



# Business Intelligence Solutions for the Sage ERP Portfolio

## Sage Enterprise Intelligence and Sage Intelligence



# What is business intelligence?



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“Business intelligence is an umbrella term that refers to a variety of software applications used to analyze an organization’s **raw data.**”

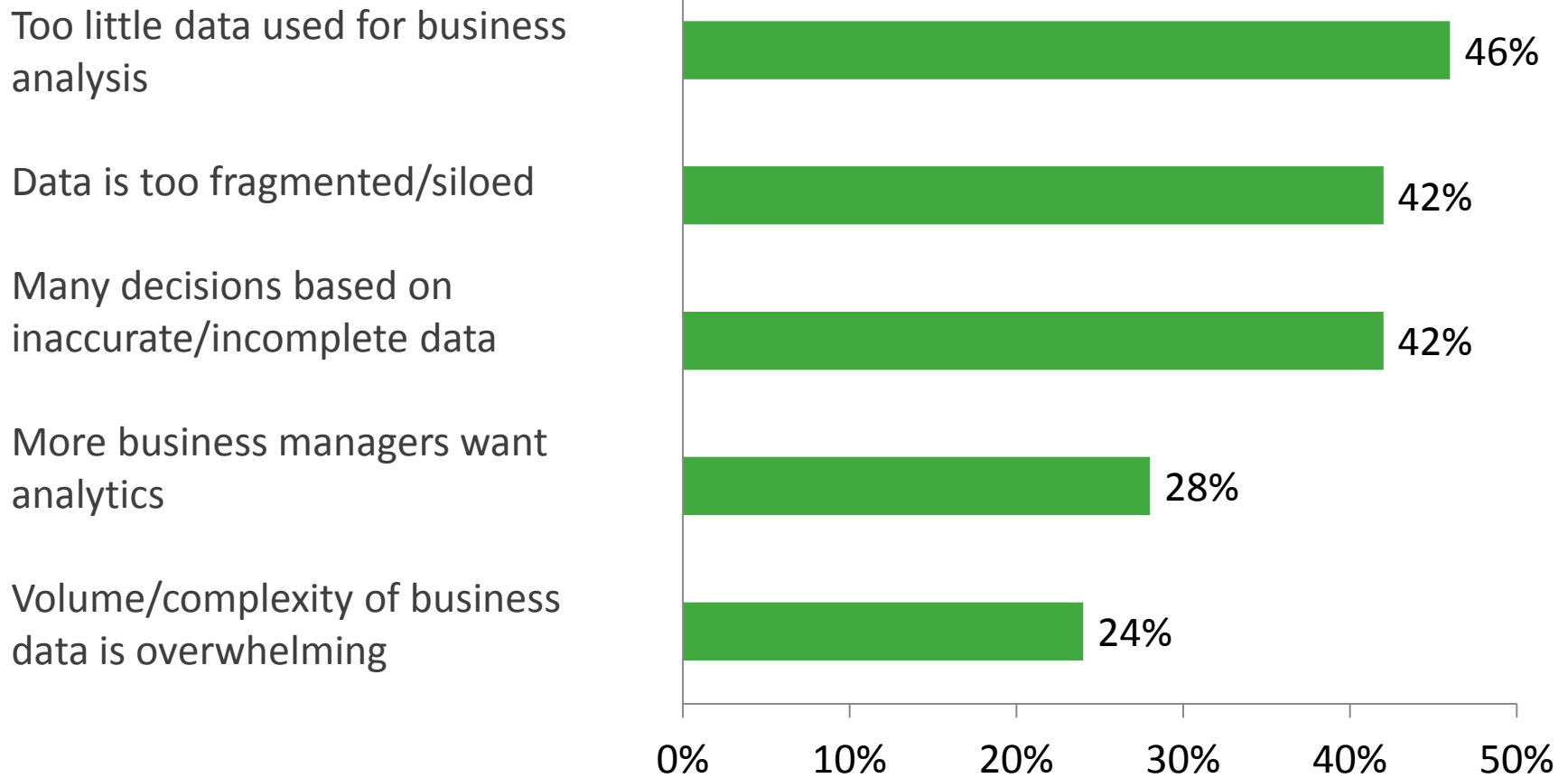
# Why business intelligence?



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Data volume is  
growing **56%** year  
over year

# Too much data, not enough information



Source: Aberdeen Group—ERP and BI in the SMB—July 2013

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**66%** of managers  
admitted to having less  
time to make decisions

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Seven in ten organizations spend more time:

- Waiting for data
- Preparing for data
- Reviewing data for quality and accuracy

**Instead of analyzing the data!**

The system holds the clues



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Better data  
+  
Time to analyze data  
=  
Better business decisions

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# Sage ERP Solutions

## Core Reporting Capabilities



**Sage 300 ERP Core Analytics** include user dashboard (portal), Financial Reporter, inquiries, statistics and Crystal Reports

**Sage 500 ERP Core Analytics** include user dashboard (portal), web reports, SQL reporting, business insights explorer and analyzer, Crystal Reports and Sage Intelligence Reporter

**Sage ERP X3 Core Analytics** include user dashboards (portal), inquiries, statistics, SQL requesters, financial data extractor (FDE) and Crystal Reports





“With Sage Intelligence we have converted weeks of repetitive work every month into a few hours. Now that’s what I call a measurable return on investment.”

Ravind Sukdeo, Financial Director,  
Bidfreight Port Operations (Pty) Ltd



# Sage Intelligence

## Control, Automate and Analyze within Excel



Fully integrates with Sage 50 U.S. and Canadian Edition, Sage 100 ERP, Sage 300 ERP, Sage 500 ERP and Sage ERP X3

The screenshot displays the Sage Intelligence interface within an Excel spreadsheet. The main window shows an 'Income Statement by Region' report for 2012. The report is organized into columns for North America, Europe, and Africa, with sub-columns for 2012 YTD. A pie chart titled 'Sales by Region' is positioned to the right of the table, showing the distribution of sales across the three regions. The interface includes a ribbon with various tabs like 'BI Reports' and 'Distribution', and a sidebar on the right with a navigation menu.

	North America	Europe	Africa
	2012 YTD	2012 YTD	2012 YTD
Sales	29 659 929	6 441 206	12 641 393
Sales - Education	4 353 107	410 034	8 706 214
Sales - Electronic	153 795	2 350 060	307 510
Sales - Chemicals	0	2 281 054	0
Sales - General	9 080 800	0	1 816 160
Sales - Other	16 072 267	1 400 058	1 811 509
Cost of Sales	0	0	0
Gross Profit	29 659 929	6 441 206	12 641 393
Expenses	0	0	0
Salaries	0	0	0
Employee Expenses	71 000	142 000	142 000
Building Dep Exp	-71 000	-142 000	-142 000
Media & Production	0	0	0
Net Profit	29 659 929	6 441 206	12 641 393

# Sage Intelligence

## Gain control of your data

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- Edit and view reports through the familiar interface of Microsoft Excel.
  - Store and run reports in a controlled and secure environment.
  - Create financial reports with drag-and-drop tools.
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# Sage Intelligence

## Automate your reporting



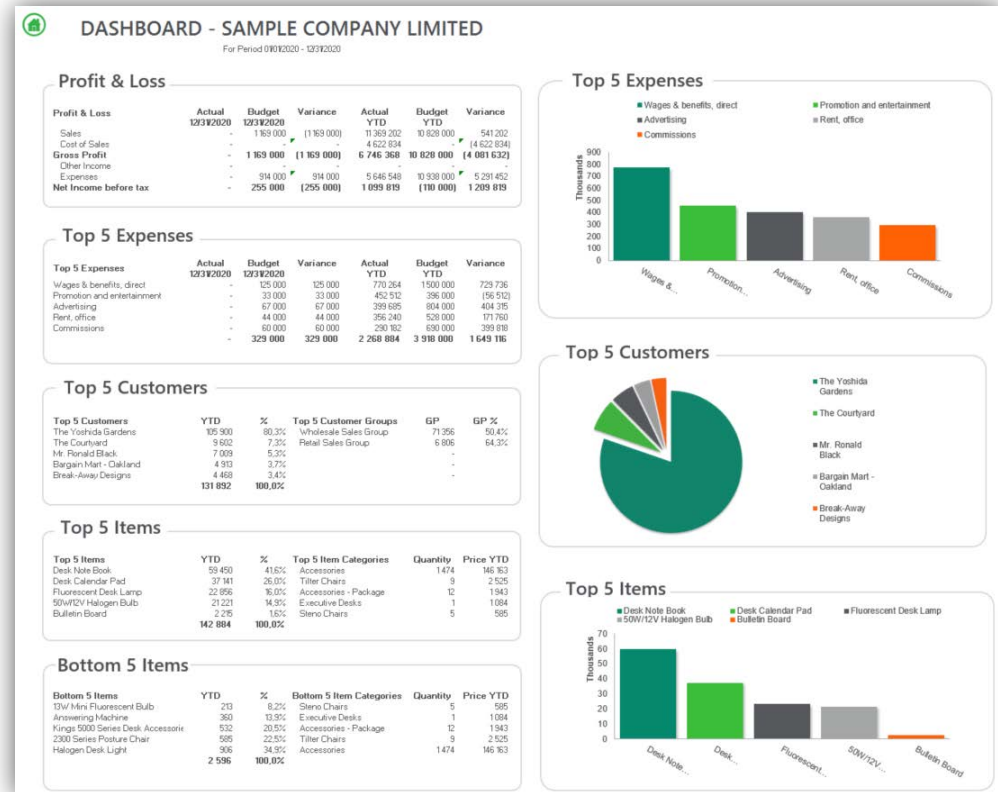
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- Run reports at the click of a button.
  - Automatically distribute reports to anyone who needs them.
  - Schedule the routine running of reports.
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# Sage Intelligence

## Analyze your business



- See data from your entire business.
- Create dashboards of your KPIs with charts and graphs.
- Drill down into your reports with the click of a button.





“It is easily twice as fast as our former reporting tools. That speed means our staff spends less time looking for data and more time acting on that data.”

Marc Lefebvre, Vice President & CIO,  
Ganong Bros. Limited

# Sage Enterprise Intelligence Product Positioning



## Self-Service, Comprehensive Business Intelligence

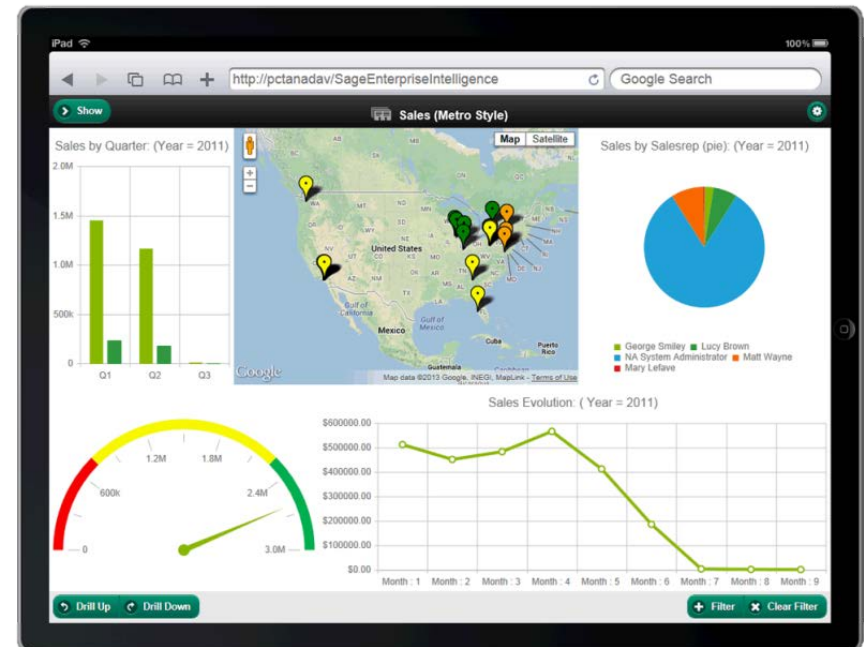
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**Reduce time** spent on business analysis and reporting.

**Empower any users** to analyze and report on financial and operational data without needing assistance from others.

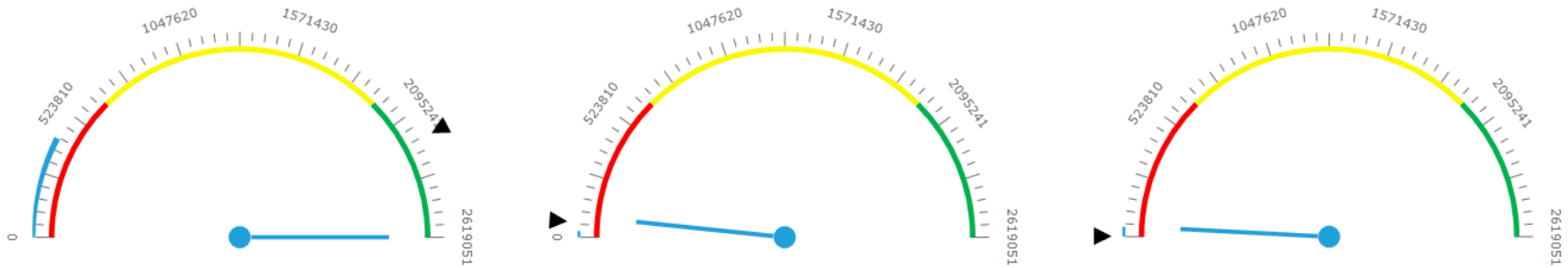
**Simplify and accelerate** the distribution of relevant information across the organization, for coherent and better-informed decision-making.

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# Key Features

## Powerful, Yet Intuitive for Users



**Comprehensive Analytics and Reporting on Any or Multiple Sources** ✓

**Live and Secure ERP Integration** ✓

**Dashboarding** ✓

**Geospatial Analysis** ✓

**Automatic distribution of reports** ✓

**Self-Service:** for executives, managers and business users ✓

**Web Interface, Mac/Win** ✓

**Big Data / OLAP Processing** ✓

**Mobile** ✓

**Excel Add-In** ✓



# Sage Enterprise Intelligence Web Access



Real-time access to ERP and other data sources

Some Key Features and Benefits include:

- Intuitive user Interface fully integrated with Sage 300 ERP, Sage 500 ERP and Sage ERP X3
- Access to KPIs and dashboards to easily share information as well as leverage pre-built templates and drill-down into transactional data.
- Centralized security layer
- Data entry (ie. Budgeting)
- Distribution module
- Data warehouse and consolidation (OLAP)

Groups	0		1		2		3		4		5	
	Actual Amount	Budget	Actual Amount	Budget	Actual Amount	Budget	Actual Amount	Budget	Actual Amount	Budget	Actual Amount	Budget
2	0.00	0.00	29,668,827.04	-145,331.63	28,822,589.12	-193,872.44	32,572,752.72	-191,840.27	30,706,072.00	-194,299.99	42,791,691.84	-194,049.84
0B1 Operating Budget P21	0.00	0.00	7,406,301.76	47,000.00	6,837,105.46	0.00	7,714,580.68	0.00	7,676,518.00	0.00	10,697,922.96	0.00
SAG Sage Budget	0.00	0.00	7,406,301.76	0.00	6,837,105.46	0.00	7,714,580.68	0.00	7,676,518.00	0.00	10,697,922.96	0.00
USA USA Budget	0.00	0.00	14,812,603.52	43,200.01	13,674,210.92	43,199.98	15,429,161.36	43,200.01	15,353,036.00	43,200.01	21,395,845.92	43,199.98
10100 Bank Account	0.00	0.00	0.00	0.00	1,142,522.16	0.00	1,730,644.16	0.00	2,027,159.40	0.00	1,892,780.00	0.00
10110 Bank Account 2	0.00	0.00	0.00	0.00	2,099.20	0.00	22,437.04	0.00	12,390.00	0.00	19,157.04	0.00
12100 Accounts Receivable	0.00	0.00	1,454,768.80	0.00	1,415,192.00	0.00	1,541,606.96	0.00	1,525,550.08	0.00	3,611,137.92	0.00
12400 Shipped Not Invoiced Clearing	0.00	0.00	2,050,525.84	0.00	2,010,035.84	0.00	2,005,918.84	0.00	2,193,766.64	0.00	1,620,129.28	0.00
15100 Inventory - Raw Materials	0.00	0.00	1,298,446.32	0.00	950,236.92	0.00	966,126.16	0.00	815,938.08	0.00	1,566,785.00	0.00
15200 Inventory - Work in Progress	0.00	0.00	1,842,609.28	0.00	1,470,580.44	0.00	1,807,328.16	0.00	1,766,853.92	0.00	3,531,075.00	0.00
15300 Inventory - Finished Goods	0.00	0.00	4,735,839.84	0.00	2,735,341.44	0.00	3,060,289.80	0.00	3,006,149.44	0.00	4,688,948.40	0.00
20100 Accounts Payable	0.00	0.00	0.00	0.00	413,567.68	0.00	350,981.92	0.00	414,534.40	0.00	128,220.48	0.00
20200 Received Not Invoiced Clearing	0.00	0.00	937,908.56	0.00	924,252.60	0.00	1,144,000.90	0.00	800,245.20	0.00	1,242,630.00	0.00
22100 Inter-Site Clearing	0.00	0.00	0.00	0.00	180,315.76	0.00	129,843.56	0.00	105,767.28	0.00	40,834.64	0.00
41100 Sales Revenue	0.00	0.00	119.96	-87,250.00	45,000.00	-87,250.00	0.00	-87,250.00	0.00	-87,250.00	0.00	-87,250.00
41600 Sales Revenue - Inter Company	0.00	0.00	0.00	19,250.01	0.00	19,249.98	0.00	19,250.01	0.00	19,250.01	0.00	19,249.98
41900 Sales Revenue - Clearing	0.00	0.00	2,050,069.60	0.00	1,851,635.84	0.00	1,932,918.84	0.00	2,265,555.04	0.00	1,650,168.96	0.00
44100 Finance Charge Income	0.00	0.00	0.00	1,008.33	0.00	1,008.34	0.00	1,008.33	0.00	1,008.33	0.00	1,008.33
51100 Cost of Sales	0.00	0.00	409,565.88	36,791.67	479,836.44	36,791.66	486,223.20	36,791.67	348,993.80	36,791.67	1,269,607.08	36,791.67
53100 Purchase Price Variance	0.00	0.00	0.00	8,166.67	0.00	8,166.66	45.92	8,166.67	0.00	8,166.67	0.00	8,166.67
54100 Subcontracted Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	608.00	0.00	0.00	0.00
57100 Material Variances	0.00	0.00	0.00	6,208.33	0.00	6,208.34	0.00	6,208.33	0.00	6,208.33	0.00	6,208.33
57200 Labor Variance	0.00	0.00	0.00	9,583.33	0.00	9,583.34	0.00	9,583.33	0.00	9,583.33	0.00	9,583.33

# Sage Enterprise Intelligence Mobility



## Anytime, Anywhere Intelligence

Mobile Business Intelligence provides users immediate access to real-time enterprise information from mobile devices. Users out in the field are able to view and analyze business data, easily and instantaneously, resulting in better decision making and increased productivity.

### Features

- Intuitive User Interface
- Delivers real-time data
- Fingertip analysis with KPIs and drill-down
- Worry-free secure access



### Benefits

- Remote access to enterprise data
- Quick access to key metrics
- Improves decision making
- Enhance Corporate Performance

# Sage Enterprise Intelligence Excel Add-In



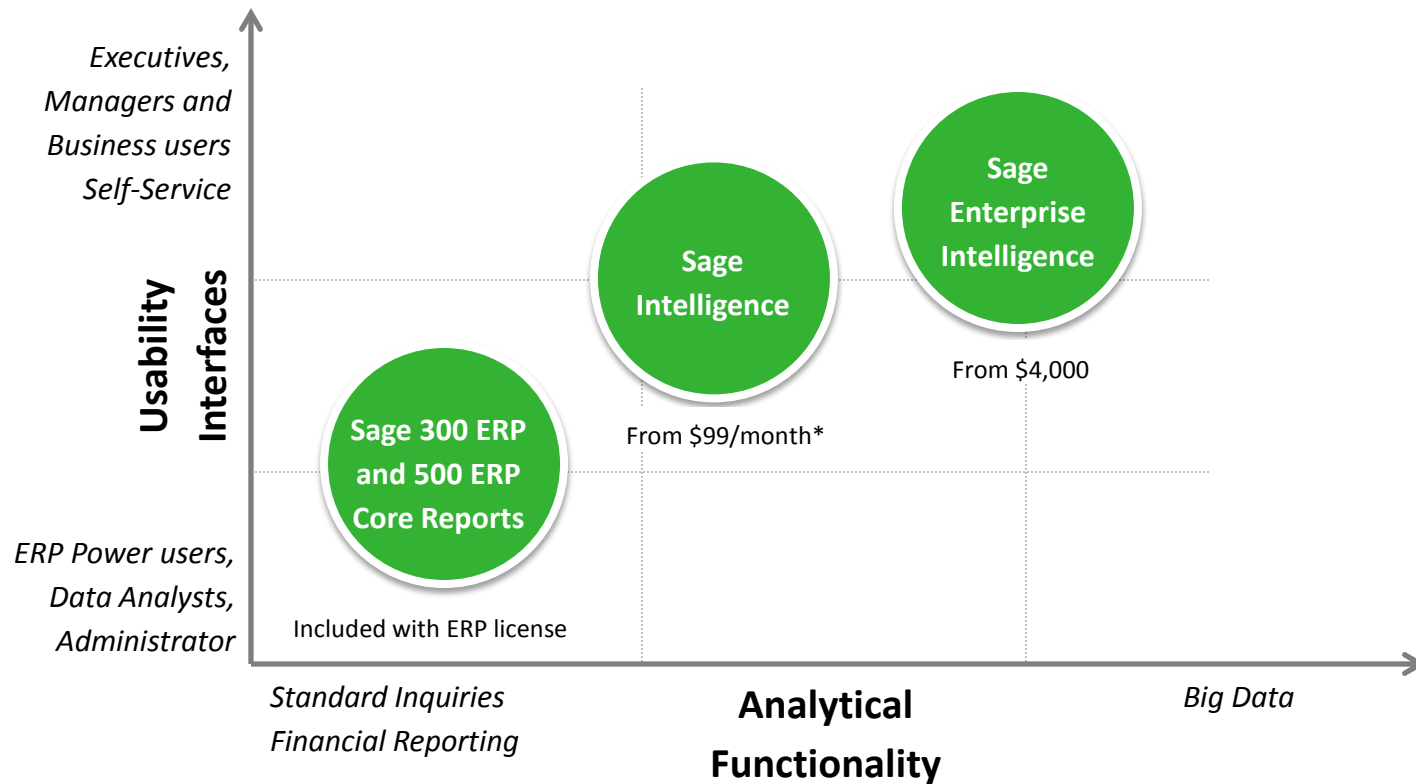
Empowers users with a dynamic and powerful means of accessing real-time information within Microsoft Excel, eliminating the need for users to rely on IT resources to pull data for them.

## Some Key Features and Benefits include:

- Install and configure quickly to integrate seamlessly between Excel and data sources.
- Increase productivity by eliminating manual entry.
- Access enterprise data securely and share Excel documents without compromising security.
- Produce real-time financial statements and reports
- Drill into real-time transactional data within Excel.
- Easy to consolidate information from multiple data sources.

Account	Description	Current Period				Year to date			
		Actuals	Budget	Variance	Ratio	Actual	Budget	Variance	Ratio
<b>Sales</b>									
<b>Revenue</b>									
41100	*Sales Revenue	186,544.76	16,666.67	-169,878.09	-91%	2,612,621.85	100,000.00	-2,612,621.85	-99%
41800	*Sales Revenue - Invt Company	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
41900	*Sales Revenue - Clearing	-8,230.00	0.00	8,230.00	100%	22,707.53	0.00	-22,707.53	-100%
44100	*Franchise Charge Income	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
44100	*Shipping Insurance	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
	<b>Total Revenue</b>	<b>178,314.76</b>	<b>16,666.67</b>	<b>-161,648.09</b>	<b>-91%</b>	<b>2,635,329.38</b>	<b>100,000.00</b>	<b>-2,535,329.38</b>	<b>-99%</b>
<b>Sales returns and allowances</b>									
4100	*Sales Returns & Allowances	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
	<b>Total Sales returns and allowances</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0%</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0%</b>
<b>Discounts</b>									
49100	*Sales Discounts	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
	<b>Total Discounts</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0%</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0%</b>
	<b>Total Sales</b>	<b>178,314.76</b>	<b>16,666.67</b>	<b>-151,648.09</b>	<b>-91%</b>	<b>2,635,329.38</b>	<b>100,000.00</b>	<b>-2,535,329.38</b>	<b>-99%</b>
<b>Cost of sales</b>									
<b>Cost of goods</b>									
91100	*Cost of Sales	149,237.03	0.00	-149,237.03	-100%	2,207,000.33	0.00	-2,207,000.33	-100%
92100	*Commission	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
92200	*Freight Charges	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
93100	*Purchase Price Variance	-135,973.75	0.00	135,973.75	100%	669,890.89	0.00	-669,890.89	-100%
	<b>Total Cost of Goods</b>	<b>34,263.28</b>	<b>0.00</b>	<b>-34,263.28</b>	<b>-100%</b>	<b>1,845,779.44</b>	<b>0.00</b>	<b>-1,845,779.44</b>	<b>-100%</b>
<b>Manufacturing Cost</b>									
54100	*Subcontracted Services	0.00	0.00	0.00	0%	152.00	0.00	-152.00	-100%
54100	*Material Variance	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
57200	*Labor Variance	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
57200	*Machine Variance	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
57300	*Subcontract Variance	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
58100	*Absorbed Labor Cost	-8,185.79	0.00	8,185.79	100%	-78,548.84	0.00	70,363.04	100%
58200	*Absorbed Machine Cost	-5,849.79	0.00	5,849.79	100%	-37,143.37	0.00	31,293.57	100%
58300	*Absorbed Overhead Cost	-623.44	0.00	623.44	100%	-4,899.81	0.00	4,276.37	100%
58400	*Absorbed Subcontracting Cost	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
59100	*WIP Inventory	0.00	0.00	0.00	0%	3,229.99	0.00	-3,229.99	-100%
59200	*WIP Scrap	0.00	0.00	0.00	0%	0.00	0.00	0.00	0%
	<b>Total Manufacturing Cost</b>	<b>-14,659.01</b>	<b>0.00</b>	<b>14,659.01</b>	<b>100%</b>	<b>-118,809.42</b>	<b>0.00</b>	<b>118,809.42</b>	<b>100%</b>
	<b>Total Cost of Sales</b>	<b>-5,244.93</b>	<b>0.00</b>	<b>5,244.93</b>	<b>100%</b>	<b>1,925,969.01</b>	<b>0.00</b>	<b>-1,925,969.01</b>	<b>-100%</b>

# Business Intelligence Portfolio Positioning



\*The Sage Intelligence subscription is tiered by the number of required users

# Differences between Sage Intelligence and Sage Enterprise Intelligence



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Sage Intelligence	Sage Enterprise Intelligence
Must-have for Financials	Comprehensive Reporting
<ul style="list-style-type: none"><li>• Ideal for users who perform a majority of analysis in Microsoft Excel</li><li>• Financial report designer with drag and drop capabilities and reporting trees</li><li>• Multiple templates across modules available out of the box</li><li>• Great scheduling and distribution capabilities</li></ul>	<ul style="list-style-type: none"><li>• Complete reporting for full ERP across mobile, web and Excel</li><li>• Easy to use/create graphical analytics and dashboards with drag and drop</li><li>• Multiple templates (Processes) across modules available out of the box allows users to create many real-time views (reports)</li><li>• Great scheduling and distribution capabilities with field-level security and the ability to add mobile portal</li></ul>

# A Need for Both Reporting Solutions?



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## Sage Intelligence

- Client has pure Excel-based report requirements
- Easy financial report design is a key selling point with Report Designer
- Multi-company and multi-site requirements can be addressed with reporting trees
- Report distribution with Excel cell references for email messages
- Strong graphical report designer front-end without complex Excel knowledge
- Financial and Operations report templates are provided

## Sage Enterprise Intelligence

- Client has strong user-based reporting requirements for operations
  - Requires self-service reporting and analysis
  - Need for distributing reports across the enterprise with security
  - Mobile reporting is a key selling point
  - Strong and easy to use interface for building new report views – graphical, table, etc.
  - Multiple graphical report view options, including bubble graphs, geospatial analysis, etc.
  - Extensive templates are provided for operations and financial transactions
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# The Right Solution for Customer Needs



COMMON CUSTOMER REQUIREMENTS		BEST FIT
<b>FINANCE</b>	Requires reporting for financial statements and analysis. All reporting is done in Excel. Would like to build reports using tree structure and distribute reports across the organization. Users are fluent in Excel.	Sage Intelligence
<b>OPERATIONS</b>	Requires real-time reporting across multiple modules. Need to build reports on the fly. Multiple users reporting off of the same data, but require different views for informational purposes.	Sage Intelligence and/or Sage Enterprise Intelligence
	Users are not always tied to Excel, or even in the office; therefore, needing more functionality.	Sage Enterprise Intelligence
<b>EXECUTIVE</b>	Requires interactive dashboard-level reporting and quick access to key performance indicators. Strong comfort level in Excel, but may also benefit from web or mobile portal.	Sage Intelligence and/or Sage Enterprise Intelligence



# Business Intelligence for Sage ERP Solutions



Reduce time spent on analysis & reporting, and make faster, better-informed decisions.

