

Sage ERP



Sage ERP Intelligence Reporting:
Straight Talk About Replacing FRx[®]





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Introduction

With Microsoft® announcing the retirement of Microsoft FRx® in 2011, and ending its support thereof in 2012, companies are presented with an opportunity to evaluate their reporting requirements and upgrade to a solution designed for today's connected and global economy.

A number of alternative reporting solutions are available, each with its own strengths, making it difficult to make an informed decision about which one to implement. Ultimately, you need a solution that best meets your needs and provides your organization with a competitive advantage, both now and into the future.

Sage is committed to helping you make the right choice for a reporting solution that can not only replace your FRx software, but take your business intelligence capabilities to the next level.

Sage ERP Intelligence Reporting is our recommended alternative to FRx. As you evaluate different options available to you, we want to make sure you have all the facts about this powerful reporting solution.

15 Things You Need to Know About Sage ERP Intelligence Reporting

1. Seamlessly integrates with Sage ERP.

Intelligence Reporting is a tightly integrated business intelligence solution for Sage 100, and 500 ERP, offering a streamlined extension to Sage ERP and providing reporting that pulls trusted data on demand directly from the ERP system. Since it's a module of your Sage ERP package, no new relationships or extensive IT investments are required to implement Intelligence Reporting, which makes for low TCO and rapid deployment without any hurdles.

The module installs easily, with a simple click-and-run installation that completes in less than ten minutes. The software is launched from within your Sage ERP solution and leverages the native security functions provided.

2. Delivers real-time information on demand.

Intelligence Reporting empowers you to run reports at the click of a button, pulling trusted real-time information directly from the ERP database into Microsoft Excel®—in the format of your choice. Intelligence Reporting helps you save time and get more accurate reports by eliminating redundant data entry.

Different levels of detail can be displayed within the reports, while the data can be drilled down into for transactional details as required.

The data has always been there; however, Intelligence Reporting puts it into an easily digestible format and gets the right information to the right people, when they need it, providing visibility of what has happened even in the last few minutes. A clear understanding of the transactional history in your database, and visibility of trends at a glance, empowers you and your team to make decisions based on timely, relevant, meaningful information, which gives you the means to plan ahead and grow in the face of competition.

The Benefits of Sage ERP Intelligence Reporting

Intelligence Reporting empowers you to quickly and easily gain control and obtain the information you need for operations and strategic planning. You'll be able to:

- Minimize manual, repetitive work in Excel and save valuable time.
- Access ready-to-run financial, operations, customer, and vendor reports for immediate ROI.
- Quickly identify and respond to trends using customizable dashboards.
- Empower your staff with timely, meaningful information and trend reports.
- Extract up-to-the-minute high-level summaries, account groupings, or detailed transactions.
- Effortlessly consolidate data from multiple companies, divisions, and databases.
- Efficiently view, manipulate, analyze, customize, and distribute reports in a familiar Excel format.

3. Dynamically drills down to underlying transactional details.

Intelligence Reporting Dashboard and Financial reports ship with real-time prebuilt drill downs to the source data. Users also have the ability to create and configure custom real-time drill downs to any data they choose. Once set up, easily access the data using the “right-click drill down” feature from within Excel. Each time you drill down, live data is extracted from the database, allowing you to quickly look at the underlying data to certain metrics and take corrective measures.

4. 100% Microsoft Excel-based for easy report design, distribution, and consumption.

Report creation, organization, drill down, and housekeeping of reports are done from the Intelligence Reporting proprietary interface, which makes administration of reports easy to manage. However, reports are delivered in the familiar Excel interface and can be manipulated, analyzed, and distributed accordingly.

Intelligence Reporting seamlessly draws trusted data directly from your company’s database(s) and delivers it automatically into the tool you are already compiling static reports in today, Microsoft Excel, making it easy to adopt. You don’t have to be a programmer to get the data, and you don’t need to be an accountant to interpret the data. Information can be “sliced and diced” extensively using the powerful native functionality of Excel, such as PivotTables, for more insight. This leverages existing Excel skills in your business and lowers your total cost of ownership.

Intelligence Reporting allows businesses to continue using Excel as their preferred data sharing application in a controlled, secure environment but eliminates “spreadsheet chaos.” No more cutting and pasting repetitively, no more human error, no more doubt about data accuracy. With Intelligence Reporting decision-makers can spend less time gathering data and more time focusing on strategic analysis and interpretation with up-to-date, accurate, and presentation-quality reports.

Intelligence Reporting supports Excel 2003, 2007, 2010 and 2013.

5. Ships with predefined Excel-based reports for immediate ROI.

An entire library of ready-to-run reports is delivered out of the box to get you up and running immediately and enable you to produce meaningful reports right away. The report templates—which include several iterations of financial income and balance sheet statements, GL trend analysis dashboards, a comprehensive KPI dashboard, customer sales, inventory status, vendor purchases, and operation analysis reports—have been carefully developed and researched to meet a wide range of reporting requirements. If necessary, these reports can be reformatted or built from scratch in Excel to meet your company’s needs and saved in the customized format for repeat use.

6. Provides for flexible financial reporting.

Intelligence Reporting is new-generation BI software, designed from the ground up with SMME needs in mind; for example, it specifically addresses serious challenges around financial reporting—which are prevalent worldwide—like departmental reporting, GL segmentation, and project reporting.

The Report Designer fast tracks the building of powerful financial reports using an easy-to-use, drag-and-drop interface to allow for flexible financial reporting with multilevel groupings according to your unique business needs.

“Since implementing Sage Intelligence, manual reporting processes have been completely automated and the level of trust in reporting accuracy has increased significantly. I would recommend Sage Intelligence.”

Robert Neable, Accounting and Integration Manager, Discovery Air Inc.

7. Report Designer Add-in provides even greater control.

The Report Designer Add-in (available as a free download on the [Sage Customer](#) or [Partner](#) portal) provides an alternative method for building advanced financial reports and allows you to take even more control of the design aspects of your reporting layouts. The Add-in provides drag-and-drop Excel financial formulas, which communicate with an In-Memory processing engine for brilliant performance and greatly enhanced flexibility.

Creating multiyear and multibudget financial reports is quick and easy using the simple drag-and-drop options. You can also easily control the way your accounts roll up using ranges and arithmetic, allowing you to present the required level of detail in your reports.

With the Report Designer Add-in all financial reports are interactive from the In-Memory Engine, allowing users to interact dynamically with GL data in real time.

8. Allows for conversion of FRx reports.

FRx reports can be efficiently converted to Intelligence Reporting using the Report Designer Add-in by simply exporting them into Excel and linking them. All existing Excel financial spreadsheets can be converted using this method. A comprehensive conversion guide is available to take you through a step-by-step conversion process. [Download the guide now](#). In addition, [watch this video](#) for a 6 minute demonstration of how to convert a FRx report to Intelligence Reporting.

9. Goes beyond the GL.

Intelligence Reporting takes you beyond financials to provide insight into data from across your entire business, offering you total flexibility. You will be able to combine information from multiple sources, possibly from your ERP, CRM, and payroll databases, or from multiple companies, divisions, and departments into one report.

The Connector module offers connectivity into all Sage ERP modules and systems without having to link spreadsheets, understand the underlying database structure, rely on Visual Basic knowledge, or create additional content packs for each additional module outside of the GL. Multicompany reports and consolidations can be created quickly to provide instant visibility into meaningful information from across a business for insightful decision making.

You can custom-design almost any report you need, giving you total control over your reporting process. Every customization you make can be saved for future use, sparing you time and effort. Dashboard reports will give you a good idea of the health and well-being of the company by displaying current metrics and key performance indicators (KPIs) in a graphical format so that trends are visible at a glance. The ability to effectively analyze your data with powerful dashboard tools will help you make better, faster, and smarter decisions.

Download the Report Designer Add-in from the Sage Customer or Partner portal . . .

[Sage Customer](#) or [Partner](#) portal

The Report Designer Add-In is available for:

- Sage 100 ERP 4.4, 4.5 and 2013 Intelligence Reporting
- Sage 500 ERP 7.3, 7.4 and 2012

Please Note: You will need to own the Sage Intelligence Report Designer module in order to download the Report Designer Add-in.

The Sales ERP/CRM Dashboard, available for free from the Free Report Templates group on the BI Community, combines ERP and CRM data for a high-level view of top-selling items and possible sales opportunities as well as high outstanding debtors. Download a fully customizable template for:

[Sage 100 ERP](#).

[Sage 300 ERP](#).

[Sage 500 ERP](#).

10. Single reporting product with flexible application.

Intelligence Reporting is available at different user levels and for multiple databases. You can select licenses and modules individually to build a reporting system that best suits your current and future business requirements.

Report Viewer Licenses allow users to run existing reports to get access to real-time information and have some basic filter and change parameter editing capabilities, including drill down. **Report Manager Licenses** have the capabilities of Report Viewer, plus the ability to customize reports, set up parameters, establish new templates, and schedule and distribute reports. More powerful report-building capabilities are available in the **Report Designer** module, which gives you total flexibility to create as many different customized financial layouts as you wish through an easy-to-use “drag-and-drop” interface. For access to unlimited multiple disparate databases and consolidating data from multiple companies, the additional **Connector Module** is available.

11. Reporting Trees model different views of your organizational reporting.

Reporting Trees functionality in Intelligence Reporting allows you to model a reporting structure that best represents your organization and view it in many different ways with just a few clicks. Users can model their business units independently to their chart of accounts and quickly change reporting angles. Adding new departments or regions is easily managed, without having to make changes to your GL, and you can control which financial information is made available for departmental or regional reporting.

The Reporting Trees capability built into the software can easily replace any FRx Reporting Tree.

12. Enables easy report distribution with automated scheduling.

In order to effectively drive daily business decisions, Intelligence Reporting provides anytime access to business-critical information. Getting the information to the right people is key! The powerful Report Distribution feature allows for fully automated, unattended report distribution, which facilitates improved collaboration among teams, no matter where recipients are located.

Features include the ability to create rule-based alerts, insert previews of report data within the body of your rich text email, and select which worksheets you want to send to whom. You have the option to send reports in various formats, such as PDF, HTML, and Microsoft Excel. Distribution methods include email, FTP site, SharePoint, Skydrive, Dropbox, and shared network folders. The distribution rules are created once and can be reused across all reports.

Are you aware of what Intelligence Reporting components are available and which are suitable for your business requirements?

The product components are structured to cater to a basic user up to the more advanced. Depending on who in your organization needs reports and how they intend to use them, as well as what type of reporting requirements you have, you may choose to utilize different components of the Intelligence Reporting module. The BI Fit Calculator can help you determine what the best BI Fit is for your company.

[Begin Calculating](#)

“The fact that the Report Designer Add-in is formula driven makes it much easier for users to manage and without too much training. Now that I have had a chance to use the Add-in, I know this will take things to that next level. This is exactly what our clients need. The formula builder makes things much easier for them to use instead of having to link to PivotTables or using other lookup formulas.”

Justin Numainville, Caron
Business Solutions

13. Free license(s) are available.

All current customers on Sage Business Care have already received Report Manager license(s)* at no charge. This enables you to try the product at zero cost. When stacked up against other products in the market, the purchase of additional licenses and modules provides a very cost-effective solution.

14. Proven track record.

Sage has chosen to integrate the Intelligence Reporting tool into Sage 100 ERP, Sage 300 ERP, Sage 500 ERP, Sage PFW ERP, Sage ERP X3 (Financial Reporting), Sage 50 Accounting—U.S. Edition and Sage 50—Canadian Edition because of its excellent pedigree in the small to mid-sized business (SMB) market. With over 25,000 installs worldwide and a renewal rate of 90%, as well as its ability to take customers from simple financial reporting to intelligent reporting and analysis of their entire ERP solution, this is a tool to take SMBs into the future.

15. Fully supported by Sage.

Intelligence Reporting is part of a whole product offering and is supported by Sage. If your company has a current Sage Business Care plan, you can rest assured that you are backed by top-notch support to help you get the most from your Sage ERP solution. Being a Sage-owned product, Intelligence Reporting is always compatible with the latest software release at launch, and the Sage Business Care team aligns version support to the ERP systems.

Use of the module includes access to numerous resources, to support you and give you the skills you need to [maximize your investment](#):



[Free live webcasts](#) impart practical knowledge about the module and its features, reporting best practices, useful Excel® functionality, and more.



[BI Community groups](#) provide unrestricted access to discussion forums, how-to videos, product documentation, free report templates, and more.



[Sage Intelligence Tips and Tricks](#) or [Excel Tips and Tricks](#) deliver tips at no cost straight to your inbox to improve your report writing skills.



[Sage University](#) offers Excel and Sage Intelligence training to get you up to speed.

*With every new Sage 100 ERP system customers get one free Report Manager License, which includes 12 ready-to-run out-of-the-box reports. The free license is also available to all Sage 100 ERP customers on Sage Business Care, running version 4.4 or higher.

With every new Sage 500 ERP system, customers get four free Report Manager Licenses, which include 12 ready-to-run out-of-the-box reports. The four free licenses are also available to all Sage 500 ERP customers on Sage Business Care, running 7.3 or higher.



Summary

With the retirement of FRx, you have the perfect opportunity to gain greater control of the reporting across your entire business. The right financial reporting and analysis tool can enable your organization to meet complex requirements and provide you with a complete view of past and future trends across the organization. More than simple financial reporting, however, Intelligence Reporting helps you make better, faster, and smarter decisions with up-to-the minute visibility and at-a-glance analyses that can be used for strategic planning.

There are many financial reporting options out there. Make sure you have all the information you need before making this important decision for your company. With seamless integration into your Sage ERP solution and its Excel-based design, users worldwide would agree that Intelligence Reporting can take your business beyond simple general ledger reporting. Intelligence Reporting is designed to help you optimize business processes companywide and provide decision-makers with real insight into financial and operational performance.

For more information, visit the [Sage ERP Intelligence Reporting website](#).

BizNet is a competitive product that also offers an alternative reporting solution to FRx. For a comprehensive comparison of BizNet against Sage ERP Intelligence Reporting, review this [comparison chart](#).

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