CarbonBI Test Drive:

There are a lot of things you can try during your test period, including creating and viewing ad hoc reports, applying some analysis, and viewing the results in a variety of formats. All of this is done from the Carbon Report Center, which is the primary interface for business users. You are free to try whatever you want, however we are providing the following "Get Started" suggestions. The test drive should illustrate:

A. Ease of creation, customization and personalization of reports, analytics and dashboards
B. Ability to "create once and use in multiple ways"- create a report, apply metrics for analysis, visualize the results in a Mashboard, and output to PDF or Excel.

Ad hoc Reporting:

1) Toggle between Favorite Reports and Shared Reports
2) Select "Financials" from the Tree on the left most panel (Shared Reports)
    a. Expand Financials and select "Accounts Payable". The Shared Report list changes to reports concerning Payables only.
    b. Select "General Ledger". The Shared report list changes to General Ledger reports only
    c. Add and drop reports to the "Favorite" list by clicking the green "+" icon.
3) Select the "Home" button on the top right menu. This brings you back to your home page settings.
4) Select "Customer Order Management".
5) Select "Favorite" reports and click on the 'Revenue By Area' Report (either on the icon or Revenue by Area link.
    a. Click on PDF or Excel icons. They are on the right just above report data column headings.
    b. Once you view the data in PDF or Excel (on a Mac using Numbers, select the file from the downloaded files list in a popup window), close the PDF or Excel and you should be back in Report Central.
    c. Click the drop down for "Analyze As" and select any of the chart types "Bar, Line, Pie" and see the visualization.
    d. Click on "Select Columns".
    e. Select the "Available Report Columns" button/tab:
        i. Drag and drop Region_Name, Operating_Unit_Name, Order_Number, Line_Number columns
        ii. Move the columns up and down on the right panel "Selected Report Columns", after highlighting the column.
        iii. Select the sort order on each column and remove group function on Extended Booked Amount to "Blank".
        iv. Select the "View" tab.
        v. You should see data for each order line (Detail Report). Flip thru the report pages using the arrow controls at the bottom of the screen.

vi. Select the "Select Columns" tab and remove all the four columns you have selected one at a time by clicking the red "x" button adjacent to each column name. It brings you back to your original report state.

6) Click the "Home" button to go to your home page

Operational Reporting:

7) Repeat Steps 4 and 5: You should be see a detailed report that is 20 pages long.
8) Select the "PDF" button and see the PDF layout, see how column values are repeated.
9) Close the PDF window and click the Report Format tab "Report layout panel":
    a. Enter Report Title, Sub Title or whatever titles you want
    b. Check the No Repeat, Group, Column Break check boxes for Business Unit
    c. Check No Repeat for Area Name and Region Name
    d. On the "Extended Booked Amount" column, select the "Justify" drop down and then "Right" for right justification
10) Select the "View" button and click on the PDF again to see how the PDF report is formatted for you.

Mashboard Experience:

11) Select the "Home" button on the top right of the menu.
12) Select the "Mashboard" panel button on the right (below the home button).
13) Select the Mashboard, "Sales by Organization".
14) Select the drop down next to the "New chart" on each report heading, by selecting a chart type from the drop downs (this is confusing)
15) This creates your personal Mashboard, with specific visualizations for each quadrant.

Analytical Reporting:

16) Select the Home button.
17) Select "Customer Order Management" from the tree.
18) Select "Favorite reports" and click on the "Revenue By Area" report.
19) Select the "Analyze As" drop down button and change "Grid" to any other chart type
20) Select the "More" button on the far right side (above "Sub Total")
21) Select "Add Metrics" (left middle)
22) Select the "Time Metric" (Metric_Type) for "Extended Booked Amount"
23) Select the "Current Qtr and Prev Qtr" (at month level Gregorian)
24) Select "Order Date" for the time dimension
25) Select "20th March 2011" for the effective date from the calendar
26) Select "View". You will see the revenue amounts bucketed by month for Q1, 2011 and Q4 of 2010, along with Q1 and Q4 totals.

You are able to select metric calculations using historic dates and order dates as the criteria for time series comparisons. The time series can be based on any calendar: Gregorian, Fiscal, etc.

You have now navigated around the CarbonBI Report Center. Without leaving Report Center, users can create or customize operational reports, perform more detailed analysis, produce personalized dashboards and output to several different formats. Other BI platforms require several tools to do this, increasing cost and complexity.

Obviously, you've also been performing all of these actions, virtually, in the Cloud! Feel free to keep on testing the system. We would very much appreciate your feedback. If you have any questions or run into any difficulties, please contact us at: info@carbonbi.com.