Checklist:

A Guide to Your Best Year with Data Analytics and Microsoft Dynamics

JetReports®

Fast. Accurate. Anywhere.

1 - Financial Reporting

Within a company in your Microsoft Dynamics database, do you have divisions, departments, etc. (dimensions) in which you want to segment your reports by?	
Do you have multiple companies for which you need reports?	

If YES, to the above:

Do you have a requirement for consolidated company reporting?	
Do you have elimination entries which need to be posted?	
Do you or are you intending to use any Microsoft Dynamics consolidation capabilities?	
Are your companies in different currencies? If so, do they need to be converted to common or multiple reporting currencies?	
Is your Chart of Accounts consistent across all your companies?	
Could you profile the audience for your financial reports? Such as, do you send reports to senior executives as well as departmental reports to each business unit? How may recipients would you generally send reports to? (estimate if unknown)	
What is your preferred method of your recipients receiving the financial reports? **Some examples:** 1.) Allow each user to generate their own reports on demand. 2.) Send reports from the Finance department. 3.) Upload reports to a directory or share-point, etc.	

What level of detail and drilldown do you desire for your financial reports? e.g. by department, by transactional level, etc.	
Would all the recipients be Microsoft Dynamics users and have the capability to drilldown into Microsoft Dynamics?	
Are the majority of recipients within one network location? i.e. Do all users log onto the same domain, or are they geographically dispersed?	
Does your organization have Finance staff who can create their own financial reports?	

2 - Operations/Sales/Analytics

Is there a requirement or desire to have reporting and analytics capability now or in the future?	
If YES to the above question, thinking about the operations of your business: What are some examples of information you don't have today that would help you run the business better? Are there examples where you do get information, but it is not always reliable or timely? i.e. Is it too late to be useful, or is the information time consuming and difficult to gather?	
Would the ability for end-users to have easy self-serve analysis capability benefit your business? e.g. Analyzing sales trends by product/region, then flip this to region/product, etc.	
Would the solution require a mobile or Web-based capability for end-users? i.e. Users would have the ability to access from anywhere.	
Would you have a requirement to manage the access of information for your users? e.g. Only "Salesperson A" can view their sales.	
Do you have information which is not held in Microsoft Dynamics that may be of use from an analytics perspective? e.g. CRM, payroll or operations system, data in Excel, Google Analytics, etc.	