



## Looking for an alternative to FRx or Management Reporter?

Take a look at BI360! It's just what you've been asking for!

### BI360: The First Full Business Intelligence Suite for the Microsoft Dynamics

BI360 is the first 'Full' Business Intelligence Suite for Microsoft Dynamics. With out of the box **integration to Dynamics AX, GP, SL, NAV and CRM**, BI360 offers you a solution with capabilities that include **Excel-based reporting and budgeting**, Excel or Web-based **dashboards** and a **data warehouse**. Mix and match the pieces that you need, use the entire suite, or use one module at a time as your organization and needs grow. We think, and our partners and customers agree, that BI360 is the right alternative for companies looking to move on to a next generation reporting and budgeting solution for Microsoft Dynamics.

#### BI360 Reporting

- Excel-based report design and review
- Out of the box Microsoft Dynamics integration to AX, GP, NAV, SL and CRM
- Financial reporting – GL
- Operational reporting – Beyond the GL! AR, AP, Sales Order, Inventory, etc...
- Drag and drop design techniques
- Presentation/Boardroom quality formatting –conditional formatting, colors, charts, logos...

#### BI360 Budgeting

- Excel-based administrative and budget user interface
- Includes budgeting input templates to jumpstart use and ROI
- Import historical actuals from Dynamics or other source (HR, Payroll, etc...)
- Budget at the account or at line item detail level
- Budget for payroll, capital expenditures, revenue and any other aspect of your business.
- Create budget calculations based on statistical or financial drivers.
- Using the same BI360 report writer to design budgeting reports
  - View consolidated budget numbers, actual to budget variance, rolling forecasts, and more!

#### BI360 Dashboards

- BI360 dashboards offer both Excel and Web-based options.
- Help managers visualize trends and highlight exceptions to key performance indicators.
- Access vital information to better identify issues, make decisions, and drive success.

#### BI360 Data Warehouse

- Microsoft SQL Server-based, next generation, pre-configured, customizable data warehouse.
- Import data from ANY data source (ERP, HR/Payroll, legacy database, flat files, spreadsheets...)
- Manage data with an Office-like administrative interface
- Consolidate reporting, analysis and dashboards.
- Implement in days or weeks instead of months or years, and at a fraction of the cost and risk of a traditional "build-from-scratch" data warehouse projects.

## FAST FACTS

Below are features that current FRx users mention they would like to see in a new reporting solution. BI360 includes all of these features, and more, out-of-the-box....today!

### FRx Features you like today

<b>Designed 'by accountants for accountants'</b>	Built in accounting logic (i.e. 'YTD' or 'DSO', more, ...)
<b>Integration to Microsoft Dynamics</b>	Works with Dynamics (AX, GP, NAV, SL & CRM) out of the box. Installs in a few hours and reports running in less than 1 day!
<b>Reusable report templates</b>	Design a report once, and reuse it for other report variations.
<b>Drill down to underlying details</b>	Drill from summary level to transaction detail in a mouse click

### Features you've been asking for

<b>Excel-based</b>	Design and consume reports in Excel. Use existing skills and features; outlining, vlookup, etc....
<b>'Beyond the GL'</b>	Operational reporting on Sub-ledgers (AR, AP, Inventory, more...)
<b>Include Excel graphics in report</b>	Use all of the charting and formatting allowed in Excel! Include logos, graphs, traffic lighting, etc...the sky is the limit!
<b>Easy to Learn</b>	Excel-based so users capitalize on their current skills
<b>Access data from any data source</b>	BI360 Data Warehouse stores data from any source. Integrate BI360 Reporting 'live' to ANY source (Meta Data Tool)

### Features you didn't know were available

<b>Combine data across modules</b>	Combine GL + subsidiary (sub-ledger) data in 1 report
<b>Dynamic ranges in rows AND columns</b> <i>i.e. Accounts, Periods, Depts</i>	Rows/columns dynamically 'expand' to include additional account/dept/etc...added to the ERP. No maintenance!
<b>Pull (not push) reporting</b> <i>No more report distribution!</i>	Users generate their own reports with secure, 'parameter' driven designs. Share the report template once, and decision makers 'run' their own reports month after month.
<b>Ad-hoc reporting for quick query/analysis</b>	Drag & Drop ad-hoc analysis with no limits on filters.
<b>Currency conversion &amp; auto-eliminations</b>	Incorporate advanced currency translation and eliminations in your BI360 reports using the BI360 data warehouse to import, manage and store rates, eliminations and consolidated values.
<b>Integration to Microsoft Dynamics CRM</b>	Build reports off of your CRM data with the same tool you use for Financial and Operational reporting.
<b>Integrated Business Intelligence Suite</b> <i>Reporting, Budgeting, Dashboard, Data Warehouse</i>	Modules work individually or together as a Suite Mix & Match ~ buy 1, 2 or 3 modules as needed As a Suite ~ buy the whole suite at a fraction of the price of higher end consolidation tools like Hyperion or Cognos.



### ERP & Other Data-Source Integration

**Q:** To which ERPs do you integrate out-of-the-box?

**A:** BI360 integrates with the following systems 'out of the box' today.

- Microsoft Dynamics AX, GP, NAV, SL, C5
- Microsoft CRM
- Sage MAS500
- BI360 Data Warehouse (SQL Server-based)
- Microsoft Enterprise Reporting
- Various 3rd party Dynamics ISVs (e.g. Wennsoft and Binary Stream)

Planned integrations for 2011

- Epicor
- Sage X3, Sage MAS90/200

**Q:** Besides GL, to what other modules does BI360 integrate?

**A:** BI360 integrates to the GL 'and Beyond'...out of the box...today.

Module Examples: GL, AR, AP, Inventory, Sales Order, Purchasing, Project, etc...

For a more complete list for your Dynamics ERP contact us at [info@solverusa.com](mailto:info@solverusa.com)

**Q:** Does BI360 report on non-standard fields, tables or modules? (i.e. User Defined Fields (UDFs) GP's Analytical Accounting or Custom tables or Fields?)

**A:** Yes.

- BI360 integrates to between 3000 – 6000 Dynamics fields (depending on ERP) out-of-the-box.
- BI360 is fully integrated to Dynamics GP Analytical Accounting.
- BI360 also integrates to User Defined Fields (UDFs) in all of the Dynamics systems.
- BI360 can also access custom tables and fields. Using the BI360 for Dynamics Mapping tool customers can map BI360 to custom tables or fields in Dynamics. Using the standard BI360 report writer customers can design reports that combine standard fields and custom fields side by side in the same report.

**Q:** Do I have to buy all of the modules at once, or can I buy just one now (e.g. the report writer) and then later purchase the budgeting or dashboard modules?

**A:** You do not have to buy the entire suite (all modules) at once. You can purchase individual modules and add more when you need them. You can buy the reporting module today, and when you are ready, add the budgeting module. No special integration is required later on because all of the pieces of BI360 were developed and integrated to work together.

**Q:** Which versions of Excel are supported?

**A:** The BI360 Report Player (used by end-users to execute and drill down) supports Excel 2003 and newer versions. The BI360 Report Designer (used by power user to design, generate and drill down) supports Excel 2007 and newer versions.

## Report Design (Rows, Columns, Trees, FRx Conversion)

**Q:** Can you convert existing FRx Reports?

**A:** Yes! There are several ways we support you in converting FRx to BI360.

**Option 1:** Since BI360 is Excel-based many users find it just as simple to take an FRx report, exported into Excel, and simply add the BI360 fields with our drag and drop report design.

**Option 2:** Use our 'FRx to BI360 Conversion' Guide. It outlines steps to translate a report design from FRx into BI360. Developed out of a live customer experience this guide has streamlined many customers' conversion of FRx reports to BI360. Historically speaking, using these conversion steps, most FRx reports have been able to be translated into a BI360 Report in 15 – 30 minutes.

**Option 3:** Solver also offers a service, under a consulting engagement; if you wish to have our team of experts do the conversion of your top FRx reports, and jumpstart your use of BI360.

**Q:** Is there a library of existing report templates we can take advantage of?

**A:** Yes. BI360 Reporting and Budgeting both come with a number of report and budget model templates that you can use to jumpstart your use of the solution. Simply use the template, add your own account references using our drag & drop design and begin analyzing or budgeting in BI360. For specific details of the modules to which your ERP connects to, contact Solver at [info@solverusa.com](mailto:info@solverusa.com).

**Q:** Does OSR have reporting trees similar to FRx?

**A:** FRx Reporting Trees were used to represent organizational structures that could filter reports for each branch. BI360 supports organizational hierarchy report generation; yes.

Using 'parameters' and 'filters', BI360 enables users to specify aspects such as 'dept/region' at 'report-run-time'. Area/Dept/Region managers choose their own filter value (i.e. Dept 100) and generate their own reports. Filters can include more than one 'parameter' (i.e. multiple depts for a virtual or summarized rollup). All branches can be represented on one report (i.e. across columns or down rows) or each department can be in its own worksheet, with multiple sheets making up a workbook. Instead of Finance or Accounting generating reports across trees and distributing them, decision makers generate their own 'branch and summary' reports.

## Report Distribution (Sharing, Accessing, Printing)

**Q:** Can you drill down to details in BI360 reports, even though it is still in Excel?

**A:** Yes. BI360 allows you to drill from summary level information to underlying details, in Excel. Drill into either a filterable list, or a pivot table, on the fly...your choice! The initial report displays on the first tab/sheet of the workbook. Then to drill down simply right mouse click; details appear in a new tab of the workbook (list or pivot table). Users easily move back and forth between the main report and drill down results by simply choosing the different tabs.

**Q:** For Excel based systems, how do you generate, distribute or print reports?

**A:** There are several options for BI360 report generation and distribution:

**Generation & Distribution:**

1. **Recommended:** End User 'pull' or 'on-demand' Report Generation.
  - BI360, unlike other report writers that attach a 'static, pre-run' report, offers a dynamic report design that gives users the ability to 'run' their own report.
  - End users (BI360 Player License) open and generate their own reports, choosing a parameter (period,



dept, etc...) filter at 'run time'.

2. **Optional:** Finance/Accounting 'push' Report Generation.

- BI360 Power users can generate reports and email them as a link to a shared network folder, as an attachment, or place them on an Intranet/SharePoint site (SharePoint is NOT a requirement for BI360).

3. **Coming Soon:** Auto-scheduling with auto-distribution and alerts-based distribution.

- BI360 Publisher (2011 scheduled release) allows users to schedule reports for auto-generation and distribution by department, region or other parameter.

**Printing:**

- Since BI360 is Excel-based, report designers can use built-in Excel formatting to set margins, print ranges, headers and footers, etc...during 'report design phase'. Users receive, run and print their reports, without having to modify settings.

**Q: Security. How do you keep departmental reports out of the hands of the wrong manager?**

**A:** BI360 has Security that integrates with Active Directory (AD). Associating different AD users or groups in your organization with different roles in BI360 (Dept 100, Accounts Payable, etc...) you can restrict those roles to only see specific aspects of the Dynamics data being accessed by BI360. When a user receives a report, they will only be able to run, see and drill down on data based on the security setting established. **NOTE:** The same security is utilized by the BI360 Budgeting module.

**Q: Can I create report book where multiple reports can be produced together at the same time?**

**A:** Yes you can.

## Why BI360 instead of FRx or Management Reporter

**Q: Why should I consider BI360 instead of just keeping FRx or moving to Management Reporter?**

**A:** A typical small and mid-sized company often comes from a world where "Business Intelligence (BI)" means Financial Statements (e.g. produced with FRx) and budgeting/forecasting means a manual Excel-based process.

With BI360, you can afford to implement anything from GL reporting to full Operational reporting, automated budgeting with workflow, dashboards and data warehousing that combine data from the ERP and other data sources, all in one integrated suite. You can purchase one module at a time. As your company grows, easily add modules (i.e. add budgeting, or add a data warehouse) and BI360 automatically works together. No special integrations need to be built between our modules because BI360 was designed from the ground up to work together!

***Thank you for your interest in BI360!***

**Should you wish to learn more, or have questions, please contact us!**

- On-Demand Videos: <http://www.solverusa.com/news/bi360videos>

- Weekly webinars: <http://www.solverusa.com/news/webinars>

- BI360 Brochure Download: [http://www.solverusa.com/docs/products/BI360\\_Overview.pdf](http://www.solverusa.com/docs/products/BI360_Overview.pdf)

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