Positioning & Technical Guidelines
Microsoft Dynamics SL & 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 SL Customers

Taking a deeper dive into the core value of the interoperability with Microsoft Dynamics SL™, formerly Microsoft® Business Solutions-Solomon®, you will see a highly complementary offering for these customers - in particular when looking at the existing modules available for Microsoft Dynamics SL.

Looking at the Microsoft Business Portal, the Microsoft Dynamics SL portal solution, the Business Scorecard Manager should be considered highly complementary. 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 SL 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 lever 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 SL. Therefore, if a customer is seeking to focus the monitoring on the data coming from the Enterprise Resource Planning system only, they should find the Business Portal KPIs 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 where the KPI's can encounter multiple data types. Either when data come from multiple systems or from multiple Microsoft Dynamics SL 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 SL 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 SL 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 SL users.

Microsoft Dynamics SL 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 interoperability lies in the data source connection. From a data source perspective, two different technologies enable the access to Microsoft Dynamics data from Business Scorecard Manager:

- Through OLAP cubes hosed 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

Looking at these connectivity options from a pure technological standpoint, the ODBC connection is the primary data source enabler when working with Microsoft Dynamics SL. The ODBC data connection allows for direct connectivity to the Microsoft Dynamics SL data from within the Business Scorecard Builder without any further integration requirements. Microsoft Dynamics SL customers can use the ODBC data source connection string to access the Microsoft Dynamics SL data stored in the relational SQL server database directly from within the Business Scorecard Builder.

So how does it work? After the Business Scorecard Manager has been set up, the Microsoft SharePoint site has been defined and the Business Analysis cubes have been configured, you can go straight to the Business Scorecard Builder to start defining the desired Scorecards. All you need to do for connectivity is to create the data connection though the data source element of the Scorecard Builder. Since you connect directly to the relational SQL Database you have to create an ODBC connections string, which basically means that you have to build an ODBC connections string defining the specific server and database to which you are to connect. Following that, the next step is then to map the actual data from the SQL database to the specific KPIs by building ODBC queries from within the data mapping dialog box of the Scorecard Builder.

The above describes the straightforward interoperability enabler from a technological standpoint. However, since predefined OLAP cubes often represent more descriptive, user-friendly data models for the typical business user, many customers will want to take advantage of the many partners that have created predefined OLAP cubes based on Microsoft Dynamics SL. This will enable users to use the more user friendly ADOMD.NET data source enabler, empowering them to build and manage their scorecards more efficiently. Instead of having to build the ODBC Queries when connecting through ODBC, through the ADOMN.NET connection users will simply type the name of the server, whereupon all pre-defined cubes will be available from a drop down menu. After the connection has been created to a specific cube on Analysis Services, users can start to browse the Microsoft Dynamics SL-specific cube dimensions from within the Business Scorecard Manager in order to actually map the Microsoft Dynamics SL backend data to the Business Scorecard Manager defined scorecards.

A third interoperability option is available for Microsoft Dynamics SL customers who are also using either Microsoft FRx and/or Microsoft Forecaster. These customers can leverage these integrations even further by utilizing the Microsoft FRx instantOLAP capability to access their Microsoft Dynamics SL 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 SL General Ledger application.

Technology Requirements

Business Scorecard Manager is based on the following Microsoft products and technologies:

- Microsoft Windows Server® 2003
- Microsoft SQL Server 2005[1] or Microsoft SQL Server 2000 with latest service pack
- Microsoft Office SharePoint Portal Server 2003 or Microsoft 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 Microsoft Dynamics SL components required are as following:

- Supported Microsoft SQL Server database
- Optional – Microsoft FRx and the InstantOLAP module
- Optional – Partner-built OLAP cubes based on Microsoft Dynamics SL

ISV/Partner opportunity

The Microsoft Dynamics SL interoperability with Business Scorecard Manager is a great ISV/partner opportunity – both for those who specialize in building predefined OLAP cube solutions based on the Microsoft Dynamics SL data, as well as for partners who prefer to base their offerings on the technical infrastructure for out-of-the-box interoperability already made available from other partners.

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 www.nexdimension.net

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[1] Note that Microsoft Dynamics SL will support SQL Server 2005 as of as of November 2005