



WHITE PAPER

Bringing ERP Data into Excel: Seamless Integration with Orbit Analytics

Executive Summary

Enterprise Resource Planning (ERP) systems are the backbone of business operations, housing everything from financial data to supply chain metrics. Yet, most business users still use Excel for day-to-day reporting. Its flexibility, familiarity, and analytical power make it a go-to tool, but extracting ERP data into Excel is rarely straightforward.

Manual exports, delayed data updates, and IT bottlenecks create a disconnect between operational systems and business reporting needs. Orbit Analytics solves this by enabling seamless, real-time ERP-to-Excel integration — turning Excel into a live reporting environment rather than a static snapshot.

This whitepaper explores why integrating ERP data into Excel remains a critical need, the limitations of traditional approaches, and how Orbit Analytics simplifies the process.

Introduction

ERP systems have been central to managing core business functions for decades from finance and procurement to human resources and supply chain operations. These platforms offer rich datasets, yet many users still turn to Excel for reporting and decision-making. And it's not without reason.



Excel is trusted, widely adopted, and incredibly versatile. Finance teams use it for budgeting, analysts for dashboards, and managers for ad hoc reporting. However, the real issue lies in how ERP data becomes Excel. Most enterprises rely on manual data pulls, scheduled exports, or third-party middleware, all of which come with trade-offs — accuracy, timeliness, or usability.

This growing gap between ERP systems and Excel-based reporting has led to inefficiencies, especially in large enterprises where agility and accuracy are crucial. Real-time decision-making can't wait for end-of-day exports or data reconciliation exercises.

Orbit Analytics was built to solve this very challenge. It connects ERP data directly to Excel securely and in real time, eliminating friction in the reporting process. Business users can work within Excel but with the full power and reliability of their ERP data behind every number. This transforms Excel from a static reporting tool into a live window for enterprise operations.

The Challenges of Traditional ERP Reporting

Despite significant investments in ERP systems, most organizations still struggle to generate timely and flexible reports. Native ERP reporting tools are often rigid, complex, and require specialized technical knowledge. This leads users to default back to Excel — but not without consequences.

Siloed Data Access

ERP data is often trapped in proprietary structures, making direct access difficult for non-technical users. Pulling data typically requires coordination with IT or writing queries, which slows down analysis and hinders business agility.

Manual Data Exports and Errors

Teams resort to manually exporting data from ERP systems and pasting it into Excel without a seamless integration. This process is not only time-consuming but also introduces risks, from version control issues to human error in formulas or formatting.

Outdated or Inconsistent Reports

Teams resort to manually exporting data from ERP systems and pasting it into Excel without a seamless integration. This process is not only time-consuming but also introduces risks, from version control issues to human error in formulas or formatting.

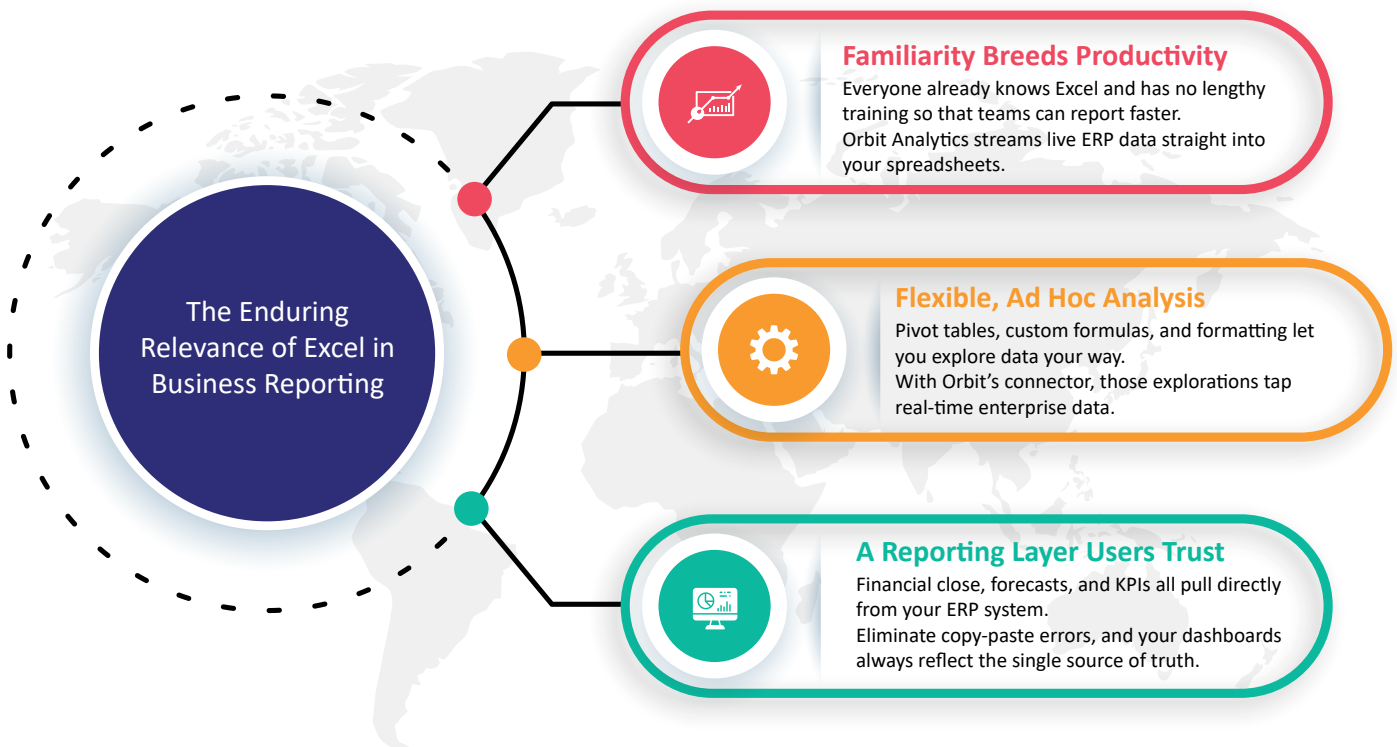
IT Bottlenecks

When reporting depends on IT to extract or transform data, backlogs are inevitable. This creates friction between business teams and IT, slowing decision-making and creating inefficiencies across departments.

These challenges point to a fundamental need: a solution that allows business users to access and work with ERP data directly in Excel — but without compromising data accuracy, governance, or speed. This is precisely where Orbit Analytics excels.

The Enduring Relevance of Excel in Business Reporting

Despite the rise of modern BI tools and cloud analytics platforms, Excel remains firmly embedded in the enterprise reporting workflow and for good reason. It's not just a spreadsheet; it's a familiar, versatile canvas that supports everything from financial modelling and data exploration to visual dashboards and what-if analysis.



Familiarity Breeds Productivity

Excel is second nature to most professionals, particularly in finance, accounting, and operations. Teams don't need extensive training or support to work within Excel, which makes it an efficient platform for fast-paced reporting tasks. Orbit Analytics builds on this advantage by embedding live ERP data directly within Excel — allowing users to keep their workflows intact while gaining access to real-time enterprise data.

Flexible, Ad Hoc Analysis

Excel's analytical features are unmatched in their flexibility, from pivot tables to conditional formatting. However, without integrated ERP connectivity, this flexibility is limited to static datasets. Orbit removes that limitation, enabling dynamic analysis, self-service exploration, and multi-dimensional reporting all inside the Excel environment.

A Reporting Layer Users Trust

Whether it's financial close, forecasting, or operational KPIs, business leaders often rely on Excel for the final word. By turning Excel into a connected reporting layer rather than a disconnected end-point, Orbit Analytics empowers users to trust the numbers they see — because they are coming straight from the ERP.

Orbit Analytics- Bridging the Gap Between ERP and Excel

Orbit Analytics reimagines how organizations interact with their ERP data by delivering a seamless, live connection between enterprise systems and Excel. Unlike traditional solutions that rely on manual data dumps or complex middleware, Orbit offers a native integration that allows users to access, refresh, and analyze ERP data within Excel — all without writing a single line of code.

Excel as a Live Reporting Environment

With Orbit's GLSense add-in for Excel, users can create dynamic reports and dashboards directly connected to their ERP backend. Whether Oracle EBS, Oracle Fusion, or other ERP systems, Orbit enables real-time access to trusted data from multiple sources. The result: Excel has become not just a spreadsheet tool but a secure reporting environment that reflects the current state of the business.

No IT Dependency

Orbit's no-code interface empowers business users to build reports independently. This reduces the burden on IT and accelerates decision-making by putting data in the hands of those who need it most. Users can define filters, build pivots, and apply formatting within Excel — while Orbit handles the data integration and governance behind the scenes.

Enterprise-Grade Security and Governance

Orbit ensures that users only access the data they're authorized to see, enforcing ERP-level permissions within Excel. This role-based access control safeguards sensitive financial and operational data, helping organizations meet compliance requirements while enabling self-service.

Multi-Source Data Consolidation

Beyond a single ERP, Orbit Analytics supports data integration across multiple systems, including databases, cloud applications, and legacy platforms. This lets teams consolidate and compare data across business units — all inside Excel.

By embedding live ERP data directly into the tool users trust most, Orbit removes the friction between IT systems and business reporting. It's Excel, but smarter — connected, governed, and always up to date.

Implementation and Integration Process

One of Orbit Analytics core strengths is its ease of implementation. Unlike traditional BI tools or middleware solutions, which require months of configuration and deep IT involvement, Orbit is designed for rapid deployment with minimal disruption to ongoing operations.

Step-by-Step Integration

Orbit's integration process is engineered to align with existing ERP structures — whether Oracle EBS, Oracle Fusion, or hybrid ERP setups. The implementation typically involves:

1. **Discovery and Setup:** Orbit's team works with the client to understand reporting needs, ERP schema, and user roles.
2. **Connector Configuration:** Secure connectors are established between the ERP and Orbit's reporting engine, preserving governance and access rules.
3. **Excel Add-In Deployment:** GLSense is rolled out to users, integrating directly into Excel with simple installation.
4. **Report Migration and Training:** Legacy reports are recreated or improved in Orbit, and business users receive tailored training to quickly adopt the tool.

Designed for Business Users

Orbit is not just IT-friendly, it's built for business professionals. Report authors and finance users can create, share, and refresh reports without needing SQL skills or technical dependencies.

Scalability and Flexibility

Orbit is not just IT-friendly, it's built for business professionals. Report authors and finance users can create, share, and refresh reports without needing SQL skills or technical dependencies.

Ongoing Support and Optimization

Orbit offers continuous support and optimization services. Whether enhancing report performance, onboarding new users, or integrating additional data sources, the solution is backed by a team dedicated to long-term value delivery.

Ready to Unlock the Full Potential of Your ERP Data in Excel?

Orbit Analytics bridges the long-standing gap between complex ERP systems and Excel's everyday reporting power. With live data access, self-service capabilities, and enterprise-grade security, your teams can stop struggling with outdated exports and start making faster, data-backed decisions.

If you are ready to modernize your reporting without changing the tools your team already trusts, Orbit Analytics is the solution. **Get in touch today** to see a live [demo](#) of Orbit GLSense, Orbit ExcelEdge and Websheets in action.