

BI and Budget Reporting

➔ Infor ERP VISUAL BI and Budget Reporting's state-of-the-art enterprise report writing and budget capabilities increase business productivity and improve the bottom line.



Be enterprising.

In today's competitive marketplace, manufacturers are being challenged by their customers to produce high-quality products more quickly, at a reduced cost. In order to do this, companies are streamlining their operations with the help of advanced enterprise resource planning (ERP) solutions. However, all ERP systems are not created equal, and many ERP system users report problems creating financial statements and budgets. Companies that use traditional spreadsheets can face even bigger problems; serious errors that are often uncovered during audits can cost them millions of dollars.

Enterprising companies are relying on new technology to easily create and maintain enterprise and budget reports, not only saving them time but also providing them with more flexibility, greater accuracy, and the ability to quickly deliver critical information to managers.

Leverage experience.

Infor™ ERP VISUAL BI and Budget Reporting powered by Synoptix provides ease of use and agility during report generation, dramatically increasing your efficiency. This technologically advanced solution:

- Easily creates reports and budgets with the look and feel of spreadsheets, but without their limitations.
- Allows you to create reports from anywhere in your database.
- Empowers you to create both summary and detail-level reports.
- Provides complete drill-down functionality.

- Connects directly to your database.
- Allows multiple-source collection of information into a single report.
- Is developed with Synoptix' Multi-dimensional Intelligent Data-store™ (MIND™) technology, which gives spreadsheet cells the ability to intelligently retrieve actual data.

This powerful functionality makes Infor ERP VISUAL BI and Budget Reporting an intensely practical analysis and research tool.

Get business specific.

Infor ERP VISUAL BI and Budget Reporting allows you to create financial reports and budgets as easily as you create a standard spreadsheet. Unlike a spreadsheet, however, it lets you drill down to a report's originating documents with just a few mouse clicks. Powered by the most sophisticated technology available, this innovative solution offers a seamless connection to your ERP, distribution, and accounting databases and provides you with fully dynamic data.

FINANCIAL REPORTS

Connect to your database directly. Within minutes, you can create—without IT assistance—virtually any report you need from anywhere in your database. Filter reports by any criteria you require and change them with simple point-and-click procedures when needed. After reports are created, easily display them in graph or dashboard formats for quick access to key performance indicators.

Analyze accounts in all their detail. Because Infor ERP VISUAL BI and Budget Reporting has been designed to accountants' specifications, its drill-down functionality is completely unparalleled. For routine tasks like account research and reconciliation, the application allows analysis of account details at the sub-ledger and source data levels by selection of specific items for display on the drill-down screens. The same user-defined columns are available at the originating document level.

Troubleshoot account balances. Infor ERP VISUAL BI and Budget Reporting gives you the ability to research:

- At the detailed general ledger and subsidiary ledger levels, where you can quickly determine the offsetting transaction for a particular posting
- At the detailed general ledger level, where you can launch a screen that lists every detailed transaction posted to an account from any or all subsidiary ledgers
- At the AR, AP, and OC sub-ledgers, where you can quickly analyze un-posted, posted, and all transactions
- At the order costing level, where you can view labor hours and quantities associated with a particular transaction

Increase security; save time. Infor's comprehensive security features free you from having to conduct research for others. On a user-by-user basis, you can easily give people access to selected accounts and categories, and exclude their access to selected accounts and categories. For instance, you can quickly give a Production Manager who is in charge of WIP accounts access to the appropriate accounts and exclude Payroll.




Create financial reports the easy way. Creating financial reports using a spreadsheet, or using a combination of spreadsheets and reports from an ERP, distribution, or accounting package, can be incredibly time-consuming—and once the reports are created, they have to be virtually re-created the next time around. With Infor ERP VISUAL BI and Budget Reporting, you can create any financial report you need in minutes, using simple point-and-click procedures, and the standard spreadsheet calculation functions with which you're already familiar.

Eliminate report re-creation. With Infor ERP VISUAL BI and Budget Reporting, you can easily create financial statement templates for a department, division, or any user-defined segment, eliminating the need to constantly re-create reports. When reports need to be updated with new data, simply select the desired criteria at runtime and click the "Run" button. The solution's filtering capabilities are powerful enough to allow for multiple departments, product classes, or any other segment definition across multiple companies to generate the most sophisticated financial statements available.

Extract data from any independent source. Infor ERP VISUAL BI and Budget Reporting enables you to include data from virtually any source in financial reports. For example, employee head-count information can be easily extracted from your current accounting system, as can non-financial data such as purchase orders and shipping orders. You can also connect to and extract data from outside databases, such as Oracle™, DB2™, Sybase™, SQL Server™, Access™, and Visual FoxPro™, through the Internet.

Perform virtual consolidations easily. Infor ERP VISUAL BI and Budget Reporting makes difficult virtual consolidations a thing of the past. To include a consolidated balance on your financial statement, simply indicate the accounts from which you wish to extract data and select the companies. The solution separates individual balances by company, allowing you to drill down into detail for each. In addition, Infor ERP VISUAL BI and Budget Reporting enables you to perform consolidations regardless of data location. For instance, consolidation of data from a server in Des Moines and a server in London is as easy as if all the data were located in the same room.

 With Infor ERP VISUAL BI and Budget Reporting, companies around the globe are dramatically increasing their efficiency in financial report writing, as well as saving time on routine tasks.

Connect to spreadsheets directly. Because many accountants are accustomed to creating reports—particularly budgets—in spreadsheets, Infor ERP VISUAL BI and Budget Reporting easily connects directly to an Excel™ spreadsheet and pulls all desired data at runtime. Just indicate the name of the spreadsheet and in which cell the data resides. When you click the "Run" button, relevant data will automatically be included in your report.

BUDGETS

Build a budget you can trust. Not only does Infor ERP VISUAL BI and Budget Reporting cut budgeting time in half, it dramatically increases the accuracy of company-wide budgets. With a live link to financial and operational data, you can:

- Pull in real-time actuals directly from your database.
- Drill down on actuals into detailed data.
- Compare budgets to real-time actuals.
- Generate unlimited multiple budgets.
- Design budgets from any segment of your chart of accounts.
- Pull operational data directly from your database.
- Collaborate on budgets.
- Utilize built-in budget exception reports.

Armed with previous-year details, each department can create its own budget for the upcoming year. With a few mouse clicks, all the budgets can be easily synchronized into a single company-wide budget. No longer do you have to manually maintain multiple spreadsheets that contain incorrect actuals, and then manually paste multiple department figures into a single budget. Instead, the entire budgeting process can be performed with simple point-and-click-procedures and unparalleled accuracy.

See results now.

Infor ERP VISUAL BI and Budget Reporting is a cutting-edge financial and business management tool that enables enterprising companies to make decisions that will help them grow and become more profitable.

This innovative solution acts as a super-charged spreadsheet in which each cell automatically tracks and retrieves data, eliminating the need to manually enter and re-enter data and construct complex spreadsheet formulas. As easy to use as a spreadsheet, Infor ERP VISUAL BI and Budget Reporting provides users with the ability to drill down to source documents by simply double-clicking on numbers once reports are generated.

By using this powerful solution, companies around the globe are dramatically increasing their efficiency in financial report writing, as well as saving time on such routine tasks as month/year-end closings and account reconciliations. And because Infor ERP VISUAL BI and Budget Reporting connects seamlessly to companies' accounting systems, users can automatically funnel required data into reports through simple point-and-click procedures.

About Infor.

Infor delivers business-specific software to enterprising organizations. With experience built in, Infor's solutions enable businesses of all sizes to be more enterprising and adapt to the rapid changes of a global marketplace. With more than 70,000 customers, Infor is changing what businesses expect from an enterprise software provider. For additional information, visit www.infor.com.

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