

sage 100 Intelligence Reporting

USA FUNDS EDUCATES OTHERS ON THE GREAT BENEFITS

of Sage Intelligence Reporting



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Customer

USA Funds

Industry

**Education and Financial
Services**

Location

Indianapolis, Indiana

System

**Sage 100 Intelligence
Reporting**

Flexibility to grow

USA Funds® is a nonprofit organization that has worked since 1960 to help prepare students for, provide access to, and enhance their success in postsecondary education. The company has also provided support for thousands of education and financial institutions nationwide. Today, USA Funds promotes what it calls “Completion With a Purpose”, aiming to increase the percentage of students who finish what they start in college or other postsecondary programs—while also ensuring a smoother transition from education to employment in the 21st Century global workforce. Basically, USA Funds intends to help students better use the degrees that they study for in college, in the real world.

Because of the scope and complexity of its activities, USA Funds faced many issues when it came to reporting—especially with regards to consolidation. Using their previous financial reporting software, USA Funds staff struggled to run the two-dozen reports that were required three times a month, including the odd report that had to be written on the fly. The biggest issue they faced was the inflexibility of the software, as well as being able to consolidate three different companies into one clear report, even though they have different ledgers. This all changed when USA Funds adopted Sage Intelligence Reporting as their reporting solution of choice, brought on by the desire to align their business management solution package to exclusively include Sage products.

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Immunity from data chaos

The transition to Intelligence Reporting went fairly smoothly, according to Kelly Wolfe, Assistant Controller at USA Funds. "The biggest challenge we faced in setting up was getting the PC to cooperate with the add-ins; as well as coordinating a meeting with the Sage Intelligence head office (based in South Africa)—due to the time difference challenges," says Kelly. However, this was quickly resolved by a Sage North America support assistant named Alec Burke, whom Kelly describes as, "Extremely patient and very helpful. He even wrote a Knowledgebase article documenting my issues so that others could learn from them too!" The initial goal for USA Funds was to simply convert their current reports to Intelligence Reporting without having to rewrite them. But since the process of completing that objective went so smoothly, Kelly decided that she wanted to create new reports too. This desire was further enhanced by the ease with which Microsoft® Excel®, the front-end of Intelligence Reporting, allowed her to customize and manipulate the reports.

"We achieved our initial goal and much more with Intelligence Reporting. It went well beyond what we initially expected," notes Kelly. Being the main report writer, Kelly was at first skeptical that they would be able to consolidate reporting on the three companies they needed to when they started using Intelligence Reporting, however, she quickly learned that this was possible. "I just started playing around with the consolidated report designer—while making use of the Sage Intelligence Community and Sage University to see how to work through the challenges I faced. The self-help YouTube videos were also amazing," mentions Kelly.

While she believes that there's still much she needs to learn about Intelligence Reporting, Kelly feels excited about the outcome thus far, and looks forward to exploring the solution more in the future. Kelly concludes, "The finance and management team absolutely love the feature 'Run All Reports', and the free additional reports available are a real plus and time-saver!"

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