



## Positioning & Technical Guidelines

Microsoft Dynamics GP & Microsoft Office Business Scorecard Manager 2005

Microsoft Office® Business Scorecard Manager 2005 is a comprehensive scorecarding application that provides all employees with deep contextual insight into business drivers. Through a collaborative environment, Business Scorecard Manager enables group analysis and action. By leveraging the power of the Microsoft Office platform, Business Scorecard Manager empowers all business users to build, manage and consume scorecards, reports and strategy maps using familiar tools.

### Business Value and Positioning

The Microsoft Office Business Scorecard Manager 2005 is to be seen as a powerful sales tool for Microsoft Dynamics™ moving forward. In addition to the business value Business Scorecard Manager represents to Microsoft Dynamics customers, the interoperability also strongly supports the integrated innovation theme and the Microsoft Dynamics Wave 1 investment efforts by offering a common user experience across product lines, portal integration, Web services and not least contextual Business Insight.

### Specific Value to Microsoft Dynamics GP Customers

Taking a deeper dive into the core value of the interoperability with Microsoft Dynamics GP™, formerly Microsoft® Business Solutions-Great Plains®, you will see a highly complementary offering for these customers - in particular when looking at the existing modules available for Microsoft Dynamics GP. First we have the Microsoft Dynamics GP Professional - Business Intelligence Foundation, which is comprised of components to deepen business insight. One of the Business Intelligence components is the Analysis Cubes for Excel, which is the piece that truly enables the out-of-the-box interoperability between Microsoft Dynamics GP and the Business Scorecard Manager. Thus the Analysis Cubes are to be seen as the Business Scorecard Manager enabler, helping customers enjoy the benefits of the Scorecard application with a limited level of investment.

Secondly, we have the Microsoft Business Portal, the Microsoft Dynamics GP portal solution, to which the Business Scorecard Manager should be considered a highly complementary offering. The two solutions are both portal based business intelligence offerings helping to provide anytime, anywhere access to business data, and they each address very different business needs. Customers can use one, the other or both in orchestration, depending upon the business needs that are to be addressed.

- **Microsoft Business Portal** is a role-based web portal, designed for delivering applications, information and processes to employees, partners and customers. It empowers users with anytime, anywhere access to the Microsoft Dynamics GP data they need, allowing them to share and collaborate on documents, to share ideas and to distribute target information to the right people.
- **Business Scorecard Manager** is a dedicated scorecard application, designed for defining, building, deploying and using scorecards and key performance indicators (KPI's), allowing users to consolidate data and from a variety of data sources. The main focus is to build out the scorecards and KPI's, supporting the task of linking defined strategies to specific measures and actions throughout all levels of the organization. Thus, monitoring the business performance is just the starting point, from where users can initiate in-depth analysis. Users can either drill down into the underlying data from within the Business Scorecard Manager or can leverage the wide variety of optional components such as Microsoft Excel, Microsoft SQL Server Reporting Services, Visio, MapPoint and others.

Diving one level deeper into the functionality layer of the Microsoft Business Portal, you will see that this application also offers KPI functionality. However, keeping in mind that the applications were designed with two different purposes, quite naturally the KPI's are designed to address different needs. The KPI's offered with the Microsoft Business Portal are designed for measuring data hosted in Microsoft Dynamics GP. Therefore, if a customer wants to focus on monitoring the data coming from the Enterprise Resource Planning system only, the Business Portal KPIs are the best choice. The KPI functionality offered with the Business Scorecard Manager, however, are designed with a broader scope in mind, allowing for creation of KPI's based on data consolidated from a variety of data sources. Thus, the KPI functionality available with the Business Scorecard Manager should be more accommodating when aiming at a more holistic solution. Here the KPI's can encounter multiple data types, either when data comes from multiple systems or from multiple Microsoft Dynamics GP companies.

The deciding factor should be based on what data the customers want to start with and what they want to achieve. It is important to note that very often you will find situations where the two solutions will be working in orchestration. Here the Microsoft Dynamics GP solution's interoperability with Business Scorecard Manager truly opens the possibilities for a best-of-breed portal experience encompassing a broader variety of needs compared to the needs covered by the two solutions individually. For example, the possibility of combining and surfacing the multi-source Business Scorecard Manager KPIs with the Microsoft Dynamics GP specific KPIs within the Microsoft Business Portal truly help increase the portal user penetration. The reason being that you are now delivering KPIs and business insight to an even boarder audience throughout the organization, without jeopardizing the familiar portal look and feel for the traditional Microsoft Dynamics GP users.

### **Microsoft Dynamics GP out-of-the-box Interoperability and Technical Enablers**

The Business Scorecards of the Business Scorecard Manager are based on four elements: Key Performance Indicators, (KPIs), Scorecards, data sources and indicators; which need to be created and combined in order to build the Scorecards prior to deploying on Microsoft SharePoint. The key elements to Microsoft Dynamics GP interoperability lies in the data source connection. From a data source perspective, two different technologies enable the access to Microsoft Dynamics GP data from Business Scorecard Manager:

- Through OLAP cubes hosted by Microsoft SQL Server Analysis Services, where the data source connection is enabled through an ADOMD.NET connection from within Business Scorecard Builder
- Through direct access to the relational (SQL Server) database/data model, where the data source connection is enabled via an OLE DB or ODBC connection string

Due to the fact that the metadata layers within the predefined Microsoft Dynamics GP Analysis Cubes for Excel offer a much more descriptive, user-friendly data model for the typical business user, the OLAP connections are the key data source enabler for Microsoft Dynamics GP. Furthermore this same key data source enabler is also the piece that supports the "out-of-the-box" interoperability between Microsoft Dynamics GP and Business Scorecard Manager. More specifically, the Microsoft Great Plains Business Foundation Layer provides our customers with pre-defined OLAP cubes covering the Financial Series: General Ledger, Accounts Receivable, Accounts Payable, Receivables, Aging and Bank Reconciliation, allowing our customers to connect directly to the Microsoft Dynamics GP business data from within the Business Scorecard Manager without any further integration requirements. For customers who want to extend the benefits of the Business Analysis and Business Scorecard Manager functionalities to the entire organization, the Analysis Cube Library and the Advanced Analysis Cube Library are available as add-on modules with Microsoft Dynamics GP, providing the possibilities of expanding the variety of functional OLAP cubes available.

So how does it work? After the Business Scorecard Manager has been set up, the Microsoft SharePoint site has been defined and the Analysis Cubes have been set up and processed, you can go straight to the Business Scorecard Builder to start defining the desired Scorecards. Since the predefined views of the Analysis Cubes are stored in multidimensional OLAP cubes hosted on Microsoft SQL Server Analysis Services, all you need to do for connectivity is to create an ADOMD.NET data connection through the data source element of the Scorecard Builder. After the connection has been created to a specific cube on Microsoft SQL Server Analysis Services you can start to browse the Microsoft Dynamics GP -specific cube dimensions from within the Business Scorecard Manager in order to actually map the Microsoft Dynamics GP back-end data to the Business Scorecard Manager defined scorecards.

Another interoperability option is available for Microsoft Dynamics GP customers who are also using Microsoft FRx, as well as Microsoft Forecaster. These customers can leverage these integrations even further by utilizing the Microsoft FRx instantOLAP capability to access their Microsoft Dynamics GP business data. The interoperability being that the instantOLAP will enable them to generate local and server-based cubes based on report data, which can include budget data from Microsoft Forecaster or the Microsoft Dynamics GP General Ledger application.

## Technology Requirements

**Business Scorecard Manager** requires the following Microsoft products and technologies:

- Microsoft Windows Server® 2003
- Microsoft SQL Server 2005<sup>1</sup> or Microsoft SQL Server 2000 with latest service pack
- Microsoft Office SharePoint Portal Server 2003 or Windows SharePoint Services
- Microsoft Office Web Components 2003
- Optional components for a richer reporting and analysis environment include Microsoft SQL Server Reporting Services, Microsoft Excel, Visio and/or MapPoint.

The specific Great Plains components required are as following:

- Supported Microsoft SQL Server database
- Microsoft Dynamics GP Professional-Business Intelligence Foundation Layer including Analysis Cubes for Excel and Microsoft Business Portal
- Optional component for Microsoft Dynamics GP include the Analysis Cubes Library and the Advanced Analysis Cubes Library, which is add-ons to the Analysis Cubes for Microsoft Excel. The Libraries offer additional cubes covering the functional areas of Distribution Series, Sales Order Processing, Purchase, Order Processing and Inventory

## ISV/Partner opportunity

The Microsoft Dynamics GP interoperability with Business Scorecard Manager is a great ISV/partner opportunity. The fact that the technical infrastructure for out-of-the-box interoperability is already in place is the key to fast creation and deployment of the Business Scorecard framework based on the Microsoft Dynamics GP data. This allows partners to focus on adding value across the extended solution, by building even richer scorecard experiences for their customers. They can focus on generating more targeted cube content designed for meeting the specific needs of their customer segments based on industry-specific best practices

Further, the Business Scorecard Manager is fully extensible to ISVs, allowing them to integrate scorecarding into their own applications, delivering rich business intelligence functionality to an even wider audience. Extending the capabilities of their products can open new revenue streams and strengthen business models.

## More information:

To learn more about the Microsoft Business Scorecard Manager, including pricing and licensing, support, product literature and white papers, training events and more, please visit [Business Scorecard Manager Office Online](#).

