



Microsoft Dynamics™ NAV

## Tableau Software

# Overview

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Microsoft Dynamics™

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# 1. Overview

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## Introductie

Tableau is een visuele analyse en rapportage oplossing voor gegevens in alle maten en vormen, en kunt u eindelijk uw bedrijf analyseren. Exporteer uw Dynamics NAV data en visualiseer uw belangrijkste klanten, uw beste verkopers, omzetverloop, afzetgebieden tot op het diepste niveau. In combinatie met ReportX kunt u zelf bepalen met welke gegevens u een analyse wilt maken.

In dit document beschrijven wij de stappen van Dynamics NAV data naar analyse.

## Exporteren van data uit Dynamics NAV

Data uit Dynamics NAV kan eenvoudig met een dataport worden geëxporteerd naar een text- of csv-bestand. Ook kunt u gebruik maken van onze Solution ReportX, waarmee u de export zelf kunt definiëren:

Figure 1

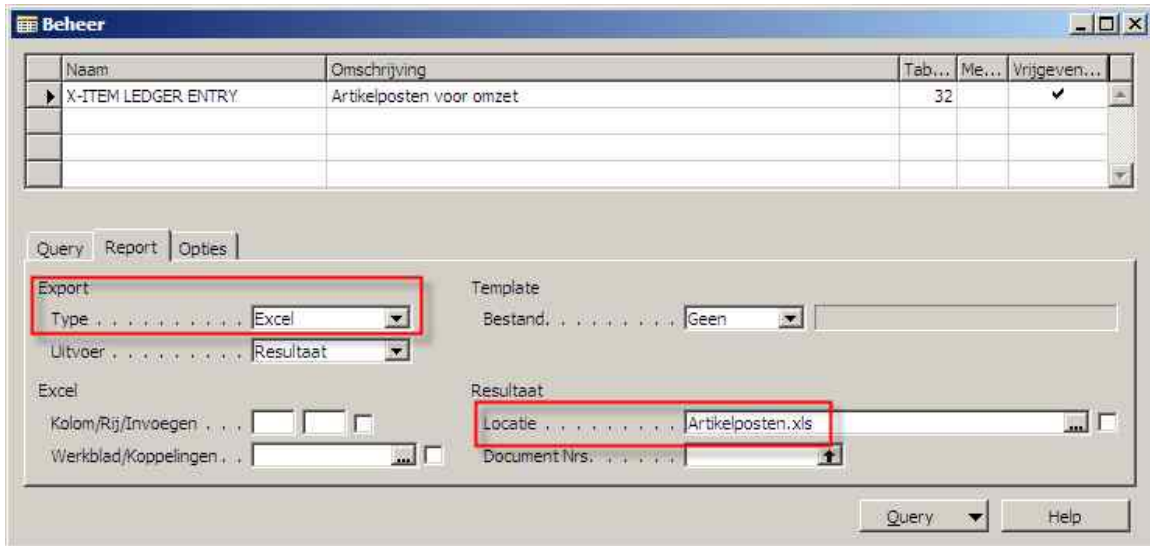


Figure 2

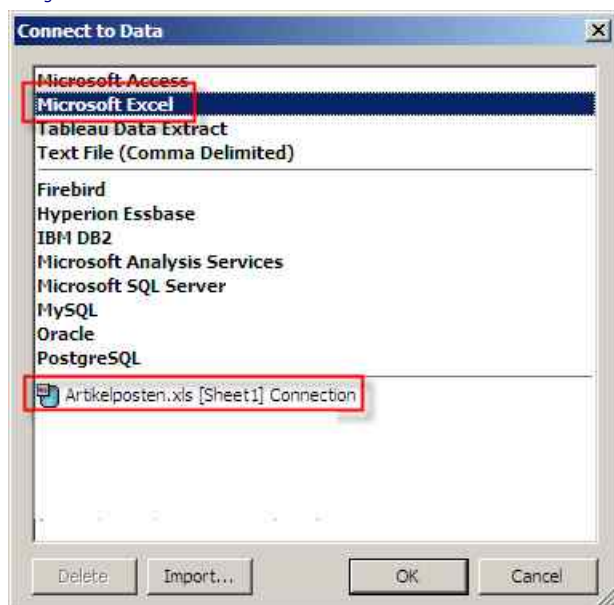
Tabelnr.	Naam	R.	F.	V.	T.
32	Item Ledger Entry				
27	Item				
5722	Item Category				
5723	Product Group				
18	Customer				
110	Sales Shipment Header				
13	Salesperson/Purchaser				
6660	Return Receipt Header				
13	Salesperson/Purchaser				

Figure 3

Item No.	Description	Description	Description	Posting Date	Name	City	Invoice Sales Amt	Salesperson Name
1100	Front Wheel	Bikes	Wheel	26-9-2001	MEMA Ljubljana d.o.o.	Ljubljana	5 5 000	JR John Roberts
1200	Back Wheel	Bikes	Wheel	26-9-2001	MEMA Ljubljana d.o.o.	Ljubljana	5 6 000	JR John Roberts
70011	Glass Door	Office furniture	Closet	17-1-2001	The Cannon Group PLC	Birmingham	5 361.5	RL Richard Lum
70011	Glass Door	Office furniture	Closet	8-1-2001	Antarcticoopy	Antwerpen	1 61.45	JR John Roberts
70060	Mounting	Office furniture	Closet	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
70102	Paint, blue	Office furniture	Closet	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
1896-S	ATHENS Desk	Office furniture	Office Desk	10-1-2001	Selangorian Ltd.	Coventry	1 629.92	PS Peter Sadow
1896-S	ATHENS Desk	Office furniture	Office Desk	16-1-2001	Selangorian Ltd.	Coventry	-1 -629.92	PS Peter Sadow
1896-S	ATHENS Desk	Office furniture	Office Desk	13-1-2001	Autohaus Mielberg KG	Hamburg 36	1 649.4	JR John Roberts
1896-S	ATHENS Desk	Office furniture	Office Desk	19-1-2001	Autohaus Mielberg KG	Hamburg 36	-1 -649.4	JR John Roberts
1896-S	ATHENS Desk	Office furniture	Office Desk	21-1-2001	Autohaus Mielberg KG	Hamburg 36	0 0	JR John Roberts
1896-S	ATHENS Desk	Office furniture	Office Desk	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
1900-S	PARIS Guest Chair, black	Office furniture	Office Chair	12-1-2001	Designstudio Gmunden	Gmunden	6 750.6	MD Mary A. Dempsey
1906-S	ATHENS Mobile Pedestal	Office furniture	Office Chair	13-1-2001	Autohaus Mielberg KG	Hamburg 36	1 281.4	JR John Roberts
1906-S	ATHENS Mobile Pedestal	Office furniture	Office Chair	21-1-2001	Autohaus Mielberg KG	Hamburg 36	0 0	JR John Roberts
1908-S	LONDON Swivel Chair, blue	Office furniture	Office Chair	17-1-2001	The Cannon Group PLC	Birmingham	1 123.3	BD Bart Duncan
1908-S	LONDON Swivel Chair, blue	Office furniture	Office Chair	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
1920-S	ANTWERP Conference Table	Office furniture	Assorted Tables	12-1-2001	Designstudio Gmunden	Gmunden	2 840.8	MD Mary A. Dempsey
1920-S	ANTWERP Conference Table	Office furniture	Assorted Tables	11-1-2001	John Haddock Insurance Co.	Manchester	0 0	PS Peter Sadow
1920-S	ANTWERP Conference Table	Office furniture	Assorted Tables	16-1-2001	John Haddock Insurance Co.	Manchester	0 0	PS Peter Sadow
1920-S	ANTWERP Conference Table	Office furniture	Assorted Tables	21-1-2001	John Haddock Insurance Co.	Manchester	0 0	PS Peter Sadow
1920-S	ANTWERP Conference Table	Office furniture	Assorted Tables	25-1-2001	The Cannon Group PLC	Birmingham	0 0	PS Peter Sadow
1928-S	AMSTERDAM Lamp	Office furniture	Various	25-1-2001	Quilford Water Department	Quilford	10 200	PS Peter Sadow
1928-S	AMSTERDAM Lamp	Office furniture	Various	14-1-2001	Selangorian Ltd.	Coventry	5 172.66	AH Annette Hill
1928-S	AMSTERDAM Lamp	Office furniture	Various	20-1-2001	Progressive Home Furnishings	Chicago	14 498.41	RL Richard Lum
1928-S	AMSTERDAM Lamp	Office furniture	Various	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
1928-W	ST MORITZ Storage Unit/Drawers	Storage units	All parts	18-1-2001	Englunds Kontorsmöbler AB	Norrköping	1 290.78	DC Debra L. Core
1928-W	ST MORITZ Storage Unit/Drawers	Storage units	All parts	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
1952-W	OSLO Storage Unit/Shelf	Storage units	All parts	18-1-2001	Englunds Kontorsmöbler AB	Norrköping	1 134.73	DC Debra L. Core
1952-W	OSLO Storage Unit/Shelf	Storage units	All parts	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
1960-S	ROME Guest Chair, green	Office furniture	Office Chair	8-1-2001	Antarcticoopy	Antwerpen	3 375.3	JR John Roberts
1960-S	ROME Guest Chair, green	Office furniture	Office Chair	11-1-2001	Antarcticoopy	Antwerpen	2 250.2	JR John Roberts
1960-S	ROME Guest Chair, green	Office furniture	Office Chair	14-1-2001	Antarcticoopy	Antwerpen	2 250.2	AH Annette Hill
1960-S	ROME Guest Chair, green	Office furniture	Office Chair	22-1-2001	Heimilisprydi	Reykjavik	1 118.85	JR John Roberts
1964-W	INNSBRUCK Storage Unit/G. Door	Storage units	All parts	17-1-2001	The Cannon Group PLC	Birmingham	10 2 920	RL Richard Lum
1964-W	INNSBRUCK Storage Unit/G. Door	Storage units	All parts	18-1-2001	Englunds Kontorsmöbler AB	Norrköping	1 248.2	DC Debra L. Core
1964-W	INNSBRUCK Storage Unit/G. Door	Storage units	All parts	19-1-2001	MEMA Ljubljana d.o.o.	Ljubljana	0 0	JR John Roberts
1964-W	INNSBRUCK Storage Unit/G. Door	Storage units	All parts	22-1-2001	Candoxy Nederland BV	Amsterdam	0 0	RL Richard Lum
1964-W	INNSBRUCK Storage Unit/G. Door	Storage units	All parts	22-1-2001	Heimilisprydi	Reykjavik	1 248.2	JR John Roberts
1968-S	MEXICO Swivel Chair, black	Office furniture	Office Chair	4-1-2001	The Cannon Group PLC	Birmingham	2 234.27	AH Annette Hill
1968-S	MEXICO Swivel Chair, black	Office furniture	Office Chair	5-1-2001	The Cannon Group PLC	Birmingham	1 117.13	DC Debra L. Core
1968-S	MEXICO Swivel Chair, black	Office furniture	Office Chair	6-1-2001	The Cannon Group PLC	Birmingham	2 234.27	PS Peter Sadow
1968-S	MEXICO Swivel Chair, black	Office furniture	Office Chair	8-1-2001	Antarcticoopy	Antwerpen	2 246.6	JR John Roberts

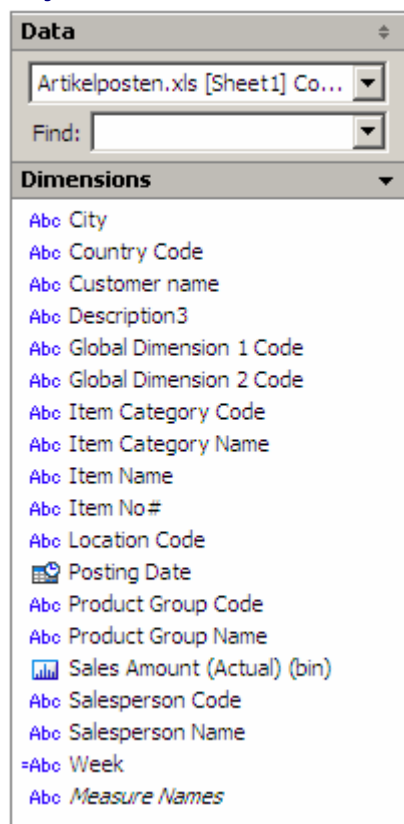
## Een koppeling maken in Tableau

• Figure 4



In Tableau legt u de bron vast, waarmee een koppeling moet worden gemaakt. De beschikbare velden verschijnen vervolgens in Tableau:

• Figure 5



## Datarelaties definiëren

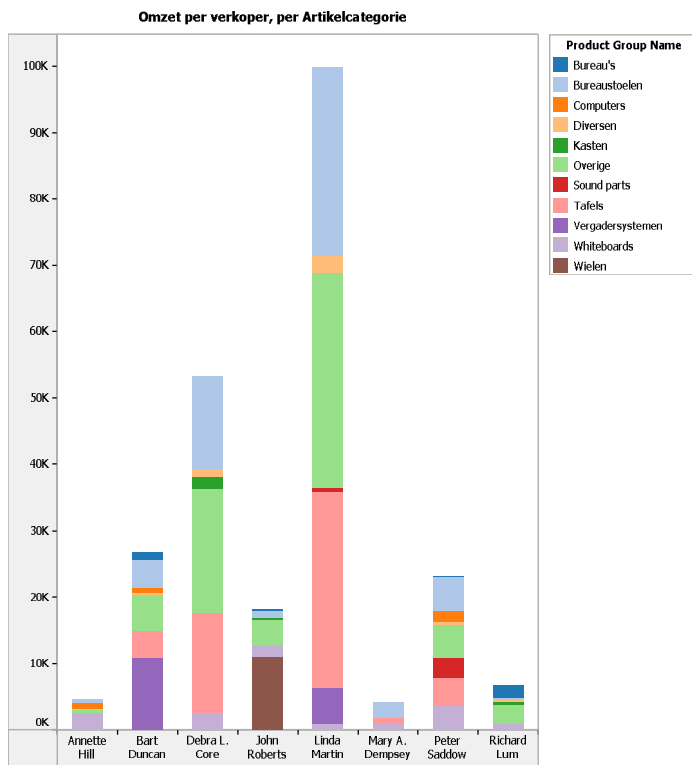
Figure 6

The screenshot shows a pivot table titled "Omzet en Marge per week, productgroep en stad". The dimensions are City, Week, and Product Group Name. The measures are SUM(Gross margin) and SUM(Sales Amount). The table is organized into a grid with rows for Product Group Name and columns for City. The data is summarized by Week and Product Group Name.

Product Group Name	Bejeune		Smeulen		Antwerpen		Brimingham		Chicago		Hambrug
	Sum of S.	Sum of G.	Sum of S.	Sum of G.	Sum of S.	Sum of G.	Sum of S.	Sum of G.	Sum of S.	Sum of G.	Sum of S.
Bureautolien							194	103			
Whiteboards							5.028	1.879			
Bureau's											899
Bureautolien	1.921	304	751	184	699	229					231
Kasten							61	28			
Overige							691	249			
Tafels			341	105							
Whiteboards			937	210							
Bureau's											-199
Bureautolien					274	82	111	61	123	27	
Computers											
Diversen									498	109	
Kasten							312	177			
Overige					461	180	1.920	1.038			
Tafels											
Vergadersystemen											
Whiteboards									877	168	
Bureau's											8
Bureautolien											8
Diversen											
Kasten											
Overige											
Tafels							8	8			
Whiteboards											
Sound parts											
Vergadersystemen											
Whiteboards											
Sound parts											
Bureautolien					4.818	1.204					
Diversen					216	82					
Overige					4.207	1.371					
Tafels					4.204	1.288					
Bureautolien											
Diversen											

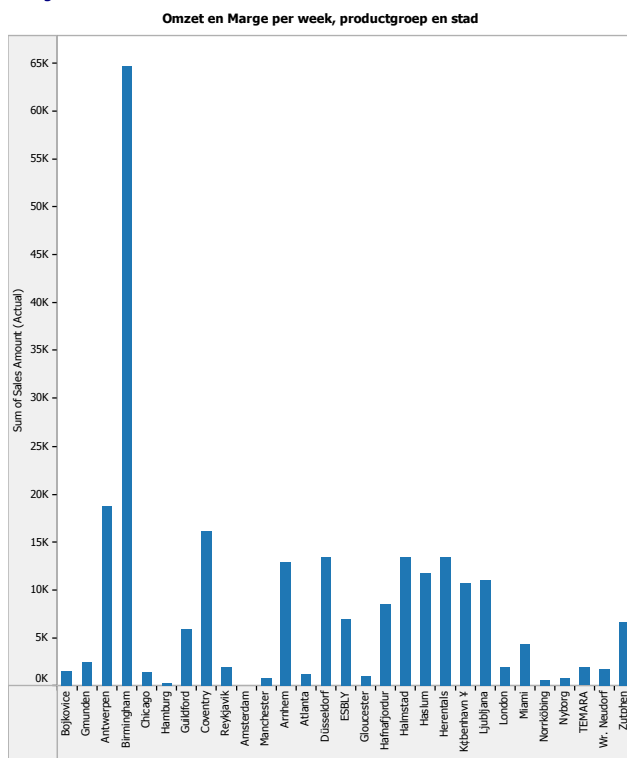
Door de verschillende velden te slepen naar de kolommen, de regels en het datagebied, ontstaan op eenvoudige wijze datarelaties. Grafieken en analyses zijn dan nog maar 1 muisklik verwijderd:

Figure 7



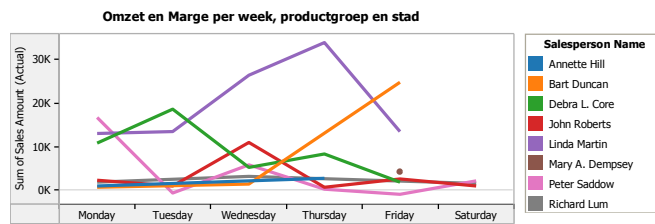
Sum of Sales Amount (Actual) for each Salesperson Name. Color shows details about Product Group Name.

Figure 8



Sum of Sales Amount (Actual) for each City.

Figure 9

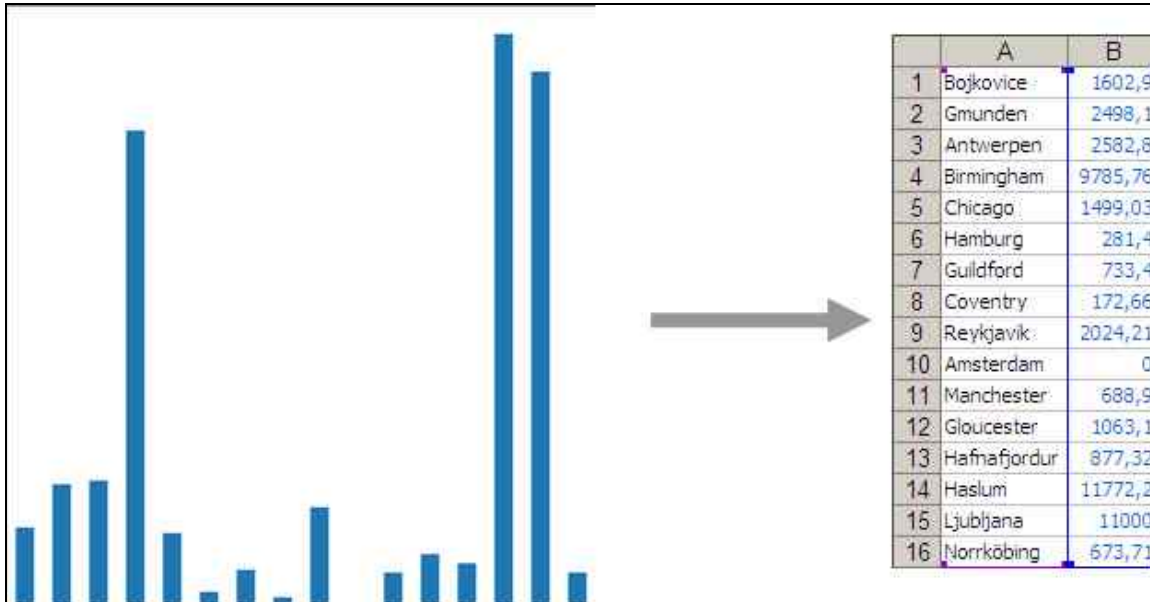


The trend of sum of Sales Amount (Actual) for Posting Date Weekday. Color shows details about Salesperson Name. The data is filtered on City, which has multiple members selected. The view is filtered on Salesperson Name and Posting Date Weekday. The Salesperson Name filter has multiple members selected. The Posting Date Weekday filter excludes Sunday.



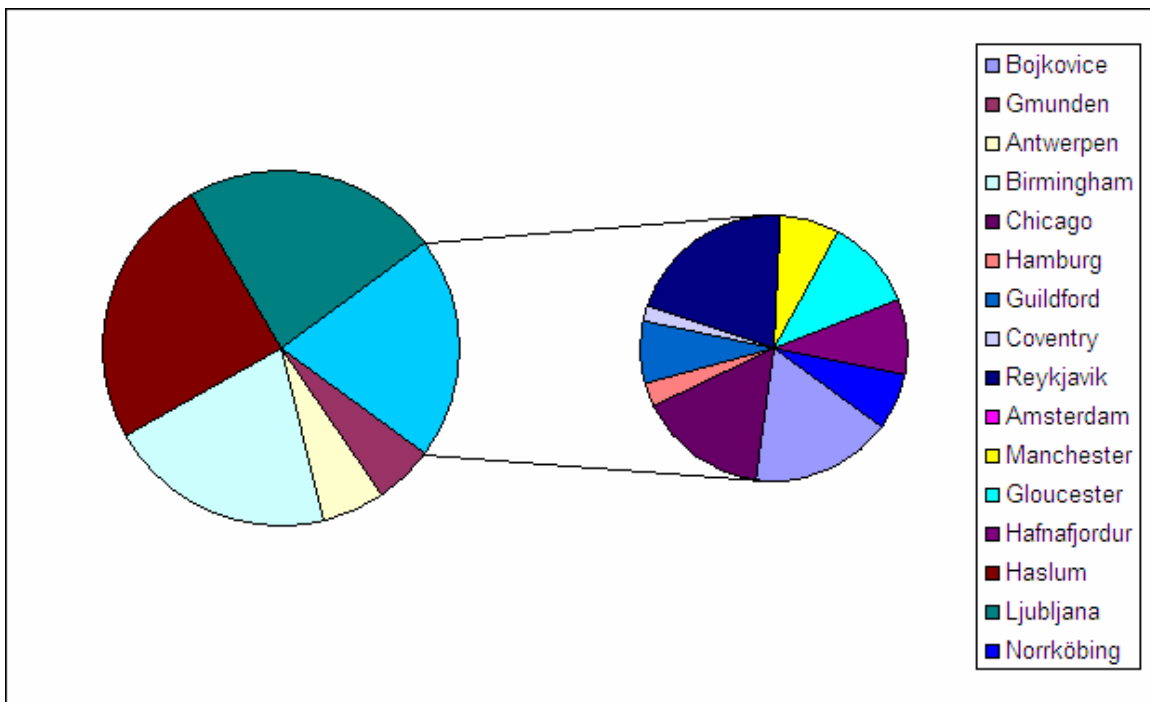
## Data-analyse exporteren naar Excel

• Figure 10



De data die bij een analyse overzicht hoort, kan naar Excel worden geëxporteerd.

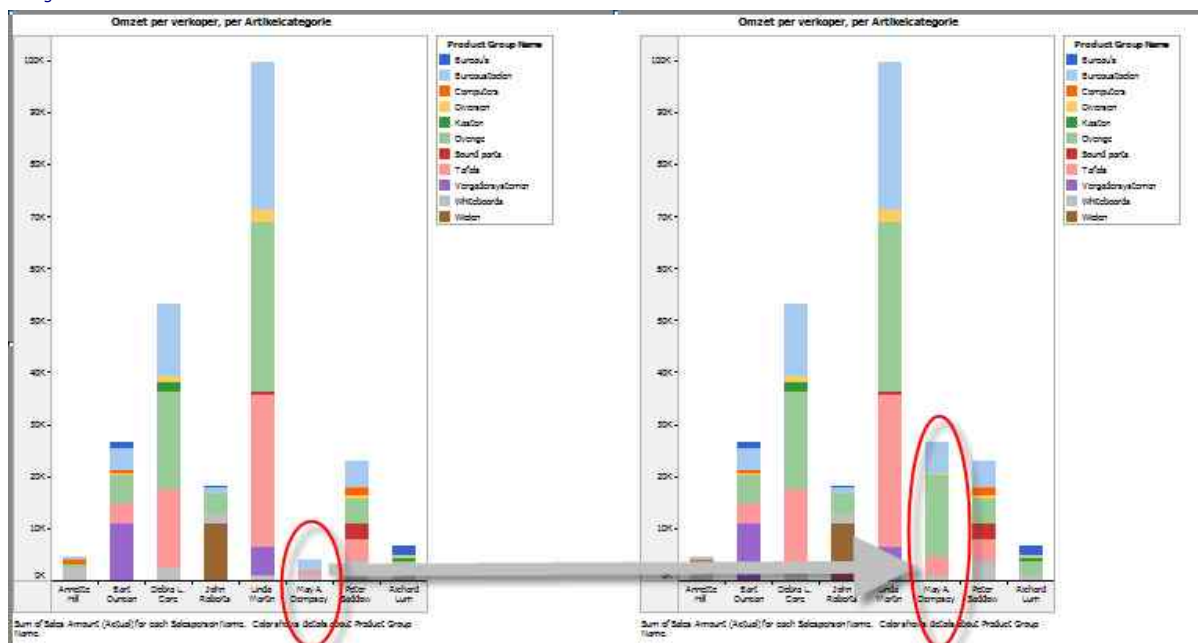
• Figure 11



Vervolgens kan deze data in Excel worden gebruikt voor additionele overzichten.

## Dynamische overzichten

Figure 12



Wanneer een nieuwe export wordt gemaakt uit Dynamics NAV, past Tableau direct de overzichten aan.