

**KNOWING  
BUSINESS.  
SHARING  
FACTS.**



**DASHBOARDS & REPORTS**  
for your successful corporate management

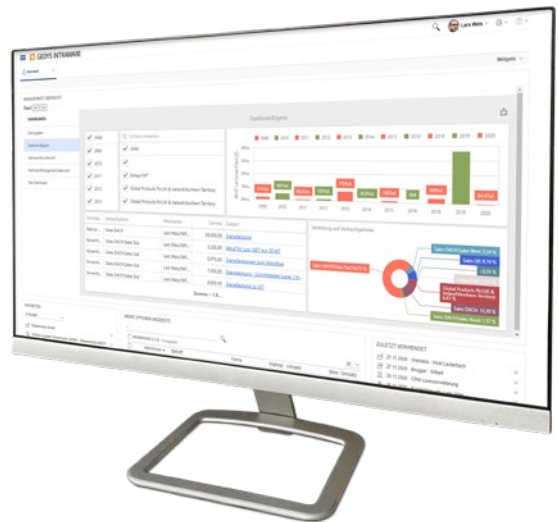
# YOUR DATA. YOUR WAY.

*In today's world, supporting all major data providers, services or APIs is not a luxury, but a requirement.*

Today, you cannot get around the detailed analysis of your company figures. And that doesn't just mean controlling your financial figures. With GEDYS IntraWare Dashboards & Reports, you can create, manage and distribute both static reports and interactive business intelligence dashboards throughout your organization – across platforms and devices.



Ihre Daten genau so,  
wie Sie sie brauchen



## IT-friendly

GEDYS IntraWare **Dashboards & Reports** software takes the burden off both your development and IT teams by enabling users to create and manage reports and analysis directly.

To do this, the application offers straightforward user management and role definition, as well as intelligent data management to maximize productivity.

Thanks to built-in document versioning, changes can be made securely. Hassle-free report distribution delivers the information to the people who matter.

- Ready to use in minutes
- User management & security
- Intelligent Data Management
- Report & Dashboard Designer
- Document versioning
- Customer branding
- Easy Localization



# COMPLETELY WITHOUT PROGRAMMING

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*Now time-consuming dashboard and report designs are a thing of the past. Drag and drop to deliver professional, interactive dashboards and reports without writing a single line of code.*

Flexibility is the key, ease of use the be-all and end-all

The goal is simple: provide business users with the information they need to monitor business results and make intelligent decisions in real time.

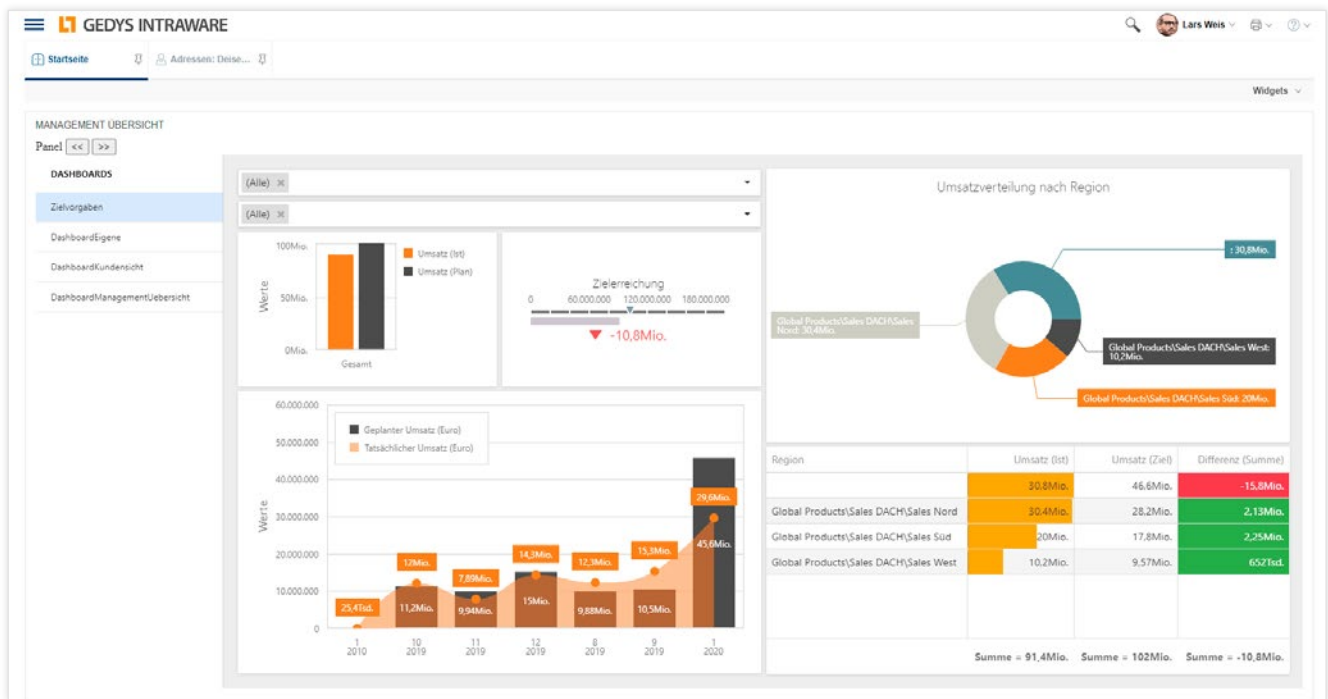
In reality, however, most reports are rigid and don't allow users to efficiently filter information to their own liking.

The simple, intuitive interface and runtime customization in GEDYS IntraWare Dashboards & Reports allow each user to personalize evaluations and reporting according to their own requirements.

Feel free to watch the extensive video on the topic: Create, Manage & Manage Dashboards.

*Please select English subtitles before playing.*





Dashboard Management

# LIVING DASHBOARDS

*Dive in. Identify trends with drill-down and data filtering. Each element can instantly provide additional insights into your data – by data series, values, and parameters.*

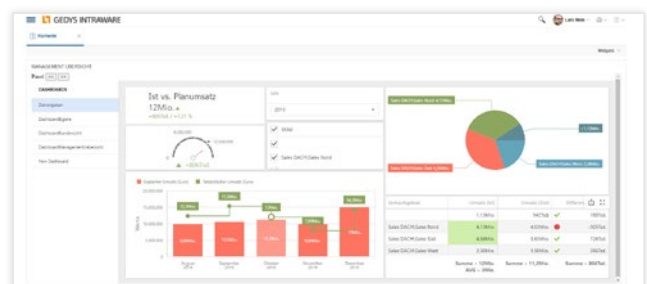
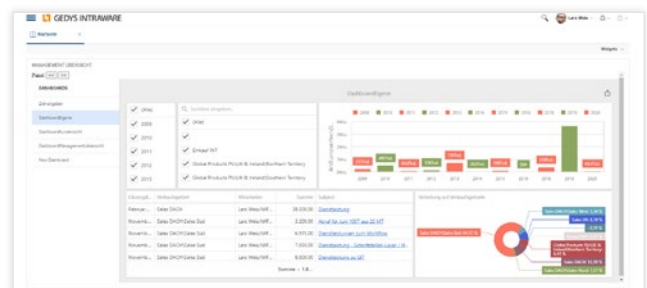
Any data source. Anytime.

Create insightful decision-making dashboards for executives and users – across platforms and devices. Regardless of data complexity and structure, selecting the appropriate data sources is hassle-free.

The designer includes a powerful wizard for retrieving data, as well as for automatic table joins and editable join conditions.

You define your data sources once. From then on, you just drag and drop the data fields you want onto your dashboard.

Dashboard Sales Areas



Dashboard Turnover



# INTELLIGENT REPORTS

*Create, design, and deliver business reports to simplify and accelerate decision making.*

Preview. Print. Export.

Set up reports and preview the result with the delivered data. Add report preview to your application to view reports for end users. Users can also edit a report, upload images and draw signatures directly in the print preview.

GEDYS IntraWare reports support numerous file formats for exporting data (PDF, DOCX, RTF, XLS, XLSX, TXT, MHT, CSV, HTML and images).

Merge PDF & DOCX


With GEDYS IntraWare Dashboards & Reports, you embed multiple PDF and DOCX documents alongside your report and display the complete report in the integrated document viewer.

# Profit and Loss

January - June 2018

	JAN	FEB	MAR	APR	MAY	JUN	TOTAL
INCOME							
Construction Income	\$75,035.31	\$81,479.21	\$84,874.68	\$75,634.84	\$80,389.13	\$79,730.35	\$477,123.52
Sales Income	\$27.00	\$770.00	\$950.00	\$977.00	\$737.00	\$117.00	\$2,864.00
TOTAL INCOME	\$75,062.31	\$82,249.21	\$85,824.68	\$76,611.84	\$81,126.13	\$79,847.35	\$479,991.52
COST OF GOODS SOLD							
Cost of Goods Sold	\$672.75	\$3,325.33	\$2,677.83	\$2,444.60	\$3,361.05	\$2,942.65	\$15,184.11
Job Expenses	\$10,679.00	\$11,661.77	\$12,124.07	\$9,783.42	\$11,181.33	\$6,555.93	\$63,003.50
TOTAL COST OF GOODS SOLD	\$11,351.79	\$14,986.40	\$14,802.24	\$11,628.02	\$14,542.38	\$9,478.58	\$78,215.41
GROSS PROFIT	\$63,710.52	\$67,262.81	\$70,976.44	\$64,983.82	\$66,583.75	\$70,368.72	\$401,776.11
EXPENSE							
Automotive	\$710.49	\$930.06	\$936.93	\$512.30	\$420.97	\$948.80	\$3,940.55
Bank Service Charges	\$60.00	\$79.00	\$62.00	\$79.00	\$12.00	\$45.00	\$334.00
Insurance	\$2,940.00	\$2,648.00	\$2,947.00	\$2,410.00	\$4,310.00	\$1,444.00	\$15,524.00
Payroll Expenses	\$17,922.00	\$10,630.00	\$13,854.00	\$9,995.00	\$15,521.00	\$14,687.00	\$82,608.00
Repairs	\$77.00	\$212.00	\$52.00	\$46.00	\$76.00	\$128.00	\$614.00
Tools and Machinery							
TOTAL EXPENSE	\$9	\$9	\$9	\$9	\$9	\$9	\$9
NET INCOME	\$54,358.73	\$52,276.41	\$56,174.20	\$53,355.82	\$52,041.70	\$60,880.20	\$223,560.20

Alphabetical List of Products



NORTH CAROLINA STATE UNIVERSITY

[illegible]

## Market Share Report

Sales			Change From Prior Year		Current Month
Region	March	September	March	September	Market Share
▼ Asia	\$20,388.00	\$22,547.00	-10.36%	-14.23%	
China	\$20,388.00	\$22,547.00	-10.36%	-14.23%	
India	\$4,642.00	\$5,320.00	9.52%	-21.62%	
Japan	\$9,457.00	\$12,859.00	12.23%	32.09%	70%
▼ Eastern Europe	\$22,500.00	\$24,580.00	5.67%	7.66%	62%
Belarus	\$7,315.00	\$18,800.00	-12.65%	7.02%	34%
Bulgaria	\$6,300.00	\$2,821.00	17.46%	-72.99%	80%
Croatia	\$4,200.00	\$3,890.00	7.62%	-13.88%	29%
Czech Republic	\$19,500.00	\$15,340.00	16.77%	2.35%	13%
Hungary	\$13,495.00	\$13,900.00	24.08%	31.22%	14%
Poland	\$8,930.00	\$9,440.00	-36.62%	-28.71%	52%
Romania	\$4,900.00	\$5,100.00	-6.96%	-23.22%	30%
Russia	\$22,500.00	\$24,580.00	5.67%	7.66%	85%
▼ North America	\$31,400.00	\$32,800.00	3.50%	2.62%	84%
Canada	\$25,390.00	\$27,000.00	79.52%	74.52%	64%
USA	\$31,400.00	\$32,800.00	3.50%	2.62%	87%

## Report Product Listing

# FEATURES DASHBOARD

*Stop looking at data on its own, and start relating it to each other.*

## Forms of representation

- ✓ Diagrams with values and arguments as
  - Bars
  - Stacked bars, fully stacked bars
  - Points
  - Lines, stacked lines, fully stacked lines
  - Pies
  - Donuts
  - Bubbles
- ✓ Rows as bars
  - Dots
  - Lines
  - Ranges
  - Areas
  - Panel
- ✓ Series
- ✓ Areas, stacked areas, fully stacked areas
- ✓ Tables with dimensions, key figures, delta data, time history, hyperlinks, totals
- ✓ Summary charts with actual/setpoint values, delta information, percentage and absolute changes, line charts, arrangements in rows and columns
- ✓ Gauges for the progress display of a target/KPIs
  - Speedometer needle
  - Marking on a scale
- ✓ Choropleth and geographic maps with value points, bubbles, pies
  - World
  - Europe
  - Asia
  - North & South America
  - Africa
  - USA
  - Canada
  - individual maps can be integrated as shapes
- ✓ Pivot for easy readable representation of multi-dimensional data

## Data Modeling

- ✓ Sorting/grouping/summary
- ✓ Filtering
  - Range filter of predefined dates/periods
  - Date filter
  - Data filter with combo box, lists, tree view, date
  - Search
- ✓ Combination of elements within a dashboard
- ✓ Interaction between elements inside/outside the group
- ✓ Custom elements via Java Script insertable
- ✓ Top N/Bottom N: display of a limited number of values
- ✓ Format defaults for number, date, currency
- ✓ Conditional formatting
- ✓ Weighting for 3-dimensional display
- ✓ Summaries & data aggregates
  - Average
  - Count/Count distinguishable
  - Max/Min
  - Median
  - Mode
  - StdDev/StdDevp
  - Sum
  - Var/Varp



Register here for  
the cost-free live  
presentation.

## Layout

- ✓ Formatting of tooltips, labels, X- and Y-axis
- ✓ Coloring
- ✓ Splitting the dashboard layout on several pages
- ✓ Images individually or as a set (data-bound images)
- ✓ Text static or data-bound
- ✓ Upload RTF file
- ✓ Use text editor
- ✓ Visualization as nested tiles (tree map) with layout algorithm, grouping etc.
- ✓ Legends
- ✓ Rotation
- ✓ Zooming and scrolling with the mouse (in geographic maps)
- ✓ Conversion of data-bound elements to another type
- ✓ Resizing dashboard elements by dragging their edges
- ✓ Drag and drop and moving of buttons

## Interaction

- ✓ Master filtering
- ✓ Drill-down

## Data analysis

- ✓ Calculated fields
  - Underlying
  - Summary
  - Intermediate
- ✓ Window calculations
  - Current sum
  - Shifting calculations
  - Difference
  - Percent of the total
  - Ranking
- ✓ Summarization via Query Builder
- ✓ Built-in parameter dialog incl. inclusion of own parameters

## Export

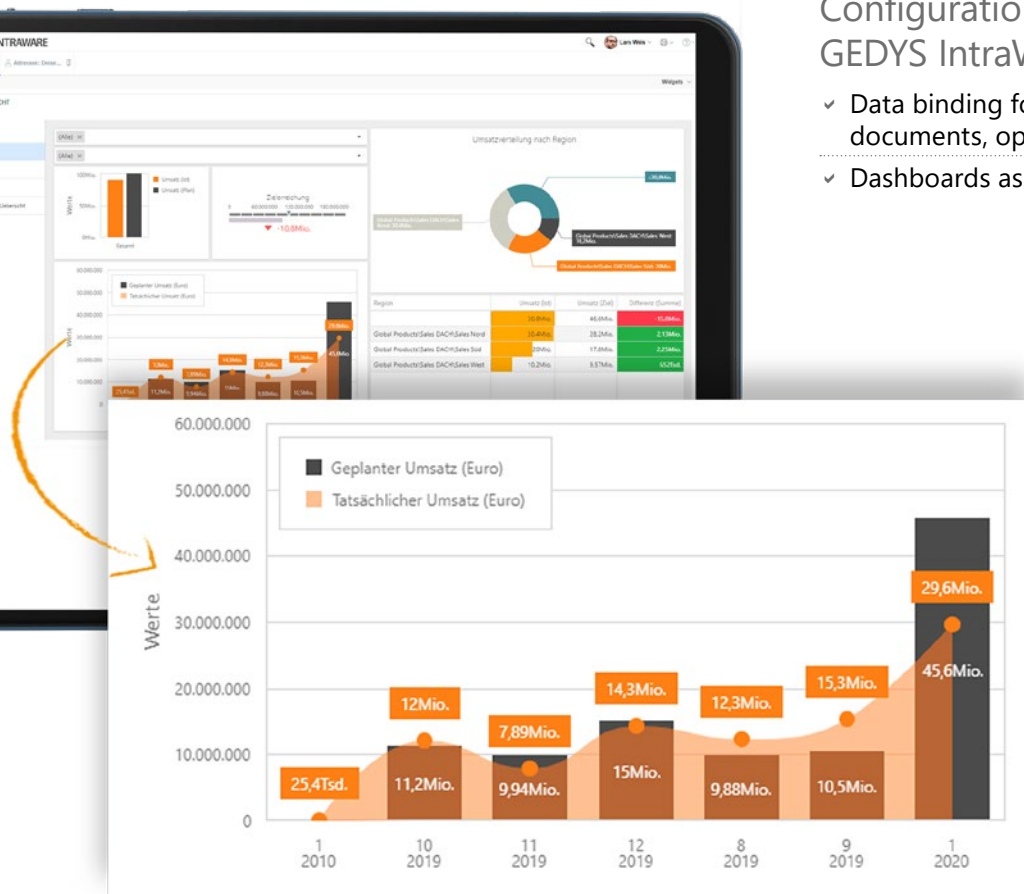
- ✓ As PDF, graphic, Excel file (data)

## Actionen

- ✓ Maximize and restore element
- ✓ Undo/Redo
- ✓ Save dashboard definition (dashboard elements, data source, data binding and layout settings, etc.) to an XML file
- ✓ Open the saved dashboard definition

## Configuration for GEDYS IntraWare CRM

- ✓ Data binding for companies, contacts, documents, opportunities, tickets
- ✓ Dashboards as tab



# FEATURES REPORT

*Create reports that inform and inspire.*

## Interaction

- ✓ Drill-down
- ✓ Sorting and content changes in Preview
- ✓ Drill-through report shows details via click in new window
- ✓ Insert label text
- ✓ Merge reports

## Supported data sources

- ✓ SQL database
- ✓ XML file
- ✓ Entity Framework
- ✓ Business object
- ✓ Excel file
- ✓ JSON data
- ✓ XPO
- ✓ Data federation
- ✓ Standard .NET Data Provider

## Shapes

- ✓ Label
- ✓ Rich text
- ✓ Letter per cell
- ✓ Barcode
- ✓ Checkbox
- ✓ Image
- ✓ Table
- ✓ Cross table
- ✓ Diagram
- ✓ Measuring device
- ✓ Lines
- ✓ Shapes

## Actions

- ✓ Send by email
- ✓ Print

## Modeling

- ✓ Filter data
- ✓ Group and sort
- ✓ Format data
- ✓ Set conditions for report elements
- ✓ Calculate summaries
- ✓ Count elements and values
- ✓ Display row numbers in a report, group, or page
- ✓ Count the number of records in a report or group
- ✓ Count the number of groups in a report
- ✓ Use calculated fields
- ✓ Use report parameters

## Layout

- ✓ Style sheets
- ✓ Cross-references and hyperlinks
- ✓ Print preview
- ✓ Bookmarks
- ✓ Document overview
- ✓ Table of contents
- ✓ Page number
- ✓ Sub-Report
- ✓ PDF signature
- ✓ Panel
- ✓ Page break
- ✓ Watermark
- ✓ Current date and time in report
- ✓ User name in report

## Configuration for GEDYS IntraWare CRM

- ✓ Data connection for companies, contacts, documents, opportunities, tickets
- ✓ Reports as tab, widget

## Export as

- ✓ PDF, DOCX, RTF, Image, CSV, TXT, XLS, XLSX, HTML, MHT





# DASHBOARDS & REPORTS

## System requirements

- Microsoft Server from 2016
  - Microsoft IIS as a free component of MS Server 2016
  - MySQL or Microsoft SQL 2016
- Our recommendation for better performance:  
Use a dedicated server with local SSDs due to the high processing power for SQL Server.
- Current version of Google Chrome, Firefox, Microsoft Edge Chromium
- Please note: Single sign-on currently only from Microsoft Edge Chromium.

[You are also welcome to contact our consultants](#)

# YOUR CRM EXPERTS

for CRM Success

*We merge proven processes with advanced ideas and technologies to create your innovative solution.  
Please contact us:*

## *All services around the CRM project*

Best practice as well as tips and tricks from 30 years of practical experience. We support you:

- with competent consulting in the run-up to the project
- with the realization of workshops
- with the implementation and realization of individual adjustments (customizing)
- with the integration of ERP or other systems
- with the successful introduction and continuous operation of the CRM system
- with the implementation of CRM audits to increase CRM efficiency
- with regular reviews and management jour fixes



### Our customers [↗](#)

Success stories with  
GEDYS IntraWare CRM



### CRM consulting [↗](#)

Benefit from 30 years  
of CRM practice.



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