sage

Managing a Legacy From Dread to Delight

From cumbersome, tedious, and time-consuming to flexible, customizable, and visually stimulating—this is the story of how financial reporting at Mega Corp went from a dreaded task to one that positively delights staff. It is the story of Sage Intelligence.

Mega Corp's finance department was producing a number of financial reports each month for the corporation's management team. Some of them were created and maintained in the old MAS FR Report Designer, some in Microsoft FRx®, and some in SAP® Crystal Reports. With these legacy systems, whenever numbers or accounts changed or whenever a manager wanted the answer to a specific question, entries would have to be adjusted, and then static reports would be generated, printed– to several PDFs in the case of SAP Crystal Reports – and distributed. If the report gave rise to the need for further data, the process would have to begin again.

Phoebe Hire, CFO, and John Lesher, IT manager, knew that their legacy systems would need to be moved to a Sage supported reporting platform going forward, they knew the finance department was having to do too much maintenance whenever accounts changed, and they knew that more dynamic reporting options existed that would allow for adhoc reporting. Hire wanted the freedom to create reports easily, quickly, and in any number of configurations as required by members of the management team. Above all, she wanted to put the real intelligence contained in their financial data directly into the hands of the managers.

Customer
Mega Corp Inc.

Industry
Manufacturing

Location
Albuquerque, NM

Number of Locations
1

System
Sage 100 Advanced ERP
• Sage 100 ERP Intelligence Reporting

Challenges
Mega Corp was handicapped by the fact that several different reporting tools were in operation in the organization, and it constantly struggled to make them all work together. In addition, it was operating on outdated systems with cumbersome and time-consuming reporting methods. If a manager needed a slightly different report than the options on offer, he would have to wait for someone to write it, and he wouldn't be able to interact with it.

Solution
Sage 100 ERP Intelligence Reporting allows the Mega Corp management team to easily and quickly create, customize, and share financial reports.

Results
The graphic presentation of key business measures helps Mega Corp to focus on the areas of its business most in need of attention. The opportunities this presents for business growth go far beyond what it originally hoped to achieve.

Sage Intelligence
Customer Success

Instant Attraction

Mega Corp is indeed a mega corporation. The company has been in business for 35 years, designing and manufacturing hundreds of pieces of equipment per year for the construction and mining industries: tanks, haulers, trailers, transports, dumpers, pumps, and scrapers. Think big yellow machines on wheels– that's Mega. It has manufacturing and OEM partners worldwide, and its products can be found all over the world. A range of reports needed to be created on an ongoing basis, not just for Mega Corp, the primary company, but a number of other companies in the group, including its international partners.

When Hire and Lesher saw Sage 100 ERP Intelligence Reporting, they knew they wanted its ability to connect to all of their Sage and other data sources and select data easily. They liked the fact that it was fast and could present reports in Excel®, a format their users knew and could customize. They also appreciated the ease of scheduling, running, and delivering reports by email and their intranet. Little did they know just how much they and their fellow managers would appreciate the system's graphical dashboards and how much it would mean to them all to be able to customize reports to understand and guide their business better.

Clear Goal Setting

To get started, Hire and Lesher consulted with Sage Intelligence specialists, BXIntelligence, who became invaluable in helping them customize reports. They also took online courses with Sage University so that they were able to set clear goals for the implementation of Intelligence Reporting. In addition to moving their legacy financial reports to a supported reporting platform and reducing the maintenance required when accounts changed, they knew enough to specify other key objectives, as follows:

- ✓ Create a visual dashboard to communicate key business measures quickly
- ✓ Provide interactive financial reports with departmental and transaction drill-down
- ✓ Issue financial statements by intranet and email
- ✓ Provide self-contained financial statements that don't rely on direct access to Sage data files
- ✓ Create a comprehensive report, that is, one workbook with tabs for each of their traditional reports
- ✓ Generate reports with the click of a single button.

Delivery Way Beyond Expectations

In the usual way of things, financial reporting is not that exciting a task, yet at Mega Corp it has created quite a buzz. This is not surprising when you consider what it has added to the way the management team now experiences financial data. Today managers can individually filter data precisely as they want to, and as they interactively drill down, they suddenly find themselves holding valuable corporate intelligence. Indeed so valuable is their data now that they are able to fully interpret it, they use their customized Intelligence Reporting dashboard to direct management meetings and discussions.

Mega Corp sees this interactivity as one of the key benefit of Intelligence Reporting over FRx and SAP Crystal Reports. In addition, it has reduced the amount of report -writing required by the finance department because Hire no longer has to produce 5 different SAP Crystal Reports sorted in five different ways; she can give her management team one report, which they can sort and filter themselves. "This is probably the most compelling reason to use Intelligence Reporting over FRx or Crystal," says Lesher. "Of course, another benefit is that our users are becoming more proficient at Excel."

Hire cites the fact that maintenance is straightforward, and report creation is no longer a time-consuming task. And because the report takes its data out of the Sage 100 ERP database, it can be used and manipulated away from the office too. Intelligence Reporting is a good tool, a really good internal management tool, she says.

> "The financial statement reports we produce today literally require a single button push. Our managers receive a single spreadsheet containing our dashboard directing them to our traditional financial and management reports but with a major difference. Now they can filter the reports by department or product line and they can drill down to see the underlying transactions." —Phoebe Hire, Financial Controller

Listen in to the Happy Sounds of Reporting at Mega Corp These Days

How would you like your management report? Open the dashboard. Now click here to filter the data this way, or that way, or that way…any way you like in fact. Want more detail? Click here to drill down. Want to track sales? By customer? By industry? By size of sale? By product? You decide. Want it delivered to you at the click of a button? No problem. Want to read it in Excel? That's the default front-end. Ah, now you want an operations dashboard to track inventory? We'll get right on it.

The Benefits of Expert Help

Mega Corp is happy to admit that it took a while to understand how the pieces of Intelligence Reporting work together and how best to take advantage of the power of Excel in context of Intelligence Reporting. It was also challenged when it came to understanding the best way to use the Connector and Report Manager modules to create reports.

Wisely, the team contracted a Sage Intelligence consulting firm, BXIntelligence, which helped them design and implement their reports and understand Intelligence Reporting. It also helped them create multi-currency reports to accommodate their international partnerships. Mega Corp is quick to praise BXIntelligence for exceeding expectations and allowing them to get up and running quickly. "They gave us exactly what we asked for," said Hire.

With such clear graphical views, the dashboards now command the attention of previously inattentive staff. They then deliver even more value by allowing staff to manipulate data to create their own highly prized personalized views.

About Sage

Sage is a leading global supplier of business management software and services for small and midsized businesses. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs more than 12,600 people and supports more than 6 million customers worldwide. For more information about Sage in North America, please visit the company website at: NA.Sage.com. Follow Sage North America on Facebook, Facebook.com/SageNorthAmerica, and Twitter, Twitter.com/sagenamerica.

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