

# KonnECT

The E-Newsletter from



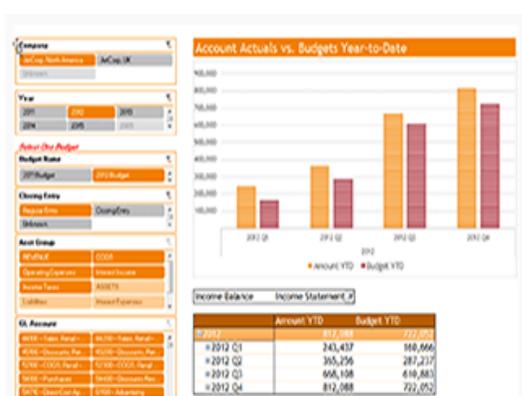
## Issue 03

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### 1. Jet Reports for Dynamics NAV Overview

Looking for a reporting solution that is easy to use, powerful and nearly automatic? With **Jet Reports** you get all that and more access to all your systems, automatic updates, report scheduling you name it. So now you have the information you need to create great reports that make the impact you want with **Dynamics NAV**.



#### Benefits:

- Create custom layouts for any report, even from non-financial and operational data.
- Access all your Dynamics data, entities, and outside data sources in a single report.
- Eliminate workarounds or manual calculations that are error-prone and hinder performance.
- Cut reporting time and costs in half.
- Easily manage, schedule, automate, and share reports.
- Control report versions and seamlessly collaborate with other users.
- Get instant access to reports on the web or from a mobile device.

**Powerful and Familiar:** Jet Reports gives you data in Excel connected directly to all your databases. You can consolidate companies, departments, and modules from Microsoft Dynamic NAV, Microsoft SQL. So, you get all the data you need for better intelligence and better decisions.

#### Access your Data CUBES anywhere

- ✚ **Jet Analytics** comes with an out-of-the-box solution for Microsoft Dynamics that is ready to use immediately. This delivers about 80% of the BI you need directly upon installation, which cuts huge amounts of development costs and starts delivering value from day one. Thousands of users have already tested it for you!
- ✚ With **Jet Analytics**, access to the data is not restricted to a desktop or to the office. Use the cubes from Analytics to see trends in Key Performance Indicators and instantly group and filter data to identify causes from virtually any device with a web browser.
- ✚ The **Jet Analytics** data warehouse automation solution has simplified the data management process – doing up to 95% of the work for you. Customise the pre-built cubes to your business needs, rapidly combine data from a variety of sources into a single set of dimensional cubes, and automate tasks such as script programming, security, documentation, scheduled updates and more.

#### JET Budgets

**Jet Budgets** is a web-based solution for streamlining and controlling the budget creation and fiscal planning process. **Jet Budgets** enables collaboration, improves accuracy, and saves time for budget owners at small and medium businesses whose current budgeting process requires managing multiple spreadsheets that can be messy, error prone and time consuming. **Jet Budgets** is built to integrate with Microsoft Dynamics 365 Business Central and NAV immediately.

**Jet Budgets** is a turnkey, out-of-box solution that takes minutes to get up and running, not hours or days. Additionally, one of the advantages of using **Jet Budgets** is that configuration does not pose a huge administrative burden on a company nor does it incur large technical resource costs.

- ✚ *Web-based budgeting platform through the Jet Hub*
- ✚ *Flexible budget structure with user-created templates*
- ✚ *Supports all existing GL accounts, dimensions, and segments*
- ✚ *Input of budgeting data in web or controlled Excel spreadsheets*
- ✚ *Workflow management, including assignment creation, notifications, commenting, and attachment support*
- ✚ *Reporting via Jet functions with Jet Reports*
- ✚ *Upload to Dynamics 365 Business Central and Dynamics NAV*

#### Expert Services

**KE Consulting** provides Reporting expert services for our Customers helping you to design and execute reports, so you don't have to pay the high price tag or wait to build it yourself with this powerful and easy to use **Dynamics NAV Reporting Solution**.

Make the most of your investment in **Microsoft Dynamics NAV**, increase insight and streamline your data analysis further with **Jet Reports**.

❖ **Contact us today to discover how we can drive you forward.**

#### BIO



**Mason Rowles** - Senior Consultant at **KE Consulting**.

*Worked with NAV since version 1 in 1998 meeting Laurence Sidney at that time.*

*Joined the KEC Team end of 2008 as a NAV Consultant and involved in Financial Services since 2005.*

#### Mason's skills:

- ✓ Business Analysis
- ✓ Solution Design
- ✓ Training
- ✓ Test Script Development

#### Mason's Advice:

*Jet Reports is a great tool to maximise the benefit from a wealth of data a business holds in NAV, particularly when used with email notifications to prompt users to take decisive action for the benefit of the business.*

*Upgrades are as rewarding as new installations as users get to benefit from improved functionality and integration of each NAV release.*

*Favourite Customers are those that constantly look to improve their business in small steps, something NAV and KEC very adept at.*

**Mason's Hobbies:** Canal Walking



## 2. Dynamic Metering

Looking for a **Utilities Billing solution** that is easy to use, powerful and fully automated? With **Dynamic Metering**, you get all that and more access to all your Billing System and automatic updates. So now you have the information you need to invoice your customers and manage your business.

**Dynamic Metering** has been developed by **KE Consulting** specifically for Water and Energy (Gas/Electricity) Utilities Companies and fully compliant with MOSL Market Architecture Plan (MAP).

This solution is built into **Microsoft Dynamics NAV** and integrates seamlessly with other peripheral systems to enable automated scheduling and data-management for multi-site meter reads.

### Accurate and Real Time

With Dynamic Metering, there is no need for error-prone duplicate data entry. With just one click you can view the data source behind your numbers, it is always current information and always as accurate as your source.

### Return on Investment (ROI)

**Dynamic Metering** gives you great value at low cost – immediately helping you realise a strong return on your investment. More importantly, you and your entire organisation have the Billing solution you need.



### Commercial & Wholesale Billing

- MOSL settlement runs
- Tariffs
- Ad-hoc invoicing
- Aggregate invoicing
- Bulk invoicing
- Refunds
- Debt management
- Accounting reconciliation

### CRM

- Contact management
- Telephone integration
- Sales team management
- Opportunities
- Campaigns (e-mails)
- Interactions
- Call centre questionnaires
- Outlook synchronisation

### Service Maintenance

- Service orders
- SLA's
- Contract management
- Dispatch
- Resource allocation
- Time and cost management

### Approvals Workflow

- Invoicing
- Payment
- Debt control
- Notifications

### Others

- Purchasing
- MOSL integration
- Developer services
- District heating
- Reporting
- Audit trail

### Calculations for Utilities

#### Gas, Electricity, Water and District Heating

- Meter reads
- Tariffs
- Rates

### Data Management System

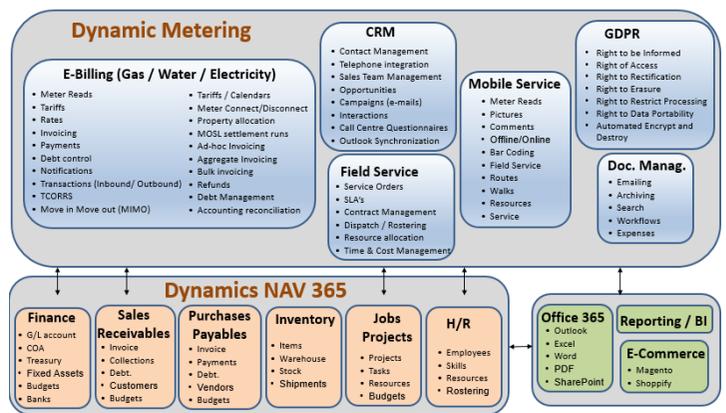
- Transactions (inbound/outbound)
- TCORRS
- Tariffs/Calendars
- Meter connect/disconnect
- Property allocation

### Meter Reading & Route Management

- Mobile NAV
- Aggregate consumption & multiple reading
- Calorific value calculation for gas meters
- Service components

### Standard Interfaces

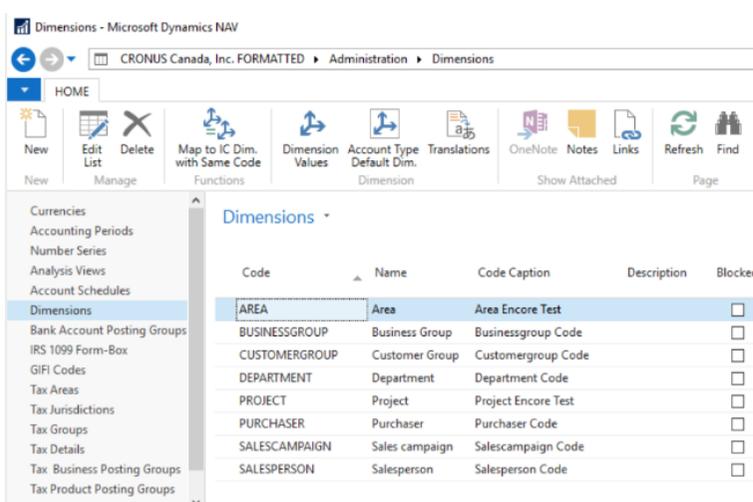
- XML
- Web services



Contact Us

## 3. Tips and Tricks – Dimensions in Dynamics NAV

A **Dimension** is the term used in Microsoft Dynamics NAV to define an analysis category. Dimensions are used to group, or categorize, data for the purpose of analysis. Dimensions consist of Dimension Values. A **Dimension Value** is a “subcategory”, or a “tag” attached to data to conduct meaningful analysis (think of them like article tags on a blog). A Dimension can consist of any amount of Dimension Values.



The basic structure of Dimensions and Dimension Values is like this:

#### Dimension 1

- Dimension Value A
- Dimension Value B

#### Dimension 2

- Dimension Value D
- Dimension Value E
- ...

**Shortcut Dimensions** are analysis categories which facilitate financial, inventory, production, and other analyses. Shortcut Dimensions can be assigned directly to journal, sales, or purchase lines; they can also be assigned to master data (e.g. a Customer, a Vendor, an Item, etc.). A company can create an unlimited quantity of Shortcut Dimensions. Certain areas of Dynamics NAV, however, will only allow a limited number of Dimensions at the same time (for example, only 4 Shortcut Dimensions can be used per Analysis View – to use other Dimensions another Analysis View must be created).

#### Example of a Shortcut Dimension

If a company sells fruits and vegetables, and they are interested in running financial reports based on what categories of products are sold and where they were sold, the following Shortcut Dimensions can be created: Product and Area (as above).

**Global Dimensions** are the most important Dynamics NAV Dimensions for a company. The maximum amount of Global Dimensions is 2. Global Dimensions can be used in the same way as Shortcut Dimensions. But unlike Shortcut Dimensions, Global Dimensions are located in the same database table as your master records. This means that besides the possibility of using Global Dimensions as a filter on all Account Schedules, Batch Jobs, and reports, Global Dimensions can also be used as a filter on G/L entries. Another unique feature of Global Dimensions is that they can be used as additional fields on purchase and sales document headers.

#### Example of a Global Dimension

If a company is a charitable organisation dedicated to promoting higher education, an example of two Global Dimensions could be:

1. **Project** (e.g. for what project/program donations are provided) and
2. **Donor** (e.g. is this a private donor or an organisation, a local donor or foreign, etc.).

These Global Dimensions would allow using a quick filter on the Chart of Accounts to break down an amount by Project and/or by Donor.

Contact us for a free assessment.

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