**Business Intelligence | Corporate Performance Management (CPM)**

# Welcome

➢ **Introduction**

➢ **Session Agenda**

  ○ **Enhancements (What's new)**

  ○ **Review**
   ○ Build a basic financial report from scratch
   ○ Tips on efficient use of screens
   ○ Report Maintenance
   ○ Report Checking (Auto-Insert and Accounts Incl.)
   ○ Formatting

  ○ **Q & A / Open Forum**

VIVID REPORTS™
Business Intelligence

VIVID REPORTS CPM

# Business Intelligence

**VIVID REPORTS CPM**

**Corporate Performance Management**

- ✓ Based on G/L and COA
- ✓ Financial Reporting
- ✓ Integrated Analysis Tools
- ✓ Budget and Forecast
- ✓ Data Warehouse

**VIVID REPORTS FLEX**

**Flexible Reporting**

- ✓ Based on any Data
- ✓ SQL / Query Writer
- ✓ Dashboards and KPI
- ✓ Combine information
- ✓ Support and Analyze

**These solutions work together or independently**

# Key Enhancements 2015

✓ Budgets

Can now enter **budget transactions**
**Attachments** can now be saved to central folder for additional support
Notes / Assumptions can now be saved in **full rich text formatting**

✓ Filters

**Filter Links** and longer expressions (3x longer = 7,500 characters)
**Audit** of Filter Definitions

✓ Analysis

New inexpensive user license: "**Viewer License**" that enables:
- dynamic report refreshing
- drill-down to transactions and images
**Drill-To-Sedona Docs**
Vendor and Customer **History Screen**

✓ Report Check

**Auto-insert of new rows and Filters**

# Key Enhancements 2014

✓ View Balances when testing a Filter (FB)

✓ Budgets
>> Better error checking on save (invalid characters, etc.)
>> Better save performance for very large templates
>> Improved distributor screen

✓ Filters
>> New icon for Auto-Created categories

✓ Filter Control Panel
>> Refresh across multiple sheets
>> Multiple Account Panels
>> Keep headings visible while searching
>> Better formatting options (Bold, Underline, Indent)

✓ Report Check
>> Allow for missing filters to be added directly to sheet

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