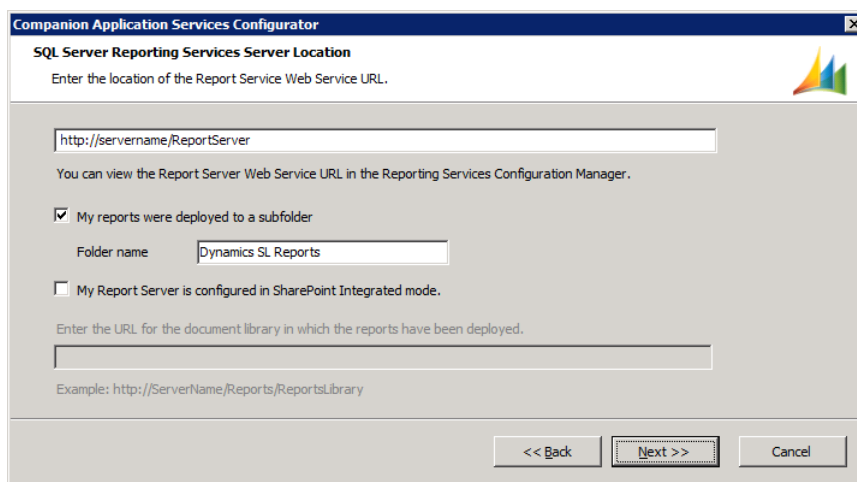


Figure 11: Companion Application Services Configurator, SSRS Server Location

- a.) Type the URL for the Report Server. Most often, this exists on a server computer and is formatted in a way that resembles the following: `http://servername/ReportServer`
 - b.) If your SSRS reports are deployed to a subfolder, select **My reports were deployed to a subfolder**, and then specify the name of the folder. The default folder name is “Dynamics SL Reports.”
 Otherwise, if you are using SharePoint Integrated mode, select **My Report Server is configured in SharePoint Integrated mode**, and then specify the URL for the document library.
9. Click **Next**.

Microsoft Dynamics Management Reporter Reports appears.

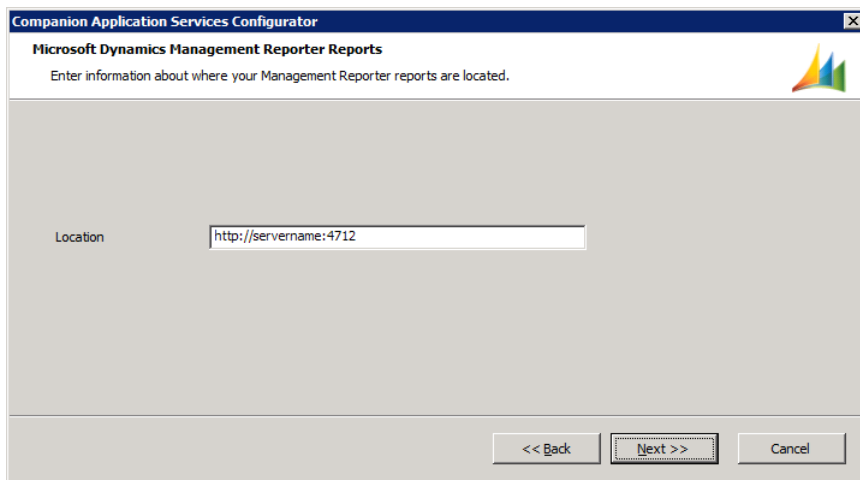


Figure 12: Companion Application Services Configurator, Microsoft Dynamics MR Reports

10. In **Location**, specify the location of your Microsoft Dynamics Management Reporter reports. Then, click **Next**. Enter the credentials you used to install Management Reporter, in domain\username format, and then click **OK**.

Configuration Complete appears.

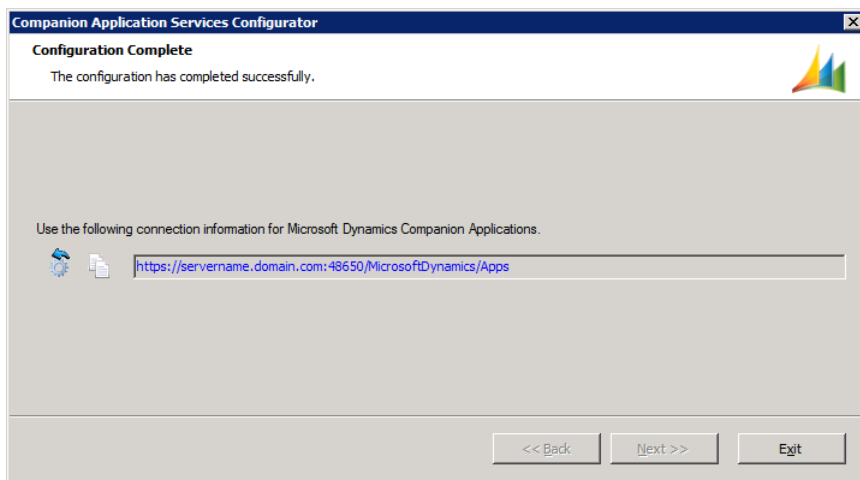


Figure 13: Companion Application Services Configurator, Configuration Complete

11. Make note or copy the URL that is displayed, and then click **Exit**.

Note: This URL is not designed to be accessed in a web browser.

Business Analyzer App

The Microsoft Dynamics Business Analyzer app must be installed and configured on the computer, Windows tablet, iOS device, or Android device of each user who wants to use Business Analyzer.

Windows 8/8.1 App, Windows Surface

Follow these steps to install and configure the Business Analyzer App on Windows 8/8.1 or Windows Server 2012/2012R2 computers or devices, including Windows tablets.

To install the Business Analyzer App, follow these steps:

1. Go to the Windows App Store on the computer or device where you want to install the app.
2. Search for and locate the **Microsoft Dynamics Business Analyzer** app.
3. Download the app, using a Windows Live ID if prompted for an account name and password.
4. Allow the Windows Store to install the app.

To configure the Business Analyzer App, follow these steps:

1. Open the Business Analyzer app.
2. Press **WIN+I** to open *Settings*. Or, hover at the lower-right of the screen and select **Settings**.
3. Click **Configuration**.
 - a.) Toggle **Sample Report Mode** to **Off**.
 - b.) Type the user's name in **User Name**, in the domain/username format.
 - c.) Type the user's password in **Password**.
 - d.) In **Service Connection**, specify the URL that you noted previously in Step 11.
4. Click **Connect**.
5. A Microsoft Dynamics SL application database name is displayed in the upper-right corner of the app after a successful configuration.
6. When you right-click within the app, the Home and Company menus appear. Within the Company menu, if you configured the source, you see each Excel "CompanyName" folder, each application database in SSRS, and "Multicompany" for Management Reporter.

Note: For information about using the Microsoft Dynamics Business Analyzer app, see go.microsoft.com/fwlink/?LinkId=509906 and go.microsoft.com/fwlink/?LinkId=330401.

Business Analyzer for Windows 7 and Windows Server 2008 R2

System Requirements

The following is a list of minimum system requirements if you want to use Business Analyzer on your desktop.

You can use Programs and Features in Control Panel to verify that the required components are installed on your computer. If a component is not installed, you can download the component from www.microsoft.com.

For current system requirements for Microsoft Dynamics SL and Business Analyzer, see mbs.microsoft.com/customersource/northamerica/SL/learning/documentation/system-requirements/.

Item	Requirements
Microsoft® SQL Server®	Microsoft SQL Server 2012 Microsoft SQL Server 2014
SQL Server Reporting Services	Reporting Services 2012 Reporting Services 2014
Report Builder	Report Builder 3.0 or later versions
Operating System	Windows 7 SP1 Windows Server® 2008 R2
SharePoint (optional)	Microsoft SharePoint Foundation 2010 Microsoft SharePoint Server 2010
Web browser (client)	For a complete list of web browsers compatible with SSRS, see technet.microsoft.com/en-us/library/ms156511.aspx
Unified Communications (optional)	Microsoft Lync 2010
Microsoft Dynamics® SL (server)	Microsoft Dynamics SL 2015 with Windows Authenticated databases
Runtime components	Installing Business Analyzer automatically installs the following components, if they are not already on your computer. <ul style="list-style-type: none"> - Microsoft Lync 2010 SDK Runtime - Microsoft Windows Installer 5.0 - Microsoft .NET Framework 4.0

Prerequisites

Before you install the Business Analyzer, you must:

- Install and configure SQL Reporting Services 2012 or SQL Reporting Services 2014
- Deploy Microsoft Dynamics SL Reporting Services reports
- Set up security for SQL Reporting Services reports by using Reporting Services Configuration Manager. This server must be available for the Business Analyzer clients to connect.

For detailed steps, see the *Microsoft Dynamics SL SQL Server Report Server* user's guide.

Client Installation

Follow these steps to install and configure Business Analyzer on your Windows 7 SP1 or Windows Server 2008 R2 computer.

This Business Analyzer client lets you connect users who have Windows 7 SP1 or Windows Server 2008 R2 computers to the same set of Microsoft Dynamics SL SSRS reports as the users who have Windows 8/8.1 or Windows Server 2012/2012 R2.

This Business Analyzer client does not support connections to Microsoft Excel on a network location or SharePoint, or connections to Microsoft Dynamics Management Reporter.

To install Business Analyzer, follow these steps:

1. Exit Microsoft Lync if it is running on the computer.
2. Run the setup.exe file that is located in the \Business Analyzer\Win7 folder of the Microsoft Dynamics SL installation package.

The *Microsoft Software License Terms* for Microsoft Lync 2010 SDK Redistributable appears.

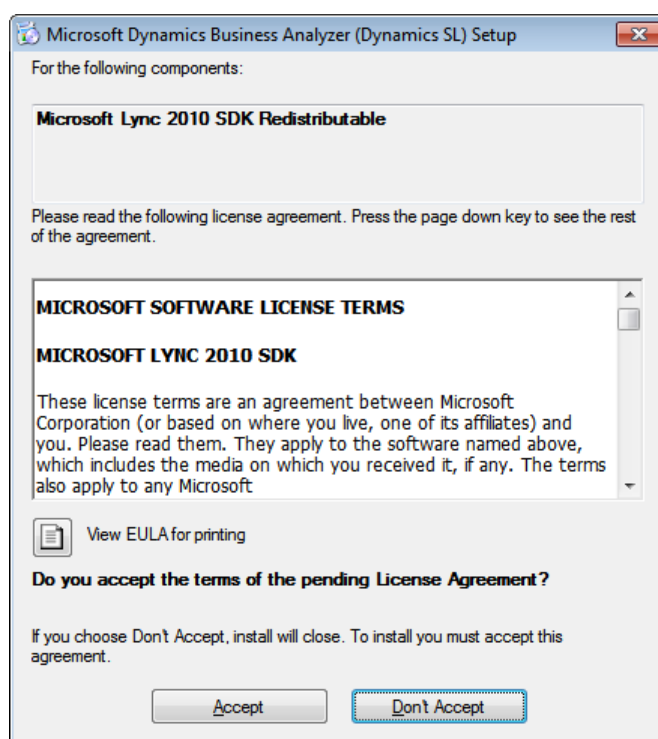


Figure 14: Microsoft Dynamics Business Analyzer (Dynamics SL) Setup, license terms for Microsoft Lync 2010 SDK Redistributable

3. Click **Accept** if you agree to the license terms for Microsoft Lync 2010 SDK Redistributable and want to continue. Otherwise, click **Don't Accept**, and the program ends.

The *Microsoft Dynamics Business Analyzer (Dynamics SL) Setup Wizard* appears.

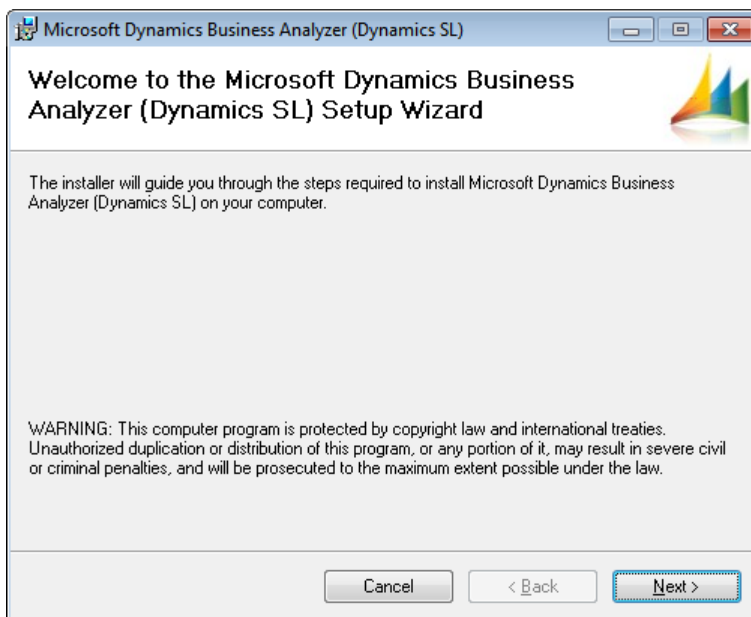


Figure 15: *Microsoft Dynamics Business Analyzer (Dynamics SL) Setup Wizard, Welcome*

4. Click **Next**. *License Agreement* appears.
5. Select **I Agree**, and then click **Next** if you want to accept the License Agreement for Microsoft Dynamics SL and continue. Otherwise, select **I Do Not Agree**, and the program ends.

If you accepted the License Agreement, *Select Installation Folder* appears.

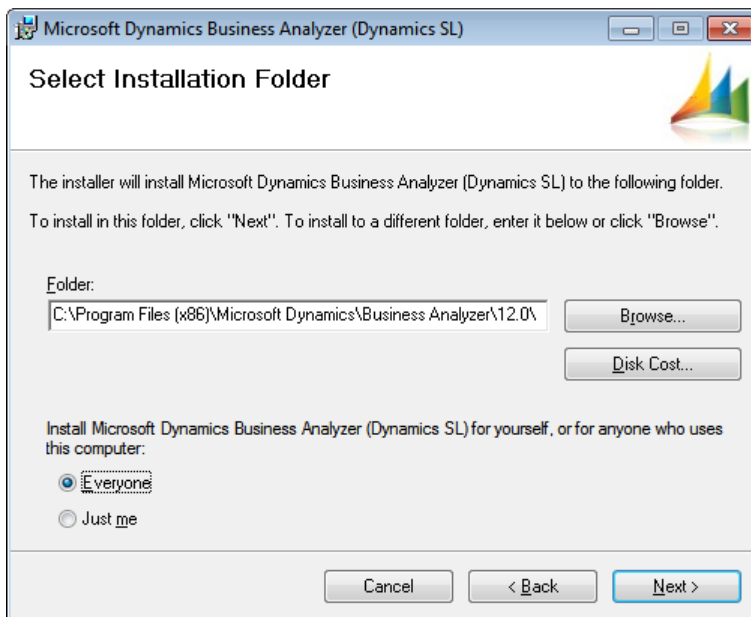


Figure 16: *Microsoft Dynamics Business Analyzer (Dynamics SL) Setup Wizard, Select Installation Folder*

6. Accept the default folder, or click **Browse** to specify a different folder.
7. Select whether to make Business Analyzer available to **Everyone** or **Just me**, and then click **Next**.

Confirm Installation appears.

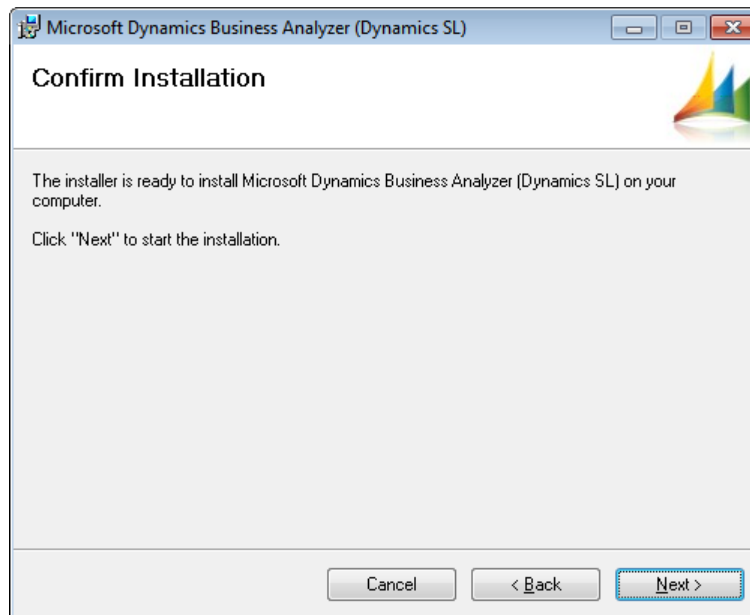


Figure 17: Microsoft Dynamics Business Analyzer (Dynamics SL) Setup Wizard, Confirm Installation

8. Click **Next**.

When the installation is finished, *Installation Complete* appears.

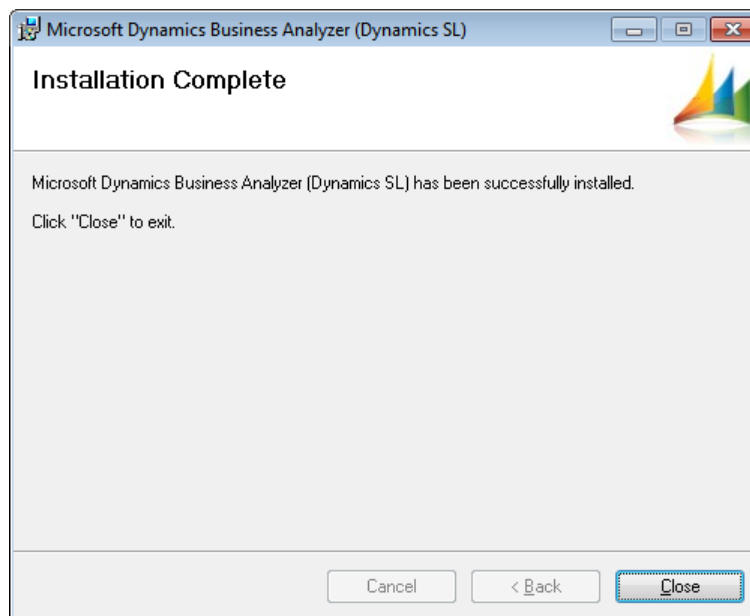


Figure 18: Microsoft Dynamics Business Analyzer (Dynamics SL) Setup Wizard, Confirm Installation

9. Click **Close**.

To configure Business Analyzer, follow these steps:

1. Run the Microsoft.Dynamics.SL.BusinessAnalyzer.Configuration.exe file from the location where you installed Business Analyzer. The default location is as follows: Program Files\Microsoft Dynamics\Business Analyzer\12.0\

Microsoft Dynamics Business Analyzer - Dynamics SL Client Configuration appears.

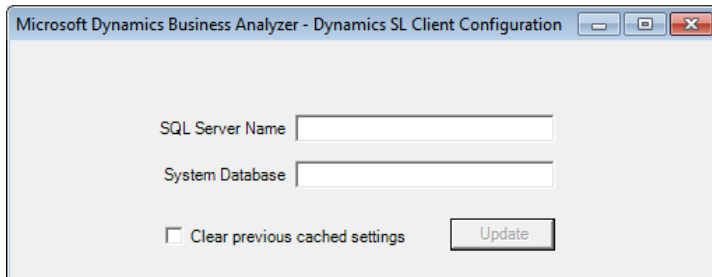


Figure 19: Microsoft Dynamics Business Analyzer (Dynamics SL) Setup Wizard, Confirm Installation

2. In **SQL Server Name**, specify the name of the SQL Server where the Microsoft Dynamics SL system database exists.
3. In **System Database**, specify the name of the Microsoft Dynamics SL system database.
4. (Optional) Click to select the **Clear previous cached settings** check box if you want to remove any previously saved settings.
5. Click **Update**.
6. After process is completed successfully, click **OK**, and then close the window.
7. Start Microsoft Lync 2010.

Silent Mode Options

You have the option to run the installation of Microsoft Lync 2010 SDK runtime and Business Analyzer, and the setup in Microsoft Dynamics SL Business Analyzer Configuration, or all three, in silent mode.

To use the silent mode option, run one or more of the following statements at a command prompt:

- Microsoft Lync 2010 SDK runtime (default location \Business Analyzer\Lync2010SDK)
`Lync2010SDKRedist.msi /quiet`
- Business Analyzer (default location \Business Analyzer)
`Setup.msi /quiet`
- Microsoft Dynamics SL Business Analyzer Configuration (default location \Program Files\Microsoft Dynamics\Business Analyzer\12.0)
`Microsoft.Dynamics.SL.BusinessAnalyzer.Configuration.exe /S{SQLServer}
/D{SLSystem} /C`
 'Replace *SQLServer* with the name of the instance of SQL Server
 'Replace *SLSystem* with the name of the Microsoft Dynamics SL system database
 'Note that /C is optional

Starting Business Analyzer

Click **Start**, point to **All Programs**, and then click **Microsoft Dynamics Business Analyzer** to run Business Analyzer.

The *Microsoft Dynamics Business Analyzer Configuration* window appears the first time that you start Business Analyzer. For more information about how to set up Business Analyzer, see Appendix: Using Business Analyzer for Windows 7/Windows Server 2008 R2 on page 21.

Appendix: Using Business Analyzer for Windows 7/Windows Server 2008 R2

Configuration

Use the following information to select user preferences to view reports, select which report to display in Business Analyzer, and assign reports to contacts in Microsoft Lync by using the Microsoft Dynamics Business Analyzer Configuration window. The Microsoft Dynamics Business Analyzer Configuration window appears the first time that you start in to Business Analyzer.

Selecting user settings for Business Analyzer

The User Information page in the Microsoft Dynamics Business Analyzer Configuration window lets you define your user preferences for reports. You can select your role, how frequently reports are refreshed, and the size of the reports displayed in Business Analyzer.

To select user settings for Business Analyzer, follow these steps:

1. Open the Microsoft Dynamics Business Analyzer Configuration window. The window appears automatically the first time that you start Business Analyzer. Or, select **Options** from the window.

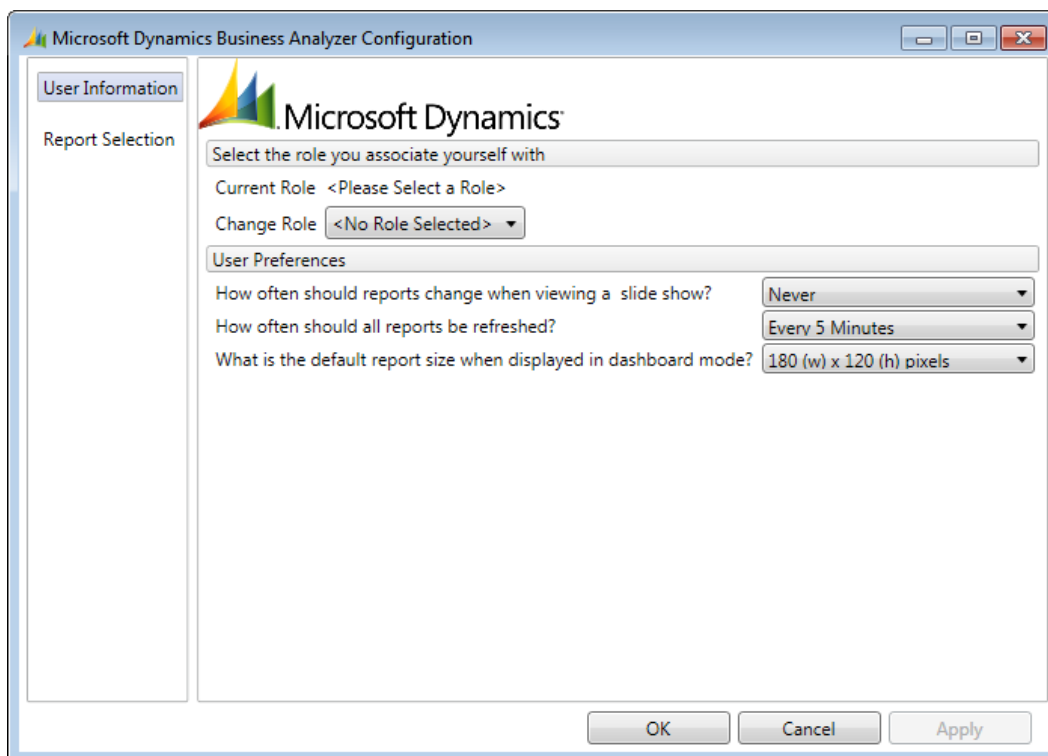


Figure 20: Microsoft Dynamics Business Analyzer Configuration, User Information page

2. In **Change Role**, select the role that is closest to your job responsibilities. The following roles are available:
 - Accountant
 - Accounting Manager
 - Accounts Receivable Admin
 - Accounts Receivable Administrator
 - Administrator
 - CEO
 - Chief Financial Officer
 - Controller

- Materials Manager
 - Operations Manager
 - President
 - Project Executive
 - Project Manager
 - Sales Manager
 - Sales Person
 - Shipping and Receiving
 - Warehouse Manager
3. After you select or change your role, a message occurs asking whether you want to load default reports for the selected role. Click **Yes** and then click **Apply**.
 4. Specify how frequently reports should change when you view a slide show.
 5. Specify how frequently the reports should be refreshed in Business Analyzer.
 6. Specify the default size that reports should be displayed in dashboard mode.
 7. To select which reports to display in Business Analyzer, click **Report Selection**. For more information about how to select report settings, see *Selecting report settings for Business Analyzer* on page 22.
 8. Click **OK** to save you changes and close the window. *Microsoft Dynamics Business Analyzer* appears, displaying the reports that you selected.

Selecting report settings for Business Analyzer

The **Report Selection** page in the *Microsoft Dynamics Business Analyzer Configuration* window lets you define which reports that you want to display in Business Analyzer. You can arrange the order of the reports that appear in Business Analyzer. You can also add or remove multiple reports.

The **Reports Available** list has tree views that you can use to select the reports to display in Business Analyzer. You can select reports by company, series, reports, and charts and KPIs. The tree view has the following levels, depending on the **Show Detailed Folder View** option.

The **Show Detailed Folder View** check box is selected.

- Base Folder
 - Database
 - Series
 - Report

The **Show Detailed Folder View** check box is cleared.

- Database
 - Series
 - Report

Expand a level to view additional levels in the tree view. You can collapse and expand sections of the tree.

To select report settings for Business Analyzer, follow these steps:

1. Open the Microsoft Dynamics Business Analyzer Configuration window. From the Business Analyzer window, click **Options**.
2. Click **Report Selection**. Default reports appear in the *Reports Selected* list if you loaded the default reports assigned to the role that you selected on the **User Information** page.

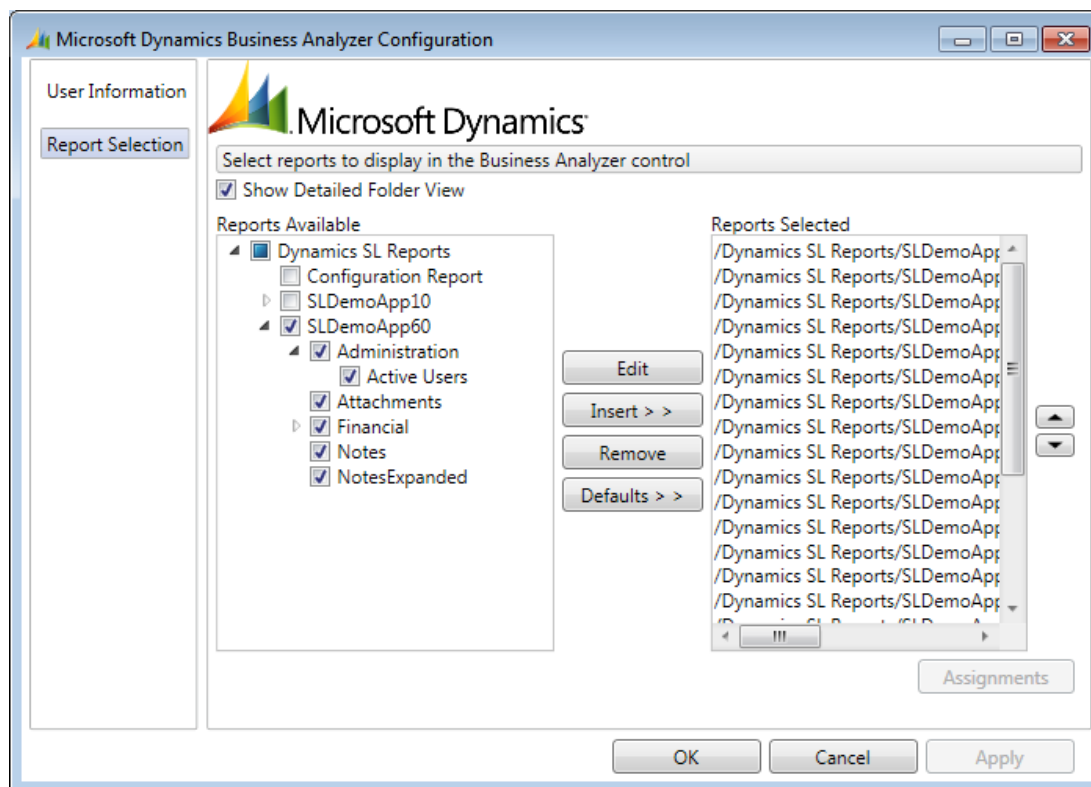


Figure 21: Microsoft Dynamics Business Analyzer Configuration, Report Selection page

3. In the **Reports Available** list, select the report or the reports that you want to display in Business Analyzer, and then click **Insert**.
4. You can select a report from the Reports Selected list and then complete one of the following actions.
 - Click **Move Up** or **Move Down** to rearrange the order in which the reports are displayed in Business Analyzer. You can move multiple reports.
 - Click **Remove** to remove the report that you selected in the **Reports Selected** list. You can select to remove multiple reports
 - Click **Defaults** to mark the default reports in the **Reports Available** list for your role. You can then click **Insert**.
 - Click **Edit** to open the *Microsoft SQL Server Report Builder* window, where you can edit the selected report. You must be using Report Builder 3.0 to change SQL Server reporting services reports.
5. To assign contacts to reports, you must first click **Apply**. This lets you click **Assignments** to open the *Manage Unified Communication/Reports Assignments* window. You must be using Microsoft Lync for this button to be enabled.
6. Click **OK** to save your changes and close the window.

Assigning reports to contacts

Use the *Microsoft Dynamics Business Intelligence Configuration* window to assign contacts from Microsoft Lync 2010 to reports.

To assign contacts to reports, follow these steps:

1. Open the *Microsoft Dynamics Business Analyzer Configuration* window. From the Business Analyzer window, click **Options**.
1. Click **Report Selection**.
2. In the **Reports Available** list, select a report or the reports that you want to display in Business Analyzer, and then click **Insert**.
3. Click **Apply**.
4. In the **Reports Selected** list, select the reports or reports that you want to assign to contacts.
5. Click **Assignments**.

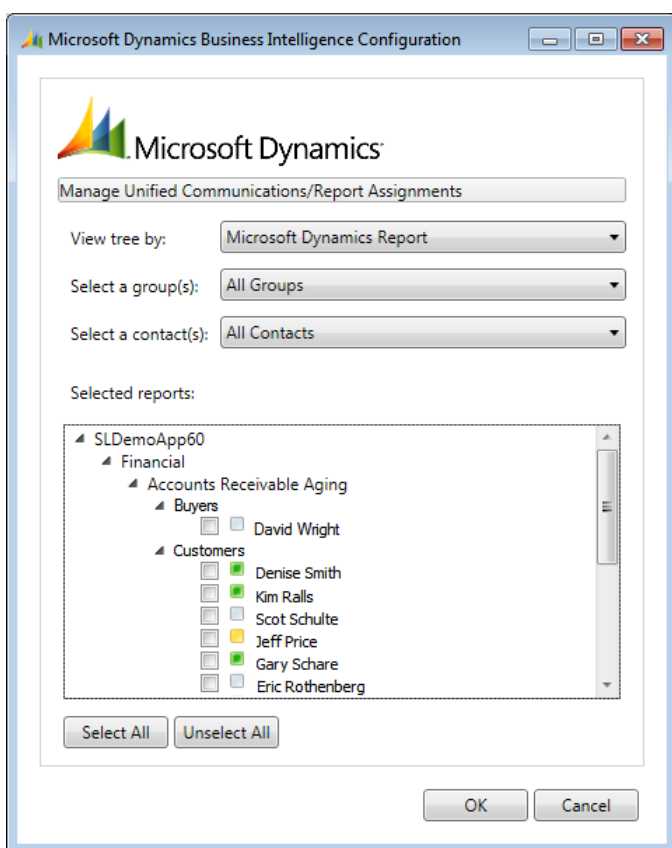


Figure 22: Microsoft Dynamics Business Intelligence Configuration

6. In **View tree by**, select to view the tree by contact or by report.
7. In **Select a group**, select to display a group of contacts or all contact groups.
8. In **Select a contact**, select a single contact or all contacts.
9. In **Select a company**, select a single company or all companies.
10. The information that appears in the **Selected reports** list depends on your previous selections.
11. Depending on your previous selections, you can assign reports to a contact or contacts to a report.
12. To select all contacts or reports displayed in the list, click **Select All**.
13. Click **OK** to save your changes and close the window.

Using Business Analyzer

You can use Business Analyzer to help you make business decisions by viewing Microsoft Dynamics SL reports from your desktop. You can take actions on the reports and share report information with other people.

Business Analyzer overview

You can use Business Analyzer to select and view SQL Server Reporting Services reports in Microsoft Dynamics SL from your desktop. To view reports, you must have security access to the Microsoft SQL Server Reporting Services reports in Report Manager.

You can perform actions for reports in Business Analyzer, such as editing the report in Report Builder or selecting the company or companies for which you want to view reports. You can assign contacts from Microsoft Lync to reports so that you can share report data with people with whom you typically work.

The following areas make up Business Analyzer.

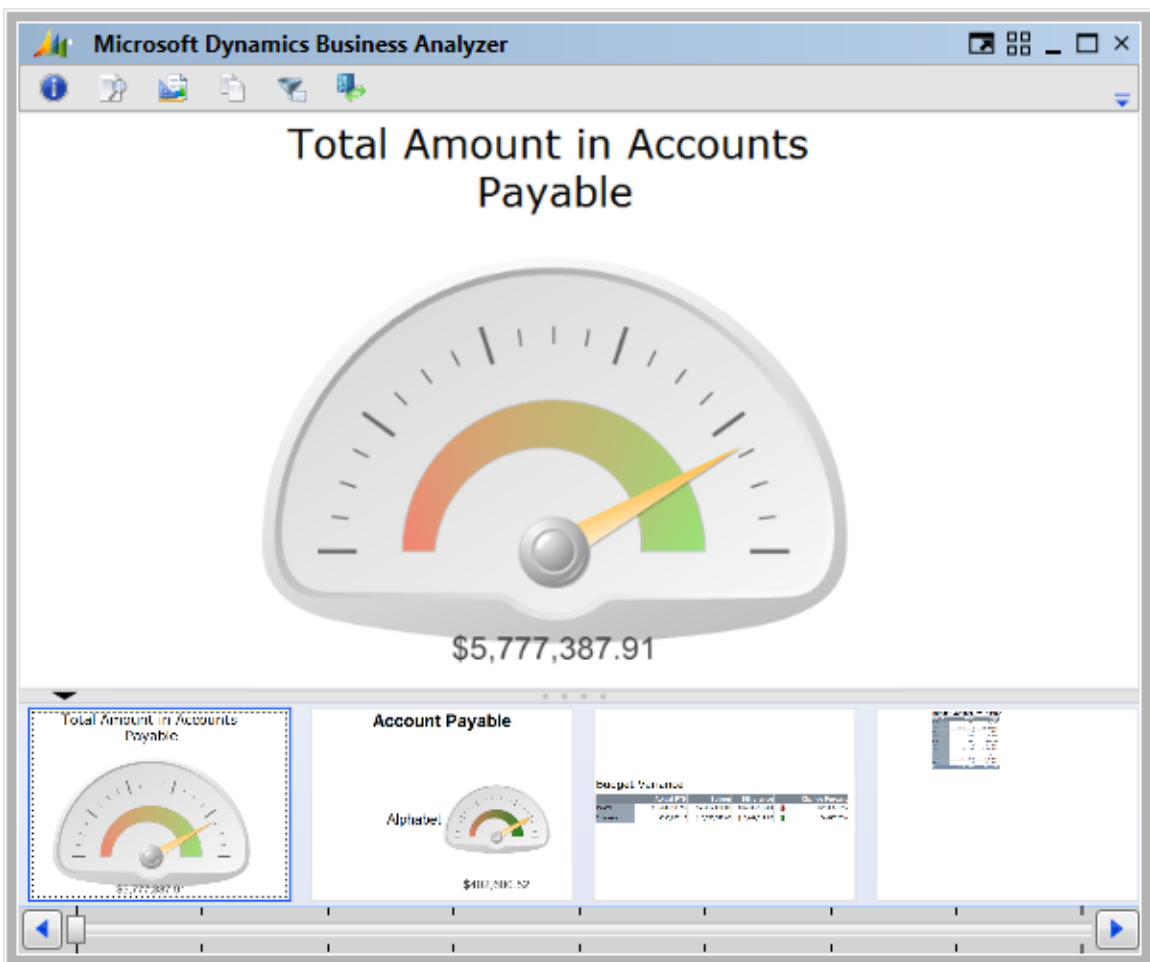


Figure 23: Microsoft Dynamics Business Intelligence Configuration

Primary report area

Displays the main report or reports that you can view. A main report is typically a single report. You can have more than one report displayed in the area. The report actions are available for each report within the primary report area.

Secondary report area

Displays the secondary report or reports for you to view. Secondary reports are typically multiple reports. You may have more than one report displayed in the area. You can click a report in the secondary report area to display the report in the primary report area.

Business Analyzer menu

Use this menu to select how to display reports in Business Analyzer by selecting the Window Mode from the menu. You can use filters to display only the reports that you want to view. Select Reload Reports to update. You can also update reports.

Click Options to open the Microsoft Dynamics Business Analyzer Configuration window, where you can define your user settings, select which reports to display in the application, and to add contacts to or remove contracts from reports in Microsoft Lync.

Report actions








Use report actions that are available for each report within the primary report area. When you put the pointer over a report, the action buttons are displayed. For more information about the report actions, see Business Analyzer actions for reports on page 27.

Report slide show

View the previous or next report in the secondary report area. You can also start or pause a slide show of your reports. How frequently the reports change when you view a slide show depends on your selection in the User Information pane in the *Microsoft Dynamics Business Analyzer Configuration* window.

Business Analyzer actions for reports

The following actions are available for each report within the primary report area. When you put the pointer over a report, the action buttons are displayed.

Icon	Name	Description
	Show Report Information	Opens a window that displays the name of the company, the date and time that the report was rendered, and the location of the report. You can click the report information window to keep the window open. Note: If you were assigned to only to the browser role in Report Manager, the company name does not display.
	View Report	Open the report in Report Viewer. By viewing the report, you can display the report by using different parameters. For example, if chart is using columns to display information, you can display the report by using lines.
	Edit Report	Opens Microsoft SQL Server Report Builder, where you can change a report. Before you can change a report, you must have access to change the report.
	Copy Report Image	Copies an image of a report to the clipboard so that you can share the report by pasting the report in an email message or another application. If you want to copy a report to Microsoft Lync, you must save the report image to a file, and then copy the file into a conversation.
	Change Date	Lets you display the report by using a different date, if the report contains a date parameter. You can also enter a custom date.
	Start Communication	Lets you share report data with people with whom you typically work. Add Contact to Report opens the <i>Manage Unified Communication/Reports Assignments</i> window, where you can assign contacts from Microsoft Lync to reports. You can also remove contacts. Select Other Contact opens the <i>Send an Instant Message</i> window, where you can select a contact. Click OK to start a conversation with the contact.
	Select Company	Displays a list of companies that you can select to view reports. Reports are displayed in Business Analyzer from the company or companies that you select.

Displaying reports in Business Analyzer

You can select how to display reports in Business Analyzer by selecting Window Mode from the Business Analyzer menu. Open the Business Analyzer menu by right-clicking in Business Analyzer. You can display reports in Split Mode, Dashboard Mode, or Full Screen.

If you select Dashboard Mode, all the reports display in the primary report area. If you select Split Mode, one report displays in the primary report area while the rest of the reports display in the secondary report area.

Filtering reports in Business Analyzer

You can use filters to display only the reports that you want to view. You can display reports for multiple companies and reports from a specific series. You can filter reports by selecting Filter Reports from the Business Analyzer menu. Open the Business Analyzer menu by right-clicking in Business Analyzer.

The SLDemoApp60 company will appear in the company list. The system administrator can hide the folder in SQL Server Reporting Services.

Reloading reports in Business Analyzer

You can update reports by selecting **Reload Reports** from the Business Analyzer menu. Open the Business Analyzer menu by right-clicking in Business Analyzer. For example, if you change the date on a report, you can update the information on the report.

Microsoft Lync actions for Business Analyzer

After you click **Start Communication** on the Business Analyzer toolbar, you can decide to add a contact to the report or select another contact.

Add Contact to Report

Click **Add Contact to Report** to open *Microsoft Dynamics Business Intelligence Configuration*. For more information about how to add a contact to a report, see *Assigning reports to contacts* on page 24.

Select Other Contact

Click **Select Other Contact** to open *Microsoft Dynamics Business Intelligence Configuration*. For more information about how to select another contact, see *Assigning reports to contacts* on page 24.

Maintenance

This documentation contains information about maintaining Microsoft Dynamics Business Analyzer.

Creating Custom KPIs

To develop custom KPIs and reports for Business Analyzer, you must have the following installed:

- SQL Server 2012 or SQL Server 2014, with SSRS Report Server
- Microsoft Dynamics SL 2015
- Business Analyzer must be deployed and you have verified that the installation is working

You can use any DataSource when you create reports by using Report Builder. However, the name of the DataSource must be *DynamicsSLApplication* if it points to a Microsoft Dynamics SL application database. When you deploy, upload, or import the KPI, the definition is modified to point to the DataSource on the destination Report Server.

To build a KPI for Business Analyzer, consider the following:

1. Determine the final KPI that you plan to develop to support a specific need.
2. Determine which roles within a company will use the KPI.
3. Choose a quick query that supports the details of the KPI or create a query that does contain the needed information. Create the Detail report and the Summary report. For more information, see the *Microsoft Dynamics SL SQL Server Report Server user's guide*.
4. Create the KPI by using SSRS Report Builder, consuming the same SQL View that the summary and detail reports used, if possible. For more information about creating KPIs in SSRS Report Builder, see "Reporting Services Reports (SSRS)" at msdn.microsoft.com/en-us/library/bb522712.aspx.

Important rules for Business Analyzer

Defined parameters

BA currently supports 2 parameter types, CompanyID and UserDate.

- **CompanyID** = the selected company IDs
 - Format: 0060 for one company or 0060,0070,0080 for multiple companies
 - Prompt: Company Name
 - Date type: Text
 - Allow multiple values checked (only one checked).
 - Available Values:
 - Get Values from a query
 - Dataset: DynamicsSLCompany
 - Value field: CpanyID
 - Label field: CpanyName
 - Default value:
 - Get Values from a query
 - Dataset: DynamicsSLCompany
 - Value field: CpanyID
 - For display: =Join(Parameters!companyID.Value,",")
- **UserDate** = the date selected

Format: Short International Date.

Prompt: Selected Date

Date type: Date/Time

Default value:

Specify values

Value Expression: = Today()

For display: =FormatDateTime(Parameters!UserData.Value,DateFormat.ShortDate)

Variable parameters

Add the following variables to each report if you are not using Quick Query to generate the report.

- **ScreenNumber** = the intended screen number for *Access Rights Maintenance* (95.270.00). This value associates a report to a screen number in Microsoft Dynamics SL.
- **RelatedModule** = the module used to preload in *Access Rights Maintenance* (95.270.00) and to decide what module group the report will be imported into (on the Report Server).
- **Author** = the author of the report. This is usually the Windows user or the company name for ISVs.

Other Report needs:

Description = Set this value in the report. It is replaced upon upload\deploy\import with the database name with which the report is associated.

Base System Shared Datasets:

These datasets are available to all Microsoft Dynamics SL reports. The Company dataset is used by Quick Query Report Generation.

- **Company** = returns only the company IDs to which the current user has rights for that report.
- **SLUserID** = returns the default Microsoft Dynamics SL User for the current windows logged on user.

Data Sources:

The report needs a DataSource to produce data. Follow these rules when you create reports outside the *Quick Query* (QQ.VIE.00) report generation.

- **Name** = The name of the DataSource must be *DynamicsSLApplication* if you want the DataSource to be the Microsoft Dynamics SL application database and you want Upload\Deploy\Import to modify the DataSource to match the Report Server environment into which it is placed. You would use a different name for the DataSource (or a second DataSource) in cases where the KPI brings data from Microsoft Dynamics SL and other sources.
- **Type** = If you are developing reports in Report Builder or Visual Studio 2008, use an embedded DataSource for the Microsoft Dynamics SL databases, or use Data Sources you created on the Report Server. You cannot use the data sources created by the Deployment process because you do not know the "Report User" SQL Login Password. When you select to use one of the data sources created by Deployment, you are prompted to log in.

When the report is uploaded\deployed\imported, your DataSource (whether embedded or shared) is replaced with the shared one already existing on the Report Server.

Miscellaneous:

The size of KPI type reports targeted for BA need their report page size reduced to fix the body size (typically .1in more width and height, also 0,0,0,0 on the margins; otherwise it will not show properly in BA).

Changing the Business Analyzer Client Configuration

If you change the report server, use *Microsoft Dynamics Business Analyzer - Dynamics SL Client Configuration* to update the configuration of the client.

To change the client configuration, follow these steps:

1. Run the Microsoft.Dynamics.SL.BusinessAnalyzer.Configuration.exe file from the location where you installed Business Analyzer. The default location is as follows: Program Files\Microsoft Dynamics\Business Analyzer\12.0\

Microsoft Dynamics Business Analyzer - Dynamics SL Client Configuration appears.

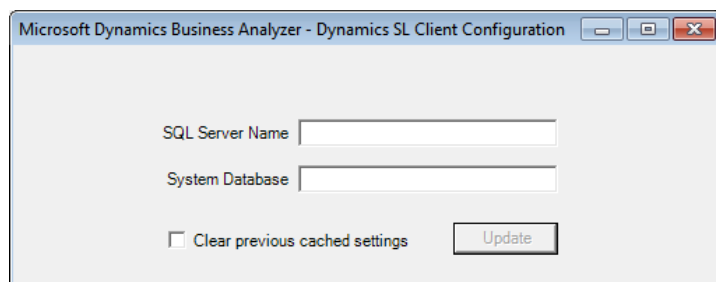


Figure 24: Microsoft Dynamics Business Analyzer (Dynamics SL) Setup Wizard, Confirm Installation

2. In **SQL Server Name**, specify the name of the SQL Server where the Microsoft Dynamics SL system database exists.
3. In **System Database**, specify the name of the Microsoft Dynamics SL system database.
4. Click to select the **Clear previous cached settings** check box to remove the previously saved settings.
5. Click **Update**.
6. After process is completed successfully, click **OK**, and then close the window.

Troubleshooting

Error Loading the Server in Business Analyzer

- If you start Business Analyzer and you receive an error that there is an error loading the server, use the Reporting Services Configuration Manager to verify that the Report Service Status is Started. If the service has stopped, click **Start**.
- You should also verify that the Report Server Web Service URL is correct. You can compare the Report Server Web Service URL in the Reporting Services Configuration Manager with the URL location in the BusinessAnalyzer.exe.config file or the SQL Server Reporting Services Server Location window in the Program Maintenance wizard.

Permissions for reports are incorrect

Use the **Synchronize Report Server** button in *Database Maintenance* (98.290.00) to synchronize the Microsoft Dynamics SL security with SQL Report Server for the reports used in Business Analyzer.

Synchronization of the rights on the Report Server associated with a Microsoft Dynamics SL system database functions to accurately represent the data that is stored in the access rights screen. For each Windows Account referenced in *User Maintenance* (95.260.00) or *Windows User Maintenance* (95.310.00), the appropriate permissions will be applied to SQL Report Server.

For more information about the **Synchronize Report Server** button, see the System Manager Help or user's guide.

Reference

Microsoft Dynamics Business Analyzer Configuration

Use the Microsoft Dynamics Business Analyzer Configuration screen to set your role, specify user preferences, and select the reports that you want to see in Business Analyzer.

Microsoft Dynamics Business Analyzer Configuration, User Information

On the **User Information** page, you can select or change your role and specify viewing preferences for Business Analyzer.

The screenshot shows the 'Microsoft Dynamics Business Analyzer Configuration' dialog box with the 'User Information' tab selected. The dialog has a sidebar on the left with 'User Information' and 'Report Selection' tabs. The main area contains the following fields:

- Select the role you associate yourself with:** A text box containing '<Please Select a Role>'. Below it, the 'Current Role' is displayed as '<Please Select a Role>'. To the right is a 'Change Role' dropdown menu currently showing '<No Role Selected>'.
- User Preferences:** A section containing three dropdown menus:
 - 'How often should reports change when viewing a slide show?' set to 'Never'.
 - 'How often should all reports be refreshed?' set to 'Every 5 Minutes'.
 - 'What is the default report size when displayed in dashboard mode?' set to '180 (w) x 120 (h) pixels'.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

Figure 25: Microsoft Dynamics Business Analyzer Configuration, User Information

The following are the field descriptions for **User Information** on *Microsoft Dynamics Business Analyzer Configuration*.

Current Role

Displays the current role, if you previously chose a role.

Change Role

Lets you select a new role.

How often should reports change when viewing a slide show?

Lets you select how frequently Business Analyzer pauses on each report, before it displays the next report.

How often should all reports be refreshed?

Lets you select how frequently reports are refreshed to display new data from Microsoft Dynamics SL.

What is the default report size when displayed in dashboard mode?

Lets you select the default size of the reports when you have Business Analyzer in dashboard mode.

OK (button)

Click **OK** to save all changes and close the screen.

Cancel (button)

Click **Cancel** to discard all changes and close the screen.

Apply (button)

Click **Apply** to save all changes and keep the screen open.

Microsoft Dynamics Business Analyzer Configuration, Report Selection

Use the **Report Selection** page to specify the reports that you want to see in Business Analyzer.

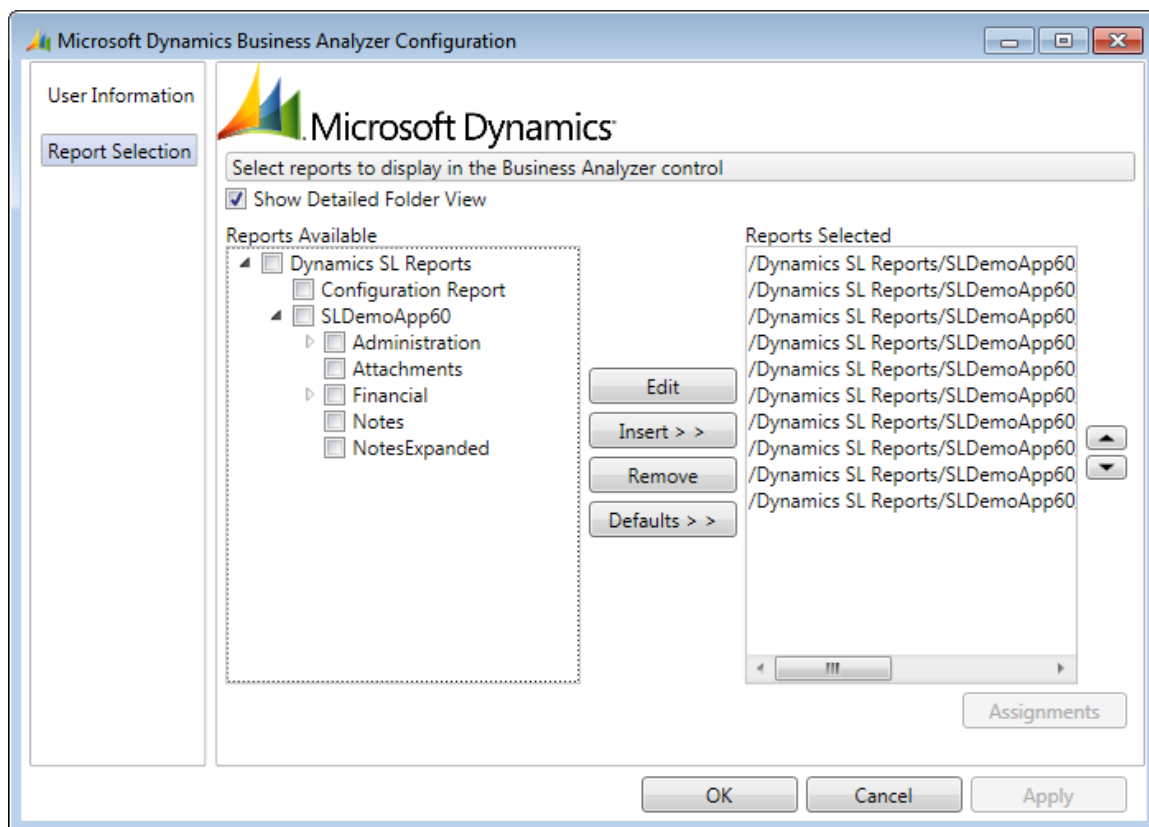


Figure 26: Microsoft Dynamics Business Analyzer Configuration, Report Selection

The following are the field descriptions for **Report Selection** on *Microsoft Dynamics Business Analyzer Configuration*.

Show Detailed Folder View

Changes the tree view as follows:

When the **Show Detailed Folder View** check box is selected.

- Base Folder
 - Database
 - Series

- Report

When the **Show Detailed Folder View** check box is cleared.

- Database

- Series

- Report

Reports Available

Displays the reports that are available for you to display in Business Analyzer.

Reports Selected

Displays the reports that you have selected to display in Business Analyzer.

Edit (button)

Click **Edit** to open the Microsoft SQL Server Report Builder window, where you can edit the selected report. You must use Report Builder 3.0 to change SQL Server reporting services reports.

Insert (button)

Click **Insert** to move a report that you selected in **Reports Available** to **Reports Selected**. You can select to remove multiple reports.

Remove (button)

Click **Remove** to remove the report that you selected from the **Reports Selected** list. You can select to remove multiple reports.

Defaults (button)

Click **Defaults** to mark the default reports in the **Reports Available** list for your role. You can then click **Insert**.

Move Up (button)

Click **Move Up** to rearrange the order in which the reports are displayed in Business Analyzer. You can move multiple reports.

Move Down (button)

Click **Move Down** to rearrange the order in which the reports are displayed in Business Analyzer. You can move multiple reports.

Assignments (button)

Click **Apply**, and then click **Assignments** to open the *Manage Unified Communication/Reports Assignments* window.

Note: You must be using Microsoft Lync for this button to be enabled.

OK (button)

Click **OK** to save all changes and close the screen.

Cancel (button)

Click **Cancel** to discard all changes and close the screen.

Apply (button)

Click **Apply** to save all changes and keep the screen open.

Glossary of Terms

KPI

Key Performance Indicator - any measurable value in a report that has business significance, for example, Total Sales.

RDL

Report Definition Language - an XML representation of a SQL Server Reporting Services report definition. For more information, see "Report Definition Language (SSRS)" at msdn.microsoft.com/en-us/library/ms155062.aspx.

Report Definition

The contents of the RDL file in the form of XML.

SSRS

SQL Server Reporting Services - tools and services to help you create, deploy, and manage reports for your organization. For more information, see "Reporting Services (SSRS)" at msdn.microsoft.com/en-us/library/ms159106.aspx.

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