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# Sage 100 Tip:

Sage Intelligence Report Distribution in Sage 100

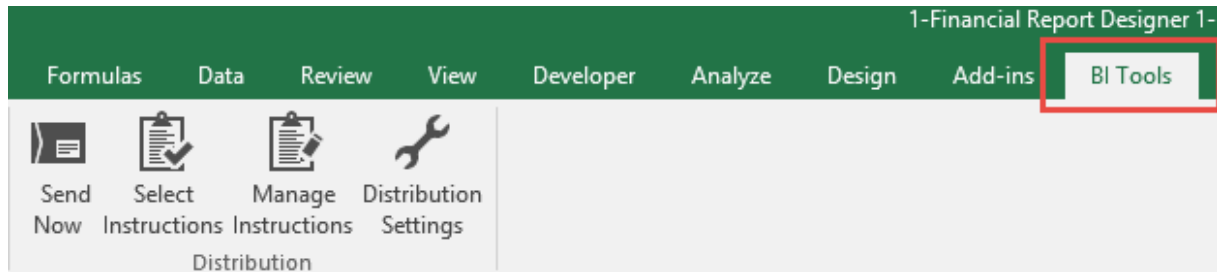
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## Sage Intelligence Report Distribution in Sage 100

Sally has finished developing Sage Intelligence reports for her boss, Sue, and she really liked what Sally was showing her and asked her to send the reports to others on her team and upper management. Sally had never thought of needing to share her analysis with others and needed an efficient way to distribute the reports. Now what?

Well, fortunately for Sally, Sage Intelligence has features that efficiently and securely share Sage Intelligence reports directly from the file that is being shared.



Four simple steps to setup and use the distribution features of Sage Intelligence:

1. Distribution Settings
2. Manage Instructions
3. Select Instructions
4. Send Now

Let's take a look at each of these steps in more detail.

## Distribution Settings

Clicking on the Distribution Settings will launch the screen below.

Please select one of the following options for sending email and enter the required settings below:

Use My Outlook Profile

Email settings will be retrieved from the current outlook profile.

Use SMTP / Exchange Server

**User Information**

Your name:

Email address:

**Server Information**

Outgoing mail server:

Use SSL:  Port number:

**Logon Information**

User name:

Password:

OK Cancel

There are two options available:

### 1. Use My Outlook Profile

This option requires Outlook to be open at the time of distribution.

### 2. Use SMTP/Exchange Server

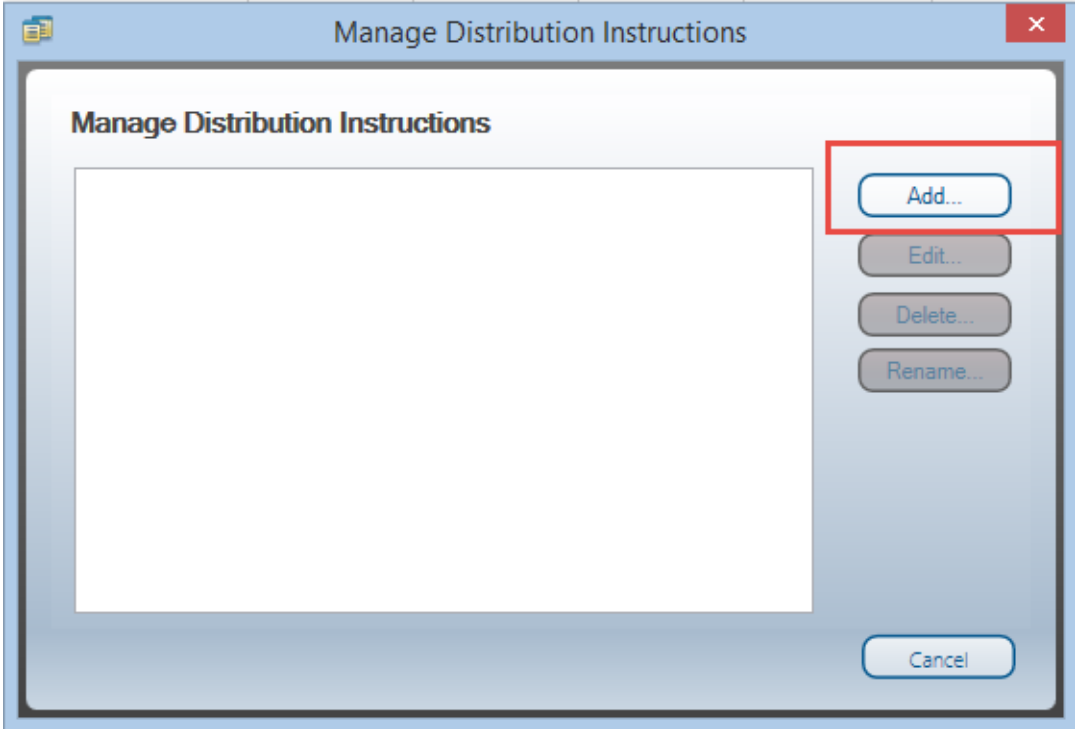
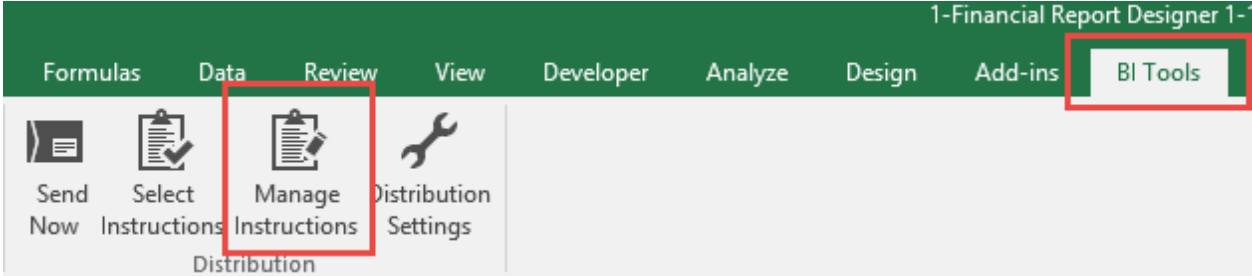
This option is recommended for unattended distribution. These details will need to be obtained from the network administrator if not known.

This is only needs to set up once.

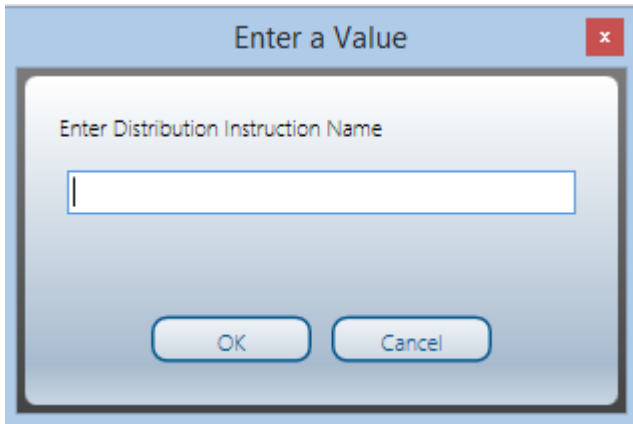
# Manage Instructions

Setting up Instructions allows the right people to get the report in the correct format. Multiple Instructions may be set up depending on reporting needs.

Click on the Manage Instructions from the BI Tools Tab.



To set up a new set of Distribution Instructions, click the Add... button.

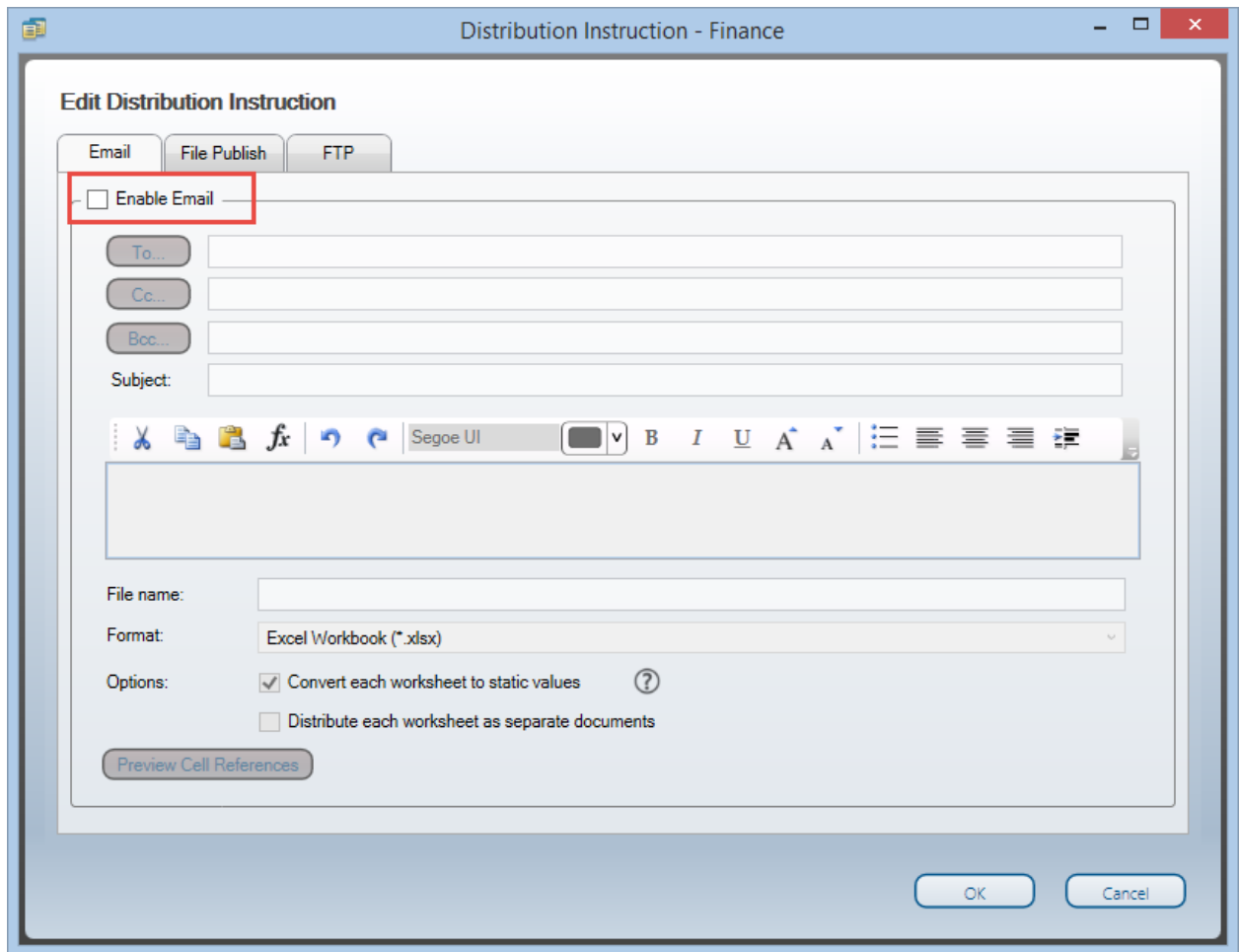


The screenshot shows a dialog box titled "Enter a Value" with a close button (X) in the top right corner. Inside the dialog, there is a text prompt "Enter Distribution Instruction Name" above a single-line text input field. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Enter the Instruction Name and click OK.

Select the method of distribution **Email**, **File Publish** and **FTP**.

Check the Enable box to select one or all of the distribution types.



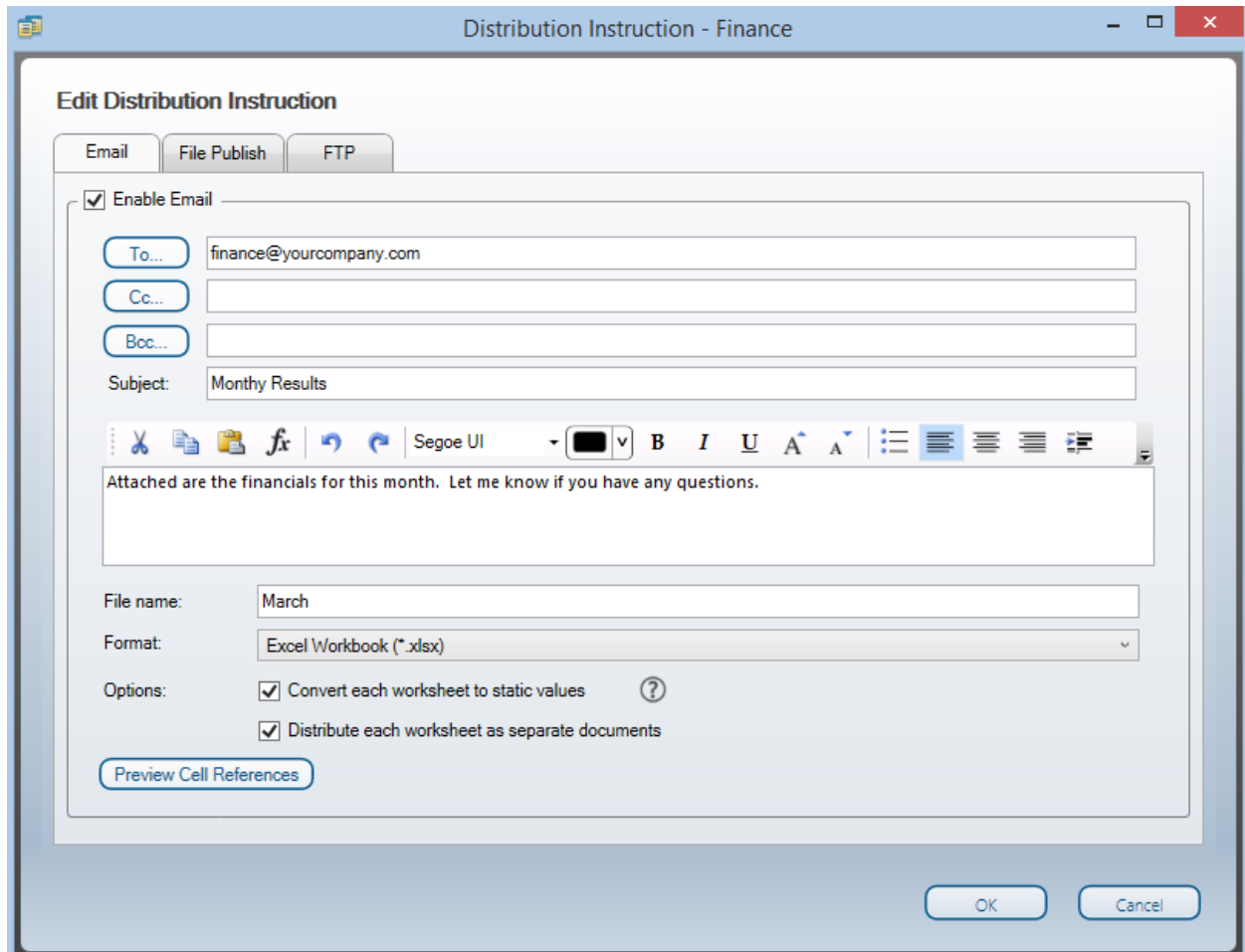
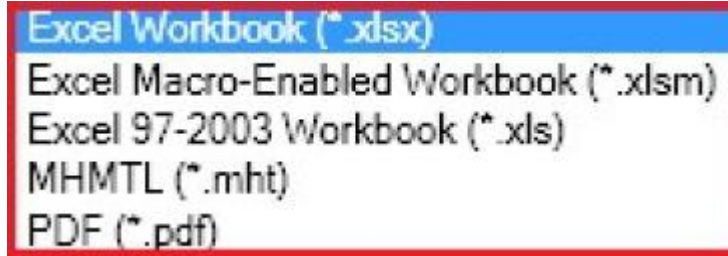
The screenshot shows a dialog box titled "Distribution Instruction - Finance" with a close button (X) in the top right corner. The main area is titled "Edit Distribution Instruction" and contains three tabs: "Email", "File Publish", and "FTP". The "Email" tab is selected and highlighted with a red box. Below the tabs, there is a checkbox labeled "Enable Email" which is currently unchecked. Underneath the checkbox are three input fields for "To...", "Cc...", and "Bcc...", each with a corresponding button to the left. Below these is a "Subject:" label followed by an input field. A rich text editor toolbar is visible, featuring icons for cut, copy, paste, undo, redo, font color, bold, italic, underline, text color, and list creation. Below the toolbar is a large text area. At the bottom of the dialog, there are fields for "File name:", "Format:" (set to "Excel Workbook (\*.xlsx)"), and "Options:" which includes two checkboxes: "Convert each worksheet to static values" (checked) and "Distribute each worksheet as separate documents" (unchecked). A "Preview Cell References" button is located below the options. At the very bottom of the dialog, there are "OK" and "Cancel" buttons.

## Email Distribution Instruction

Fill out the Email basics (To, Cc, Bcc, Subject and applicable messages) the same as a regular Email.

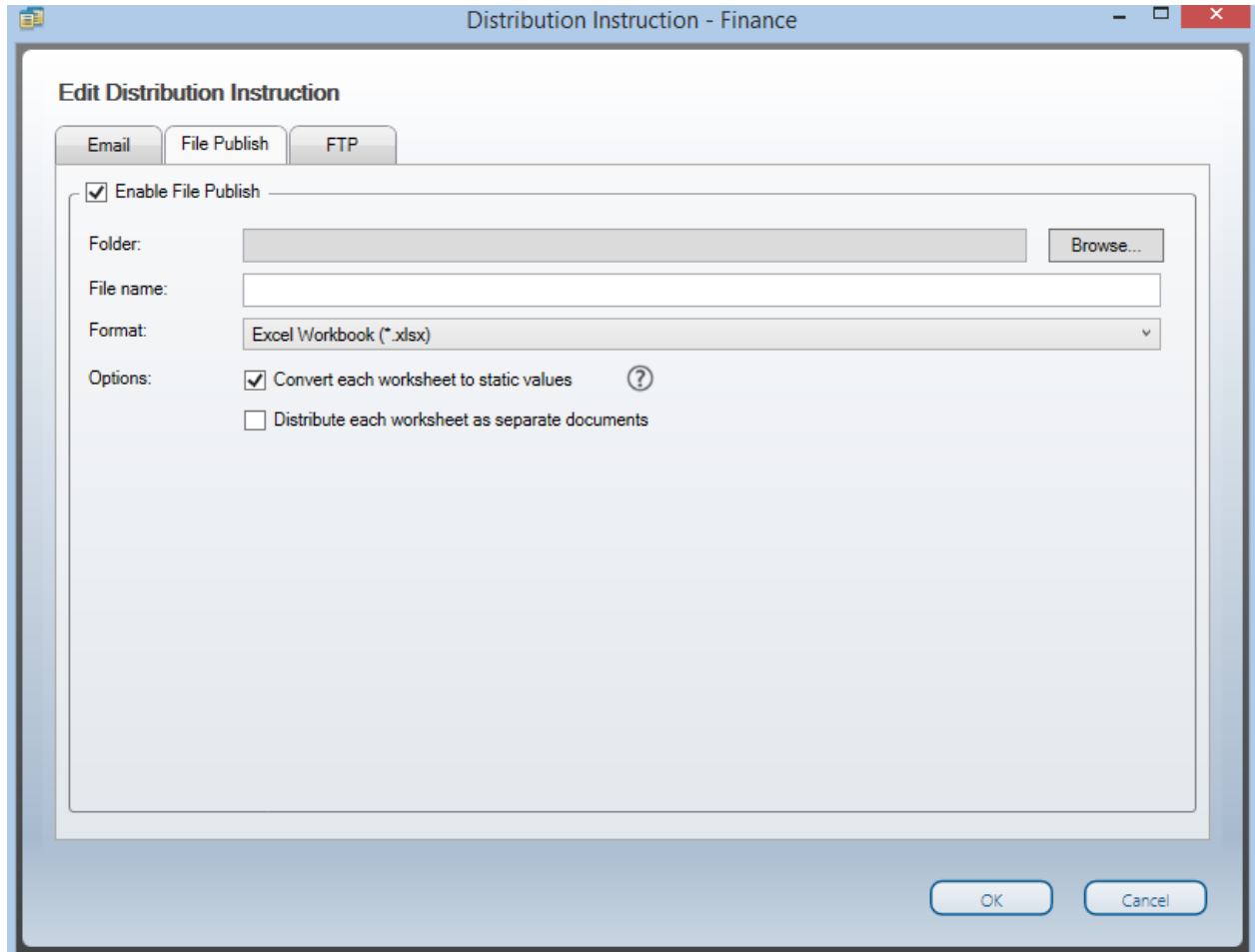
Give the file that will be distributed in File Name:

- The important part is to select the correct format for the file.



## Add File Publish Instruction

To save a report to a specific location for users to access, then enable the File Publish Instructions and select the file location and type.

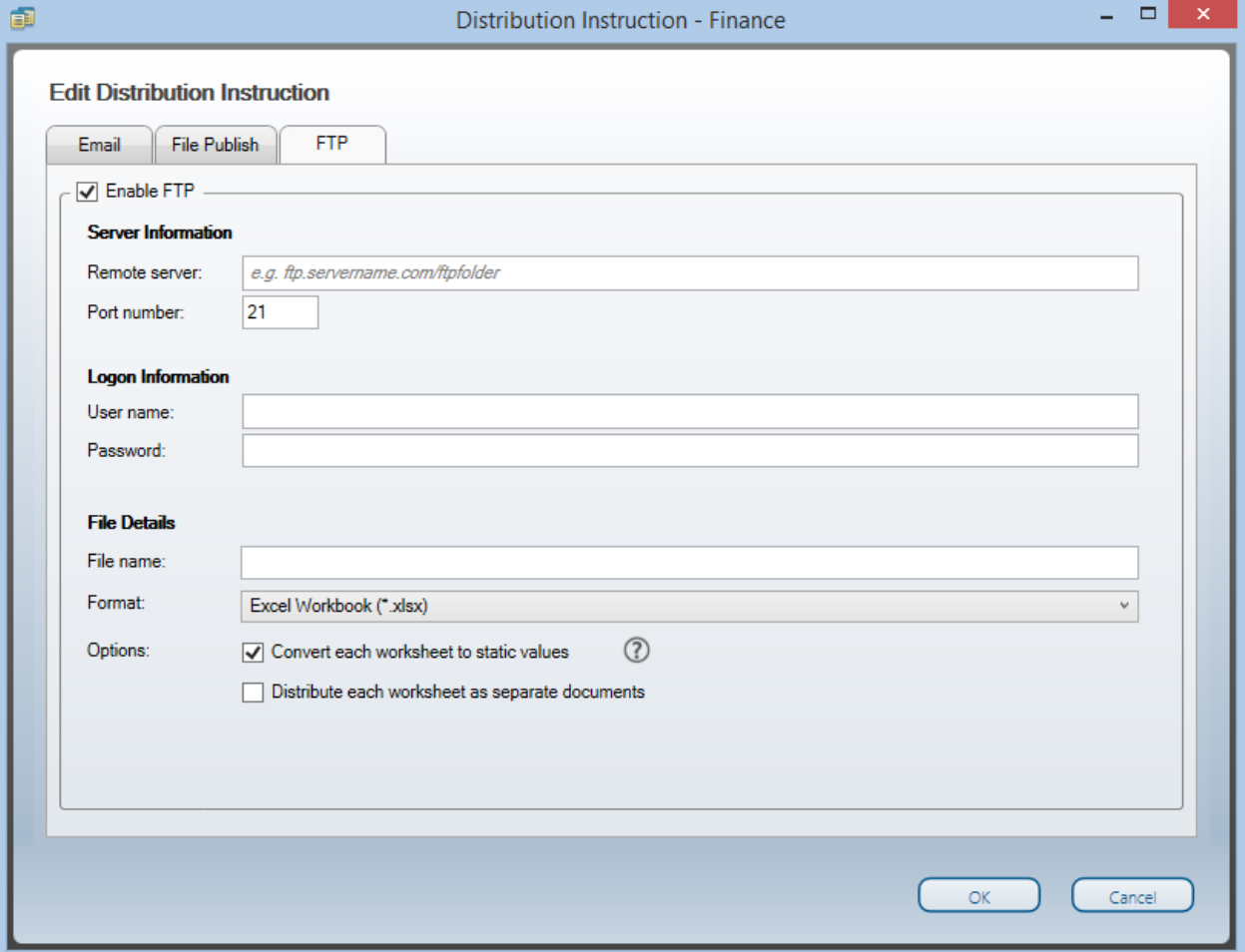


Click OK to accept.

## Add FTP Instruction

To distribute a report to a specified FTP location, enable this option.

Again, you will need to work with your IT department for proper setup.



The screenshot shows a dialog box titled "Distribution Instruction - Finance" with a sub-header "Edit Distribution Instruction". It features three tabs: "Email", "File Publish", and "FTP", with the "FTP" tab selected. The "Enable FTP" checkbox is checked. Below this, the "Server Information" section includes a "Remote server" field with the placeholder text "e.g. ftp.servername.com/ftpfolder" and a "Port number" field containing "21". The "Logon Information" section has "User name" and "Password" fields. The "File Details" section includes a "File name" field, a "Format" dropdown menu set to "Excel Workbook (\*.xlsx)", and "Options" with two checkboxes: "Convert each worksheet to static values" (checked) and "Distribute each worksheet as separate documents" (unchecked). A help icon (?) is next to the first option. "OK" and "Cancel" buttons are at the bottom right.

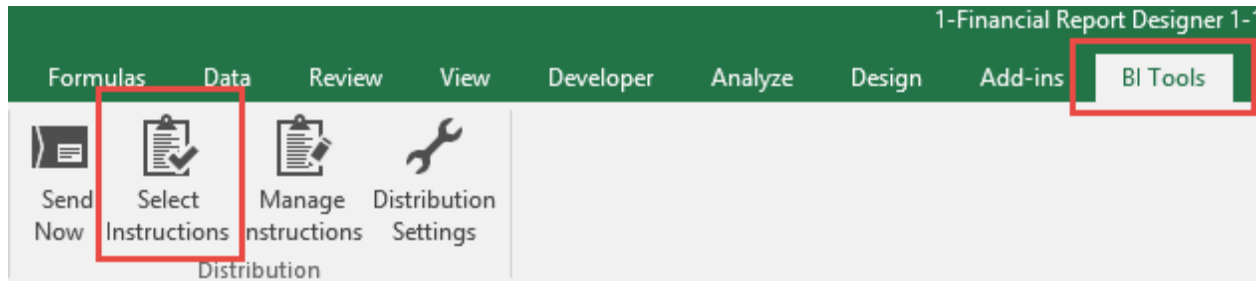
Click OK to accept.



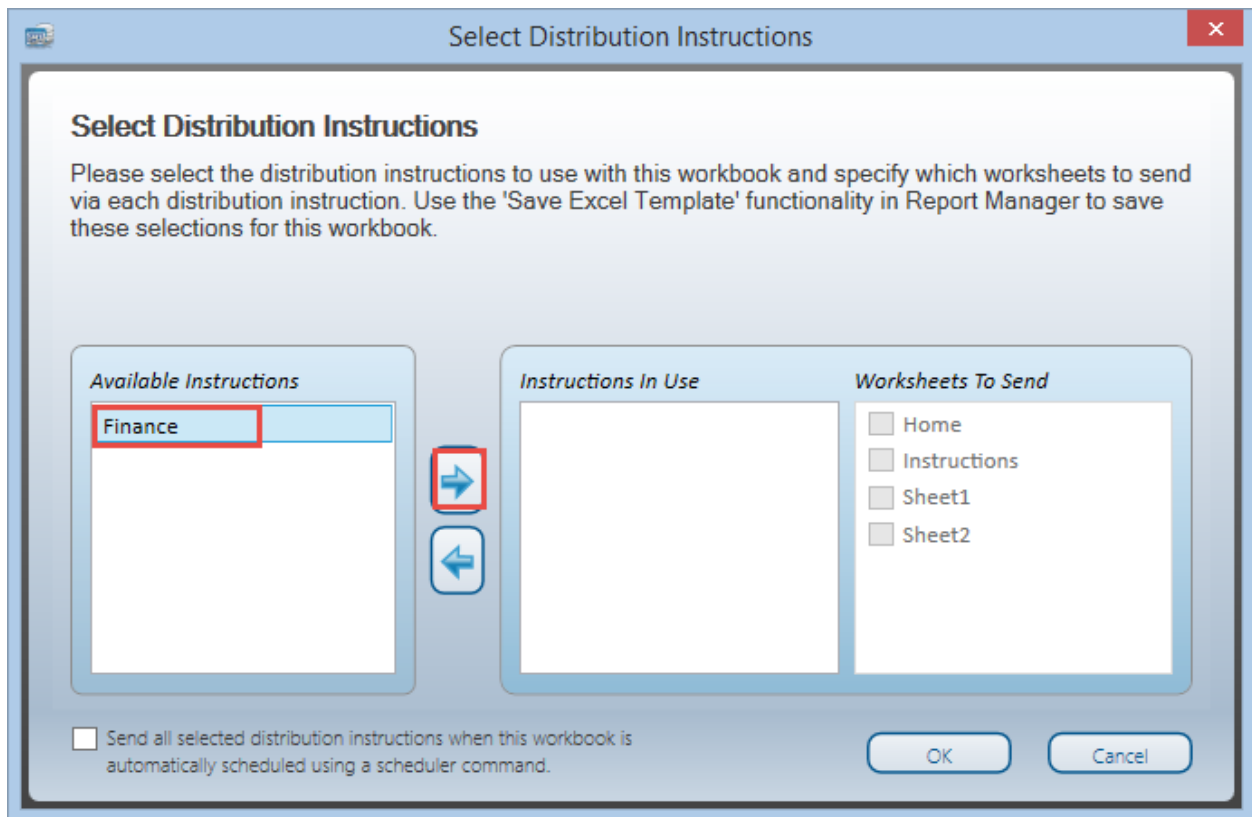
## Select Instructions

Now that the Distribution Instructions have been setup, they need to be selected by the specific report to be utilized.

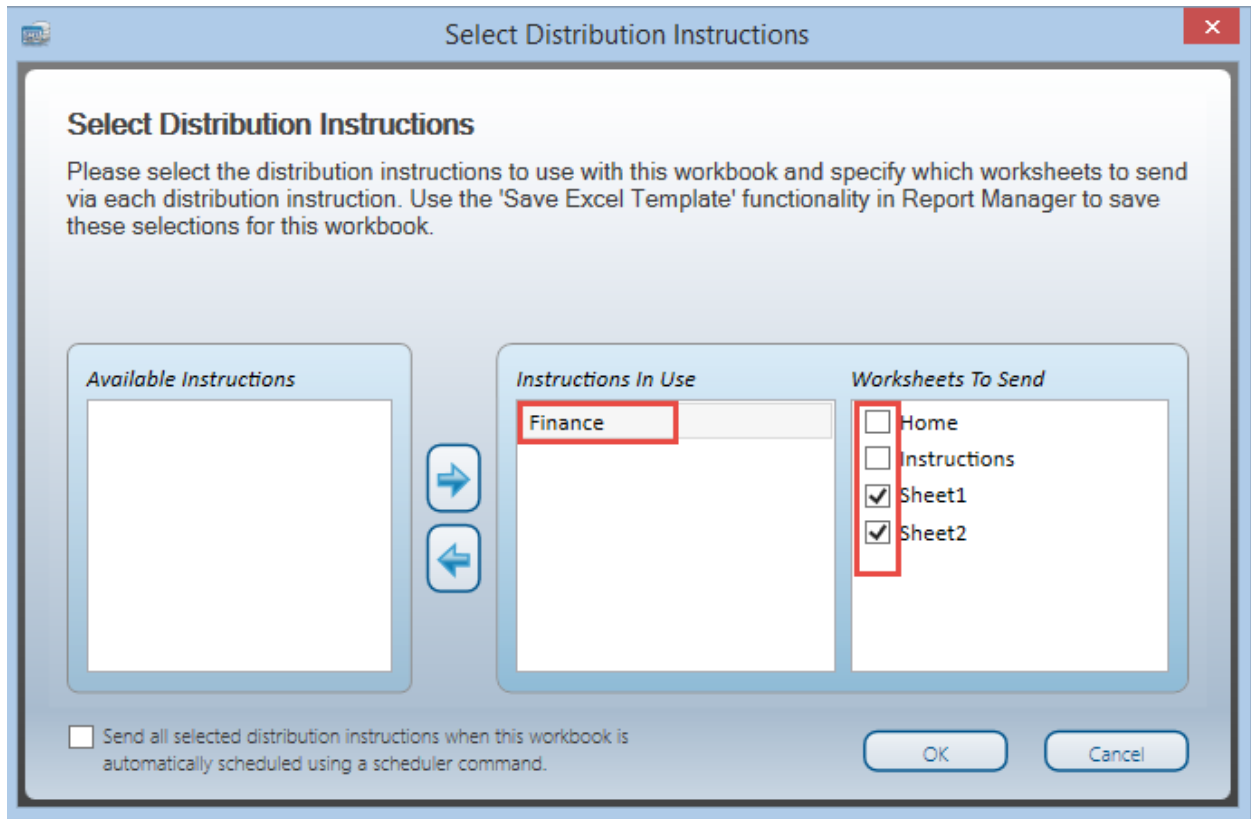
Select the Select Instruction from the BI Tools tab.



To activate and select the instructions to use on this file, highlight and click the arrow.



Select the worksheets that are to be included in this distribution instruction.

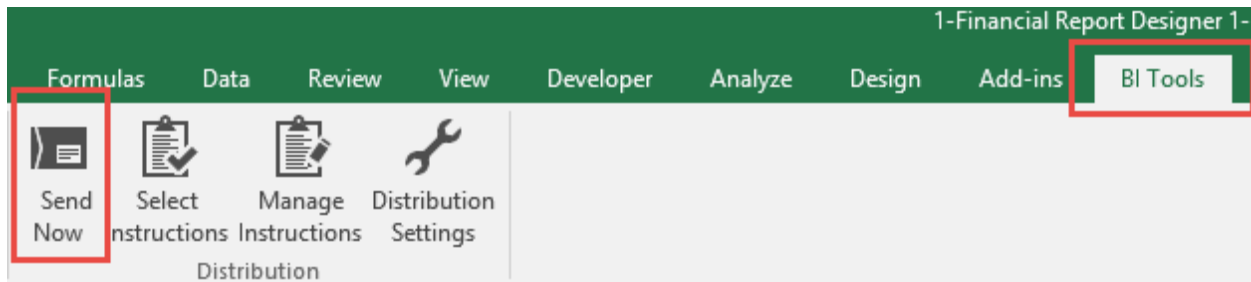


If there are multiple instructions, repeat the process of selecting available instructions.

Click OK to accept.

### Send Now

Once the Select Instructions step is complete, clicking on the **Send Now** will execute the selected Distribution Instructions.



Sally was able to distribute her reports by walking through the Distribution tools that come with Sage Intelligence.