sage 500 ERP Intelligence Reporting

Frequently asked questions

Sage 500 ERP 2016 Intelligence Reporting partners

Contents

Overview of Sage Intelligence Reporting

What is Sage 500 ERP Intelligence Reporting?
Sage 500 ERP Intelligence Reporting is a flexible business reporting tool that integrates with your Sage 500 ERP solution and allows for better insights into your business's data. Intelligence Reporting gives you a holistic view of your business by seamlessly consolidating your data from Sage 500 ERP, 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 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 500 ERP does Intelligence Reporting work with?
Sage 500 ERP 7.4 2013, 2014, and 2016

Which version of Excel does Sage 500 ERP 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 of support is handled by Sage. Other useful support platforms include the **Sage Knowledgebase** and the **Sage Intelligence Community**.

What countries is Sage 500 ERP Intelligence Reporting available in?
Sage 500 ERP Intelligence Reporting is currently available through the U.S. and Canada.

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 four Report Manager licenses to get you started with Sage 500 ERP Intelligence Reporting.

What are the benefits for the different Sage Intelligence components?
Below is a summary of the benefits you receive with each component you acquire:

Components	Benefits
Report Viewer	• View and analyze existing reports in real time when you want them (no Excel skills required to view). • Easily drill down into the details of your data. • Set parameters such as timeframe and departments at the time of running the report.
Report Manager	Everything the Report Viewer offers, as well as the ability to: • Edit and customize your standard report templates and save them for future use. • Create new reports with the standard data tables available. • Sort, drill down, and aggregate data. • Send reports to a file, publish to an intranet site, or send by email with automated report distribution. • Set permissions and security for reports.
Report Designer	• 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. • Get predefined report layouts for Income Statement, Balance Sheet, and Trial Balance. • Utilize Reporting Trees, which allow you to model a reporting structure and view your organization in many different ways. • Available for financial reporting only, Microsoft Excel 2007 and above.

Connector	• Access and consolidate information from multiple sources.
	• This allows for:
	    - Multicompany and multicurrency consolidations.
	    - Create new reports on any part of Sage 100.
	    - Connectivity to unlimited ODBC databases.

Comparison 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 appropriate solution to meet their requirements and budget. Refer to the comparison matrix provided below to identify your best option for Sage 500 ERP:

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

Pricing

What are the pricing options for Sage Intelligence Reporting?
Sage Intelligence Reporting can be purchased in two ways:

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:

Subscription-based pricing for Sage 500 ERP Intelligence Reporting Bundle	
1–2 ERP companies	$99
3–9 ERP companies	$129
10+ ERP companies	$199
Service activation	
Implementation with training (1-2 hrs.)	$395
Installation of Sage Intelligence Reporting includes the following:	
On the server: • Sage ERP Intelligence Reporting Connector module • Sage ERP Intelligence Reporting Designer module • Sage ERP Intelligence Reporting Report Manager and Report Designer modules	
• Sage ERP Intelligence Reporting Report Manager and Report Designer modules on one workstation • Sage ERP Intelligence Reporting Report Viewer and Report Designer modules on one workstation • A 30-minute overview of Sage ERP Intelligence Reporting	

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:

Module-based pricing for Sage 500 ERP Intelligence Reporting	
Report Manager (per additional user)	$1,100
Report Viewer (per user)	$385
Connector module	$1,100
Report Designer module	$1,100

Qualifying and selling Sage Intelligence Reporting

What questions should I ask to identify opportunities for my ERP customers?

Here are a few questions you can ask to identify which solution would be best for your customer:

- How do you currently run reports today?
- Are you pulling information for your reports from your BMS system or from multiple sources?
- How long does it take to run all of your reports?
- How do your reports get distributed to teams or individuals today?
- How do you create new reports?
- What are the top three reports that you use to run your business?
- What are your top three challenges with reporting?
- On a scale from 1-5, 1 being not familiar at all and 5 being an expert, how would you rate your level of familiarity with Microsoft Excel?

What is the best value proposition to introduce Sage Intelligence Reporting?

Please see the messaging guide on the Sage Intelligence Reporting playbook on **Sage Sell.**

However, at a high level, Sage Intelligence Reporting offers comprehensive and flexible reporting and gives organizations the insights across the company, helping them to make better informed business decisions, faster. The scheduling of reports to automatically run, and the automatic distribution of reports to teams or individuals through a variety of distribution methods, allow companies to improve their reporting efficiency and collaboration.

With Sage Intelligence Reporting, you and your customers get the following benefits:

Gain control
through accurate
reporting

Take action through
better analysis

Get timely automated
reports

- Gain control with accurate, Excel-based reports containing data that is pulled straight from your Sage solution. With the ability to consolidate your data from your business management solution, you get a single version of the truth with your own trusted information.

- Get immediate access to insightful information that you can view any way you choose. While dashboards and KPIs give you a pulse of your business, drill down capabilities allow you to see the data that makes up the numbers. This enables you to take action while making more informed decisions.

- Make faster business decisions with real-time data automatically made available to the relevant people when they need it. Say goodbye to spreadsheet chaos with reports that can be scheduled to run and distribute at your convenience, giving you more free time to do what you love.

What's new in Sage 500 ERP 2016 Intelligence Reporting?

How has Sage 500 ERP Intelligence Reporting been enhanced for Sage 500 ERP 2016?
We have included new features to further optimize how you and your customers use and report on your business's data. These are as follows:

- When designing custom financial reports using the Sage Intelligence Financial Report Designer with Sage 500 ERP, you can now:

  - Choose to create/customize financial reports using the Layout Generator or the Task Pane (previously known as the Report Designer Add-In), or a combination of the two methods, giving you full control of your financial reporting.
  - Automatically detect missing accounts from reports.
  - Exclude zero value rows from reports to make them easier to read.
  - Select dynamic ranges that detect any changes to the General Ledger and automatically updates them.
  - Change the level of detail seen at a row level by using account ranges, account wildcards, and account exclusions, giving you maximum control and flexibility over your financial report layouts.

- You can look forward to a fresh look and feel of the Intelligence Reporting modules and reports, with an intuitive ribbon and right-click menu options.
- You can also distribute reports with calculated values or with embedded formulas, to see how calculations were made.
- Additional reports that allow you to better analyze your data have now been added to a constantly updated online library and are available through the Report Utility. These free reports are automatically uploaded into the Report Manager as you select and download them.

For more details on the latest Sage 500 ERP Intelligence Reporting enhancements, please refer to the **Sage Intelligence Community.**

What is the Report Utility?
The **Report Utility** is a tool that you can download from our website, which enables you to automatically import any of the additional free Sage Intelligence Reporting reports.

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. Many Dynamic Account Range formulas can be added into your report to allow you to create many dynamic areas inside your report. **To find out more, watch this video.**

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.

What is In-Memory processing?

In-Memory processing is a database management system that stores data entirely in your computer's RAM. Because working with data In-Memory is much faster, the Report Designer is able to report on larger data volumes, greatly enhancing the performance of your financial reporting.

Are customized reports built into an older version of Sage 500 ERP Intelligence Reporting compatible in Sage 500 ERP 2016 Intelligence Reporting?
You are able to bring your existing reports into Sage 500 ERP 2016 Intelligence Reporting through a simple export and import process. Please work with your customer to find out which existing reports they would like to bring into Sage 500 ERP 2016 Intelligence Reporting.

Which reports have been removed from the new version?
The following reports have been removed, as the features and functionality have been replaced by the Report Designer:

• Financial Reports
• Aggregated Financial Reports
• Consol. Financial Reports
• Aggregated Financial Report Designer
• Financial Reports Designer
• Report Designer Add-in
• Consol. Financial Report Designer
• Consol. Report Designer Add-in

Is there a way for me to access the removed reports?
Yes, all existing reports are available for download from the Sage Intelligence Reporting Community **Free Report Templates Group.**

What is the Report Designer?
The Report Designer enables you to create financial layouts based on your current Sage Business Management Solution (BMS) data, using companies, sites, and budget sets. The revamped Report Designer includes a Task Pane (previously known as the Report Designer Add-In) and the Layout Generator, both utilizing a powerful in-memory engine, enabling you to take full control of all design aspects of your financial reporting layouts.
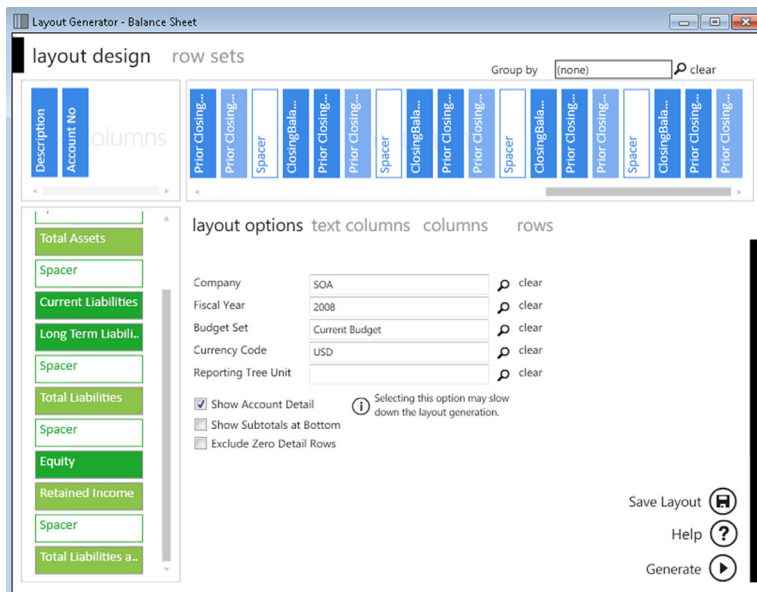
What is the Layout Generator?
The Layout Generator is for those who may not have an advanced knowledge of Microsoft Excel. It provides an intuitive drag-and-drop interface to design and generate financial layouts quickly and easily.

What is the Task Pane?
The Task Pane is especially for those who have an advanced knowledge of Microsoft Excel and are familiar with Microsoft Excel formulas. It provides a complete solution to design your financial reports using powerful Microsoft Excel functionality, therefore giving you complete control of the design of your report.

Where is the Reporting Trees group that was on the BI Tools Ribbon?

The Reporting Trees has been moved from BI Tools Ribbon to the Task Pane. Reporting Trees are set up in the same way. You simply need to drag the required Reporting Unit into the appropriate cell in the Excel sheet.
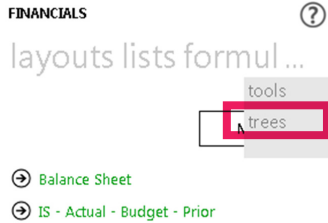

Where is the "What if Analyzer" that was on the BI Tools Ribbon?

The "What if Analyzer" has been removed from the BI Tools tab in Excel. Microsoft Excel is the front end of Sage Intelligence Reporting and has an extremely powerful What if Analysis features built in. These can be incorporated into Intelligence Reporting reports.
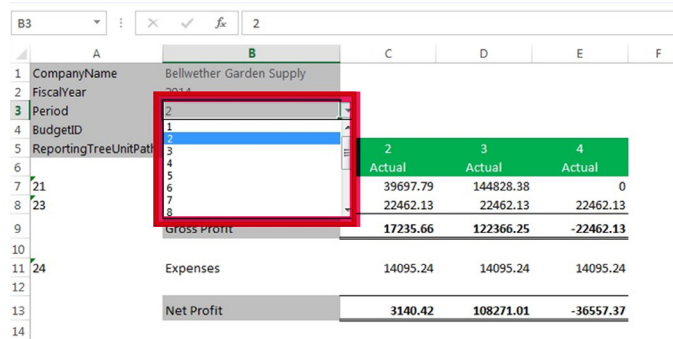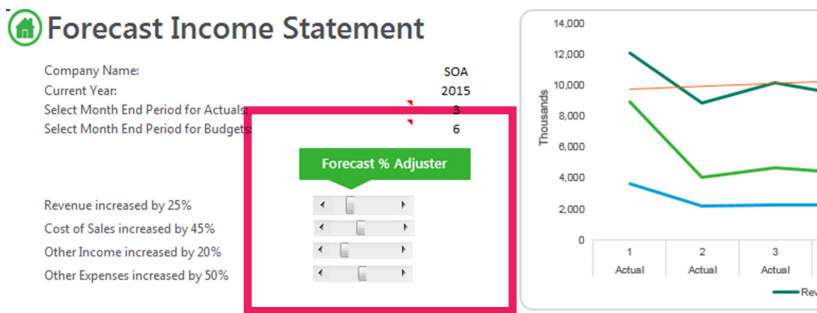

What if I upgrade to the latest version of Sage 500 ERP Intelligence Reporting and I don't see the new reports in my Report Manager?

You can quickly and easily access your reports using the Report Manager's bulk import and update feature. The purpose of bulk importing is to automatically import new and updated reports that are included with your new version of Intelligence Reporting into your Report Manager.
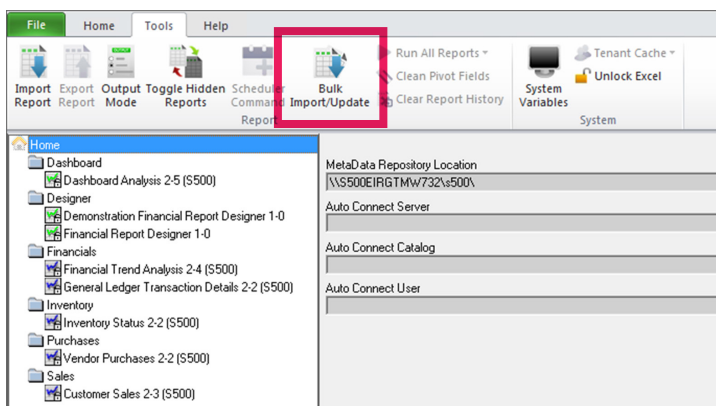
What has happened to the change month option for Financial Reports?
The change month add-in allowed users to change months/ periods in the older financial report layouts. The change month option is no longer required and has been removed in the new Report Designer reports. With the new In-Memory you can simply type in the month that you would like to analyze in the required cell, and the data in the layout will automatically update to reflect the selected month. In addition, you could add Microsoft data validation to your template, which will give you a drop-down list to choose from.

Why does the mapping tool not open when I run the Report Designer?
The mapping tool has been removed from the Report Designer. Previously with the mapping tool, row reporting groups were restricted to categories only. The new Report Designer Layout Generator incorporates more powerful row sets. Row sets allow users to define customized rows based on rules using ranges and wildcarding. The row set is reusable across all layouts in the report and is centrally managed, reducing the time spent customizing and editing rows in reports. An account rule preview is available to ensure that the rules return the correct accounts. Once a row set has been defined, users can select to use the row set within their layout design.

Row set types available:

- Account
- Account Category
- Account Group
- Account Type

Customer requirements

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

Recommended system requirements
- One of the following operating systems fully installed and operational:
    - Windows 2000, XP, Vista, or 7
    - Windows Server 2003
    - Windows Server 2008
- Microsoft SQL Server 2005, 2008/R2, and 2012
- 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: 512MB RAM
- Hard drive space: 1GB

Database connectivity supported
Sage 500 ERP 2016 Intelligence Reporting uses ODBC and OLEDB technology to gain access to Open Database Systems through the Connector. Sage 500 ERP 2016 Intelligence Reporting includes direct support for most popular database systems and Connection Types for these 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 through the System DSN connection types within the Connector. Please note that although the Sage Intelligence Reporting Connector Module natively works with several database types, it only ships with reports for the Sage 500 ERP databases that run on a SQL Database.

Training available for Sage Intelligence Reporting

There are a variety of Sage 500 ERP Intelligence Reporting on-demand courses available on **Sage University.**

Resources

To help get going with Sage Intelligence Reporting, there are now more resources available in our resource library:
- Engage with partners and customers on **Sage Intelligence Reporting Community** forums.
- Download the one-page **Kick-off guide** to quickly get started on Sage Intelligence Reporting, including how-to videos and other great resources.
- **Subscribe** to Sage Intelligence Reporting and Excel tips and tricks emails.
- Register for upcoming **webcasts** conducted by a Sage Intelligence Reporting product specialist. Or view **recorded webcasts** anytime.
- Visit our **YouTube channel**, which includes step-by-step videos on the features of Sage Intelligence Reporting.
- 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.

Here are additional resources for business partners:

- Take a look at the Sage Intelligence Reporting playbook on **Sage Sell**, which hosts all of the Sage Intelligence Reporting marketing materials, including a quick sales cheat sheet.
- **Sandra Smith** is our Sage Intelligence Reporting product specialist based in Irvine, California, who supports our business partners. **Contact her** if you have any queries regarding Sage Intelligence Reporting.

Sales product specialists
Contact our sales specialist through **BusinessIntelligence@sage.com** or contact him directly:

Michael Nardini: 800-368-2405 ext. 266096 or mobile: 443-370-0397

Product marketing managers
Liz Garnand: 503-439-5388 (NA)

Bronwyn Dorrofield: +27 31 537-7244 (Global)

Product manager
Ruth Gray: +27 31 537-7244 (Global)

Where do I go to find out more about Intelligence Reporting?
Go to: **www.sageintelligence.com**

Out-of-the-box reports

Sage 500 ERP 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

Financial Reports
General Ledger Transaction Details
Financial Trend Analysis

Financial Report Designer *
Demonstration Report Designer *
Report Designer *
Consolidation Report Designer *

Inventory Reports
Inventory Status

Purchases
Vendor Purchases

Sales Reports
Customer Sales

*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 500 ERP 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 Reporting 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.

sage

6561 Irvine Center Drive
Irvine, CA 92618-2301

866-996-7243

www.sage.com