

Frequently Asked Questions



1. **What is Sage 100 ERP Intelligence Reporting?**

Sage 100 ERP Intelligence Reporting helps you to easily control, automate, and analyze your data to make better informed decisions, more quickly, across your business. It consolidates data from your Sage ERP system and virtually any system, giving you a single version of the truth in Excel, helping to reduce spreadsheet chaos and improve collaboration.

2. **How has the installation and access to Intelligence Reporting changed in Sage 100 ERP 2015?**

Sage Intelligence is now an optional install during the Sage 100 ERP workstation setup, making installing Sage 100 ERP Intelligence Reporting a simpler process. Sage Intelligence is now listed on the Module Menus toolbar and Tasks tab in Sage 100 ERP 2015.

3. **How has Sage 100 ERP Intelligence Reporting been enhanced for Sage 100 ERP 2015?**

Our focus for this version of Sage 100 ERP Intelligence Reporting has been to give you more control of your financial reports. We have done this through combining the functionality of the Report Designer Layout Generator and the Report Designer Add-In and adding to its functionality so you have all the tools you need in one place to create powerful financial reports specific to your company's needs.

For more details on the Sage 100 ERP 2015 Intelligence Reporting enhancements, [click here](#).

4. **Where do I go to find out more about Sage Intelligence?**

Go to SageERPSolutions.com/Intelligence to learn how your business can make better decisions, more quickly, across your business.

5. **What versions of Sage 100 ERP does Sage Intelligence work with?**

Sage 100 ERP 4.5 and above

6. **Which version of Excel does Sage 100 ERP 2015 Intelligence support?**

Sage 100 ERP 2015 Intelligence Reporting supports Microsoft® Excel® 2007, 2010, and 2013, both 32-bit and 64-bit versions.

7. **What reports do I get with Sage Intelligence?**

Sage Intelligence ships with the following standard report templates to get you up and running immediately:

- Financial reports
 - Financial Trend Analysis
 - General Ledger Transactional Detail

- Operational reports
 - Dashboard Analysis
 - Inventory Status
 - Vendor Purchases
 - Customer Sales

8. **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 full Report Manager User License to get you started with Sage Intelligence.

9. **Will customized reports built in an older version of Sage 100 ERP Intelligence Reporting be compatible in Sage 100 ERP 2015 Intelligence Reporting?**

Yes, you are able to bring your existing reports into Sage 100 ERP 2015 Intelligence Reporting through a simple export and import process. You will notice that your Report Designer Add-In reports will have the updated task pane, once they have been imported into the Sage 100 ERP 2015 Intelligence Report Designer. Please work with your Sage business partner and let them know what existing reports you would like to bring into Sage 100 ERP 2015.

10. **Where can I get the Report Designer Add-In?**

The Report Designer Add-In is now part of the new Report Designer and has been renamed the Task Pane.

Please Note: You will require an active Report Designer site license.

11. **What is the difference between the Report Designer Add-In and the Report Designer Layout Generator?**

The new Report Designer has a fresh new user interface and has vast improvements in performance through its powerful new In-Memory technology, giving you a quick and responsive experience when designing reports in the familiar interface of Microsoft® Excel®.

The new Report Designer gives you two methods to create your financial reports depending on your Excel knowledge.

If you're still getting used to Excel, the Layout Generator is easy to use and automates the design and generation of simple financial report layouts quickly and accurately within Excel. The Layout Generator provides you with a set of standard financial layouts to get you up and running immediately, and these can then be edited to suit your unique requirements. The Layout Generator user interface and performance has been enhanced, greatly improving your user experience. The generated layouts have also been given a cleaner look and feel and are now easier to customize using the Task Pane once your layout is created.

If you're more familiar with Excel, the new Task Pane (previously the Report Designer Add-In) greatly enhances your Excel reporting experience, by providing instant and dynamic access to data within the General Ledger. You can simply drag in data lists, formulas, or Reporting Trees from the Task Pane on the right-hand side of the Excel window, and the In-Memory technology will update results instantaneously. You can also 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.

Please Note: You will require an active Report Designer site license.

12. 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, Sage Intelligence is now able to report on larger data volumes, greatly enhancing the performance of your financial reporting.

13. What is the Sage ERP Intelligence Reporting Subscription Bundle?

The Sage ERP Intelligence Reporting Subscription Bundle is a new way to purchase Sage Intelligence and 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:

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

Customers that have already purchased Sage Intelligence cannot switch to the Sage ERP Intelligence Reporting Bundle. Sage Intelligence is available to be purchased through individual users and modules outside of the Sage ERP Intelligence Reporting Bundle.

14. Do I have to purchase the subscription bundle, or can I purchase licenses individually?

Sage ERP Intelligence Reporting can still be licensed through individual users and modules. If you have already purchased Sage ERP Intelligence Reporting, you cannot switch to the subscription bundle.

15. What is the Sage ERP Intelligence Reporting profitability dashboard?

The Sage ERP Intelligence Reporting Profitability Dashboard enables Sage 100 ERP users to quickly identify the profitability of customers, products, and salespersons based on weekly, monthly, quarterly, or annual segments. The Sage ERP Intelligence Reporting Profitability Dashboard allows companies to:

- Meet customer demand by identifying and focusing on high-volume products.
- Quickly identify top performing salespeople.
- Make decisions quicker using meaningful graphics.

16. What are the differences between the two versions of the profitability dashboard?

The biggest difference between the two versions of the profitability dashboard is the compatibility with Microsoft Excel 2013. The Excel 2007 and 2010 version are compatible with Sage 100 ERP versions that support Excel 2007 and/or Excel 2010. The Excel 2013 version is compatible with Sage 100 ERP 2013 and 2014. The Excel 2013 version does have additional functionality that utilizes Excel's built-in capabilities, such as mapping, bubble timelines, and data selection features.

17. Where can I get the profitability dashboard?

The profitability dashboard can be downloaded in the [Sage Support website](#) under the Intelligence Reporting download page for Sage 100 ERP. You will need to import the report into Sage Intelligence after you download the report. Please reach out to your Sage business partner, or if you choose Sage to help with the installation of Sage Intelligence, Sage will import the dashboard as part of the installation of Sage Intelligence. Please note that Sage support does not assist with importing reports into Sage Intelligence.

Sage 100 ERP 2014 Intelligence Reporting

Frequently asked questions



18. Do I get access to the Sage Intelligence profitability dashboard?

The Sage Intelligence profitability dashboard is available as a report to import into Sage Intelligence. Customers that have purchased additional Sage Intelligence licenses and are current on their Sage Business Care or on the monthly Sage Intelligence bundle can access this report.

19. How do I get additional training on Sage Intelligence?

To get you started with Sage Intelligence, there are a range of how-to videos, webcast and other resources available on [Sage University](#). Additional resources can be found [YouTube](#) under the Sage Intelligence user channel as well as the [Sage 100 ERP Intelligence Reporting Group](#) on the Sage Intelligence Community.

For more info, visit: NA.Sage.com