

sage 50 ME Edition Intelligence Reporting

Frequently asked questions

Sage 50 ME Edition Intelligence Reporting customers

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1.0 General

1.1 Can you use Sage Intelligence Reporting on a Terminal Services and Citrix environment?

Official support for Citrix and Terminal Services load balanced hosted environments is provided for integrated versions of Sage Intelligence Reporting and has been added in the form of additional configuration settings. These settings can configure Sage Intelligence Reporting to run in a mode required specifically when using Sage Intelligence Reporting within a secured load balanced hosted environment.

1.2 Can Sage Intelligence Reporting connect to any database?

Sage Intelligence Reporting is able to connect with all ODBC compliant databases.

1.3 What operating system is Sage Intelligence Reporting compatible with?

The following operating systems are supported by Sage Intelligence Reporting:

- Windows 7 (32 and 64 bit)
- Windows 8 (32 and 64 bit)
- Windows Server 2008 R2
- Windows Server 2012

1.4 Is Sage Intelligence Reporting compatible with Microsoft Office 32 and 64 bit versions?

Sage Intelligence Reporting supports both 32 and 64 bit versions of Microsoft Office.

2.0 Connector

2.1 Why would I use the Connector Module?

The Connector further simplifies day-to-day operational tasks by providing access to the information needed from multiple sources as well as the consolidation of data from multiple companies. The Connector allows for consolidation and connectivity to unlimited ODBC data sources and includes a graphical join tool to simplify database queries.

2.2 Can you add your own connection types in the Connector?

The Connector module allows reports to be created off any ODBC-compliant database for an unlimited number of companies and databases. Users are able to add a new connection type to any of the ODBC drivers.

2.3 What types of containers are available and is there an advantage to using one type of container over another in the Connector module?

Containers can be based on a database table, view, stored procedure, custom SQL query, or a custom join based on two or more tables/views in a database.

Graphical joins, existing views, and SQL joins are the preferred methods for creating containers and wherever possible these should be used. Stored procedures and SQL query containers provide less flexibility for customers creating new, or modifying existing, reports off these containers. For example; parameterization of reports built off SQL query and stored procedure containers can only be achieved using pass through variables, which is an advanced feature of Intelligence Reporting.

2.4 Why are SQL expressions is better to use than Excel formulas?

Excel formulas should be a last resort if the end result cannot be achieved through SQL expressions, as Excel formulas have a negative effect on file size and performance.

2.5 Am I able to lock containers?

Support for locking containers and expressions in the Connector has been deprecated. You are able to lock reports in the Report Manager module.

2.6 Is there a way to back up your containers?

Yes. In the Connector module, select the File tab. Select the Backup Metadata option which will ensure that the existing reports and their containers are backed up to the location specified. To specify the backup location, go to the file menu in the Connector and select the Change option. You will then be able to specify the back-up location.

2.7 Is there a limit to the number of containers in the Connector?

There is no limit to the number of containers in the Connector.

2.8 Are there any limitations or specifications in naming containers or expressions?

It is recommended to provide meaningful names for expressions and data fields, as often database fields are presented in a cryptic manner.

2.9 Can you copy SELECT statements from other reporting systems and use the same statements in the Connector?

Yes, you can copy SQL statements when using a SQL container. However, be wary that depending on how the connection has been set up you, will need to verify that these statements are valid by either check/testing the container or selecting to sample data.

3.0 Report Manager/Viewer

3.1 Is there a way to see what container a report is using?

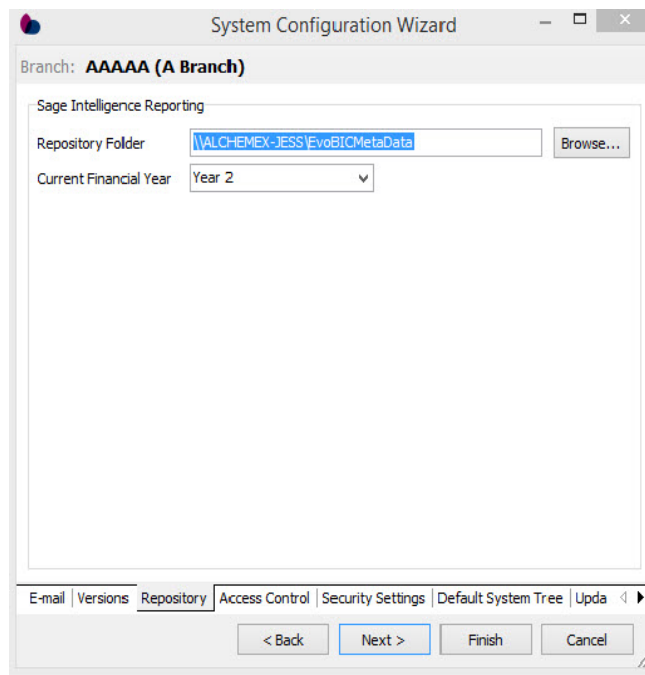
Yes. In the Report Manager, ensure that the report is not locked. Double click on the report in order to view the containers used by the selected report.

3.2 Is there a way to run all reports in a folder?

Yes. In order to run all reports in a folder, select the folder, then under the Tools tab select the option Run All Reports. This will run out all reports within the Report Manager folder selected.

3.3 Are Sage Intelligence reports automatically backed up and where are the reports backed up to?

In your business management system select the "Administration" tab, navigate to the "System Configuration Wizard" and click on the "Repository".



Select a repository folder to back up the reports too, this will ensure that the existing reports are backed up to the location specified. Click finish.

3.4 Is there a limit to the number of reports in the Report Manager or its folders?

There is no limit to the number of reports in the Report Manager or a Report Manager sub-folder.

3.5 Are there any limitations or specifications in naming reports?

Reports and template names can contain alpha numeric as well as special characters. It is recommended that you use meaningful names for reports and sub-reports.

3.6 What is a sub-query report and when would you use it?

A sub-query report is used to create a union report. A union report is a group of sub-query reports running together in a specified order, with the control to deliver all the sub-reports' data into one workbook. This is critical as it eliminates the need to manually consolidate information from multiple Excel workbooks into a single workbook. Sub-query reports are used to present data together in a single workbook that is unrelated, or comes from various data sources.

Although union reports are a series of sub-reports, they are treated as a single entity.

3.7 Is there a limit to the number of sub-reports that can be used in a union report?

There is no limit to the number of sub-reports that can be used; however, the number of sub-reports used will impact on the performance of the union report.

3.8 Can you export multiple reports from within Report Manager?

No. You must export each report individually from the Report Manager module.

3.9 Can you import multiple reports into the Report Manager?

Yes. You can make use of the Bulk Import option available in the Tools tab of the Report Manager module. The Bulk Import Tool imports all reports in the report update folder on the auto-connect connection.

3.10 Can you create custom system variables to use as filters or parameters?

Yes. To create filters and parameters based on system variables, select the report inside the Report Manager and in the properties screen, select the appropriate tab. You can then select whether to add a filter or parameter based on a defined system variable. To view system variables, select System Variables under the Tools tab in the Report Manager.

3.11 If you have not ticked the mandatory option on a parameter property, could you run a report without entering parameters?

Yes. A report will run out successfully with no parameters specified where the parameter is not mandatory.



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