

# Sage ERP X3 Business Intelligence

Sage ERP X3 provides powerful business intelligence tools that offer self-service access to both data and intuitive information analysis, helping users turn business insights into effective decisions.

## User Portal and Dashboards

Sage ERP X3 offers a user-defined decision support portal and dashboards providing users with actionable, up-to-the-minute graphical representations of key statistical information such as revenues and equipment usage.

The Sage ERP X3 user portal enables each user to create a personalised management chart for real-time tracking of the indicators most pertinent to his task. General or detailed information appears in the form of graphs, tables, or organised in a calendar, with links making it possible to follow the entire security audit trail up to the information details.

Dashboards can help boost profits by providing instantaneous access to key company data, allowing management to react quickly to changing business conditions. Users can monitor the relevant indicators for their activity in real time and focus on anomalies. In case of an unusual event or level of activity, it takes no longer than a click on the given indicator to move back by successive zoom operations to the detailed information or the original document explaining the result in order to make a well-informed decision.

## Advanced Business Intelligence Engine and Data Warehouse

Powered by leading Business Objects® technology, Business Intelligence is fully integrated within the Sage ERP X3 system. It functions seamlessly in sync with the day-to-day business operations being processed by Sage ERP X3. It does not require maintenance of a separate data warehouse, and the integrated Business Intelligence data warehouse is fully managed—and kept up to date—as part of the ERP software system. Like all Sage ERP X3 functions, Business Intelligence is a Web-native feature that may be accessed in the same fashion using a simple Web browser, locally, or over a network such as the Internet.

## Simple Interface for Users

With Sage ERP X3 Business Intelligence, users can access and format information to suit their needs with an easy-to-use, drag-and-drop Web interface. And you can customise the zero-foot-print Web interface to meet specific user segments inside and outside of the organisation. In addition, with minimal knowledge of the underlying data structures, users can access and synchronise data from multiple sources (whether structured, text-based, or even Microsoft® Excel® spreadsheets, CSV, and .txt files), create custom formulas, and use variables within a single report.

Within their Web browsers, Business Intelligence users can:

- View report metadata
- View, edit, remove report, section, or block filters
- Format and resize cells, tables, and charts
- Recombine report objects and variables in tables and charts
- Set breaks and sorts
- Insert calculations
- Add rows and columns to tables
- Create and duplicate tables and charts
- Turn a grid into a chart or a chart into a grid
- Create formulas and variables
- Edit cell formulas in place



### Powerful Query and Reporting

Sage ERP X3 Business Intelligence allows users to analyse business performance on the fly by simple drag and drop of aggregated data that are updated with the flow of ERP operations. With a few mouse clicks, users create a query from scratch, format the retrieved information, and easily analyse it to understand underlying trends and root causes. And if they don't require the full power of query capabilities, users can simply explore information in existing reports—formatting and interacting with data to meet specific needs.

### Preconfigured Universes

While a set of preconfigured Business Intelligence Universes covers most users' needs for advanced business statistics and indicators, Sage ERP X3 provides the tools and information to build custom universes about any area of business. Preconfigured universes notably include: Sales, Purchasing, Inventory, Manufacturing, and Finance.

### Secure Access to Data

Designed as a fully integrated ERP function, Business Intelligence benefits from the highest level of security management that can be expected from an ERP solution. Security is controlled and managed at the ERP system level for all users and can easily be defined at the function, screen, and/or field level. Aggregated data handled by Business Intelligence may inherit from all the security rules that have been defined for the system.

Also, whether users are accessing the system locally or remotely through the Internet, Sage ERP X3 manages standard security network protocol to provide users with a safe connection to the system.

### Flexible Reporting Tools

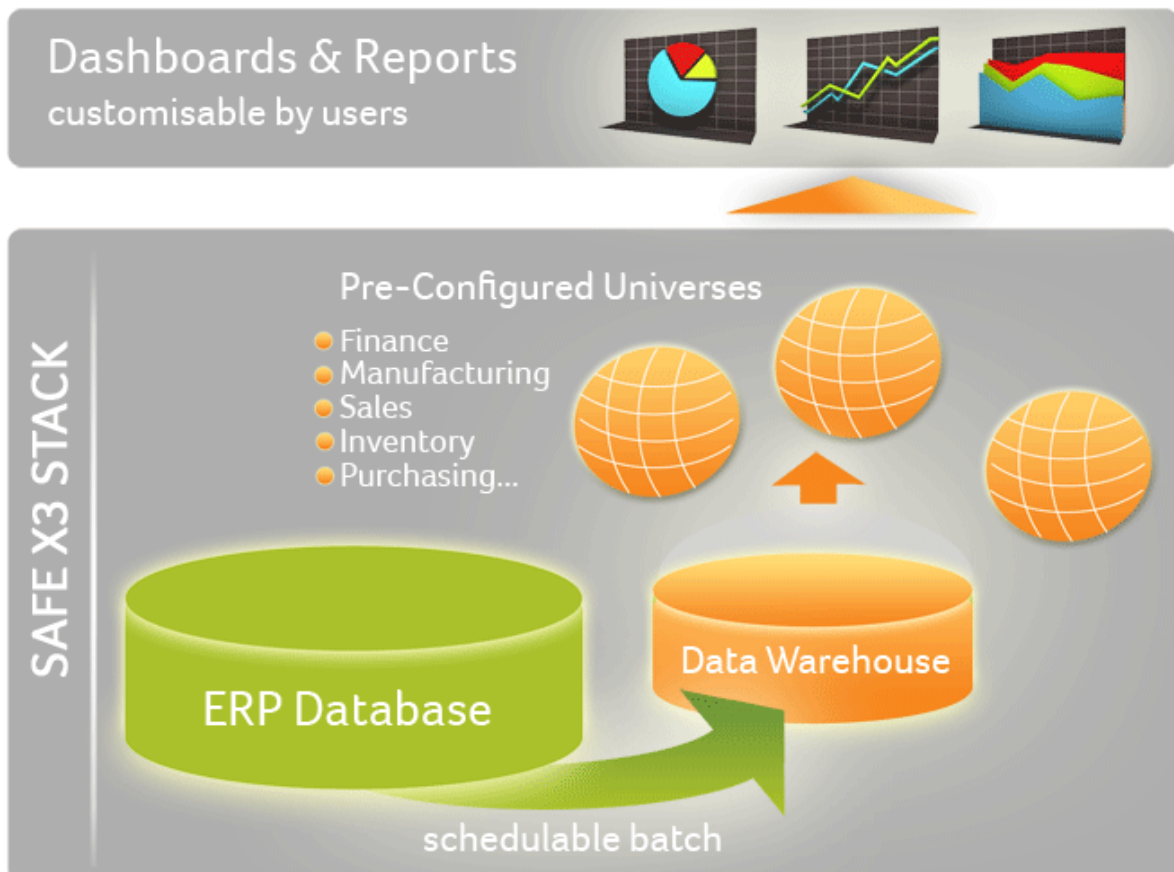
#### Standard Financial Reporting Tools

With the Crystal Reports® statement generator, Sage ERP X3 provides a library of nearly 400 reports: General ledger, balances and daily account activity, invoices, delivery orders, packing lists, shop packet, labels, inventory statements, analyses, and lists can be used directly.

Additionally, companies can choose from two optional interfaces that link to the Sage ERP X3 General Ledger (GL) for more enhanced financial reporting capabilities. Microsoft Management Reporter® provides an expanded set of tools for financial analysis and report publishing, while Infor F9 enables GL data to be formatted into any desired financial report in the flexible and powerful environment of the spreadsheet.

#### Profound Integration with Microsoft Office®

Integration with Microsoft Office allows users to export and manipulate data in Office standard format, without losing the accuracy and consistency provided by the single, up-to-date database of the ERP system.



## Features and Functions

### User Portal and Dashboards

User-defined triggering events for updating statistics in batch or real time

User-defined statistical codes and grouping:  
Multidimensional analysis, accumulates amounts and quantities, user-defined periods (day, week, month), progressive zooming to event source

### Advanced Business Intelligence

Integrated business intelligence engine Business Objects

Web Intelligence

Integrated Data warehouse and ETL process

Supports multiple import/export formats such as structured, text-based, or even Excel spreadsheets, CSV, and .txt files

Web-browser interface

Simple query based on configurable universes

Preconfigured Universes include: Sales:  
Revenue; discount; margin; volume; item; line of business; best-selling products; most profitable, seasonal trends; geographic coverage; and more

Purchasing: Suppliers; products purchased by price, discount, volume, or number of orders; and more

Inventory: Stock movements by product, value, or quantity; top variations by period; receipts and shipments by product and period; rate of rejected items by product, category, product line, and/or supplier; and others

Manufacturing: Late work orders by period, average work order duration, work centre efficiency, occupation rate, rejected product rate per period, material consumption, and others

Finance: Analyse and track costs at all levels (drill down and up from an aggregate level following dimension groupings), control actual vs. forecast, develop week/month/quarter analysis for internal/external reporting, and more

Security management

### Reporting

Full integration of Crystal Reports (transfers report criteria and parameters directly from screens to the reports)

Crystal Reports library includes over 400 reports for general ledger, balances and daily account activity, invoices, delivery orders, packing lists, shop packet, labels, inventory statements, and more

Microsoft Office integration (Word, Excel®, HTML pages, images, videos, and more)

Optional interface with Microsoft Management Reporter

Optional interface with Infor F9



The Datel logo consists of the word "Datel" in white, bold, sans-serif font, centered within a solid red square.The Sage logo features the word "sage" in a green, lowercase, sans-serif font with rounded letterforms.

Business Partner

A larger version of the Sage logo, featuring the word "sage" in green, lowercase, sans-serif font with rounded letterforms.

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## About Datel

Datel is Sage's largest Business Partner in the UK and is acclaimed as its leading systems integration specialist. Headquartered in Warrington, Datel also has offices in Leeds and the Netherlands employing a loyal team of over 140 highly-skilled people who look after its growing base of over 900 customers worldwide.

We specialise in:

- Sage ERP X3
- Sage 200
- Sage Line 500
- Sage ERP 1000
- Sage CRM
- SalesLogix

We also have our own in-house products which we have developed to integrate with, and sit alongside, Sage solutions. Known as Datel FUSION, the suite of products enhances and extends the functionality provided by the core Sage applications.

Datel looks after a broad ranging base of customers including those in the following sectors:

- Distribution
- Manufacturing
- Food and drink
- Chemical Processing

Typically they are mid sized companies who rely upon Datel to make the most of their investment with Sage.

We pride ourselves in our approach to doing business. We seek to know and thoroughly understand our customers and their businesses so, in turn, we can appreciate fully all of the issues and challenges they face. Only then can we presume to offer a solution that will make a real difference to the way they do business. Everything Datel does is guided by our belief in providing only the very best in customer service.

To find out more about our products and services, visit our website at [www.datel.info](http://www.datel.info)