Sage X3 Data Management and Analytics

Integrate, manage and analyze data from multiple applications and data sources with Sage X3
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**Introduction**

Sage X3 Data Management and Analytics simplifies the process of collecting, organizing and analyzing data from Sage X3 and combining it with other data sources.

Automation, out-of-the-box capabilities and deep Sage X3 integration reduces the technical effort of managing data and extracting accurate insight.

The pre-packaged solution is rapid to deploy and simple to administer and maintain. A lower risk investment with a faster time to value and more predictable TCO, when compared to custom BI projects.

**Key benefits for your business**

- Fast to implement and start generating reliable insight, with lower cost and risk.
- Achieve business-wide visibility across multiple systems and data sources from Sage X3.
- Enjoy peace of mind that data is secure and accurate with strong data governance built-in.
- Get relevant information via personalized dashboards aligned to Sage X3 roles, within the Sage X3 UI, on any device.
- Gradually migrate historic ERP data to Sage X3 to preserve insight without having to maintain legacy systems.
Solution Overview

Sage X3 Data Management and Analytics’ pre-set data model and analytics delivers immediate visibility into Sage X3.

It’s easier to achieve business-wide insight, too. Pre-set data models for other ERPs and automated integration makes it simple to combine data from other applications with Sage X3 in one central hub.

The system produces standardized, highly-governed data models that are secure and accurate. They require less maintenance than manually-built data warehouses, reducing total cost of ownership and risk.

 Powerful data modeling capabilities are accessed via an intuitive, user-friendly UI. Data can be customized to meet specific reporting demands, without high levels of technical expertise.

Pre-set dashboards, reports and calculations span all functional areas, from Finance, to Distribution, Manufacturing, Sales, and Services.

Information is explored inside or outside the Sage X3 UI. Dynamic visualizations are fully responsive to all devices, optimized for touch and easily customized.
Solution Overview cont.

**Deploy**
Cloud, On-premises, or Hybrid, with pre-set data models and analytics for Sage X3, other ERP and applications such as CRM
- Pre-packed solution for rapid implementation and quicker time-to-value
- Remove the need for expensive technical experts
- Align investment to existing and future technology strategy

**Integrate**
Automated connection and collection of data from cloud and on-premises data sources
- Out-of-the-box integration with almost any data source
- Quicker and easier to combine data from multiple sources with Sage X3
- Easy to continue to add data sources to enrich insight

**Model**
Powerful modeling capabilities accessed via a user-friendly graphical interface, with a drag and drop UX
- Customize data models to meet the most demanding reporting needs
- Built-in data quality, administration, security, and deployment
- Data warehouse and cube automation simplifies process and removes need for technical expertise

**Govern**
Comprehensive system administration and strong data governance tools built-in
- Enterprise-class security controls to set permissions, regulate access and protect data at any granularity
- Audit and monitor usage via dashboards to optimize performance and maintenance
- Manage upgrade lifecycles with tools to ensure consistency of data and business continuity

**Analyze**
Enable self-service reporting through Enterprise-class analytics, or other data visualization tools e.g. Tableau, Qlik, Power BI
- Industry best-practice analytics and role-based dashboards are ready to use
- Easy to adapt, dynamic analytics enable drill-down, data discovery and sharing
- Responsive, touch friendly user interface adapts to any device, driving user adoption
Data management and analytics tailored for Sage X3

Sage X3 Data Management and Analytics is deeply integrated in the Sage X3 platform. Its Smart data source for collecting Sage X3 data, pre-built Sage X3 data model, and embedded analytics means it is deployed and live in days.

**Sage X3 Smart data source**
- Metadata (localized captions, keys, relationships, modules)
- Mono or multi-folder
- Multi-company and multi-lingual caption extraction
- Automatic analytical dimension configurations
- Statistical groups support
- Automatic captions for local menus
- Customizations detection
- Miscellaneous tables
- Currency conversions

**Pre-set Sage X3 data model**
- Pre-modeled data warehouse and cube for Finance, AR, AP, Sales, Procurement, Manufacturing, and Inventory
- Configurable currency conversion
- Custom account categories for consolidation purposes
- Account pyramids and reporting codes support
- Friendly datawarehouse schema for operational reporting
- Generic Date and also Source Fiscal calendar dimensions
- Geocoded addresses for map charts

**Analytics in the Sage X3 UI**
- Access business-wide analytics from within the Sage X3 UI
- Measure performance with pre-set best-practice calculations
- Out-of-the-box dashboards aligned to Sage X3 roles
- Pre-set analytics for all Sage X3 functions from Finance to Manufacturing, Distribution, Sales and Services
- Dynamic, touch optimized UI fully responsive for all devices
Why Sage X3 Data Management and Analytics

Sage X3 Data Management and Analytics helps customers and partners unlock the value of their data.

Sage X3 customers
Out-of-the-box data models and analytics for Sage X3 allow for the rapid delivery of consistent and reliable information to the business without complexity and cost.
• An integrated data model that is maintained with every Sage X3 update
• Become data-driven without adding expensive technical expertise in-house
• Avoid the risk and cost of creating and maintaining proprietary data warehouses
• Connect all valuable internal and external data sources to Sage X3
• Maintain data consistency in the event of changing supporting business partner

Value Added Resellers (VAR)
Sage X3 VARs that integrate Sage X3 Data Management and Analytics can differentiate their offering and add value to customer relationships.
• Take a share of the growing data market that is a high investment area for customers
• Increase customer engagement through greater data insight
• Differentiate with IP and industry solutions built on a consistent data model
• Aid customers’ upgrades by migrating historic ERP data to Sage X3

Independent Software Vendors (ISV)
Sage X3 ISVs can increase the value of their proposition. Sage X3 Data Management and Analytics facilitates the development, IP protection, hosting and monetization of partner data models and analytics. And provides the ability to add any other data source to enrich them.
• Developer and ISV solutions link directly to the data model
• Integrated and extendable analytics built into Sage X3
• Build and license analytical outcomes for specific industry verticals
• Add value to a solution and make it more attractive for business partners to re-sell
Dashboard Gallery

The following gallery contains sample analytics for the Sage data management and analytics solution.
The Chief Financial Officer dashboard provides quick access to business metrics that are key to monitoring profitability and liquidity. Using a number of industry standard ratios users can quickly gain insight into company performance.

Using the drill functionality users see the details behind the analytics. Users can get consolidated reports with minimal effort.

For multinational operations, there is support for reporting currency and custom currency conversion.
**Section 1: General Ledger**

**1.1 Chief Financial Officer**

**Audience**
- CFO
- Senior business managers
- VP operations

**Business outcomes**
- Monitor key performance metrics and business ratios
- Keep a close eye on trends relating to profitability and balance sheet ratios
- Find out all the key information to monitor your business in one view.

**Key metrics**

- **Performance**
  - Selected month net sales (sales less sales returns and discounts)
  - Selected month gross margin and percent age (net sales less cost of sales)
  - Selected month operating profit (gross margin less operating expenses)
- **Profitability**
  - Return on assets (net operating profit after tax/total assets)
  - Return on equity (net operating profit after tax/total equity)
- **Liquidity**
  - Working capital (current assets—current liabilities)
  - Working capital ratio (current assets/current liabilities)

**Interactive**
- Drill-through: from any cell or segment to analyze the underlying X3 transactions
- Drill-up/down on every chart's member
- Filter by
  - Company
  - Month
- Hover over any cell or chart member to display additional information

**Quick ratio (current assets—inventory/current liabilities)**

**Leverage**
- Debt ratio (liabilities/assets)
- Debt to equity ratio (liabilities/equity)
- Long term debt to equity ratio (non-current liabilities/equity)
- Gross margin over time
- Net sales and cogs comparison over the last twelve months

**Operating profit over time**
- Gross margin and expenses comparison over the last twelve months
- Line graph operating profit % over the last twelve months

**Liquidity ratios over time**
- Current assets and current liabilities comparison over the last twelve months
- Line graph working capital ratio and quick ratio over the last twelve months

**Profitability ratios over time**
- Total assets and total liabilities comparison over the last twelve months
- Line graph debt ratio, debt to equity ratio and long term debt to equity ratio over the last twelve months
- Cash to cash cycle over time (DIO+DSO — DPO)
- Line graph DSO, DIO, and DPO comparison over the last twelve months
- Cash to cash cycle comparison over the last twelve months (showing data labels)
- Line graph return on assets and return on equity over the last twelve months
- Line graph return on assets and equity over the last twelve months
The cornerstone of any business is timely financial reporting. The income statement dashboard utilizes the traditional income statement and supplements it with trend analysis and reporting on key margins.

The dashboard allows key decision makers to view the business profitability and growth trends at a glance.

The user can also drill through on the number to reveal the detail.
Section 1: General Ledger

1.2 Income Statement

**Audience**
- President
- CFO
- Financial Accountants

**Business outcomes**
- Monitor company profitability and growth trends
- Review and compare profit and growth over time
- Keep a close eye on key margins

**Interactivity**
- Filter by
  - Company
  - Fiscal month
  - Budget model
- Hover over any cell or chart member to display additional information
- Drill-through: from any cell or segment to analyze the underlying X3 transactions
- Drill-up/down on every charts’ member

**Key Metrics**
- Income statement
  - Company currency and selected budget, current month and year to date
- Profit share by net profit, gross margin
- Profit—actual vs budget
  - Actual budget gross margin
- Operating profit % month on month growth
  - Columns indicates monthly operating %, line indicates growth
- Operating profit % quarter on quarter growth
  - Columns indicates quarter operating %, line indicates growth
The Accounts Receivable dashboard is a vital tool in assisting managers to improve their companies’ cash flow and increase collection effectiveness.

Key industry metrics combined with other information on the dashboard will help managers improve the order to cash cycle time. Managers can quickly ascertain collection trends and problematic customers. No more consolidating multiple aged trial balances—the dashboard allows the users to see a customer’s interaction with your entity—displaying it all in one central view with the ability to drill-down and see the detail.
Section 2: Accounts Receivable

2.1 Accounts Receivable

Audience
- President
- CFO
- Collection Manager
- Collection Agent
- Accountant

Business outcomes
- Monitor collection effectiveness and customer balances
- Review customer invoicing and collection trends
- Analyze the effect of collections on cash flow
- Find out which customers are consistently late at making payments.

Interactivity
- Filter by

Note: the collection metrics use General Ledger amounts and are not filtered by the following.
- Company
  - Customer group
  - Classification
  - Line of business

Hover over any cell or chart member to display additional information
- Drill-through: from any cell of the dashboard to analyze the underlying X3 transactions
- Drill-up/down on every charts’ member

Current receivables by age
- Current balance by aging bucket, hover over to see amounts the center amount is the total amount overdue
- Performance month to date
- Collection effectiveness index (CEI) for the selected month. CEI is a percentage that expresses the effectiveness of collection efforts over time. The closer to 100 percent, the more effective the collection effort.
- Days sales outstanding (DSO) for the selected month
- Best possible DSO (BDSO) for the selected month
- Average days delinquent (add) for the selected month
- Top 10 overdue AR
- Top 10 customers with the largest overdue AR balance
- Top 10 current AR
- Top 10 customers with the largest current AR balance
- Collection effectiveness over time
- Summary of the collection metrics over the last 6 months.
- Net sales is the general ledger balance of sales less sales returns and discounts for the month
- Receivables is the general balance for the month
- Current is balance of invoice generated that month not due (omitting unpaid invoices where the invoice date and due date where in the selected month)
- Collection effectiveness index (CEI) for the selected month
- Days sales outstanding (DSO) for the selected month
- Best possible DSO (BDSO) for the selected month
- Average days delinquent (add) for the selected month
- Open days to pay over time
- Average days to pay over four months
- Number of invoices processed in the last four months
- Average days in the last four selected month
- Straight line linear regression trend of the average days to pay over the last four months
- CEI vs DSO
  - Comparing the collection effectiveness index (CEI) with days sales outstanding (DSO) over the last four months. Comparing the order to cash process efficiency to the collection effectiveness.
  - DSO vs ADD
  - Comparing days sales outstanding (DSO) vs average days delinquent (ADD). This compares your non delinquent customers to your delinquent customers.
Having effective controls over your accounts payable team is critical to maintaining a good relationship. The accounts payable dashboard displays key metrics enabling managers to maintain good vendor relationships, continuity of supply and keep a watchful eye on cash flow.

The information will assist in monitoring the effectiveness of accounts payable workflows and the processing efficiency of your payables team. The dashboard allows the users to provide a corporate view and use of various filters help gain insight on how a vendor or group is performing across all your entities.
Section 3: Accounts Payable

3.1 Accounts Payable

Audience
- CEO
- CFO
- Accountants
- Accounts Payable Manager
- Accounts Payable Agent

Business outcomes
- Monitor accounts payable team efficiency and procure to pay workflow effectiveness
- Analyze payment processing and your top vendors
- Maintain effective vendor relationships

Interactivity
- Filter by
  - Company
  - Vendor groups
- Hover over any cell or chart member to display additional information
- Drill-through to analyze the underlying X3 transactions

Key metrics
- Open transactions
  - Number of vendors with a unpaid AP balance and amount
  - Number of vendors with an overdue AP balance and amount
  - Average number of days AP invoices are overdue
  - Number of vendors with a current AP balance and amount
- Value of settlement discount available in company currency
- Overdue payables by age
  - Overdue balance by aging bucket, hover over to see amounts the center amount is the total amount overdue
- Top 10 overdue AP
  - Top 10 vendors with the largest overdue AP balances, ordered by balance descending
- Current payables by age
  - Current balance by aging bucket, hover over to see amounts the center amount is the total amount overdue
- Top 10 current AP
  - Top 10 vendors with the largest current AP balance
- Days to pay over time
  - Average days to pay over twelve months
  - Columns show number of invoices processed in the last twelve months
  - Line graph shows actual average days to pay in the last twelve months
  - Straight line linear regression trend of the average days to pay over the last twelve months
- Top open accounts payable stats
  - Top vendors by amount overdue, hover over the vendor name to see vendor information
  - Overdue balance for the vendor
  - Average days to pay the vendor for all time
- Number of invoices processed relating to the vendor for all time
- Total value of invoices processed in the company currency relating to the vendor for all time
- Average invoice amount for the vendor

Value of settlement discount available in company currency
- Overdue payables by age
  - Overdue balance by aging bucket, hover over to see amounts the center amount is the total amount overdue
- Top 10 overdue AP
  - Top 10 vendors with the largest overdue AP balances, ordered by balance descending
- Current payables by age
  - Current balance by aging bucket, hover over to see amounts the center amount is the total amount overdue
- Top 10 current AP
  - Top 10 vendors with the largest current AP balance
- Days to pay over time
  - Average days to pay over twelve months
  - Columns show number of invoices processed in the last twelve months
  - Line graph shows actual average days to pay in the last twelve months
  - Straight line linear regression trend of the average days to pay over the last twelve months
- Top open accounts payable stats
  - Top vendors by amount overdue, hover over the vendor name to see vendor information
  - Overdue balance for the vendor
  - Average days to pay the vendor for all time
- Number of invoices processed relating to the vendor for all time
- Total value of invoices processed in the company currency relating to the vendor for all time
- Average invoice amount for the vendor
The Procurement Manager dashboard gives users powerful insight into procurement operations.

The dashboard shows the information needed to manage the procure-to-pay process and maintain robust supply chain. At a glance, users can see the key vendors and related metrics that will assist in maintaining a good relationship with those vendors.

With the spend analysis metrics users can see the top items been procured. With the cell slicing feature users can see analytics relating to the selected vendor or item.
Section 4: Procurement

4.1 Procurement Manager

**Audience**
- Procurement Manager

**Business outcomes**
- Monitor vendor performance and spending
- Keep a close eye on trends relating to spending and delivery performance
- Find out all the key information relating to vendors

**Interactivity**
- Filter by
  - Company
  - Date
  - Vendor group
  - Procurement category
- Hover over any cell or chart member to display additional information
- Drill-through from any cell or segment to analyze the underlying X3 transactions
- Drill-up/down on every charts’ member

**Key Metrics**
- Spending stats
  - Total spent is the total value of purchase orders raised in the current year
  - Quantity purchased is the total quantity on invoices processed in the current year based on purchase unit.
  - Current backorder amount and quantity
  - Received not invoiced is the value of purchase order lines received but no invoice has been processed.
- Cost efficiency
  - Purchase price variance % (actual purchase order invoice value/invoice value using the standard cost price). This show the average variance between unit price on invoice and standard cost in the system.
  - Procurement cost per $ spent (invoice value based on inventory value/actual purchase order invoice value).
- Delivery performance
  - On-time delivery gives the percentage of purchase orders delivered within the expected delivery date. This measures delivery precision.
  - Full delivery gives the percentage of purchase orders delivered in full on first delivery. This measures delivery fulfillment.
- Quality
  - Returned quantity for the current year in purchase units
  - Returned amount for the current year
  - Return % of total: the value of returned items compared the total value of orders for current year. This is measure of vendor quality
  - Open purchase statuses
  - Value of purchase order lines by current line status for the current year
  - Quantity on purchase order lines by current line status for the current year based on purchase unit of measure.
  - Supplier Pareto — vendor with 80% of total spend
  - Lists the vendors and their spend value that make up 80% of the total procurement spend. The graph gives insight in to the key vendors in your supply chain.
  - Top 5 procurement category
  - Showing the top five procurement categories by invoice value for the current year.
- Delivery performance is the perfect order index (poi) for the vendor the current year.
- Spending over time cy vs ly
  - Quantity in stocking units moved this month
  - Quantity movement in stocking unit by direction over the last twelve months.
- Top 10 vendor stats (by total spend for current year)
  - Total spent for the current year
  - Number of invoices processed for the current year
  - Quantity purchased in purchase unit for the current year
  - Amount currently on backorder
  - Quantity currently on backorder
  - Calculated price variance for the vendor where a standard cost price exists for the items been procured.
  - Delivery performance is the perfect order index (poi) for the vendor the current year.
  - Return quantity for the vendor for the current year
  - Return amount for the vendor for the current year
  - Procurement cost per $ spent
  - Procurement cost per invoice
From this dashboard a Vice President can effectively monitor his sales divisions across all operations in a single view.

With the currency conversion and support for reporting currencies, multinational companies can quickly get a consolidated view in their currency of choice. Our trusted analytics allow the VP to analyze trends and make informed decisions on strategy knowing the information is accurate and up to date. Cell slicing allows various analyses within a single dashboard and the ability to drill through allows the VP to investigate the finer detail and quickly find any issues.
Section 5: Sales

5.1 Vice President of Sales

Audience
- CEO
- CFO
- VP sales

Business outcomes
- Monitor key revenue indicators
- Keep a close eye customer and revenue trends
- Find out key regions, customers and products

Interactivity
- Filter by
  - Company
- Hover over any cell or chart member to display additional information
- Drill-through: from any cell or segment to analyze the underlying X3 transactions
- Drill-up/down on every charts' member
- Click on chart values to slice data in certain cells

Key metrics
- Revenue stats
  - Invoiced sales current month (prior month)
  - Invoiced sales current quarter (prior quarter)
  - Invoiced sales current year to date (prior year to date)
- Customer stats for this quarter
  - Customer with sales, is number of distinct customers invoiced this quarter
  - New customers is number of distinct customers invoiced this quarter that have not been invoiced previously.
  - One-time customer invoices created during this quarter
- Actual vs target sales quarter to date
  - Percentage growth compared to last quarter
  - Current quarter to date, is shown as the value in the center
  - Prior quarter to date
  - Prior year same quarter value
  - Current quarter forecasted sales
- Top 5 regions
  - Invoiced sales by order account customer location
- Customers by segment
  - Invoiced sales by order account customer segment and sub segment. Hover over tiles to display amounts and drill-down on the segments to reveal sub segment amounts
- Actual vs target sales year to date
  - Percentage growth compared to last year
  - Current year to date, is shown as the value in the center
  - Prior year to date
  - Current year forecasted sales
- Top 5 customers
  - Invoiced sales by order account ordered by total sales descending
- Sales forecast
  - Columns represent forecast amount
  - Line graph represent invoiced sales value
- Sales trend
  - Columns show the growth per quarter for the last four quarters
  - Line graph show current year sales vs prior year sales amount by quarter hover over graph lines to see values
Having the right information in a timely manner is key to managing your sales force. The Sales Manager dashboard gives users up to date information on sales trends and top performing analytics allowing the sales manager to efficiently direct resources. With cell slicing you can see with a single click what your top customer is buying, sales volume over time and many other scenarios.

The dashboard gives the user the ability to have a holistic view of all the company's information in a single dashboard with the ability to drill-down in to key areas. The dashboard allows users to quickly select prior periods for a quick comparative view.
Section 5: Sales

5.2 Sales Manager

Audience
- VP Sales
- Sales Managers

Business outcomes
- Monitor sales and sales team performance
- Keep a close eye on sales trends and delivery performance
- Find out key regions and products

Interactivity
- Filter by
  - Company
  - Date
- Hover over any cell or chart member to display additional information
- Drill-through: from any cell or segment to analyze the underlying X3 transactions
- Drill-up/down on every charts’ member
- Click on chart values to slice data in certain cells

Key Metrics
- Top 5 regions
  - Invoiced sales by order account customer location.
- Top 5 customers
  - Invoiced sales by order account ordered by total sales descending
- Top 5 sales takers
  - Invoiced sales by person who entered the sales order, invoices without an order taker are omitted.
- Top 5 item groups
  - Invoiced sales by item group, invoices without an item group such as free text invoices are omitted.
- Delivery performance
  - In-full delivery gives the percentage of sales orders delivered in full on first delivery. This measures delivery fulfillment.
  - On-time delivery gives the percentage of sales orders delivered within the expected delivery date. This measures delivery precision.
- Perfect order index (poi)
  - (delivery precision * delivery fulfillment)
- Sales order by status
  - Shows sales order amount by current sales order line status. Hover over the circular gauge colors to reveal amounts for the different statuses. The amount in the center is the total sales order value.
- Customer delivery performance over time
  - In-full delivery percentage over the last twelve months
- On-time delivery percentage over the last twelve months
- Perfect order index (poi) (delivery precision * delivery fulfillment) over the last twelve months. Hover over line to see the line values for the selected month.
- Actual vs target (YTD)
  - Year to date invoiced sales
  - Prior year to date sales
  - Current year to date forecast

Legend analysis
- Bubble size represents quantity sold
- Legends shows the relevant regions and the color used, hovering over the bubble shows invoiced sales amount in thousands, contribution margin and the quantity sold in sales units.
- Backlog ratio analysis
  - Line graph shows 4 month rolling sales over 2 years backorder amount
  - Sales backlog ratio
  - Backlog % of total orders
  - Line graph shows 4 month rolling sales over 2 years backorder amount
  - Sales backlog ratio
The Inventory Manager dashboard provides managers with the key information needed to manage their inventory. Using industry standard analytics combined with out of box analytics allows managers to analyze key business metrics. Our flexible nature allows users to customize the dashboard adding their relevant inventory dimensions with a simple drag and drop.

The dashboard gives users the ability to analyze internal vs external inventory movements and volume of stocked units moved to maintain optimal stock levels. The drill functionality allows the users to look high level then view the detail behind the analytics.
Section 6: Inventory

6.1 Inventory Manager

**Audience**
- Supply Chain Manager
- Procurement Manager
- Stock Controller

**Business outcomes**
- Monitor key inventory trends
- Keep a close eye on trends relating to inventory movement and valuation
- Find out all the key information to monitor inventory in one view

**Interactivity**
- Filter by
  - Company
  - Date
  - Item group
  - Unit of measure
- Hover over any cell or chart member to display additional information
- Drill-through: from any cell or segment to analyze the underlying X3 transactions
- Drill-up/down on every chart's member

**Key Metrics**
- This month’s stats
  - Average inventory days of supply (inventory valuation/average daily cost of sales)
  - Inventory to sales ratio (inventory valuation/sales amount)
  - Days in inventory (average inventory value/average daily cost of sales amount)
- Opening balance of inventory for the selected month
- Backorder rate for the selected month (amount on backorder/total sales order amount entered for the month)
- Order fill rate is the percentage of order lines fulfilled in one delivery
- Inventory turn
  - Inventory turn (cogs/average inventory) comparison selected month vs prior month
- Valuation
  - Inventory valuation comparison selected month vs prior month
- Qty by issue status
  - Number of items send from warehouse by their current issue status
- Qty by receipt status
  - Number of items received into the warehouse by their current receipt status
- Inventory to sales ratio over time
  - Average inventory value over the selected twelve months
  - Net valuation change from selected period to prior period
  - Inventory valuation comparison over the last twelve months (showing data labels)
- Line graph show sales and inventory to sales ratio comparison over the last twelve months
- Top 5 item group valuation
  - Showing the top five item groups by stocking unit quantity movement split by direction. Use the cell slicing to show the effects on inventory valuation and quantity movement over time.
- Top 5 qty movement by origin
  - Showing the top five transaction types by stocking unit quantity movement split by direction. Use the cell slicing to show the effects on inventory valuation and quantity movement over time. Compare internal transfer volume with external transfer volume.
- Inventory qty movement trend
- Opening balance of inventory for the selected month
- Backorder rate for the selected month (amount on backorder/total sales order amount entered for the month)
- Order fill rate is the percentage of order lines fulfilled in one delivery
- Inventory turn
  - Inventory turn (cogs/average inventory) comparison selected month vs prior month
- Valuation
  - Inventory valuation comparison selected month vs prior month
- Qty by issue status
  - Number of items send from warehouse by their current issue status
- Qty by receipt status
  - Number of items received into the warehouse by their current receipt status
- Inventory to sales ratio over time
  - Average inventory value over the selected twelve months
  - Net valuation change from selected period to prior period
  - Inventory valuation comparison over the last twelve months (showing data labels)
- Line graph show sales and inventory to sales ratio comparison over the last twelve months
- Top 5 item group valuation
  - Showing the top five item groups by stocking unit quantity movement split by direction. Use the cell slicing to show the effects on inventory valuation and quantity movement over time.
- Top 5 qty movement by origin
  - Showing the top five transaction types by stocking unit quantity movement split by direction. Use the cell slicing to show the effects on inventory valuation and quantity movement over time. Compare internal transfer volume with external transfer volume.
- Inventory qty movement trend
- Quantity in stocking units moved this month
- Quantity movement in stocking unit by direction over the last twelve months.
- Inventory reports included but separate to the dashboard
- Inventory aging analysis report—show inventory movement over time.
- Item analysis report—quantity on hand compared to last sale qty and date also last purchase qty and date
- Slow moving inventory analysis—displays inventory that has not been sold or consumed ordered by oldest descending.
The production dashboard gives users the much needed high level overview, with ability to combine company operations and the ability to drill-down to the work center detail.

Production controllers can gain insight to production capacity and efficiency. The dashboard can assist in scheduling and production capacity planning. Efficiency metrics give valuable feedback on performance and output quality. The drill functionality allows users to see the detail behind the analytics and quickly find any issues.
Section 7: Production

7.1 Production Manager

Audience
- Supply Chain Manager
- Production Manager
- Production Controller

Business Outcomes
- Monitor production costs and performance
- Keep a close eye on capacity and production costs
- Find out scheduling pressure points

Interactivity
- Filter by
  - Company
  - Date
  - Production order type
  - Scheduling status
  - Site
- Hover over any cell or chart member to display additional information
- Drill-through: from any cell or segment to analyze the underlying X3 transactions

Key Metrics
- Order status
  - Number of open production orders for current month (not ended or reported as finished)
  - Number of completed production orders for the current month (marked as ended or reported as finished)
- Order fulfillment
  - On-time delivery gives the percentage of production orders completed within the expected delivery date
  - Quality gives the percentage good quantity compared to the total number of produced items
- Order fulfillment is on-time percentage multiplied by the quality percentage
- Efficiency
  - Average planned lead time based on the planned time to complete operations divided by the number of production orders
  - Average actual lead time based on the actual time to complete operations divided by the number of production orders
  - Efficiency % is the ratio of actual to planned cycle times
- Production cost
  - Actual cost of all the production orders for the current month
  - Planned cost or estimated cost of all the production orders for the current month
- Actual % of planned cost
  - Actual % of planned cost for the current month, prior month, year to date and prior year to date.
  - Value in the middle of the gauge is the current month percentage. Hover over the lines on the circular gauge to see the percentages for the other periods.
- Order fulfillment over time
  - Count of production orders over the current year. Data labels show the count of ended production orders.
  - Line graph the order fulfillment percentage, on-time percentage and quality percentage.
- Actual vs planned consumption by resource group
  - Resource group id and description
  - Planned cost amount for the current month
  - Actual cost amount for the current month
  - Variance (actual cost minus planned cost)
  - Variance percentage (variance/actual cost)