BI360 Module & License Descriptions

BI360 is a Business Intelligence Suite with four integrated modules. Below, you will find explanations of the modules, as well as the user licenses and add-on components available. The sections in this document are listed in the same order as the sections in the BI360 Order Form. For further information, contact Solver at info@solverusa.com.

BI360 Reporting

An Excel-, web- and mobile-based reporting module focused on empowering the business user. With an intuitive 'drag and drop report design,' it has 'out-of-the-box' integrations to many major ERP systems (Dynamics, Sage, others…), as well as to the BI360 Data Warehouse. Custom integrations can also be built to create 'live reporting' off of almost any SQL Server-based data-source.

Report & Form Design	
BI360 Report Designer Base Reporting Module (required with all new BI360 purchases)	The report writer application base module. The BI360 Report Designer is the base reporting application. With this module (plus Power User licenses), you can design reports. The Report Designer is also used to design budget forms (if the budget module is purchased). - Works with Microsoft Excel 2007 or newer Excel versions.

BI360 Web Portal

BI360 Web Portal is a web-based portal that provide reporting, budgeting and dashboards with deep collaborative features, on top of the BI360 data warehouse and/or real-time on your ERP system.

BI360 Web Portal Licenses

BI360 Web Portal – Reporting and Dashboard Web Portal for reporting and dashboards	This base license includes the BI360 Web Portal for reporting, dashboards and collaboration. With the purchase of <u>End User or Power User licenses</u>, your users can run reports and drill down, view dashboards, collaborate with discussions, etc. Power Users can also build new dashboards. All the users can also use the free BI360 mobile apps (requires the BI360 Web Portal).
BI360 Web Portal – Reporting, Dashboards and Budgeting Web Portal for reporting, dashboards and budgeting	This the same Web Portal as the above, but with the addition of the <u>web-based budgeting module</u>, which allows users to enter any type of data you have designed input forms for (see <u>BI360 Report Designer</u>), such as budget forms, forecast forms, statistical forms, commentary forms, etc.

BI360 Data Warehouse

A preconfigured SQL Server-based database with a user-friendly interface for easy configuration, the BI360 Data Warehouse enables companies to combine data from one or more data sources into a single database (the BI360 Data Warehouse). This allows for streamlined reporting, dashboards, budgeting and collaboration using the various BI360 modules. You can also access the data in the Data Warehouse with Microsoft or third party business intelligence tools that supports the SQL Server platform. The BI360 Data Warheouse includes 7 preconfigured modules (GL, AR, AP, Revenues, Assets, HR, and Project), plus 50 'open' and 'user-definable' modules (import ANY type of data you wish). BI360 Data Warehouse also includes advanced currency conversion as well as a business rules engine for trees, consolidations, eliminations, KPI management and more.

BI360 Data Warehouse License

BI360 Data Warehouse	The BI360 Data Warehouse is a pre-configured MS SQL Server data warehouse with a user-friendly administrative console. It serves many purposes, such as: 1) Reporting database/data warehouse for multiple data sources 2) Currency conversion engine 3) Consolidation database (consolidate data from many companies/business units) 4) Budgeting database[1]

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	5) Statistics and KPI database
	BI360 Data Warehouse integrates with BI360 Reporting, dashboards and/or BI360 Planning, enabling reports, dashboards and budget forms to be designed and generated off of data from the data warehouse.
	[1] If you are only using the BI360 web- or Excel-based budgeting modules for 'budget related data and processes' then the BI360 Data Warehouse is NOT required to be purchased along with BI360 Planning because the budgeting tables in the data warehouse framework are automatically included in the purchase of BI360 Budgeting.

Add-on Modules

Ad-hoc Reporting	
Report Composer Base Module	Ad-hoc reporting tool for drag and drop queries. It is a standalone license, separate from the Report Designer module. The Composer can be used to create 'ad-hoc analysis reports' for on-the-fly insight. It can also be used as a wizard to quickly build reports that can be exported into the Excel-based BI360 Report Designer for quicker report design.

Automated Report Scheduling & Distribution	
Report Publisher For automated report scheduling and distribution	The Report Publisher is an add-on module to the BI360 Reporting module that allows an unlimited number of users to automate the processing and distribution of reports. Users are able to specify various aspects of report publishing including, but not limited to, the following: • Identify report recipients (with Email addresses). • Multiple Report formats (Excel, PDF, HTML, etc…). • Schedule (Date and time for automatic report generation and distribution). • Report target location (If publishing BI360 reports to a shared network location, identify the network folder where the report shall be placed).

Multi-Company Reporting

Multi-Company Module	This module enables you to consolidate companies (merges individual company General Ledger (GL) information, set up in separate databases in your ERP, into a single table in the ERP database) in order to design and run consolidation reports across companies. This module is used to enable <u>simple</u> GL consolidation reports without the use of the BI360 Data Warehouse.

Excel Add-in for Budgeting Input through Excel

Excel-based Budgeting	This Excel add-in is used in conjunction with the BI360 Report Designer (to design the Excel budget forms) and the BI360 Data Warehouse (to store entered budget data and historical data used in the budget process). With Excel-based Budgeting, <u>users</u> can:
	• Set up the planning/budget environment • Run/refresh a budget form • Enter budgets, forecasts and other data • Save plans/budgets to the budget database • Run budget reports. • Create and run budget models
	SPECIAL NOTE: If you are only using BI360 Budgeting for budget-related data and processes, then the BI360 Data Warehouse is NOT required to be purchased along with BI360 Planning because the budgeting tables in the data warehouse framework are included with the purchase of BI360 Planning.
	- Works with Microsoft Excel 2007 or newer Excel versions.

Connectors

There are two types of pre-built connectors (integrations) in the BI360 Suite:

1) Pre-built Data Warehouse integrations to populate the BI360 Data Warehouse with data

2) ERP integrations that provide live reporting, dashboards and budget write-back to your ERP system. Both are described below

Connectors (=Pre-built Integrations)	
Pre-built Data Warehouse Integrations To populate the BI360 Data Warehouse	These are specific wizard-based integrations to make it easy for a business user to populate the BI360 Data Warehouse with certain data and dimensions from a source system. Ask Solver (info@solverusa.com) which connectors are available. Examples of current connectors are: Acumatica, Intacct, Netsuite, Salesforce. Note: You can use any type of ETL (integration) tool (such as MS SSIS) that supports MS SQL Server to populate the BI360 Data Warehouse.
Additional ERP Integrations **(for live reporting and dasboards)** Real-time reporting and dashboards for certain ERP and CRM systems	These pre-defined ERP Integrations 'connect' BI360 Reporting and Dashboards to certain ERP (such as Dynamics AX/GP/ NAV/SL, Sage X3, Sage 500, Sage 300, SAP Business One and Acumatica (on-premise)) or CRM (such as Microsft CRM) data sources, allowing you to design and run reports and dashboards real-time on that data source. BI360 comes with ONE pre-built ERP/CRM integration of your choice. This would typically be your ERP system. ADD-ON CONNECTORS: If you wish to report real-time on additional data sources beyond your primary ERP or CRM system, an additional 'Connector' will need to be purchased. Example: If you purchase BI360 Reporting for Dynamics GP and wish to also use BI360 Reporting to report on your MS CRM system, you will need to purchase 1 'additional' connector. 1 connector is included with BI360 (here: for your 1st ERP), while the other connectors would provide integration to connect to the MS CRM database.

BI360 User Licenses

There are only three types of BI360 Users: 1) Power Users, 2) End Users and 3) Composer Users. These are explained below:

BI360 Users	
Power Users Users that can do anything in BI360	Reporting: These users can both design reports and run/view reports. They have access to the BI360 Excel add-in, the BI360 Web Portal (if this module is purchased) and the BI360 mobile app. Dashboards: Power Users can also design and use dashboards. *Note: The first Power User license you purchase comes with the rigth to also design dashboards. For all other users that need to design dashboards, you need to purchase a Power User license for each of them, regardless if they already have a Power User license used for report/form design or not.* Budgeting & Forecasting: Power users can also design and use budget forms (requires the Excel- or web- budget module) Administration: Power Users can also be assigned administrative rights to manage user security, etc.
End Users – Reporting & Dashboards User Licenses	These BI360 users can run reports (not design reports or dashboards). These users can also use the BI360 Web Portal where they can run reports and dashboards, and they can use the mobile app.
End Users – Reporting, Dashboards & Budgeting User Licenses	These users can also use the BI360 Web Portal where they can run reports and dashboards, and they can use the mobile app, plus, they can use the BI360 Budgeting modules (Web budgeting or the Excel budgeting module).
End Users - Insight (View Executed Reports and Collaborate)	These users can use all the functionalities inside the BI360 Web Portal except the three items listed below. They can both view and comment reports that have been published and they can use all the collaboration features

User Licenses	(Groups, tasks, projects, profiles, email alerts). These users can't: - Access and run live reports (incl. drill down) - Access and use dashboards - Access and use Planning (budget/forecast input)
Report Composer Users User Licenses specifically for the Composer ad-hoc reporting module	These are user licenses for the Report Composer module. See Composer ad-hoc reporting module description earlier in this document.