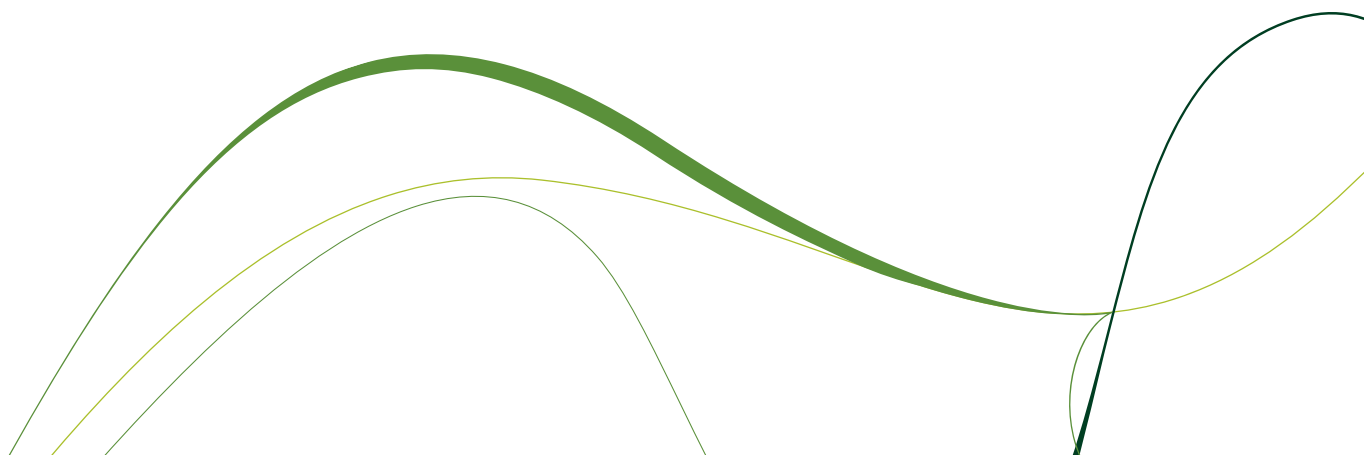# Sage 200 Business Intelligence Datasheet

Business Intelligence comes as standard as part of the Sage 200 Suite giving you a unified and integrated view of important data, with complete management dashboards, and analysis. Sage 200 Business Intelligence helps you to make better and faster business decisions by analysing metrics and KPIs that are not easily measured in a non BI environment. It helps you to embrace strategic planning for business growth, by identifying key trends and patterns in your data and gain a better understanding of your business, transforming data into actionable information. You are more responsive and can support future planning with the ability to identify opportunities to increase revenue or to reduce costs.

Feature	Explanation	Benefits
Pre-defined data cubes	Sage 200 BI comes with powerful pre-defined data cubes enabling a 360 degree view of your data.	Sage 200 BI has 5 financial data cubes, 8 commercial data cubes and 3 Project Accounting cubes enabling quick access to all your financial and commercial data.
Reporting and analytics within the familiar environment of Microsoft™ Excel™	Sage 200 BI brings business data into the familiar Microsoft Excel environment allowing quick analysis of company data from many different angles. Furthermore, because the data is now in Microsoft Excel, you can make full use of existing functionality and add your own calculations or bring data in from other sources.	The features of Excel, such as ease of formatting (layout and printing), calculations and macros can all be used to enhance the reports created using Sage 200 BI.
Pre-defined reports out of the box	Sage 200 BI is supplied with pre defined reports allowing you to analyse and understand financial information within your Sage 200 solution. Profit & Loss by cost centre and department, Sales by Customer by Month, Stock Valuation last 3 months, Trend In Overdue orders and Stock Movements by Product Group - and many more.	Key reports are provided out of the box to save time, by removing the need to create reports from scratch and making information more easily accessible.
Easy to understand terminology and usage	Sage 200 BI uses easy to understand business language rather than technical or complex terminology. No knowledge of the Sage 200 tables is required to use Sage 200 BI.	Sage 200 BI can be used and understood by all customers regardless of their technical ability as there is no technical knowledge or pre-requisites required to use BI.
Make faster, better informed and confident decisions	Sage 200 BI is an easy to use product that allows quick access to Sage 200 data. Multi dimensional analysis means that data can be easily viewed from different angles. For example sales by region, customer and month	Sage 200 BI provides quick and easy access to your data. The report fields can be easily changed in seconds to allow quick and easy reporting and analysis.
Save essential time on reporting	Sage 200 BI provides a superior alternative to complex spreadsheet reporting with dynamic reports easy to create, from easy to access data that is automatically refreshed.	Provides you with one version of the truth and reduces the need for complex time consuming spreadsheets which require manual intervention and manipulation.
Uses reliable Microsoft SQL Server Analysis Services	SQL Server Analysis Services is a market leading OLAP technology. The Sage 200 BI solution is therefore built on a reliable and robust platform. Having a server based solution also ensures that the BI data can be accessed by all users.	Sage 200 BI is built using market leading Microsoft technology.
Report Wizard	The Report Wizard allows you to change the report layout to meet your business requirements. For example if customers were shown on the rows of the report, but you wish to see products, the wizard will allow this change to be made easily.	The report wizard is a powerful editing tool which provides flexibility and ease of use by enabling you to extract the information you require and display it the way you want.
Drill across	Drill down through increasing levels of detail for more detailed analysis. For example look at an overview for the current year and then drill to look at the data by month and then at a daily level.	Allows you to easily go from a summary report to detailed analysis on specific items in the report.

Feature	Explanation	Benefits
Drill To Detail	Allows you to show the underlying values that make up the totals that are shown in a report.	Provides you with the ability to analyse to a transactional level to allow further detailed analysis of your data
Change the report parameters	Enables multi-dimensional analysis, by selecting a different slice of the data. For example you can view sales figures for Customer A and then change the customer report parameter to be viewing figures for Customer B within seconds.	Enables you to quickly flick between data by changing the report to get a different view of your data and a better insight of your business.
Sort, Filter and subtotal functionality	Allows the data to be manipulated making it easy to view and analyse. For example you can create a Top 10 report to see your 10 best customers or sort the data based on sales value.	These additional features provide additional flexibility allowing you to create the reports you require to suit your business needs.
Conditional Formatting	Allows you to highlight anomalies in your data by colour coding the data based on the criteria you specify.	Provides a very quick and easy method of spotting exceptions within a report thus saving you valuable time.
Dynamic Charts	Dynamic charts can be created using any chart type within Excel based on the data in a report to show a graphical view of the data. The chart is automatically updated when the report is changed.	Easily add charts to reports to give a graphical representation of the data - ideal for presentations and reporting.
Ad-hoc analysis via Report Layout Panel	Sage 200 BI allows you to create reports however you require by specifying the fields required on the rows and columns in a report. Slice and dice the data, drill up, down, across and back to the underlying transactions as required.	Provides full flexibility to create reports which can be configured and designed specifically for your requirements.
Flexible layout options to produce formal reports	Layout all forms of reports exactly as required within Microsoft Excel. Insert new rows and columns into the reports, and format the reports using Excel knowledge. You can also build dashboard reports with multiple linked queries and charts.	Produce professional and aesthetic reports and dashboards quickly and easily – ideal for use in presentations.
Report Sets	Sage 200 BI allows you to create report packs to create static reports which can be distributed via e-mail or saved to a server. A report pack automatically generates the reports you specify. For example you may create a Top 10 Customer report for January, but want to see the same report for each month. All you need to do is set up the parameters for the report pack and then run it.	Automating the creation of multiple reports to create report packs and save time on reporting.
Link reports	Enables synchronisation between reports within a workbook as common dimensions can be linked. This means that when the dimension changes in one report it is automatically changed in any linked reports.	Allows you to create a dashboard of a number of reports that can all be linked and updated together.
Insert user defined rows and columns into reports	Add additional rows or columns in a report to add additional calculations using Excel formulae to meet reporting needs	Increasing flexibility to utilise Excel functionality within a Sage BI report.
Named Sets	Group specific items to place on reports which can be saved and also used in other reports. For example, if you want to split customers into regional groups, create a list of customers for each region and this can then be easily used when creating subsequent reports or when analysing existing reports. Other examples include creating a set for the last 6 months to quickly be able to show data for each of the previous 6 months.	Save time and improve reporting by creating sets specific to the business.
Calculated Members	Allows you to define additional calculations based on existing data within a report. For example if two values were 'Number of Items' and 'Number of Items Settled', a calculation could be created to determine the percentage of items that have been settled.	Extend reports by creating additional calculations as required

Sage 200 Business Intelligence includes five financial data cubes and eight commercial data cubes. A cube is a set of data which uses pre-calculated measures and dimensions enabling multi-dimensional analysis. The table below is designed to show what analysis you can achieve:

Sage 200 Financials Data Cubes				
Data Cube:	**Enables Analysis of:**	**By:**	**Out of box reports**	**Example scenario**
Sales Cube	Sales Invoices and Credits values Settlement days	Customer Posted Accounting Period Transaction Date	Sales Dashboard Average Days to Pay Overdue Settlements by Invoice Month Total Bad Debt This Year Inactive Customers Top Customers Worst Paying Customers	Easily review the performance of the business in terms of sales e.g. spot areas of growth, review performance on prior year. Identify which customers spend the most, which ones have stopped buying and spot late payment trends
Purchase Cube	Purchase Invoices and Credits values Settlement days	Supplier Posted Accounting Period Transaction Date	Top Suppliers Inactive Suppliers	Easily identify which suppliers you are spending the most with and which ones you have stopped buying from
Aged Debt Cube	Outstanding sales invoices, grouped by ageing period	Customer 'As at' dates in the past or today	Outstanding Sales Invoices by Transaction Date Outstanding Sales Invoices by Due Date	Monitor how the age of debt is increasing or decreasing period to period. Identify customers who regularly have overdue invoices
Aged Credit Cube	Outstanding purchase invoices, grouped by ageing period	Supplier 'As at' dates in the past or today	None - create user defined report.	Payments control staff can identify who has been waiting for payment the longest at different times of the year
Finance Cube	Nominal Ledger movements, balances and budgets	Nominal Account Cost Centre Department Accounting Period Financial Statement	Balance Sheet Analysis Trial Balance Analysis P&L Analysis P&L by Cost Centre Analysis P&L by Dept Analysis Nominal Code Trend Analysis Cumulative Budget Accruals Accounts with Variance Exceptions	Monitor how the business is performing against budget period by period, easily identifying variances and trends. An MD can see how the worth of the company has changed year to year. You can quickly drill down into the detail of each cost Centre, department and nominal account
Data Cube:	**Enables Analysis of:**	**By:**	**Out of box reports**	**Example scenario**
SOP invoice credits	Sold quantity and value Returned quantity and value Estimated and realised profit on sales	Product Customer Stock Location Selling unit or Stock unit Invoice Date Accounting Period Trading Period	Most Profitable Customers Sales by Product Sales by Customer by Month Top 20 Selling Products 20 Least Profitable Products	Identifying trends in product lines, which are most popular, which are not selling, seasonal trends etc. Which items are being returned more than usual

Sage 200 Financials Data Cubes

Data Cube:	Enables Analysis of:	By:	Out of box reports	Example scenario
POP invoice credits	Purchased quantity and value Returned quantity and value	Product Supplier Location Buying unit or Stock unit Invoice Date Accounting Period Trading Period	Credits from Suppliers by Product Most Used Suppliers Purchasing Trends	Identify which products you purchase the most and associated suppliers to negotiate terms or find cheaper, alternative suppliers. Identify which product lines are being returned on a regular basis
Stock Movement	Stock quantities and values moved in and out of stock Profit on issued stock	Product Stock Location Movement Type Movement Date Accounting Period Trading period	Stock Movements by Product Group Stock Consumption YTD Issued Stock Profitability Average Cost of Stock Added	Find which stock items are the most profitable. Identify stock that is used the most. See seasonal trends in stock movements
Sales Order Book	Un-invoiced orders Un-despatched orders Orders due or overdue for delivery	Product Customer Stock Location Selling unit or Stock unit Promised Delivery Date 'As at' dates in the past or today	Order Book Status Year to Date Trend in Overdue Orders Orders for Future Delivery	Identifying seasonal trends in outstanding orders. Finding locations where orders are regularly overdue for delivery
Sales Despatches	Quantity and value despatched Number of days to despatch and overdue despatches	Product Customer Location Selling unit or Stock unit	Time to Despatch Longest Despatch Times by Product Group Value of Overdue Despatches	Monitor proficiency of warehouse despatch process to meet customer delivery requirements
Purchases Supply	Quantity and value received Number of days to receive and overdue deliveries	Product Supplier Location Buying unit or Stock unit	Time to Receive Longest Delivery Time by Supplier Average Value of Deliveries	Delve into data to investigate late deliveries of stock and supplier performance against deadlines
Data Cube:	Enables Analysis of:	By:	Out of box reports	Example scenario
Stock Levels *This cube allows a true retrospective stock valuation	Quantity and value of stock held Quantity allocated and on purchase order Quantity awaiting allocation to Sales Orders Age of stock held	Product Location 'As at' dates in the past or today	Stock Quantity at Last 4 Weeks Stock Valuation Last 3 Months Stock Shortages compared with Last Year Overstocked Products Average Age of Stock over time	Identify changes in stock valuation over time Evaluate stock levels at different locations Monitor the time stock has spent on the shelf
Stock Discrepancies	Quantity of discrepancy Value of discrepancy Type of discrepancy (over/under)		Highest Value of Lost Stock Discrepancies by Month	Identify if discrepancies in stock are re-occurring. Which locations have the worst stock losses

Sage 200 Project Accounting Data Cubes

Data cube:	Enables analysis of:	By:	Out of the box reports	Example scenario
Project costs, revenues and Profitability	Costs and revenue transactions linked with the various types of project item.	Project Project group Project item Transaction Type Resource Time Period	Costs by project and group in last 6 months Project revenue as percentage of total costs Project costs by item and resource this Year Gross profit by project this year and last Most profitable projects (Net) Billable status of project costs incurred this year Project profitability analysis	Compare project costs year on year and at project level Identify profitability of individual projects and compare based on resources used Identify how quickly revenue is received by project and identify reasons e.g. project manager
Project Resource Utilisation	Usage of different resources, whether individual persons or groups. Comparison of applicable cost and charge rates.	Time periods per project, Project groups or items Resource status	Hours posted by project and accounting period Resource cost and charge value this year Chargeable hours by resource - this year and last Project groups using most resources this year Project resource analysis	Identify where resources are spent by activity e.g. plumbing Identify whether the use of resources varies from project to project Find out what the average cost of resources is per hour and whether it varies by region or time of year Analyse where overtime is paid and whether there are any patterns to this
Project Budgets v Actuals	Project budgets and the actual cost and revenue totals associated with them.	Time Period Project Project Groups or Items Resource	Revenue budget v actuals by project Cost budgets v actuals by project structure this year Projects exceeding cost budget any period this year Projects below revenue budget at the latest period Cost budget v actuals for project items by project Project budget analysis	Identify which projects exceeded their cost budget at the end of last month Compare actuals with current/previous budget, month by month, last year Compare proportion of project completed against budgeted/actual revenue Identify the cumulative variance for projects, analysed using an additional information field e.g. region

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