

FEATURE SHEET

Excel Add-In

The capabilities of Excel combined with the power of Sage Enterprise Intelligence

sage Enterprise Intelligence



The interface you know, the power you need

The Excel Add-In seamlessly integrates Sage Enterprise Intelligence capabilities into the familiar Excel interface. Dynamic data in real time, with the same level of security as SEI. Create flexible ad-hoc reports by combining data from different departments into a single worksheet, with the ability to drill-down. Create static reports that can be viewed outside of the Add-In, or create and share reports that are automatically refreshed with the latest real-time data. Use the scheduler to control who you share reports with, and when. Define your parameters and let the Add-In take care of the rest.

Over 25 tools to create custom reports, including

Reporting Tree

- Easily create standardized financial reports for complex company structures
- Build company-wide hierarchies comprised of different business units such as departments, cost centers, and regions, and save time by not having to filter through the same information every time you create a report
- Centralized reporting trees, so all users get access to the same information, for more consistent and dependable data analysis

Formula Wizard and Drill-Down

- Simple click and pick functionality
- Custom build your own reporting templates
- Perform mathematical calculations based on parameters through data model selection
- Ability to select all fields or specific fields to include in the drill-down
- See different postings and general transactions

Data Extraction

- Access real-time data from any source
- Select what fields to extract, what filters to apply and how many rows of data to bring in
- Use this with the formula wizard to build dynamic reports
- Create dynamic lists on account codes, products, customers etc.

Duplicator Tool

- Create multiple copies of a report spread across various dimensions, such as company code, cost centers, departments, fiscal period, etc.

Open View

- Get direct access to the views within SEI

Pivot Table

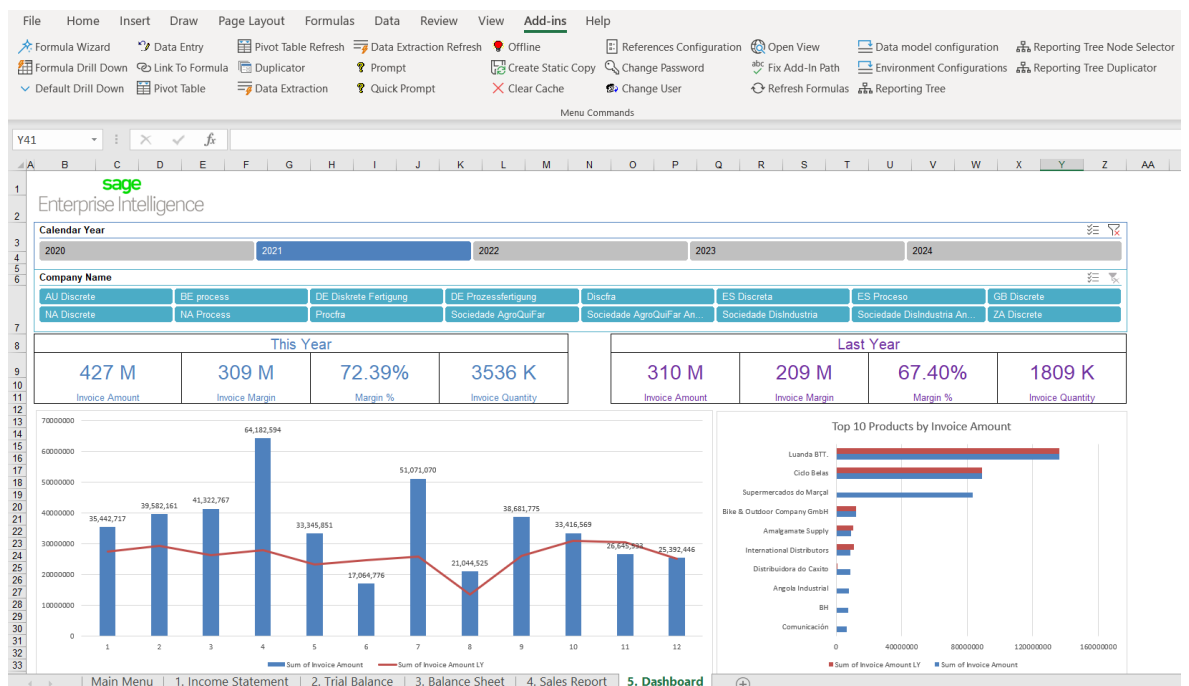
- Store your data in the pivot table and then access it offline to perform the analysis.
- SEI will assist you on what database/tables and fields to include, using the familiar Excel pivot feature

Sharing and Distribution

- Create static copies to share with the team
- Use the SEI scheduler to automate the distribution of reports

Link-To Formula

- Open other application based on the application links defined in SEI
- Connect to an ERP solution, do a web search, track items, and more



KEY FEATURES

Reporting Tree

Formula Wizard

Formula Drill-Down

Data Extraction

Data Extraction Refresh

Link-To Formula

Duplicator Tool

Pivot Table

Sharing and Distribution

Quick Prompt

Open View

Data Entry, and more...

For more info, visit: www.sage.com/en-us/products/enterprise-intelligence/

