



With the CDI® Premium application, you get a fully integrated financial analysis and reporting tool that provides quick access to comprehensive data. The SMinq Reporting tool uses a familiar interface and unique drag-and drop technology to simplify report creation for financial and operational data.



Figure 1: How easy it is.

Simplify Reporting with SMinq Reporting in CDI® Premium

Integrated, Comprehensive Financials Management

Many small businesses struggle with the complexities of generating accurate and timely financial reports from company data. Few report generation tools have both the ability to gather the correct financial data and the flexibility needed to put that data into a useful format. Businesses are often forced to export data into various applications and then piece that data together to create reports that are out-of-date the moment they are created.

You cannot afford to base the critical business decisions you make every day on unreliable financial data.

The CDI® Premium application is an integrated business management solution designed specifically for small businesses. With it you can create up to the-minute reports with ease. You can use the SMinq Reporting tool to create high level management reports or detail reports that provide snapshots of key performance indicators such as sales bookings, year-to-date revenue, accounts receivable, and open orders.

SMinq Reporting in CDI Premium gives you comprehensive and accurate insight into the financial status of your business. Because SMinq Reporting is tightly integrated in CDI Premium, it reports on live data drawn from a variety of sources, including general ledger, receivables, payables, sales, purchasing, and inventory software, without first storing the data in online analytical processing (OLAP) cubes or in other databases.

Small Businesses Gain Insight into Finances and Operations

Accurate and Timely Reports

SMinq Reporting provides all the tools your business needs to create and execute reports in an easy-to-use windows environment. Use point and click or answer yes or no to maneuver comfortably in your reports and get access to multiple levels of data in CDI Premium.

Enhance your control over reporting and budgeting work with SMinq reporting by generating standard and ad hoc reports and by drilling down into and analyzing detailed data.

You can quickly organize reports using flexible report parameters. You can determine the format in which reports are distributed: paper, Excel Word, Adobe an send then via e-mail.

Rapid Employee Adoption

SMinq Reporting in CDI Premium has an intuitive user interface that accesses Microsoft Excel and provides the data in a format that limits user exposure to technical tables and field structures. SMinq Reporting presents a meaningful view of business and system data. In seconds, even novices can use the tool's features to create reports with drill-down capabilities.

From simple transaction-detail reports to advanced financial statements and managements reports. You can generate reports whenever they are needed.

Compose	Design	Organize
Create Microsoft Excel reports and queries using the export features	Combine standard Microsoft Excel interface with SMinq Reporting tools to facilitate advanced report design	Manage and organize reports using the menu builder
Drill down into transactions from report data	Create custom parameters, formulas, and layouts	Create multiple version of the report depending on who will use it.
Start from current reports already build and modify then to create your own version of the report, easily	Extensive use of filters to select only the data wanted at this time.	Establish security to determine who can see each report

To improve report usability, SMinq Reporting supports multilevel reporting, which allows data to be grouped and viewed at all levels. If you need to access lower-level detail, you can easily drill down to information directly from your report output. To ensure that your reports contain only relevant data, you can customize them according to your needs by using the filter tool that allows you to filter by any field.

Because Microsoft Excel is an integral part in today's environment, you can format a report and send it immediately to excel.

You can also simplify administration by organizing reports in menus. To meet specific business needs, all reports can be done from multiple databases.

Standard and Ad Hoc Reports Based on Live Data

The report composer in SMinq Reporting provides the starting point for you to create reports using very simple and powerful features. The report definition simplifies report creation for virtually anyone. You can create custom queries of CDI Premium data with just a few mouse clicks. Once SMinq Reporting has generated the reports, you can drill down on any piece of data to see underlying transactions if you have choose so. In addition, you can view and refresh live data while creating queries.

Advanced design options in the report designer extend your ability to compose reports and work with standard Microsoft Excel functions and interfaces.

The report designer makes it easy to create custom parameters, formulas, and layouts and to integrate them into your report menus. In addition, you can use charts and graphs in Microsoft Excel to create sophisticated dashboards that can be used for management and administrative reporting in your business. Finally, you can use the report designer to execute and view finished reports. Report output is generated based on current data, so you always have an up-to-date view of your organization.

TOTAL	ACCT NUMBER	CURR PERIOD	LAST-YR PERIOD	PERIOD VARIANCE	CHANGE	TO DATE	YEAR LAST-YR YTD	YTD	VAR YTD-VAR*
	PAYROLL EXPENSES								
	801000 COMMISSION EXPENSE - INTERNAL	1,000	4,000	3,000	-300	12,286	54,361	-41,374	-76
	801020 COMMISSION EXPENSE - ASSOCIATE								
	802000 SALARIES	8,000	9,899	1,899	-24	71,777	311,628	-239,851	-77
	808010 SOCIAL SECURITY	583	807	304	-52	5,520	24,759	-19,239	-78
	808015 MEDICARE	136	207	71	-52	1,291	5,795	-4,504	-78
	808020 UNEMPLOYMENT	226	338	113	-50	226	360	-134	-37
	808025 FEDERAL UNEMPLOYMENT	75	113	38	-50	75	120	-45	-37
	808030 DISABILITY INSURANCE	28	43	15	-52	28	51	-23	-45
	808035 DRIVERS' INSURANCE						108	-108	-100
	808040 CANCER INSURANCE								

Organize Your Reports

Use the report organizer function in SMinq Reporting to manage and organize report definitions, report outputs, and report menus. The report organizer allows all reports to be change at any time.

Quick facts

Summary

The SMInq Reporting tool, part of the CDI® Premium application, helps simplify report generation and distribution. Using SMInq Reporting, you can quickly create the exact reports you need when you need them, with assurance that the data is accurate and timely. The tool uses a familiar interface to help you organize the data and distribute the reports easily.

Business Challenges

- Obtain access to accurate and timely data
- Access financial and operational data at various levels
- Distribute data to those who need it Supported Business Processes and Software Functions
- **Report composition** – Create reports and queries using the simple and powerful features, drill down into transactions from report data, and create reports easily
- **Report design** – Combine standard Microsoft Excel interface with SMInq Reporting tools to facilitate advanced report design; create custom parameters, formulas, and layouts; and view and execute finished reports
- **Report organization** – Manage and organize report definitions, create reports menus, view menu structure within the CDI Premium main menu.

Business Benefits

- Improved decision making, due to timely and accurate financial reports from critical company data across financials, sales, customers, inventory, and operations
- Cost savings, due to less time and effort required to generate reports
- Improved access to information and rapid employee adoption, due to intuitive and familiar user interface.

For More Information
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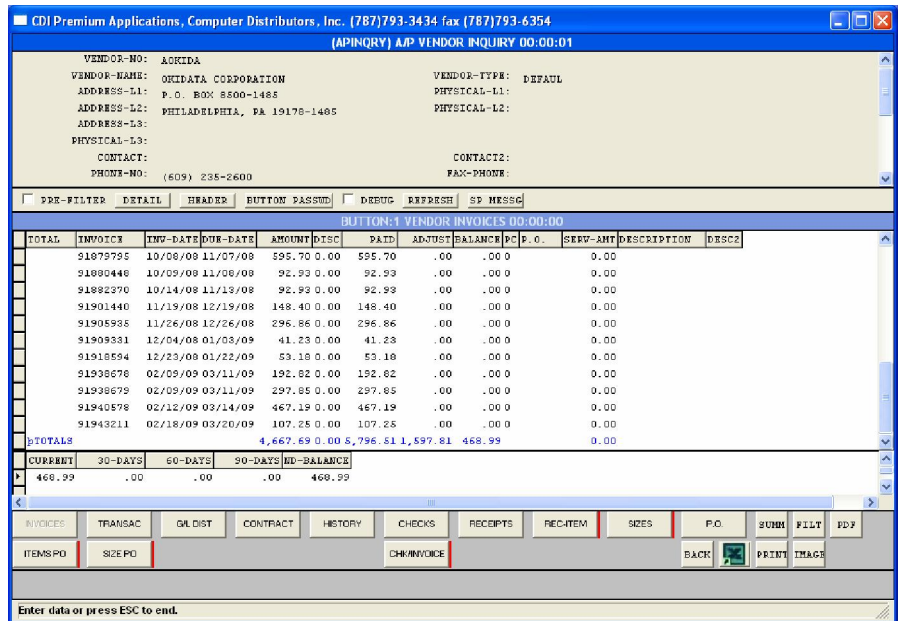


Figure 2: Create Your Own Inquiry Screens

Report with Excel Chart

