



Sage Active Planner

Budgeting and Planning Solutions

Put an End to Your Budget Nightmares with Sage Active Planner

It's time to stop wasting valuable time reconciling numbers on spreadsheets...Time to eliminate countless hours of number crunching. You need a solution that will allow you to react to last minute changes in assumptions, incorporate the data you need (when you need it!) and make more informed business decisions. You need **Sage Active Planner**.

Our purpose-built enterprise-wide budgeting and planning software will give you:

- Shorter planning cycles
- Seamless integration with all enterprise data
- Automatic incorporation of key nonfinancial data
- Robust analysis features

Sage Active Planner will transform your budget nightmare into a truly collaborative budgeting and planning process. With shorter planning cycles and time to focus on continuous performance improvement, you'll help your company realize its strategic goals.

Sage Active Planner Feature Sets

Free yourself from time-consuming spreadsheet mechanics and focus on strategic budgeting and planning. With more control over your budgeting and planning process, you'll be able to create effective, more accurate budgets and forecasts and render a true analysis of company performance.

Sage Active Planner Management Features

Sage Active Planner offers robust management features to help make your budgeting and planning process more efficient and effective.

Utilize bottom-up or top-down budgeting processes ... or a combination of both.

Whether you need to allocate a revenue target or cost projection from the top down, or consolidate several different budget plans from the bottom up, Sage Active Planner accommodates your organizational structure and provides a purpose-built solution.

Encourage budget collaboration across the enterprise.

Strong management capabilities allow for seamless integration of budget submissions from multiple departments, using "Plan Sheets" that have a familiar spreadsheet look and feel. Plus, Sage Active Planner's "Web View" provides access to budgeting Plan Sheets at any time and from any location for participants across the enterprise.

Take command of your budget.

The Plan Manager, the command center of Sage Active Planner, coordinates the consolidation and distribution of your Plan Sheets into an efficient, seamless and flexible budgetary system. Within Plan Manager, Plan Sheets are established, reviewed for status and revision, locked for control and managed for consolidation and distribution.

Integrate your budget with enterprise data sources.

Once your system is set up, Sage Active Planner automatically integrates financial information from your general ledger. You can also calculate and deploy values from enterprise data sources including SQL Server, Access, Dbase, Excel, FoxPro and any ODBC or OLE-DB compliant database.

Control access to sensitive data.

Sage Active Planner provides comprehensive security so you can easily limit use of plan sheets to authorized users - as well as define their ability to view, edit or modify information.



Sage Active Planner Analysis Features

Sage Active Planner provides sophisticated multidimensional analysis tools with Microsoft SQL 2000 Analysis Services. You'll be able to visually analyze budgeting and planning data that is organized by your company's business drivers and variables and rapidly see the impact a change in assumptions will have on your plan.

Utilize multidimensional analysis tools to view budgeting and planning data.

With Sage Active Planner, you'll be able to analyze data that is organized according to business drivers and variables (such as region, product, customer, etc.). Values are extracted directly from Plan Sheets to multidimensional OLAP cubes, where you can slice and dice important data with easy click and drag techniques and write-back changes to the Plan Sheet.

Perform what-if analyses.

Easily reorganize budget structures, including planning assumptions and variable drivers so you can view the impact of potential changes to your plan. This enables you to make more effective and predictive management decisions.

Compare actuals to budgets for greater fiscal accountability.

Sage Active Planner provides the ability to compare actuals to budgets on an ongoing basis. For example, if the plan is developed based on products by customer by salesperson, you can compare and analyze actual, plan and variance values in an OLAP cube. With quick and easy data management and analysis, you'll increase your organization's fiscal awareness and accountability.

Make critical business decisions quickly based on results of multidimensional analysis.

Sage Active Planner can be used to analyze individual Plan Sheets and entire plans with multidimensional and data visualization tools. Extract important data and create relationships between data points to illustrate patterns, trends and exceptions that indicate how your business is doing — and where it is going.

Comprehensive and Powerful Calculation Techniques

Using a comprehensive calculation engine to retrieve values for budgeting, planning and analysis, Sage Active Planner enables you to link key business drivers to the budget, spread costs or revenue targets over defined periods of time and model seasonal trends.

Create an unlimited number of formulas and formula lines.

Use formulas to annualize sales for the last quarter for a fast growing company, derive account values as a percentage of previous year's sales, compute average daily balance of debt for an interest calculation, or use database queries to retrieve enterprise-wide information.

Flexible spreading techniques

With Sage Active Planner, you'll be able to apply calculations to a group of columns and spread back to individual periods using factors such as seasonal trends (evenly spread), business drivers (user-defined spread) and prior year balances (historical year averaging spread).

Track up to six period balances.

You'll be able to track fixed or relative period ranges; up to 11 years; actual, budget or statistical balances; beginning, change, ending or average daily balances; computations; any accounts or ranges of accounts; and multi-company.

Define global and local formulas.

Global formulas can be used by anyone in the system, eliminating the need for users to rekey standard formulas. Local formulas can be created for and attached to a specific plan sheet.