
INTEGRATING NAV:

Effectively sharing data across multiple business applications

■ WHY INTEGRATE?

Whether Microsoft Dynamics NAV is used as an ERP system or as the main business system, it needs to be able to share data effectively and work well with other products for a number of reasons. Some of these reasons include: reducing duplication of entry, reducing duplication of effort, reducing redundancy in processes, avoiding keying mistakes, as well as increasing accuracy by ensuring that the data matches between systems .

“There can also be speed issues,” says Jeff Austin, Vice President of Dynamics Services Group (DSG), a division of IndustryBuilt Software. “It may not be all that difficult to move data from one system to another manually, but it may take a lot of time. Making sure that the data moves automatically will save money and time.”

Organizations must integrate processes to break down the silos of information and to ensure that information entered into one application is immediately available for use in other applications. Integrating systems can make it easier for everyone in your organization to connect with customers, suppliers, and partners. Integrating data across applications can make employees more productive because they don’t have to pull information from separate sources. Additionally, it allows your company to quickly respond to new business opportunities and be more competitive.

■ WHAT SYSTEMS CAN YOU INTEGRATE?

“One of the key systems that Dynamics NAV can be integrated with is a warehouse management system (WMS),” Austin says. “Although NAV has WMS capabilities, the client may already have a system they’re happy with, that’s entrenched in the business and that the users know how to work with. So it doesn’t make economic sense to rip that out and put something else in. The idea would be to integrate that to NAV.”

It could be a third-party process-type system like a QA process in manufacturing or it could be time entry for use with payroll, such as entering the time people start and stop work each day. In fact, it could be payroll—if you’re not using payroll through NAV but through a different tool and you want to share the information between the two systems. Another system you might want to integrate with NAV is a reporting package for business analysis that you’re comfortable working with and that you have experience using.

“You may have some legacy reports that you’ve already built and it doesn’t make sense to reinvent the wheel so why not integrate NAV to the product that you already have,” Austin says.

■ DETERMINE YOUR BUSINESS GOALS

When it comes to deciding what systems to integrate with NAV, it’s important for companies to determine their ultimate business goals. DSG works with companies to figure out what will serve the business best.

“The first question to ask is if it makes sense to integrate at all,” Austin says. “Is it going to be worthwhile to the business to integrate or is there a better system or a better product out there that’s built right into NAV? Is the product we’re looking to integrate to still the right product for the business? And does it make the most sense to continue to use it?”

Next, DSG looks at interface options to determine how data can be shared between systems including via flat files, where a text file sent out of one system is imported into another system, or via XML files that use a different but more modern architecture. Another more recent option is to use web services that would be appropriate for handheld devices, websites and web-type integrations done through NAV’s web services component.

DSG will then ask the company questions that are more specific to their business process, such as:

- How often does this integration need to happen—monthly, weekly, daily or up to the minute?
- Is the integration of data single directional or bidirectional?
- Who owns each set of data? With WMS integrations, who owns the items? Do the items themselves get set up or do they get created from the warehouse system?
- Who owns the records? You don’t want to end up with conflicts between the two databases.

■ TEAMWORK, TESTING ARE CRITICAL TO A SUCCESSFUL INTEGRATION

Then in order to determine the best way to share data between two systems, DSG tries to work directly with the vendor of the other system.

“We would actively encourage working in a team with the other third party vendor,” Austin says. “We don’t care to be the only vendor of record or to lead a project. The whole goal is to do this on behalf of the client and in that mode we’d want to do the best job we can so we’re going to need the expertise of the other vendor.”

The key to a successful integration project is heavy testing or detailed client testing.

“This is important because we know our data and the other vendor knows their data but the client is the only group that’s going to know both sets of data. And the client can validate that it’s accurate and it’s appropriate and that it’s coming in correctly and synchronizing correctly,” Austin says. “So there needs to be a good bout of cycle testing, data testing, process testing and we can help the client through that.”

DSG also recommends that each company create a testing environment because an integration project will typically occur during a company’s regular business operations. A safe testing place off to the side that doesn’t touch production data will allow DSG to do full cycle testing on all the pieces of NAV and on the product it’s integrating to, so it can analyze the data, run reports, train, test and validate and ensure that everything is running smoothly before doing the actual go-live on a project.

“If these go-lives are done right, the preparation work has been done in advance and the testing is good, the go-live is a non-event,” Austin says.

■ QUESTIONS TO ASK OF POTENTIAL VENDORS

Before hiring an integration vendor, companies need to ask some important questions including:

- What types of integrations have they done in the past and how many have they done? Integration to a WMS product is completely different and more complex than integration to a payroll system.
- What’s the vendor’s experience with the technical integration?
- Is the vendor willing to work as part of a project team with the client and the other vendor to make it a successful implementation?
- What sort of support mechanisms does the vendor have to help a client through the testing? How would the partner help the client with the testing process?
- What are the vendor’s automation options? How has the partner been able to automate the process—not just integrate it? Can it be automated and scheduled so it’s hands off?
- What type of integration is it? Is it on demand? Is it a scheduled type of integration that happens once a day or once a week or once a month according to a schedule or a plan? Or, is it an immediate or direct integration that’s happening in real time? Ask if the vendor has experience in doing those sorts of

integrations and ask about the options to automate the process—taking it from pushing a button to it happening automatically.

- What are the controls the vendor has in place to audit the process to make sure it's accurate and it gives your company the result you need?

WHY DSG

Over the last 10 years, Dynamics Services Group has provided services for hundreds of companies working with Microsoft Dynamics NAV, and has most likely helped a customer who has faced similar integration challenges to many other businesses, and can bring those solutions to your company.

DSG has helped numerous companies with integration projects of different types—everything from flat files to data ports, XML to direct SQL integrations, exporting GL records to a third party payroll system, to WMS integrations and to external systems that power remote handheld devices for technicians on the road visiting customers.

“But we won’t just integrate to what the client already has, we’ll try to provide options and choices. And we may end up realizing that the product they have is the exact correct product for them and then we go ahead and integrate,” Austin says. “We try to ensure that we’re not integrating to a third party client when there might be some package functionality that the client already owns. We want to make sure that each integration is appropriate for the business and ultimately will save the company time and money and improve efficiencies.”

The Dynamics Services Group has a full project team ready to help its clients with their NAV integrations. Full integration of Microsoft’s Sure Step Methodology, resources including project managers, business analysts, and developers who are all product certified and heavily experienced make DSG the right choice as your business partner.



Information on Dynamics Services Group can be found at <http://industrybuilt.com/ProductsServices>



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