Overview:

Advanced Reporting is an Aptean partner solution that works alongside Aptean ERPs, **enhancing** their financial reporting and budgeting capabilities without replacing core ERP functions. The matrix below highlights key differences in functionality, user experience, data agility, and business impact – showing how Advanced Reporting complements Aptean's native tools to solve reporting and planning challenges.

ERP NATIVE TOOLS	ADVANCED REPORTING SOLUTION
Budgeting Process	**Integrated Budgeting**
Native ERP budgeting and forecasting capabilities vary by Aptean product, but many teams still rely on spreadsheets and manual consolidation when planning across plants, departments, or business units.	Advanced Reporting streamlines the entire budgeting process, with built-in collaboration and live ERP data. Teams spend less time gathering numbers and more time analyzing results. The platform simplifies budgeting, produces accurate forecasts, and manages financial performance efficiently.
Financial Reporting	**Advanced Reporting**
Standard ERP reports offer basic, static formats and limited drill-down. Complex analyses often require exporting data to spreadsheets, making it harder to get detailed insights.	Advanced Reporting provides real-time, customizable financial reports with a familiar spreadsheet-like interface. Users can drill down into transactions for deeper insight, creating on-demand reports without manual data wrangling.
Scenario Planning	**What-If Analysis**
Performing *what-if* analysis or multi-year forecasts in the native ERP is cumbersome (or not supported), often forcing reliance on offline models. This limits proactive financial planning	Advanced Reporting enables robust planning with features like rolling forecasts and what-if scenario modeling. Finance teams can quickly evaluate multiple financial scenarios (e.g. demand shifts or raw material cost changes) and plan accordingly, all within the system.

ERP NATIVE TOOLS	ADVANCED REPORTING SOLUTION

Collaboration & Sharing

Reports are typically shared by exporting spreadsheets or PDFs, creating multiple versions and scattered discussions outside the reporting system.

Collaborative Reporting & Distribution

Reports can be scheduled and shared automatically in multiple formats, including Excel. Built-in conversations tied directly to account numbers keep questions and decisions connected to the underlying data.

Ease of Use

Aptean's ERPs' native reporting tools can be functional but may be less flexible for finance-led analysis, often requiring more training, setup, or technical support than teams would prefer.

User-Friendly Interface

Advanced Reporting offers an intuitive, Excel-like interface designed for finance professionals. The familiar look and feel greatly reduces learning curves. Financial staff can easily build or modify reports and budgets themselves, without coding or IT intervention.

Data Access & Agility

While Aptean ERPs provide strong operational and financial data, accessing and combining information across modules, sites, or business units can require manual report creation or spreadsheet exports. Building consolidated views across departments or operational areas often takes additional effort, slowing the speed at which finance teams can analyze and respond to changing conditions.

Real-Time Data Integration

Advanced Reporting connects directly to the live Aptean ERP databases, pulling any data point, record, department, date, or line item on demand. It can aggregate multiple data sources into one report, providing a single real-time view of information. A seamless connection to all your data means updates are instantaneous – change a single number, and all related figures update automatically.

Data Accuracy & Trust

When reporting and planning rely on spreadsheet exports and re-keying data, errors and version control issues creep in. In fact, studies find ~88% of audited spreadsheets contain errors, undermining confidence in the numbers.

Single Source of Truth

Advanced Reporting draws directly from the ERP system of record, eliminating risky manual data transfers. This ensures data consistency and accuracy in reports and budgets. By automating data flow, Advanced Reporting minimizes human errors while maximizing efficiency.

Implementation Speed

Creating new reports or extending ERP reporting capabilities often requires IT resources, development time, or specialized configuration. This can slow the process of delivering new financial insights or responding quickly to evolving business needs.

Rapid Deployment

Advanced Reporting is quick to implement and start delivering value. Our team handles setup and connects to your Aptean ERP in hours – not weeks – with minimal IT effort. In fact, first-time users often have a set of custom reports ready from day one of using Advanced Reporting accelerating time-to-value.

ERP NATIVE TOOLS	ADVANCED REPORTING SOLUTION

IT Dependency

Finance teams largely depend on IT or consultants to create and modify ERP reports. This dependence can cause backlogs and slow response to information requests, since "native" reporting is too difficult for end-users.

Self-Service Empowerment

With Advanced Reporting, finance and budget staff are empowered to build and adjust their own reports and forecasts without technical help. The no-code, self-service approach frees up IT resources and allows faster answers to business questions. Users get the data they need, when they need it – independently.

Business Impact

Native ERP tools support daily financial operations but may offer limited flexibility for deeper financial analysis or forward-looking planning. Finance teams may struggle to quickly generate the insights leadership needs for strategic decision-making.

Data-Driven Decisions

Advanced Reporting extends the ERP's impact by delivering timely, insightful information for better decisions. Automated reporting and interactive dashboards mean less time on manual tasks and more on analysis, giving leaders confidence to act on up-to-date data. By enhancing transparency and foresight, Advanced Reporting helps drive strategic planning and improved financial outcomes.

Bottom Line:

Aptean ERPs provide a strong operational and financial foundation. **Advanced Reporting builds on that foundation by delivering more flexible reporting, collaborative budgeting, and faster financial analysis.** Together, they help finance and operations teams reduce spreadsheet dependence, gain clearer financial visibility, and make better decisions with greater speed and confidence.

ADVANCED REPORTING