



FIDO (The Data Retriever)



SANDLER • KAHNE
SOFTWARE

You've been collecting lots of data with your Microsoft Dynamics SL system. Let FIDO (The Data Retriever) dig that data out for you and turn it into useful information. And it should be easy. Having received much obedience training, FIDO comes to the rescue again! In less than 15 minutes, you'll have an understanding of the basics and be able to turn FIDO loose to retrieve your data!

FIDO: The Basics

We said FIDO's easy to learn. It's a web-based Silverlight™ application that looks a lot like Windows Explorer or Microsoft Outlook. FIDO includes a whole host of predefined views into your data. Just select one to view your data. Filter it and/or group it as you see fit. Then, if you like, you can export the results to MS Excel for further processing! If you've customized the view as described below, you can easily save it for use in the future.

Data Dictionary

Ever had the experience of trying to find the field you need, but don't recognize any of the field names? FIDO's data dictionary is a big help by using friendly field (aka column) names. And if you don't quite like FIDO's name for the field, you can change it. From that moment on, any time you want to use that field in a view, it'll be known by your name! And that goes for those user fields that you may be using for your customized information! All without customizing a SQL view!

Filtering

So, you've picked a view that comes close to giving you what you want, but not quite. You want to filter out the data you don't need. Just tell FIDO to do it! Let's say you're trying to analyze the GL Transactions that have impacted your Property & Equipment GL Account in the month of March. Just go to the Account column heading and enter your Property & Equipment account, then go to the Posting Period column and enter March. FIDO will restrict your view to only those transactions.

Grouping

Now that your view shows you all the transactions for the March period that have effected your Property & Equipment account, you'd like to group those transactions by Project ID. This is another simple task for FIDO! Simply dragging the column heading for ProjectID up to the heading area tells FIDO that you want to group your selected transactions by Project ID. Drill down by Project and have all transactions that don't have a Project ID under their own group. Click to expand each group.

Column Order / Hide / Show

Use Drag 'n Drop to reorder your columns. Use FIDO's column picker to decide which fields you want to include in or exclude from the view. Of course, picking columns can be security-controlled.

Designed For
Microsoft Dynamics
SL™

A Silverlight™
web application
built with
ease-of-use
in mind

The screenshot shows the FIDO application interface. The title bar reads "FIDO (The Data Retriever)". The main window displays a table titled "View Title: GL Transactions - Period Summary (10200)". The table is grouped by "Transaction Type". The columns include Company, Ledger, Account, Subaccount, Fiscal Year, Transaction Debit, Transaction Credit, and Period Posted. The data is sorted in descending order by Transaction Credit.

Company	Ledger	Account	Subaccount	Fiscal Year	Transaction Debit	Transaction Credit	Period Posted
CK							
CHS	ACTUAL	2000	00	2004	511,821.50	0.00	04-2004
CHS	ACTUAL	2000	00	2004		135.00	04-2004
					Sum 511,956.50	Sum 0.00	
VO							
CHS	ACTUAL	2000	00	2004	0.00	135.00	04-2004
CHS	ACTUAL	2000	00	2004	0.00	1,611.90	04-2004
CHS	ACTUAL	2000	00	2004	0.00	2,124.90	04-2004
CHS	ACTUAL	2000	00	2004	0.00	4,783.13	04-2004
CHS	ACTUAL	2000	00	2004	0.00	5,225.00	04-2004
CHS	ACTUAL	2000	00	2004	0.00	144,850.00	04-2004
CHS	ACTUAL	2000	00	2004	0.00	241,600.00	04-2004
CHS	ACTUAL	2000	00	2004	0.00	270,221.50	04-2004
CHS	ACTUAL	2000	00	2004	0.00	287,535.00	04-2004
					Sum 0.00	Sum 958,086.43	
					Sum 511,956.50	Sum 958,086.43	

Here's an example of GL transactions that have been grouped by Transaction Type, filtered on Period Posted=200404, Account=2000. The results are sorted in descending order by Transaction Credit. All this in a matter of seconds with a few clicks of the mouse!

Export to Excel

Once you have the data you're looking for, if you want to do all those cool things with your data that Excel is so good at, FIDO will send your data there for you...at whatever level you choose!

Save Your Favorite Views

Using the convenient Explorer-like organization, you can pick a view from the growing list of out-of-the-box views, customize it to meet your specific needs, save it as a new member of the family, then organize it in your Favorites area using Drag 'n Drop.

Security

Maybe all you need is to control which views your people have access to. However, if you want to allow folks to run a view, but restrict what records (rows) or fields (columns) they can see based on their security clearance, FIDO will accommodate you! You can apply security to individual users or groups of users.

FlexKey Support

FIDO allows you to display a *flexkey* field (e.g. *SubAccount*, *Inventory*, *Project*, *Task*, etc.) as a single, formatted field, or broken down with each segment in its own column ... or both!

Lookups

No more checking the documentation for field names. Trying to find that field with a cryptic name? FIDO will present you with the friendly name from the data dictionary. No more having to look up the values from a *coded* field (like *Transaction Type*) ... FIDO knows that VO is Voucher!

BUSINESS ISSUES	HOW THIS FLEXIBLE PRODUCT CAN HELP
We have two companies. I'd like to show the sales from both companies in a single view.	Use the Multi-Company feature If you have security clearance for both companies and the appropriate data, all you have to do is select the two companies and FIDO will provide a composite of your data when you select your view.
I want my project team to see the detail transactions for their projects, but I don't want them to see pay rates.	Use Column-level security If you want to get down to this detail, FIDO is there to help. Security will allow you to specify columns that you want to curtain from the user. Pay rate would be secured in this case, even though it's included in your view definition. Only those with security clearance will see the actual data.
I don't see a master view that's close enough to what I want.	Create your own Table or SQL View FIDO supports view <i>families</i> (the included <i>master</i> view and any <i>siblings</i> that you've created from the master). FIDO also allows you to add your own table views, as well as views based on a SQL Server view. Just create and add these to your menu!
I don't want to have to buy a full seat for each of my employees to access SL. Can they just use a web browser?	Yes! FIDO is a native web application Because FIDO is built using Silverlight™, all you need is access to a web browser. If the user is already secured through Dynamics SL, security begins there. Otherwise, FIDO's administration section allows you to provide security access. Windows authentication is supported.

FIDO's Features include:

- Easy to use!
- Silverlight™
- Data Dictionary
- Flexkey support
- Lookups
 - Code fields
 - Table fields
- Tables or SQL Views
- Group
- Filter
- Sort
- Drilldown
- Launch application
 - SL / Non-SL
- Export/share views
- Multi-company
 - Select
 - Combine
- Views Library
- Security
 - Simple / Advanced

Available on these versions of MS Dynamics SL:
V6.x or greater w/
SQL2005 or greater



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Revised 08/29/2011