sage Pastel Intelligence Reporting

What's new

For the Sage Pastel Partner Version 17 release, we've introduced the Sage Intelligence Report Utility in the menu. The Report Utility replaces the Free Reports group in the Sage Intelligence Community. Similarly to the Free Reports group, the Report Utility allows you access to a pool of reports which is constantly being contributed too by our highly skilled report writer team.
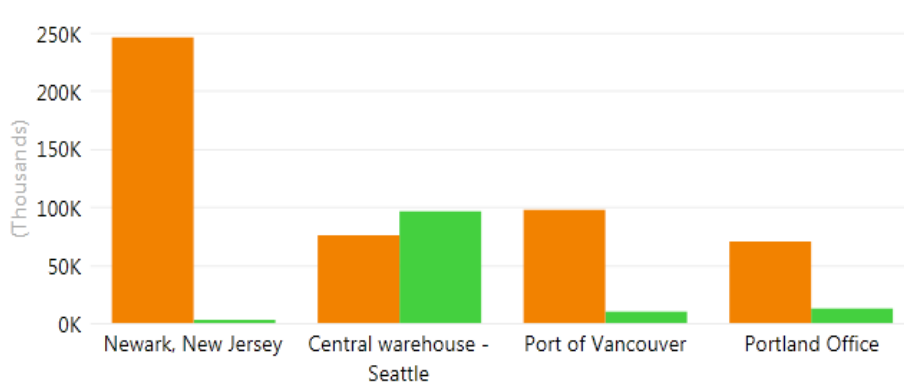
What is the Report Utility?
No longer do you need to wait for a new release to get new reports, or spend hours creating reports from scratch to help you make sense of your business data. We have a library of additional reports, created according to customer feedback, available for you to access on an on-going basis. Better still, the Report Utility will allow you to select the reports you would like and automatically imports them to your 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 customisation required.

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Purchases Dashboard
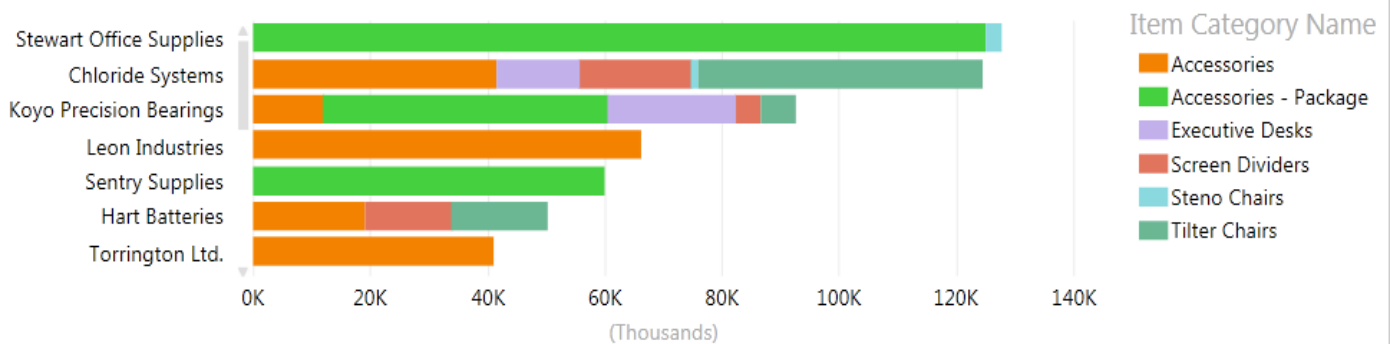
Purchases by Location

Fiscal Year
- 2019
- 2020

Fiscal Month
- January
- February
- March
- April
- May
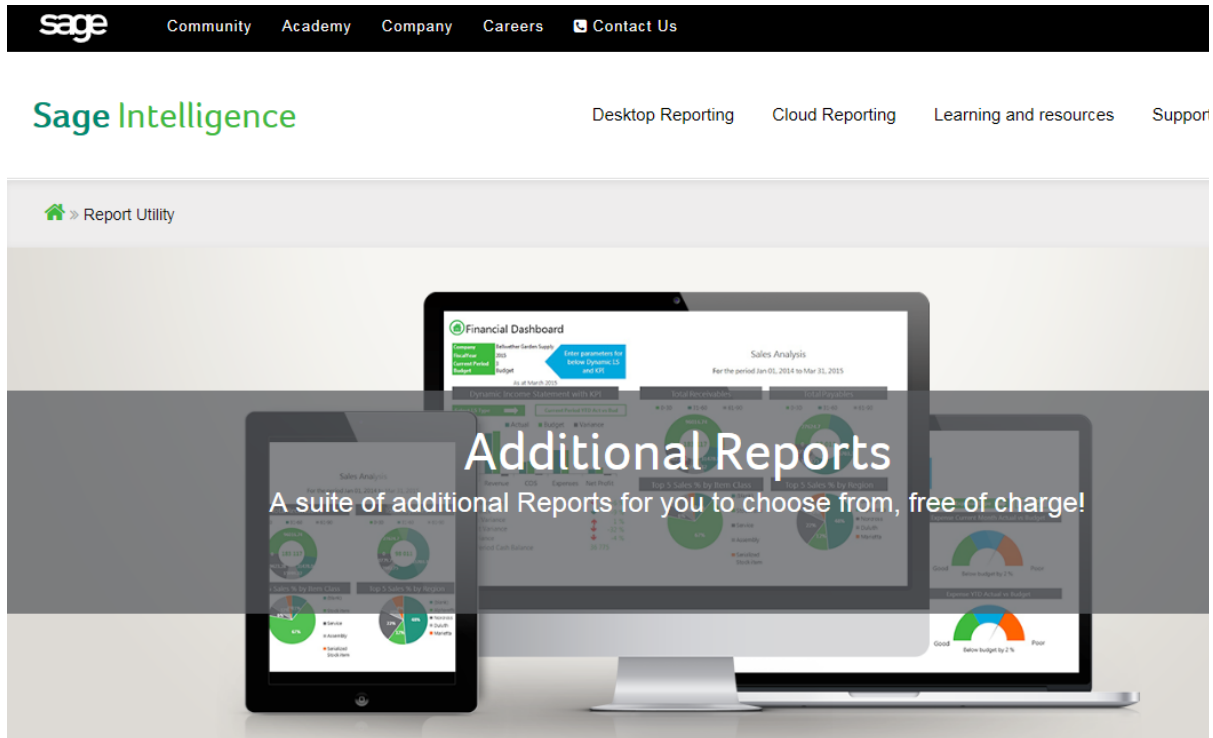- June
- July
- October
- November
- December

Purchases by Supplier and Category

Item Category Name
- Accessories
- Accessories - Package
- Executive Desks
- Screen Dividers
- Steno Chairs
- Tilter Chairs

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Downloading the Report Utility
The Report Utility installer can be downloaded from the Sage Intelligence website: https://www.sageintelligence.com/report-utility/.
Select **Sage Pastel Intelligence Reporting**.

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Make sure that you download the Report Utility to the desktop that you are running the Intelligence Reporting on. Once you have downloaded the Report Utility. Ensure that Intelligence Reporting modules are closed.

Report Utility

The Report Utility allows you to select the reports you would like and automatically imports these reports into a "New Reports" folder in your Sage Intelligence Report Manager module.
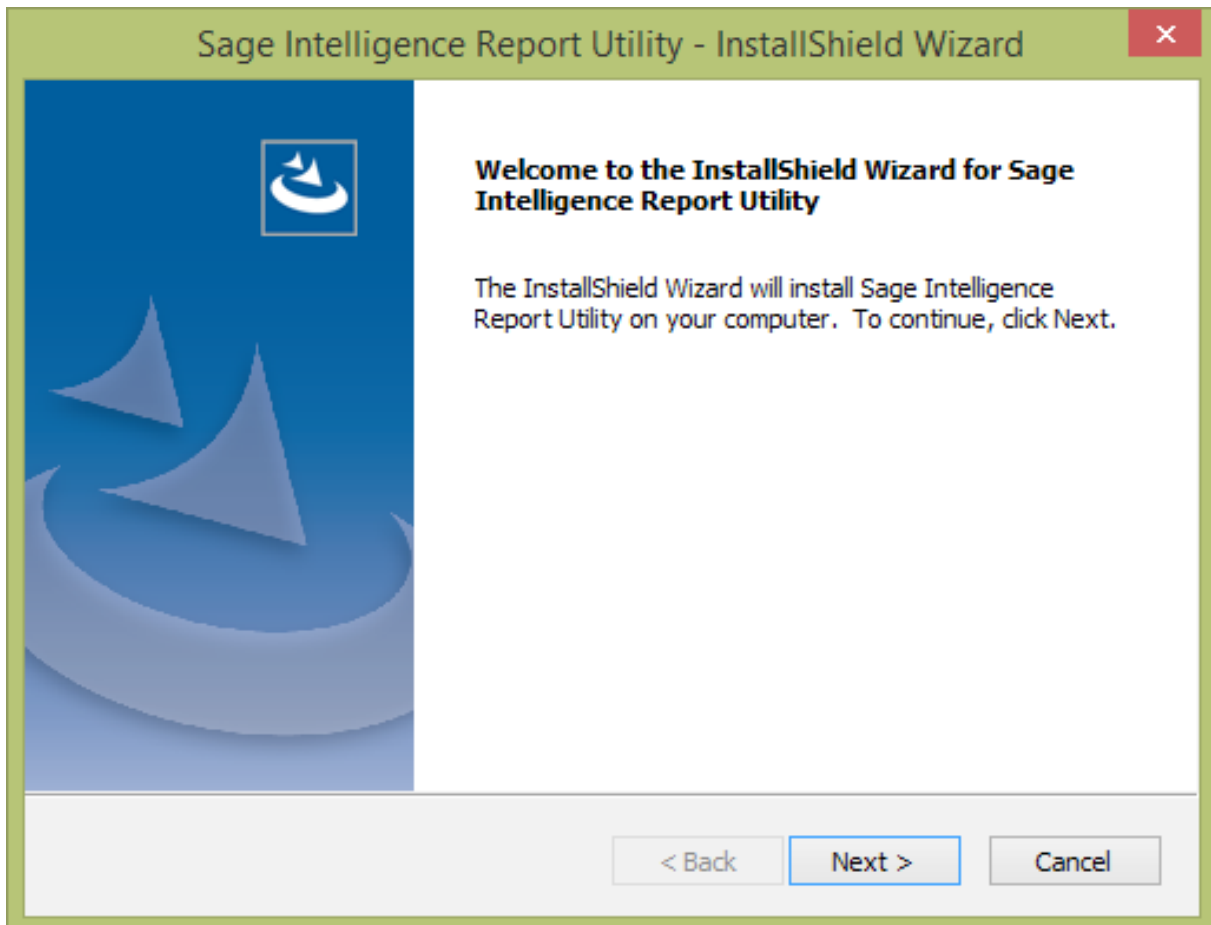
Download >

Can't find the report you are looking for? We'd love to hear your report ideas. Click here to submit your idea
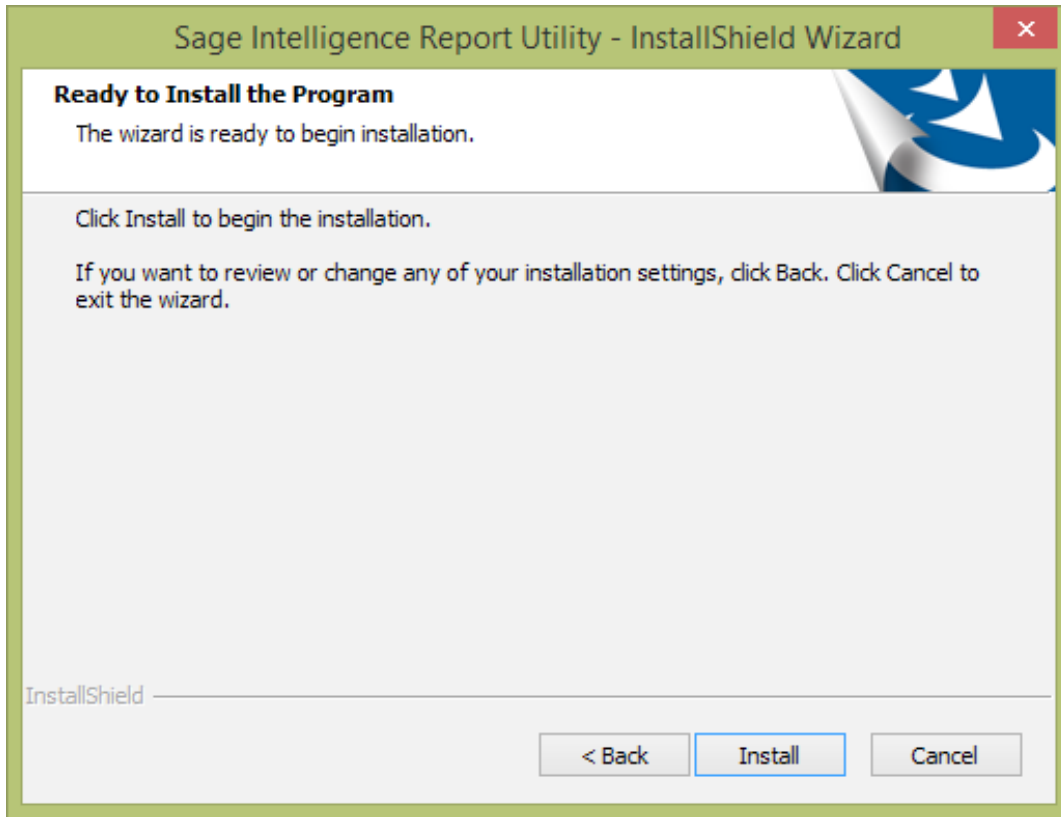
Installing the Report Utility

Run the Report Utility Installation exe. It will look for Microsoft .NET framework 4.5. Should this not be installed, it will be automatically installed before the Report Utility installer starts. It is recommended to restart your machine once this process is complete.
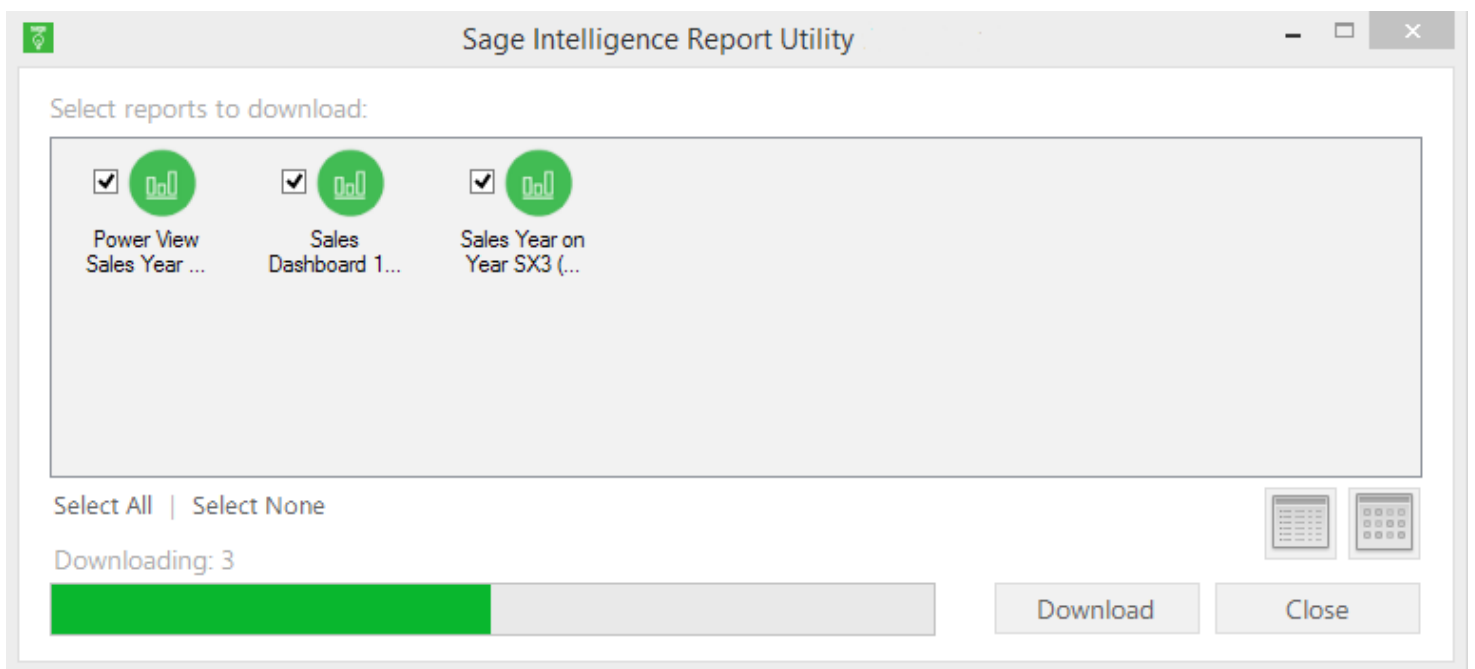
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Follow the simple installation wizard, and select **Finish**. The Report Utility window will open.
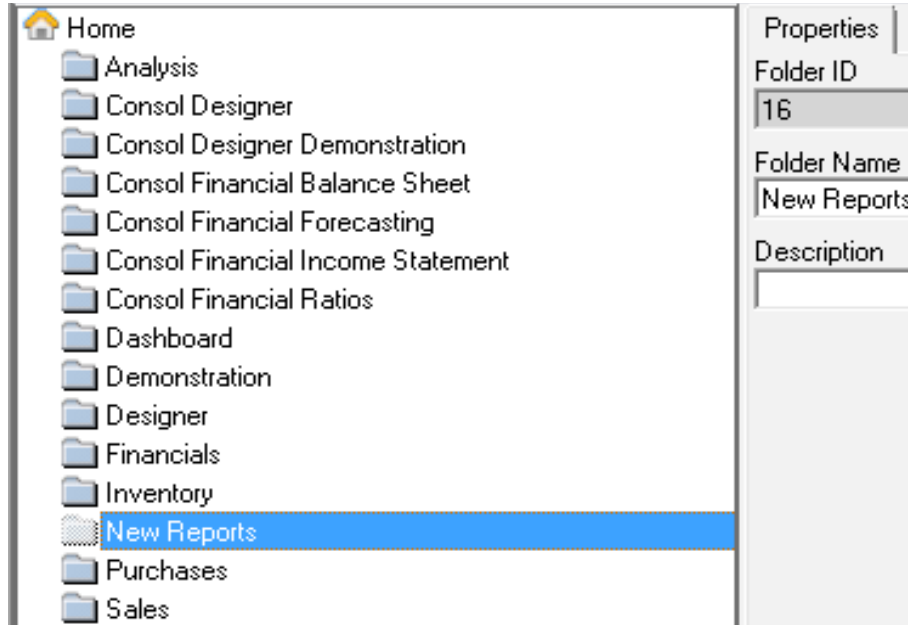

Note: At this point some Sage Intelligence integrations will require you to select the metadata repository folder to identify which reports are missing. If not, the window below will open automatically.

All available reports will appear in the Report Utility Window. Reports missing from the Report Manager will be selected. By selecting **Download** the selected reports will be automatically download and be imported into the Report Manager. The selected reports will be imported into a folder in your Report Manager called "New Reports". However, if you would like, you can also unselect all the reports to only select specific reports that you want to download.
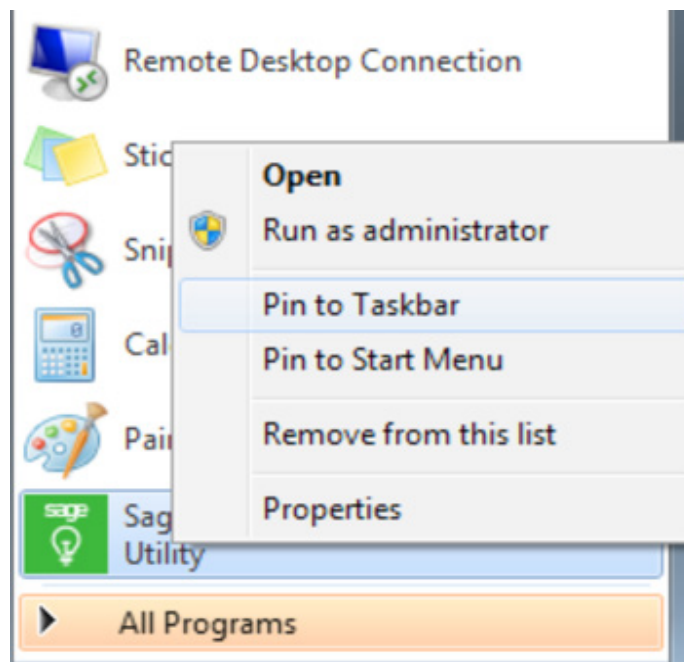
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Pinning the Sage Intelligence Report Utility

It is advisable to pin the Sage Intelligence icon to the Taskbar or Start Menu in order to quickly check for new reports:

- Go to Start All Programs.
- The Report Utility should appear in the recent menu.
- Right select on the icon and choose to pin to Taskbar or pin to Start Menu.

Note: At this point some Sage Intelligence integrations will require you select the metadata repository folder to identify which reports are missing. If not the window below will open automatically.