ADVANCED REPORTING

Advanced Reporting Feature Summary
Planning, reporting, collaboration, and delivery in one platform

Access & Experience

Browser-Based Access

Use Advanced Reporting entirely in the browser—no desktop installs, no version mismatch, no IT push.

Single, Central URL

Users just bookmark a URL and log in; IT controls access behind the scenes.

Customizable Tile Launchpad

Clickable tiles take each user straight to key dashboards, reports, or worksheets they care about most.

Favorites & Recents Panel

Users see their favorite reports and most recent activity immediately, instead of hunting through folders.

Flexible Layout & Navigation

Resize or collapse side menus to focus on what matters—reports, dashboards, or setup.

Budgeting, Forecasting & Planning

Advanced Budgeting Module

Create detailed budgets with structured workflows, department contributions, and multiple versions (approved, forecast, best/worst case).

Departmental Expense Worksheets

Give each department or plant manager a tailored worksheet to update just their portion of the budget.

People Planning & Salary Allocation

Model salaries, benefits, and allocations across multiple departments, plants, or cost centers from one place.

Revenue Planning (Sales & Operations)

Plan product revenue and operational drivers like production volume, pricing, and sales forecasts in one system.

What-If Scenario Modeling

Adjust key drivers—like production volume, pricing, or labor costs—and instantly see the impact on revenue and expenses.

Multi-Version Budgeting

Keep separate versions (approved budgets, quarterly forecasts, best/worst case) and report on any of them.

Reporting & Analysis

Self-Service Report Creation

Build brand-new reports directly in the web, using an interface that feels like a spreadsheet.

Edit Existing Reports on the Web

Update or tweak current reports without going back to a desktop designer or calling IT.

Multi-Level Drill-Down

Click a number to see the accounts behind it, then click again for line-level detail, then GL transactions.

Audit-Level Detail View

Run an "audit report" that shows every single account (including zeros) that makes up a report for reconciliation or auditors.

Template-Based Reporting

Use one report template and run it for different plants, departments, cost centers, or business units with filters.

Interactive Dashboards & KPIs

Visualize key metrics with charts and gauges you can rearrange, adjust, and drill into.

Pre-Built Filters (Chart of Accounts)

Filter reports by plant, department, cost center, or other segments instantly, without rebuilding anything.

Collaboration & Communication

Cell-Level Conversations (Collab)

Attach a conversation directly to a specific number in a report, with due dates and context.

Email Notifications with Context

When someone is tagged in a conversation, they get an email with the details and link back to the report.

Attach Supporting Files

Upload PDFs, spreadsheets, or other supporting docs directly into a conversation tied to a specific value.

Historic Context by Report

Conversations are tied to the report's run date, so you can look back next year and remember why numbers looked odd.

Automation & Delivery

Built-In Scheduler

Schedule any report, dashboard, or packet to run automatically on your chosen cadence.

Flexible Frequency Options

Set schedules to run once, daily, weekly on specific days, monthly, or quarterly—whatever matches the business rhythm.

Multi-Format Delivery

Each scheduled report can be delivered as a PDF, Excel file, and an HTML link back into Advanced Reporting.

Early-Morning Delivery

Schedule reports for early morning so they're in inboxes when users log in.

Design & Flexibility

Familiar Spreadsheet-Like Designer

Rows, columns, formulas, and formatting work much like Excel—just focused on financial statements.

Unified Accounting Cell

Define which accounts belong in each line once; reuse across actuals, budgets, and forecasts.

Highly Customizable Dashboards & Tiles

Link tiles to any report, dashboard, worksheet, or view—tailored for Higher Ed or Manufacturing audiences.

Dynamic Columns & Layout Tools

Easily switch between actuals, budgets, year-to-date, variances, and percentages without rebuilding the report.

Lookup Tools for Labels & Structure

Pull account descriptions, labels, or hierarchies straight into reports without manual retyping.

Security & Governance

Role-Based Permissions

Control who can run, modify, or drill down into each report.

Department-Level Data

Use filters to ensure users only see the departments or funds they're allowed to view.

Multi-Factor Authentication

Optionally require a one-time code emailed to the user for extra login security.

Single Sign-On Alignment

Supports directory-based login (like LDAP/Active Directory), with more modern SSO options under development.