



# Atlas xl

for Microsoft Dynamics™ AX



Gain Visibility  
into Microsoft  
Dynamics™ AX



Atlas xl is an intuitive and adaptable reporting solution for Microsoft Dynamics™ AX using the capabilities of Microsoft Excel™. It allows you to maximize your Excel™ skills so you can build reports, answer ad hoc queries and exchange journals or other data with Microsoft Dynamics™ AX. Users can achieve immediate results without having to learn complicated query languages.

## Benefits

### Streamline Your Work

Use Atlas xl to upload journals, budgets, forecasts and timesheets, which often start in Microsoft Excel, into Microsoft Dynamics™ AX.

### Speed Up Your Reporting

Quickly build and deploy reports and queries in your company's format.

- Leverage your Microsoft Excel™ skills to get more from Microsoft Dynamics™ AX without compromising security.
- Deliver financial results faster.
- Customize Atlas xl to meet your information needs.
- Realize a faster return on investment by fully utilizing your Microsoft Dynamics™ AX system including customized tables and user permissions.

## Integration between Microsoft Excel™ and Microsoft Dynamics™ AX

Atlas xl can be used to obtain real time information from Microsoft Dynamics™ AX. Using an intuitive interface from within Microsoft Excel™, users can build formulas that are directly tied to tables and fields within Microsoft Dynamics™ AX. As data is updated within Microsoft Dynamics™ AX, each report automatically updates to reflect new balances.

In addition to updated balances, many balances also have the ability to drill down into greater detail within Microsoft Excel™. Users do not need to return to Microsoft Dynamics™ AX to see greater detail. With Atlas xl, the detail is provided automatically by right-clicking on the amount.

## Enhanced Business Data

With Atlas xl, reporting is not limited to balances and transactional data. Pivot tables, cross-tab reports and graphics can be created using Atlas xl's intuitive interface. Using the power of Microsoft Excel's™ native reporting capabilities, data is securely rendered in familiar charts, tables and graphs. Users gain efficiencies by using a familiar interface with data that they already know.

## Leverage Technology and Security

A Microsoft Dynamics™ AX Business Connector is used to retrieve and upload data in Atlas xl. Consequently, Atlas xl utilizes the security roles and permissions created within Microsoft Dynamics™ AX automatically. With a direct integration to Active Directory, users simply select the configuration that they would like to use and the security is transferred to Microsoft

Excel™. Individual table and field security are respected by Atlas xl just as they are in Microsoft Dynamics™ AX. Since Atlas xl does not access the database using an outside technology such as ODBC, additional security does not need to be maintained on the database. As a result, companies reduce administrative overhead as security only has to be maintained in one place.

Languages and wording are flexible within Microsoft Dynamics™ AX. That flexibility is also transferred to Atlas xl due to the Business Connector interface. Any changes to field descriptions are displayed correctly in Atlas xl. As a result, if the term "customer" is changed to "client", the proper term is also displayed within Microsoft Excel™ through Atlas xl.

### Upload data

Uploading data into Microsoft Dynamics™ AX is critical to most companies. Atlas xl is the most efficient method for users of Microsoft Dynamics™ AX to upload and update data. With Atlas xl, data can be easily uploaded into Microsoft Dynamics™ AX using an intuitive interface. Using the same methodology to retrieve data, users can select which data to upload or update. And unlike the Microsoft Excel™ import utility in Microsoft Dynamics™ AX, users can select individual fields to update instead of having to specify the value for each field in a table.

You can use Microsoft Excel™ to generate your general ledger budgets and forecasts then use Atlas xl to upload them into Microsoft Dynamics™ AX. Atlas xl includes the ability to:

- Prepare and upload ledger, accounts payable, inventory, accounts receivable and project journals
- Prepare and upload budget and forecast transactions
- Prepare and upload main table items such as vendors, customer, items, projects and ledger accounts
- Prepare and upload items into custom tables using the Enterprise Edition

### Conclusion

Atlas xl provides additional features and functions to help you maximize your investment in your Microsoft Dynamics™ AX system. For more information, please contact your Microsoft Dynamics™ AX partner or visit [www.redmaple.com](http://www.redmaple.com).

## Quick information



#### *What Modules are Required?*

Microsoft Dynamics™ AX  
Microsoft Excel™ 2000 or higher  
Microsoft Dynamics™ AX COM Connector license per  
Atlas xl license



#### *Are you on the Internet?*

More information about our products can be found at [www.redmaple.com](http://www.redmaple.com).



#### *Who do I contact to get a demonstration or purchase?*

Your Microsoft Dynamics™ AX partner is the place to start.

