sage software
Your business in mind.

Sage Active Planner provides dynamic, feature-rich solutions designed to optimize the analysis and manipulation of your financial information. Convenient and easy to use, its features are designed to increase efficiency and automate your most critical business processes.
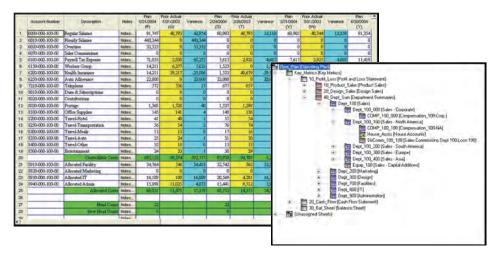
MANAGEMENT FEATURES

- Allocate budgets from bottom-up, top down, or a combination of both. Can also consolidate several different budget plans.

- Strong management capabilities allow for seamless integration of multiple departments budgets, using "Plan Sheets" that have a familiar spreadsheet look and feel.

- Automatic integration of your most important financial information is available directly from your general ledger.

- Comprehensive security lets you limit the use of Plan Sheets to authorized users as well as define their ability to view, edit or modify information.

ANALYSIS FEATURES

- Create "what if" analyses to reorganize budget structures so you can view the impact of potential changes to your plan.

- 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.

CALCULATION FEATURES

- Apply calculations to a group of columns and spread back to individual periods using factors such as seasonal trends, business drivers and prior year balances.

- Global formulas can be used by anyone in the system, eliminating the need for users to rekey standard formulas.

Upper: The spreadsheet look-and-feel minimizes the learning curve. Lower: Manage the budgeting and planning process with Plan Manager.

Take control of the budget process and bring strategic insight to business planning.

Sage Active Planner is an enterprise-wide, purpose-built budgeting and planning application. With Sage Active Planner, you'll make quicker, more informed business decisions by shortening budgeting and planning cycles. And with a planning process that is easier and more efficient, you'll be able to encourage collaboration across all lines of business and tie budgeting activities to organizational performance.

Organize and manage the budgeting and planning process.

Free yourself from time-consuming spreadsheet mechanics and focus on strategic budgeting and planning. With Sage Active Planner, you'll improve the flow of key information, such as business drivers and transaction data, through templates, automatic distribution and consolidation of the budget, central control over budget revisions, real-time seamless integration of data sources, and built-in security mechanisms. 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.

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. Strong management capabilities allow for seamless integration of budget submissions from multiple departments, using "Plan Sheets" that have a familiar spreadsheet look and feel.

- Seamless integration with all enterprise data

- Seamless integration with GL

- E-mail notification

- Spreadsheet-like control

Sage Active Planner

"Sage Active Planner allows us to manage the budget using non-financial data that represent the factors that drive our business and help us accurately forecast expenses."

Craig Strohecker
Christian Broadcasting Network, Inc.

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.

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.

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 other data sources including SQL Server, Access, Dbase, Excel, FoxPro, and any ODBC or OLE-DB compliant database.

Access your information quickly and easily.

A single database improves real-time accessibility to information and virtually eliminates time spent on coordination, distribution, and collection of data.

Automatically update users on activity in the planning process.

Using e-mail notification, critical information is sent to the appropriate reviewer or budget administrator as the status of the plan changes.

Transfer information directly from the source.

You can insert rows into a Plan Sheet directly from your chart of accounts or using any enterprise data.

Shorten planning cycles and improve decision making within the enterprise.

Plan Manager provides a Windows interface with access to and control of any company budget. Simple drag and drop techniques support rapid reorganization and easy management of budgeting and planning. Sage Active Planner helps organizations quickly respond to rapidly changing business conditions with detailed analysis tools.

Analysis features provide more powerful insight.

Sage Active Planner gives you additional power to analyze budget and actual data with Dimensions and Microsoft SQL 2000 Analysis Services. Within a data cube, you'll be able to view data in several dimensions (such as by territory, product, and customer), change an assumption or driver, and return it to the plan.

Publish a Plan Sheet to an OLAP cube for advanced reporting capabilities.

Advanced reporting applications such as Excel Analyzer can retrieve information in your OLAP cube so you can present your numbers clearly and effectively.

Build multi-dimensional cubes and launch the Analyzer Tool directly from Active Planner.

Sage Active Planner can build cubes using any plan data. The Analyzer Tool can retrieve information in your OLAP cube so you can present your numbers clearly and effectively.

Support "what-if" analysis.

Reorganize budget structures, including changing planning assumptions and variable drivers. These changes easily support corporate reorganization considerations.

Incorporate data from enterprise- wide systems to create multidimensional plans.

Different sets of data can be grouped or tiered using system (e.g., General Ledger) or user-defined dimensions.

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.

Define global and local formulas.

Global formulas can be used by anyone in the system, eliminating the need for users to re-key standard formulas. Local formulas can be created for and attached to a specific Plan Sheet.

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, user defined business drivers, and prior year activity.

Track general ledger balances.

You'll be able to track fixed or relative period ranges; actual, budget or statistical balances; beginning, change, ending or average daily balances; any account or ranges of accounts; and multiple companies.