

## Arbela Technologies

“In the past, I have used Atlas as the data migration tool and saved over 300 hours. Atlas is instrumental in exposing a user of Excel to the data found in Dynamics AX. As long as you understand the constraints involved in designing your workbooks for the massive data available in Dynamics AX, Atlas is a perfect tool for Ad Hoc reporting.”

### Challenges

The business challenges that led the profiled company to evaluate and ultimately select Atlas by Global Software, Inc.:

- Rekeying data from Microsoft Dynamics into spreadsheets
- Manual, multi-step reporting processes
- Lack of access to real-time information
- Heavy reliance on IT to create or edit reports
- Creating reports in a timely manner
- Lack of data accuracy and/or validity
- Combining / consolidating GL and non-GL data from multiple ERP & relational database sources
- Limitation(s) of Management Reporter or Excel Add-in

#### Company Profile

Company:  
**Arbela Technologies**

Company Size:  
**Medium Enterprise**

Industry:  
**Professional Services**

ERP Platform:  
**Microsoft Dynamics AX**

### Use Case

Used Atlas for reporting beyond Financials/GL in the following areas:

- Reports for top management
- Manufacturing
- Project management
- Sales / marketing



- Inventory
- Job costing
- Procurement
- Customer service

Chose Atlas over the following tools:

- Business intelligence solutions (Targit, JetReports, Zap, BI365)
- Management Reporter
- An Excel Add-in

## Results

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The surveyed company achieved the following results with Atlas:

- The removal of disparate static excel sheets
- Streamlined report creation
- Improved data accuracy
- Improved access to live data to make strategic decisions
- Users being able to create their own reports, and less dependence on IT
- Visibility into the overall business strategy
- The ability to upload data directly from Excel

Streamlined the following processes by using Atlas:

- Extracting data from Dynamics / relational database
- Sharing of reports/dashboards with the team or management
- Month-end close & Management / Board Reporting Package
- Reporting outside the GL, such as Inventory, Manufacturing, Sales, Purchasing, Projects, etc.
- Preparing Audit and Tax schedules
- Budgeting / Forecasting processes
- Data migration / upload
- Integrating report information with Microsoft Office tools

Gained the ability to do the following by using Atlas:

- Identify incorrectly allocated funds and/or duplicate invoices due to reporting errors
- Centralize reporting practices
- Gain Data Validation capability
- Increase the ability to complete tactical, complex analysis
- Increase time savings

### About Global Software, Inc.

Global Software, Inc. is the leading provider of Microsoft Excel-based automation & reporting solutions to enhance the world's foremost Business Intelligence (BI), Enterprise Resource Planning (ERP) including: SAP®, Oracle®, Microsoft®, Infor®, Viewpoint® and other operational platforms. Global's tools enable spreadsheet users to gain live access to ERP data within Excel for secure financial and operational reporting, budgeting, automated report delivery.


#### Learn More:

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Source: Mark Mitchell, IT Professional, Arbela Technologies

Research by  TechValidate

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