Atlas 6.1
A Whole New Experience
What’s New with Atlas 6.1

Powered by Globe Software.
The Atlas 6 system is a comprehensive, self-service, end-user reporting and upload framework that allows you to consume your business information in a variety of software platforms; Microsoft Office, Power BI and within a visualization rich desktop application. You can mix and match information from many data sources; such as Microsoft Dynamics AX, Microsoft Dynamics CRM, SQL Databases, Hubspot and SSAS OLAP cubes. Atlas maximizes your ROI by covering every stage of your system's lifecycle.
Architecture Atlas 5.1
Atlas 5.1

DATA SOURCES

SERVER
Atlas Licensing Server
Authentication

CLIENT
Atlas Data Services
Data Providers

Office
Excel
PowerPoint
Word
Outlook

@Atlas4dynamics
#Atlas
Architecture of Atlas 6
Atlas 6.1

DATA SOURCES

- Databases: Microsoft SQL, ORACLE, DB2
- SSAS OLAP Cubes: SQL Server Analysis Services
- Hubspot CRM: Inbound Marketing CRM

SERVER

- Atlas Management Studio
  - Licence Management
  - Data Services
  - Designer / Standard Users
  - Multi-Server Data Service Management
  - Database Meta Data Designer
  - User Group Security

- Atlas Data Services
  - Data Providers

CLIENT

- Office
  - Excel
  - PowerPoint
  - Word
  - Outlook
- Atlas Desktop Client
  - Reporting, Upload, Dashboards
- Power BI Dashboard
Recognize the bell curve of user capabilities from novice to solution specialist.

Visual and operational consistency

Reward users with progressive disclosure

Suggested tables with Data source lists

Incremental release rather than evolutionary and still deliver that whole new experience
DESIGNED FOR YOU

Intermediate users

DESIGNED FOR THE BEST RESULTS

Our design goal is that the user interface cannot be complex for achieving simple results, but it can be complex for achieving complex results.
What’s New for you?

Connect to Enterprise Data
Deployment
Atlas Desktop
Schedule Report Refresh
Data Source Lists
Usability Enhancements
Greater Use of Snippets
Customer Help System
Reporting
Uploading
CONNECT TO ENTERPRISE DATA

- Microsoft Dynamics AX
  - Online (AX7 on Azure)
  - 2012 R1, R2, R3
  - 2009
  - 4.0

- Microsoft Dynamics CRM
  - On Premise or Cloud

- Microsoft SQL Server

- Data Warehouse (SSAS)

- Hubspot CRM

A single reporting solution providing Microsoft Excel as a real-time client for your enterprise data. Blend data across systems.
DEPLOYMENT

• Dedicated Services Server
  ✓ All Services on single physical or cloud hosted VM.

• Authentication
  ✓ AMS user list now includes external trusted domain and forest support. AMS will now show AD user from trusted domain from external forest.
  ✓ Login credentials by Data Service.

• Data Services
  ✓ Simultaneously connect to enterprise data found on premise and cloud hosted.

• In place update
  ✓ Replaces Atlas 6.0.
  ✓ Side-by-side deployment with Atlas 5.1.

Secure, two phase login process.

1. Domain (AD) verification
2. Access credentials per Atlas Data service (AD or Azure AD)
ATLAS DESKTOP

• Dashboards
  ✓ Refreshed application ribbon and task panes to keep the user experience the same as Microsoft Office. Deliver dashboards, with drilldown, securing using this traditional windows desktop application.

• Drill-down design
  ✓ Atlas Desktop is used to design effective drill-down dashboards to be delivered from within Microsoft Office documents.

• Compatibility with Office
  ✓ Uploads mapped to columns in Atlas Desktop are now supported by Excel.
Continue working while reports refresh in the background
✅ Decide if reports should refresh within Excel or as a background task. Reports in background free up your PC so that you can continue working.
✅ Goodbye “OLE Error”, observed when Excel essentially times-out waiting for a refreshed data set.

Refresh schedules by group
✅ Schedules (hourly, daily, weekly, etc.) can be set per refresh group.

Refresh Power BI dashboards
✅ Power BI dashboards built from workbooks saved on OneDrive can be refreshed hourly. Atlas can ensure the workbooks are up-to-date for Power BI.
DATA SOURCE LISTS

Data Discovery and Learning

• User defined Lists
  ✓ Add entities to one or more lists to provide contextual.

• Switch lists
  ✓ Quickly switch between lists.

• Contextual help
  ✓ Include hyperlinks to the source system, YouTube and Yammer discussion forums.

Atlas 6.1 Client
USABILITY ENHANCEMENTS

• Ribbon refresh
  ✓ Icons and logon recovery.

• Merged Inspectors
  ✓ Report Data, Filters & Style Inspectors.
  ✓ In Memory Cache, Parameters, Object Navigation.
  ✓ Edit field data, filters and style properties in a single form.

• Progressive Disclosure
  ✓ Clean, uncluttered design.
  ✓ Discoverable features which beginners don’t need to bother learning whilst still being effective.
    ▪ Snippets & workspace library
    ▪ Data source lists
GREATER USE OF SNIPPETS

• Easier to find and manage
  ✓ Atlas Ribbon now includes access to basic copy, paste & import functionality.
  ✓ Access your snippet library hierarchy.

• Manage Snippets
  ✓ User defined groups of snippets.
  ✓ Import and Share.

• Progressive Disclosure
  ✓ Snippets can now be used when merging.
  ✓ Ability to include contextual help (Yammer, YouTube, SharePoint) in the snippet.
CUSTOM HELP SYSTEM

- **Open AX & CRM Online**
  ✓ Open the source system URLs in a new browser window. For example, open the AX7 Accounts Receivable Workspace.

- **Discuss on Yammer**
  ✓ Hyperlink to community discussion forums, managed by Globe Software.

- **On Demand Video Tutorials**
  ✓ Hyperlink to YouTube playlists for up to date tutorials.

- **Online Documentation**
  ✓ Hyperlink back to our wiki site for detailed information and examples.
REPORTING

• Own the rows or columns
  ✓ Side by Side reporting.

• Reports
  ✓ Hyperlink calculation column
  ✓ Functions (Left, Mid, Right, Trim, Len, Lower, Upper).
  ✓ “Basic” formatting for faster refresh.

• In Memory “Cache”
  ✓ Build from Atlas report, snippet.
  ✓ Build from external table object.
  ✓ Control over refresh.
UPLOAD

• Column Mapping
  ✓ Defaulted if based from an Atlas report.
  ✓ Table column syntax as an alternative to Excel named ranges. (Upload will is now compatible inside Word and Atlas Desktop).

• User Experience
  ✓ Invisible columns to reduce clutter.
  ✓ Preview.

• Batch
  ✓ Partial support for resume.
Questions?
Discuss with your Account Manager
STAY CONNECTED.

twitter.com/atlas4dynamics
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youtube.com/user/atlas4dynamics
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