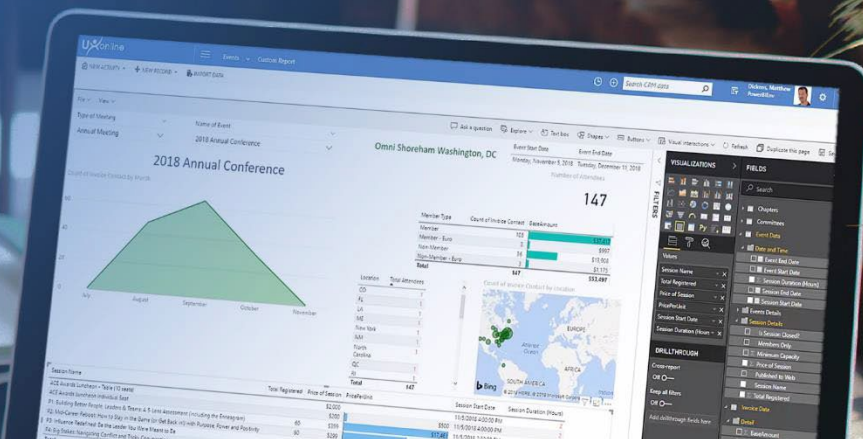


LX FAQ

Empowering association leaders to make the right decisions through business intelligence and analytics reporting



What is Protech LX?

LX stands for Leadership eXperience. LX is an advanced reporting platform built with Microsoft Power BI that provides customers the ability to create reports with interactive features, such as drill-down, global filtering, trend analysis, goal tracking, forecasting, comparisons, and dashboards. LX includes automatic synchronization with pre-built data sets that focus the power of reporting on the core membership, meetings, and financial data stored in UX.

How much do I budget for the LX Implementation?

The deployment of Protech LX includes licensing Power BI via LX, initialization of the LX data sets from your most recent UX data, deployment of out-of-the-box reports on membership, meeting registrations, fundraising, and professional development. Protech's turnkey implementation includes the services to get you creating reports fast.

Will I be able to create/edit my own reports and dashboards with LX?

Absolutely! LX is all about enabling UX users in all departments to build both simple and advanced reports and dashboards that provide great insights into your data. The LX implementation team provides the training and consulting services to give you the tools you need to master LX and to be able to modify and create new reports quickly. Available as an option, Protech is resourced with developers to offer LX services to modify existing, or build new, custom data sets and reports as needed.

What is the difference between a customer provisioned instance of Microsoft Power BI and Protech's LX?

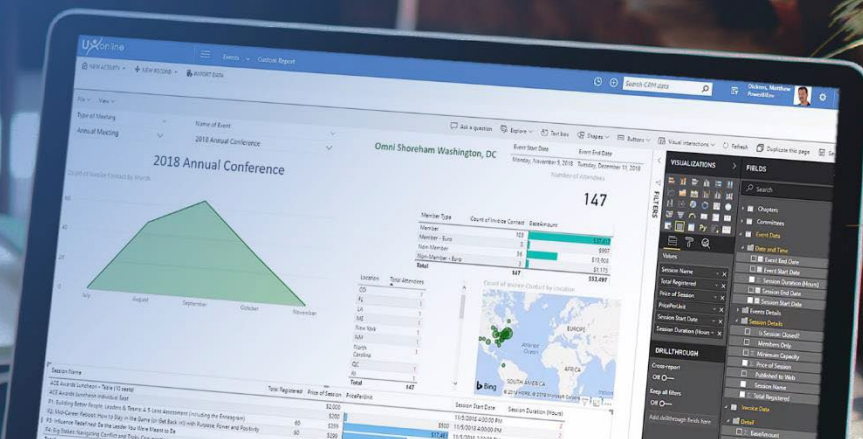
Simply put, Protech has done the heavy lifting by designing the data sets specific to the UX database functional modules rather than requiring users to create them. Additionally, Protech will support and maintain LX data sets as the Microsoft Dynamics 365 platform and UX 365 database evolve. LX provisions the Power BI platform service, establishes the connection to the UX data sets, and embeds LX reports and dashboards directly into the UX application user interface with built-in authentication for UX subscribers to create, share, and execute reports. A customer provisioned instance of Power BI will not leverage the Protech designed/built data sets for UX, and reports and dashboards will not be organized within UX application module menus for intuitive navigation.

How do customers access the LX environment?

Once your LX subscription is activated, you will simply navigate to the LX Reports section within UX. This is normally deployed on the "My Work" menu, just below dashboards. You will also see an "LX", menu option in other module menus where your permissions allow it: The Meetings Module Dashboard, Renewals, Fundraising, Education, and Financial Manager.



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What if we want to create/modify our own UX data sets?

Protech will provide the default modular data sets with LX for reporting on UX data. LX custom data sets on entities that are not included in the default data sets can be requested for the LX developers to build as needed, at any time. Custom data sets are coordinated as fee-based services between Protech and the customer to define, build, and deploy per specific requirements.

Will we be able to use custom entities with this tool?

Yes, LX can report on custom entities because Protech can create custom data sets from entities in the whole database. There will be no default reports on these entities, but new reports can be created on the new data sets without any constraints. *Protech Note:* You can add organization-specific fields, including contact and account demographics, just by editing the LX views for the applicable entities that already have default data sets. Protech will then refresh the LX data to include the new fields.

Which UX users can create, share, and view LX reports vs. those that cannot?

LX has its own permissions management in the setting called "Activate." In this setting, individual users are given "read-only", "read and edit", or "read, edit, and create" access rights to each data set. This explicit permissions system allows personnel across departments to have the appropriate rights to create and view applicable reports, regardless of UX security roles, and allows executives view-only rights to see the reports that they care about.

Will anyone at our organization require a Power BI license to use LX?

LX includes the requisite Microsoft Power BI licensing for the whole organization, extending reporting access to any specified UX users without requiring purchase of extra licenses. An LX subscription is required only for the organization, which provides pre-requisite Microsoft Power BI licensing for UX users to access, create and edit dashboards and reports.

Are LX reports and dashboards able to be shared externally?

LX supports easy, secure publishing of reports and dashboards within your MX site. MX includes an LX Report Viewer component that allows you to display LX reports of your choice to a page that can be secured and filtered for a specific target audience. For example, non-staff members of a committee can view the data they need about their committee's work in the online member portal, but only members of that committee can see it.