

# sage 300 Intelligence Reporting

Sage 300 2016 Intelligence Reporting  
Customer Frequently asked questions



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## Frequently asked questions



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## Overview of Sage Intelligence Reporting

### What is Sage 300 Intelligence Reporting?

Sage 300 Intelligence Reporting is a flexible business reporting tool that integrates with your Sage 300 solution and allows for better insights into your business's data.

### What does Sage 300 Intelligence Reporting do?

Sage 300 Intelligence Reporting gives you a holistic view of your business by seamlessly consolidating your data from Sage 300, reducing spreadsheet chaos and improving collaboration across your business. With Intelligence Reporting, you can automatically run and distribute fully customizable reports in Microsoft® Excel®, so you spend more time analyzing the data and less time locating and preparing it. You have the choice to either customize the ready-to-use reports or create new reports to suit your business's unique requirements, ensuring that visibility of your information is always just a click away. You will also enjoy full control over your financial reports with a drag and drop Report Designer tool that is exclusive to Sage Intelligence Reporting.

### Which versions of Sage 300 does Intelligence Reporting work with?

Sage 300 2014 and 2016.

### Which version of Excel does Sage 300 2016 Intelligence Reporting support?

Microsoft® Excel® 2007, 2010, and 2013, both 32-bit and 64-bit versions.

### Is this a Sage-developed product?

Yes, Sage Intelligence Reporting is a Sage-owned product. This means that your first line support is handled by Sage. Other useful support platforms include the [Sage Knowledgebase](#) and the [Sage Intelligence Community](#).

### What countries is Sage Intelligence Reporting available in?

Sage Intelligence Reporting is currently available through the U.S., Canada, South Africa, Africa, Asia, Middle East, and Australia.

### Is there a way for me to view the reports with my own data?

Yes; if you are on a Sage Business Care plan, Sage has provided you with one Report Manager license to get you started with Intelligence Reporting.

### What are the benefits for the different Sage Intelligence components?

Below is a summary of the benefits you will receive with each component you acquire:

Components	Benefits
Report Viewer	<ul style="list-style-type: none"> <li>View and analyze existing reports in real time when you want them (no Excel skills required to view).</li> <li>Easily drill down into the details of your data.</li> <li>Set parameters such as timeframe and departments at the time of running the report.</li> </ul>
Report Manager	Everything the Report Viewer offers, as well as the ability to: <ul style="list-style-type: none"> <li>Edit and customize your standard report templates and save them for future use.</li> <li>Create new reports with the standard data tables available.</li> <li>Sort, drill down, and aggregate data.</li> <li>Send reports to a file, publish to an intranet site, or send by email with automated report distribution.</li> <li>Set permissions and security for reports.</li> </ul>
Report Designer	<ul style="list-style-type: none"> <li>Get full control of your financial reports through an Excel add-in that allows you to easily create and edit financial statements using a graphical "drag and drop" interface.</li> <li>Get predefined report layouts for Income Statement, Balance Sheet, and Trial Balance.</li> <li>Utilize Reporting Trees, which allow you to model a reporting structure and view your organization in many different ways.</li> <li>Available for financial reporting only, Microsoft Excel 2007 and above.</li> </ul>
Report Connector	<ul style="list-style-type: none"> <li>Access and consolidate information from multiple sources.</li> <li>This allows for:                             <ul style="list-style-type: none"> <li>- Multicompany and multicurrency consolidations.</li> <li>- Create new reports on any part of Sage 300.</li> <li>- Connectivity to unlimited ODBC databases.</li> </ul> </li> </ul>

## Comparisons of Sage Intelligence Reporting and Sage Enterprise Intelligence

### Why do we have two business intelligence tools—Sage Intelligence Reporting and Sage Enterprise Intelligence?

Both tools cater to different levels of customer requirements. With Sage Intelligence Reporting, you can automatically run and distribute fully customizable financial and operational reports in Microsoft® Excel®, so you spend more time analyzing the data and less time locating and preparing it. Sage Enterprise Intelligence offers a different level of operational analysis using drag-and-drop capabilities on mobile and web.

### Do customers need to purchase both Sage Intelligence Reporting and Sage Enterprise Intelligence for a complete business intelligence (BI) solution?

No. Customers may select the most appropriate solution to meet their requirements and budget. Refer to the comparison matrix provided below to identify your best option for Sage 300:

	<b>Sage Intelligence Reporting</b>	<b>Sage Enterprise Intelligence</b>
<b>Primary target</b>	For Excel users	For all business users
<b>Need</b>	<b>Excel-based reporting and analysis</b> requirements, with flexibility to work with unique financial reporting requirements	Self-service <b>operational analysis</b> and reporting requirements across mobile, web, and Excel
<b>Reporting</b>	Easy <b>report design and customization</b> with report templates and stronger drag-and-drop capabilities combined with reporting trees to logically group your accounts all within the familiarity of Excel	<b>Self-service, ad-hoc operational reporting</b> with multiple templates and drag-and-drop capabilities on mobile and web
<b>Report design</b>	Graphical report designer front-end with <b>stronger report modification or customization in Excel</b>	Strong and <b>easier way to create ad-hoc reports</b> based on a <b>larger library of reporting templates</b>
<b>Drill-down</b>	Ability to drill down into the in-memory database. <b>Stronger capabilities when modifying an existing drill-down report</b> through the Report Designer	Ability to <b>drill down directly into Sage 300 or Sage 500 ERP</b> for a deeper analysis. <b>Easier to use when user only needs to view a report.</b>
<b>Graphics</b>	Ability to create <b>graphs for analysis</b> , combined with slicers to help you easily analyse the information	More powerful dashboard capabilities through <b>easy-to-use/-create cross-functional graphical analytics</b> with drill-down capabilities.
<b>Adjusting forecasts</b>	By manually generating an Excel file and importing it back in Sage 300.	By importing a file into Sage 300 or Sage 500 ERP through the integrated web reporting tool—with <b>write back capability.</b>
<b>Distribution</b>	<b>Report scheduling and distribution</b> to all employees through Microsoft Scheduler.	<b>Report scheduling distribution</b> to all employees with field-level security
<b>New customers</b>	<b>1</b> Report Manager license <b>included</b> with Sage 300.	Option for all Sage 300 new customers
<b>Current customers</b>	<b>2</b> Report Manager license <b>included</b> with Sage 300. Subscription-based option available.	

## Pricing

### What are the pricing options for Sage Intelligence Reporting?

Sage Intelligence Reporting offers three ways in which you can purchase the software:

#### The Subscription Bundle

The first method of purchasing the software is through the Subscription Bundle. This is delivered under a subscription license with no long-term contract. Customers are licensed to use the service as long as their monthly dues are current and they remain on an active software support plan.

Rights to use the service include:

- An unlimited number of Sage Intelligence Report Manager and Report Viewer user licenses.
- Report Designer and Connector modules.
- Initial term contract of four months, followed by a monthly subscription thereafter.

Below is a table summarizing the subscription based pricing available:

<b>Subscription based pricing for Sage 300 Intelligence Reporting Bundle</b>	
1–2 ERP companies	\$99
3–9 ERP companies	\$129
10+ ERP companies	\$199
<b>Service activation</b>	
Implementation with training (1-2 hrs.)	\$395
Installation of Sage Intelligence Reporting includes the following:	
On the server:	
<ul style="list-style-type: none"> <li>• Sage BMS Intelligence Reporting Connector module</li> <li>• Sage BMS Intelligence Reporting Designer module</li> <li>• Sage BMS Intelligence Reporting Report Manager and Report Designer modules</li> </ul>	
<ul style="list-style-type: none"> <li>• Sage BMS Intelligence Reporting Report Manager and Report Designer modules on one workstation</li> <li>• Sage BMS Intelligence Reporting Report Viewer and Report Designer modules on one workstation</li> <li>• A 30-minute overview of Sage BMS Intelligence Reporting</li> </ul>	

#### Individual licenses

Sage Intelligence Reporting can also be licensed through individual users and modules. If you have already purchased Sage Intelligence Reporting, you cannot switch to the Subscription Bundle.

Below is a table summarizing the module based pricing available:

<b>Module based pricing for Sage 300 Intelligence Reporting</b>	
Report Manager (per additional user)	\$1,060
Report Viewer (per user)	\$370
Connector module	\$1,060
Report Designer module	\$1,060

#### Sage Business Care Service Plans

Sage Intelligence Reporting is now included in the three different service plans for Sage Business Care

[Click here to find out what components are included in the different service plans .](#)

## What's new in Sage 300 2016 Intelligence Reporting?

### How has Sage 300 Intelligence Reporting been enhanced for Sage 300 2016?

With Sage 300 2016 Intelligence Reporting, you can look forward to extra time-saving functionality and additional reports at your fingertips.

Sage 300 2016 Intelligence Reporting enhancements include:

- Additional, time-saving benefits when designing your financial reports using the Report Designer, such as:
  - The automatic detection of missing accounts from reports.
  - The ability to exclude zero rows to neaten up reports.
  - Dynamic ranges that detect any changes to the General Ledger and automatically include your changes at run time. Set these up once to enjoy consistently up-to-date reports. (For more information on Dynamic ranges, see the next question.)
- Enhanced collaboration functionality with the option to distribute reports with calculated values or with embedded formulas—allowing for the quick determination of how results were derived.
- A fresh user experience for standard reports, including a quick link through to tips and help files to ensure you fully benefit from Intelligence Reporting functionality.
- A regularly updated library of **additional free reports** available online, which are automatically uploaded to your Report Manager module upon selection.

For more details on the latest Sage 300 Intelligence Reporting enhancements, please refer to the [Sage Intelligence Community](#).

### What are Dynamic Account Ranges?

Dynamic Account Ranges can be added to any new or existing report built with the Report Designer module and effectively allow you to mark certain areas of your report as dynamic areas, which will dynamically update themselves to show General Ledger accounts and allow zero balance rows to be removed, based on a rule of your choice.

This allows you to have areas within your report that always show detailed accounts; for example, a row for every account that you would like to see within the area. This was previously not possible, and you would have needed to use account rules to aggregate new accounts into a single row of your report, limiting your visibility of these new accounts unless a Drill Down is performed.

A new formula is now available within the Report Designer Task Pane. This formula is the key to setting up new dynamic areas within your reports. By creating the new formula into a new or existing report, you can configure it to make any area of your report dynamic. Being a formula, many Dynamic Account Range formulas can be added into your report to allow you to create many dynamic areas inside your report.

A common scenario would be to use dynamic account ranges when designing an Income Statement. Instead of listing each account within the categories of your Income Statement, you can use dynamic account ranges to generate the accounts in each category automatically when a report is run.

[To find out more watch this video](#)

### Will customized reports built into an older version of Sage 300 Intelligence Reporting be compatible in Sage 300 2016 Intelligence Reporting?

Yes, but only if you were previously using the SQL version of the reports. You are able to bring your existing reports into Sage 300 2016 Intelligence Reporting through a simple export and import process. Please work with your Sage business partner and let him or her know which existing reports you would like to bring into Sage 300 2016 Intelligence Reporting.

A new SQL version of the report would be required if you have converted from a pervasive database to the new SQL-only version of Sage 300 2016.

## Customer requirements

Before you can install Sage Intelligence Reporting on a workstation or server, ensure that your hardware and software meets at least the recommended system requirements and that you have the necessary prerequisites installed.

### Recommended system requirements

- One of the following operating systems fully installed and operational:
  - Windows 7 (32 and 64 bit)
  - Windows 8 (32 and 64 bit)
  - Windows Server 2008
  - Windows Server 2012
  - Windows Terminal Server
- Sage 300 should be fully installed and operational with the Sage 300 Intelligence Reporting option enabled during installation, along with the required modules. For a complete guide on installing Sage 300, please refer to the Sage 300 installation guide.
- Microsoft .Net Framework 4.0 (This will be installed if it is not present).
- Microsoft Excel 2007 or higher. Open Microsoft Excel at least once to ensure that it is fully licensed and activated before installing Intelligence Reporting. Close Microsoft Excel before beginning the installation.
- Hardware: CPU > 1.3 GHz
- Memory: 2GB RAM
- Hard drive space: 350MB

### Database Connectivity Supported

Sage Intelligence Reporting uses ODBC and OLEDB technology to gain access to Open Database Systems. Sage Intelligence Reporting includes direct support for most popular database systems and Connection Types that are included within the Connector. For systems where a Connection Type does not exist but where the system has an ODBC driver, these can be accessed via the System DSN connection types within the Connector.

The Sage 300 database type supported is:

- Microsoft SQL Server.

## Certification on Sage Intelligence Reporting

The Sage Intelligence Certification consists of the following courses:

### Excel on Steroids 2013

Excel on Steroids is a specialized training program, comprising three workshops, focusing on key Excel functionality for powerful business reporting and decision making!

Formulas and Functions

Data lists and Macros

PivotTables and PivotCharts

### Sage Intelligence Reporting – Beginner

What you can expect: [Sage Intelligence Reporting – Beginner demo video](#).

New to Sage Intelligence? If you are, this online course is designed to give you a comprehensive overview of Sage Intelligence and increase your understanding of Microsoft Excel's business reporting features. You will learn the basic functions of the Report Manager module, including organizing reports, creating reports, saving formats, creating union reports, and summarizing or grouping data in a report.

### **Sage Intelligence Reporting – Intermediate**

What you can expect: [Sage Intelligence Reporting – Intermediate demo video](#).

Time to take your reporting to the next level? If you have completed the Beginners online course or have a basic working knowledge of the Report Manager and want to fully utilize its capabilities, this online course will take your reporting to the next level. You will learn how to create dashboards, protect your Microsoft Excel workbook, use add-ins, schedule a report, export and import reports, distribute reports, and allow report templates to be accessed by multiple people. We will also share our best practice reporting guidelines with you.

### **Sage Intelligence Reporting – Financial Report Design**

What you can expect: [Sage Intelligence Reporting – Financial Report Design demo video](#).

Sage Intelligence is a Microsoft® Excel® based reporting tool that pulls data from Sage 300 and delivers it in an Excel format that is easy to understand and manipulate, putting you in control of the design of your reports. This online course gives you a comprehensive overview of your Sage 300 Intelligence Reporting tool. We recommend that you also attend the Sage Intelligence Beginner and Intermediate courses, preferably before you do this course. It is important to note that the advanced course is only suitable if you are going to be working with the Connector module.

### **Sage Intelligence Reporting – Advanced**

What you can expect: [Sage Intelligence Reporting – Advanced demo video](#).

Ready to start consolidating data and customizing reports? If you are familiar with the Report Manager, have a basic understanding of databases, and would like to be able to fully customize the way data is being extracted from data sources, this online course is designed for you. You will learn how to create connectivity to a data source, create containers for multiple tables, customize data fields, use variables as fields and connect to multiple companies. We will also share additional best practice guidelines for efficient and flexible reporting.

Please refer to the [Sage Intelligence Academy](#)—our dedicated learning portal—for all certification and training on Sage Intelligence Reporting.

## **Resources**

To help get going with Sage Intelligence, there are now more Sage Intelligence resources available in our resource library:

- Engage with partners and customers on [Sage Intelligence Community](#) forums.
- Download the one-page [Kick-off guide](#) to quickly get started on Sage Intelligence, including how-to videos and other great resources.
- Subscribe to Sage Intelligence and Excel tips and tricks emails.
- Register for upcoming [webcasts](#) conducted by a Sage Intelligence product specialist. Or view [recorded webcasts](#) anytime.
- Visit our [YouTube channel](#), which includes step-by-step videos on the features of Sage Intelligence.
- Download our latest [Report Utility](#) tool, enabling you and your customers the ability to access continually updated report templates. Your customers no longer need to wait to download new report templates: They can be automatically imported into the Report Manager module.

### **Where do I go to find out more about Intelligence Reporting?**

Go to: [www.sageintelligence.com](http://www.sageintelligence.com)

## Out-of-the-box reports

Sage 300 2016 Intelligence Reporting ships with a number of predefined reports to get you up and running immediately. These include the following:

### **Dashboard Reports\***

Dashboard Analysis  
Dashboard Analysis AR

### **Financial Reports**

General Ledger Transaction Details

### **Financial Report Designer \***

Demonstration Report Designer Financial Balance Sheet Financial Forecasting  
Financial Income Statement  
Financial Ratio  
Financial Report Designer  
Financial Trend Analysis

### **Inventory Reports**

Inventory Master

### **Purchases**

Purchases Master

### **Sales Reports**

Sales Master  
Sales Master AR

\*Please note these reports require an active [Report Designer](#) license

## Additional reports available on an ongoing basis

On top of the standard reports that you receive with Sage 300 2016 Intelligence Reporting, there is a constantly updated library of additional reports available on our website for you to make use of. These reports are created according to customer feedback for you to access on an ongoing basis. To make these reports easily consumable, we have created a "Report Utility" that allows you to select the additional reports suitable to you and automatically imports them into a "New Reports" folder in your Sage Intelligence Report Manager module. All you need to do is download the Report Utility and follow the easy steps to select the reports you would like. These provide a great basis for you to build useful reports for your business, with minimal customization required.

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