Sage 100 Tip:

Sage Intelligence Report Distribution in Sage 100

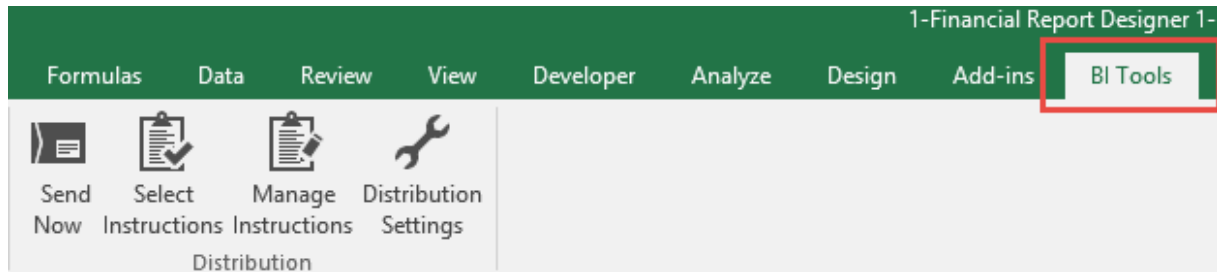## DWD
TECHNOLOGY GROUP

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.

There are two options available:

1. **Use My Outlook Profile**

   This option requires Outlook to be open at the time of distribution.
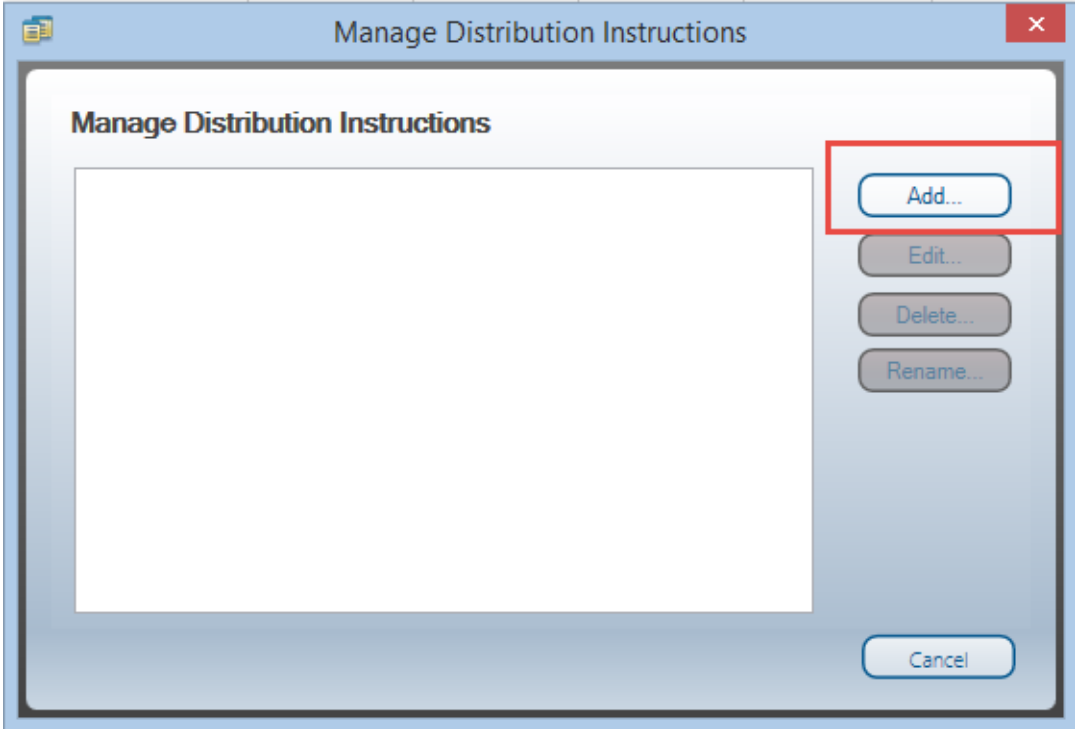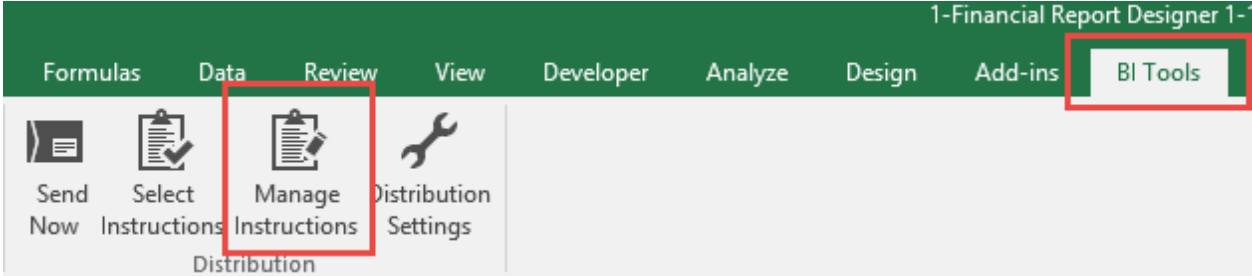
2. **Use SMTP/Exchange Server**

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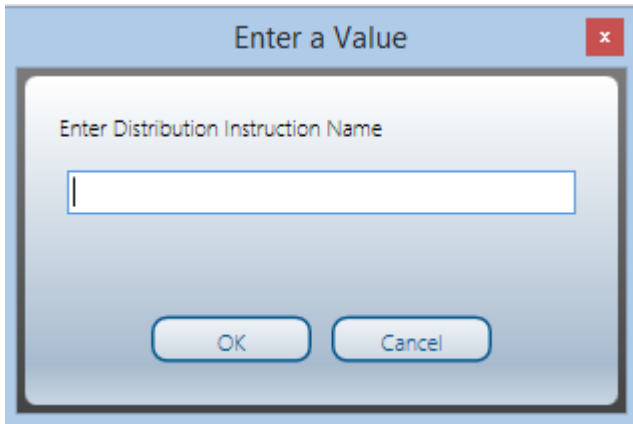
This is only needs to set up once.

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.

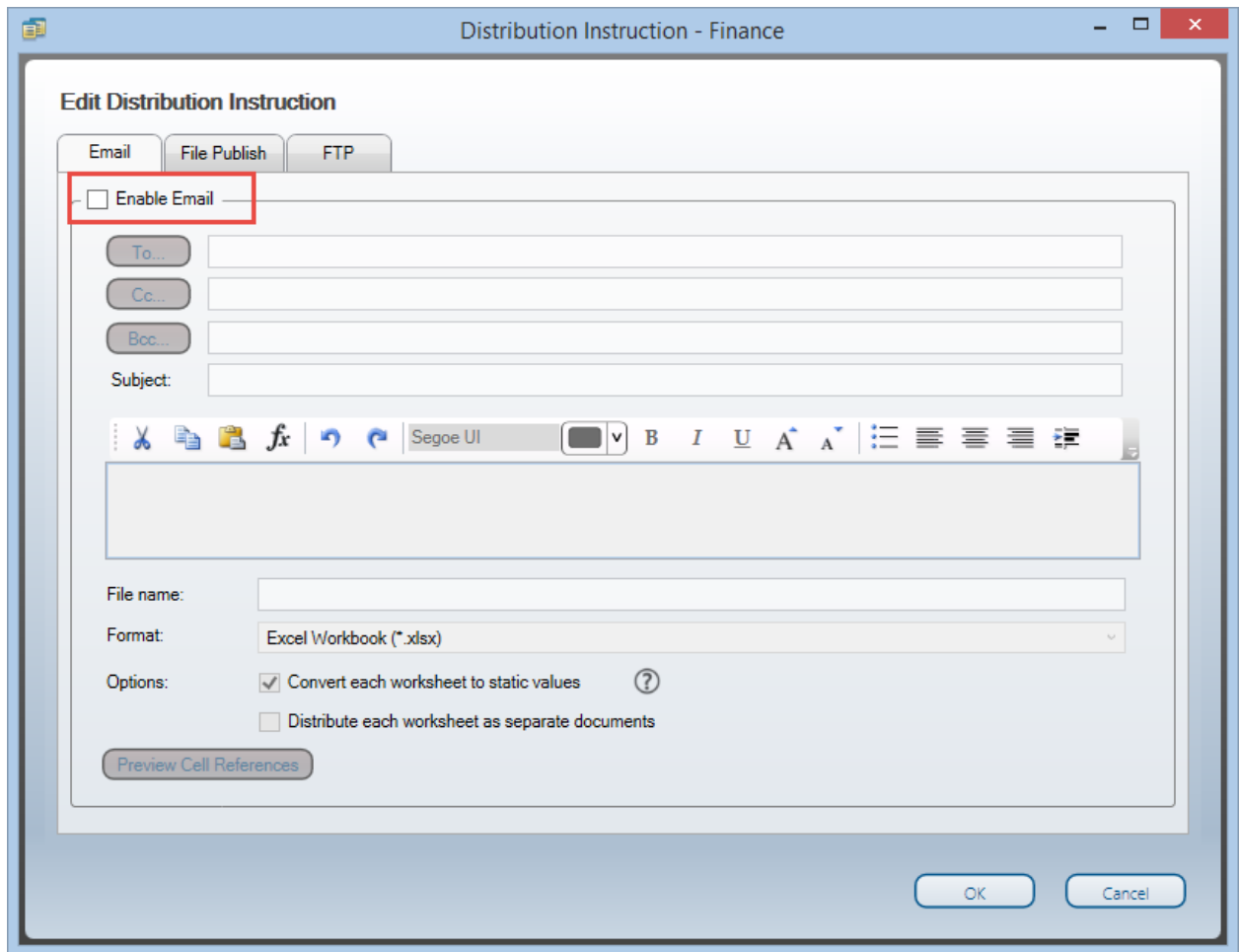To set up a new set of Distribution Instructions, click the Add… button.

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.
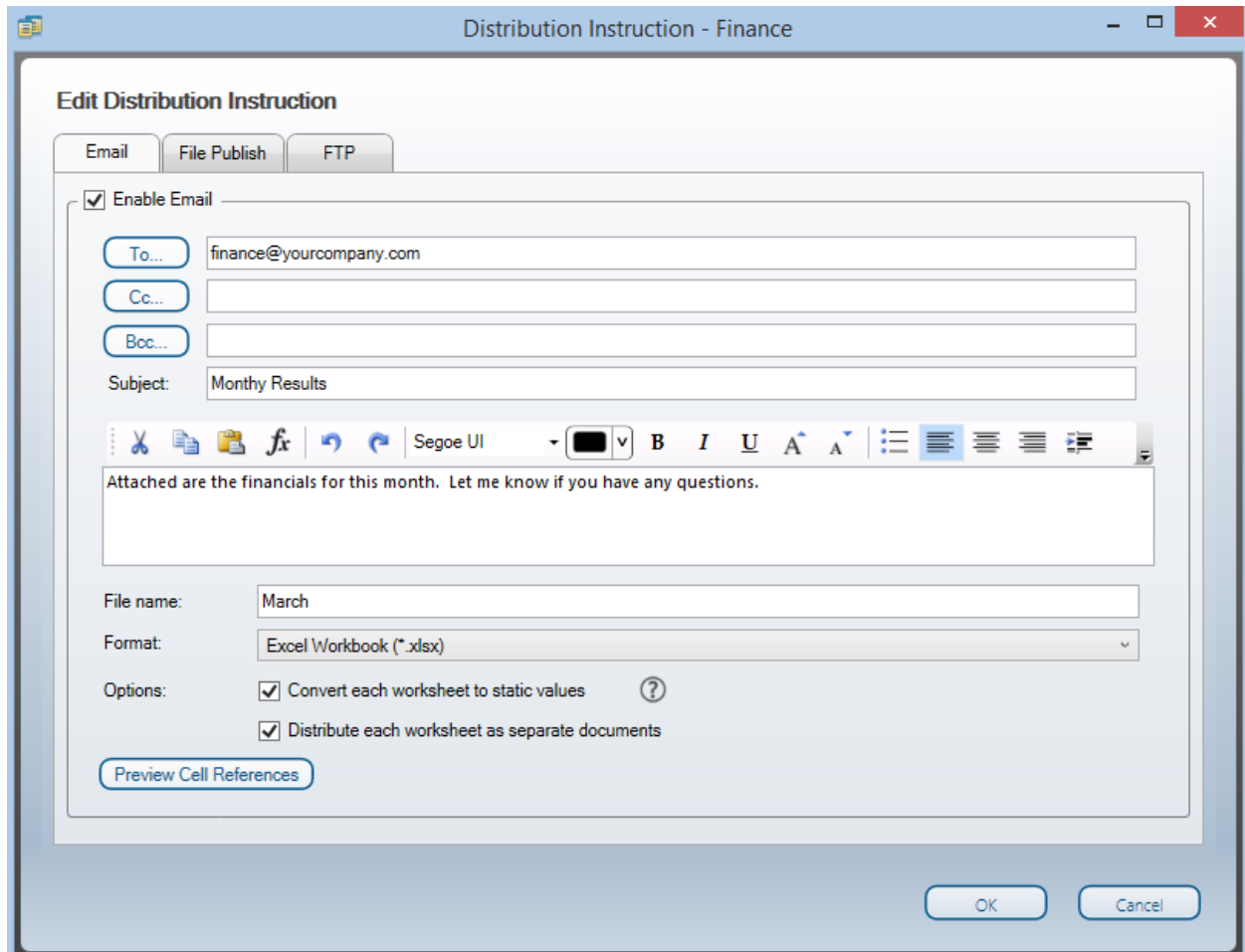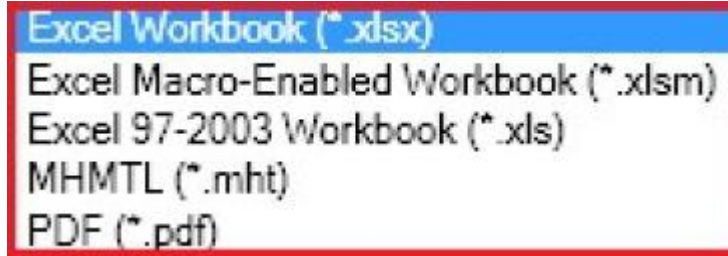
Email Distribution Instruction

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

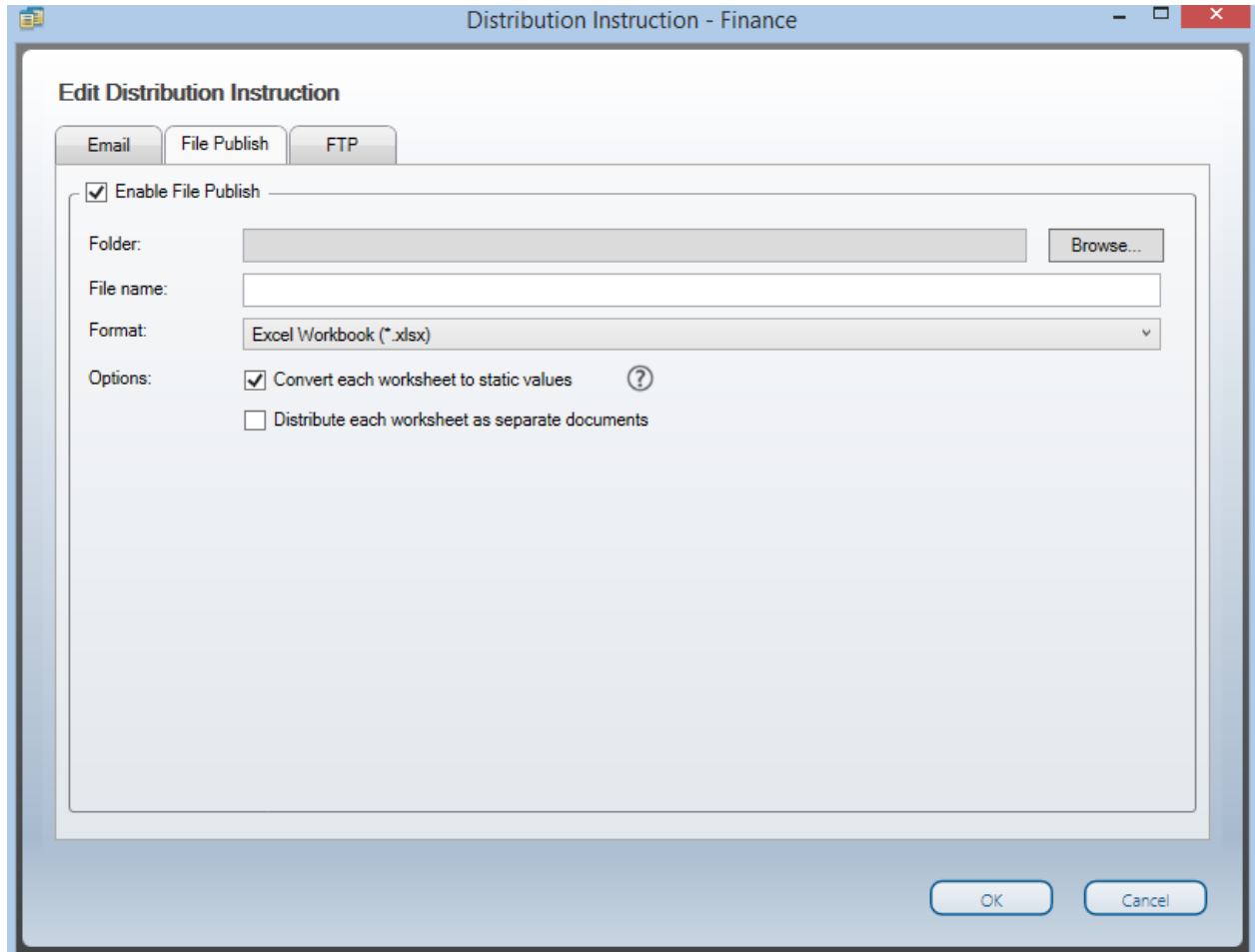Give the file that will be distributed in File Name:

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

Excel Workbook (*.xlsx)
Excel Macro-Enabled Workbook (*.xlsm)
Excel 97-2003 Workbook (*.xls)
MHMTL (*.mht)
PDF (*.pdf)

Distribution Instruction - Finance

Edit Distribution Instruction

| Email | File Publish | FTP |

☑ Enable Email

To...   finance@yourcompany.com

Cc...

Bcc...

Subject: Monthy Results

Segoe UI   B I U A A

Attached are the financials for this month. Let me know if you have any questions.

File name: March

Format: Excel Workbook (*.xlsx)

Options: ☑ Convert each worksheet to static values   ?
           ☑ Distribute each worksheet as separate documents

Preview Cell References

OK   Cancel

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.
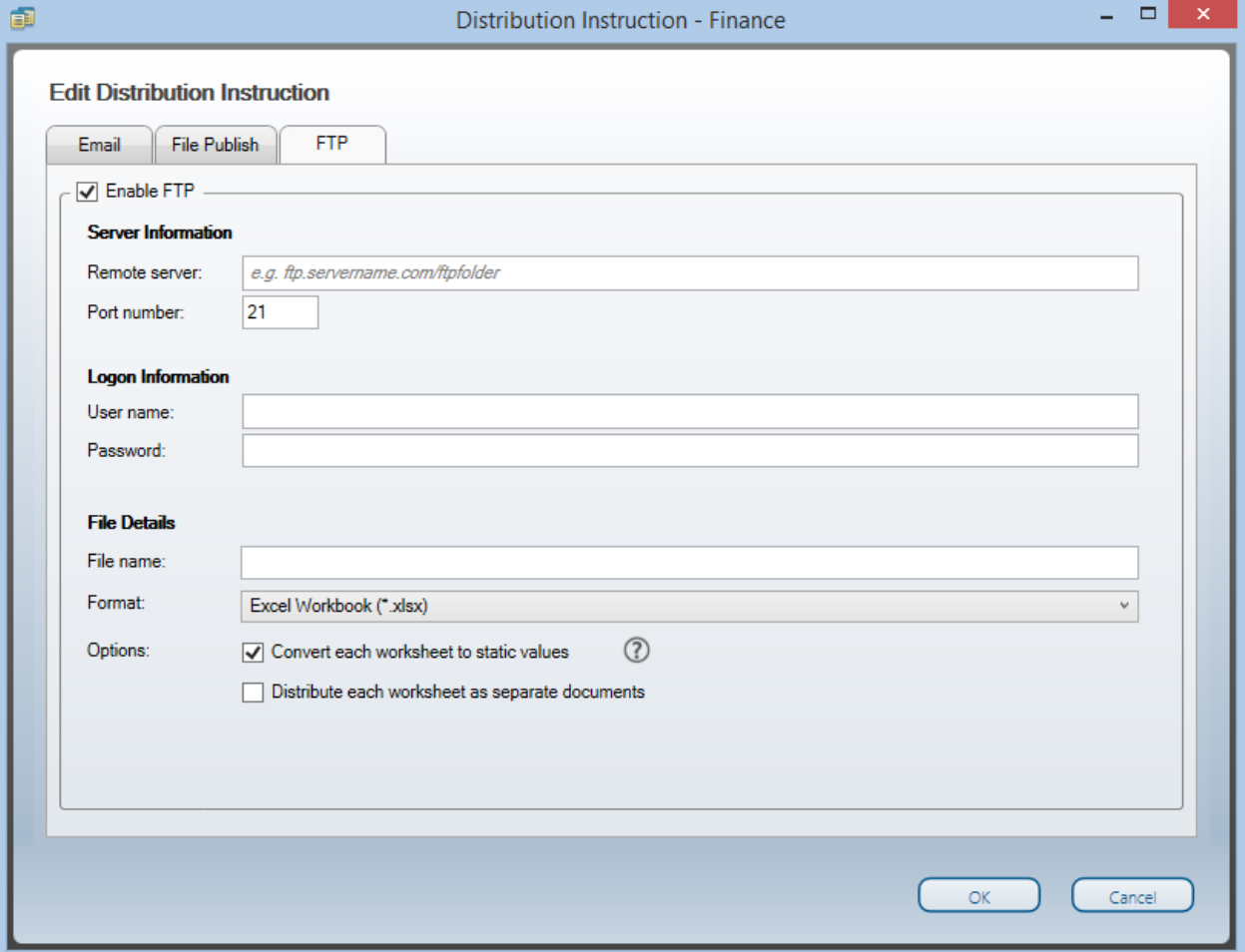

Click OK to accept.

Add FTP Instruction

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

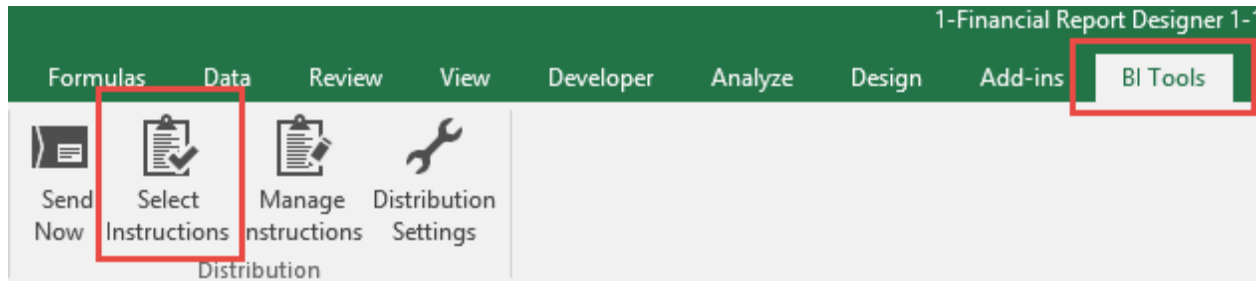Again, you will need to work with your IT department for proper setup.
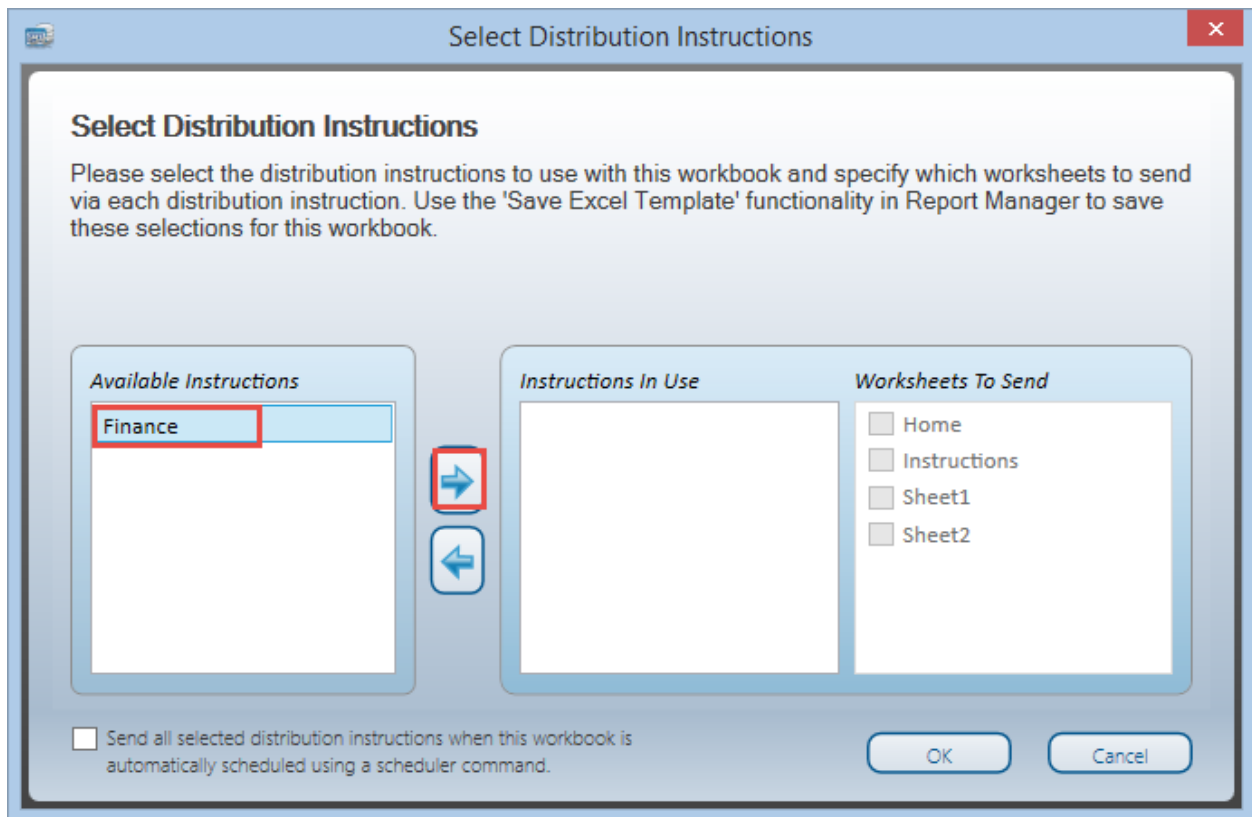

Click OK to accept.

Select Instructions

Now that the Distribution Instructions have been setup, they need to be selected by the specific report to be utilized.
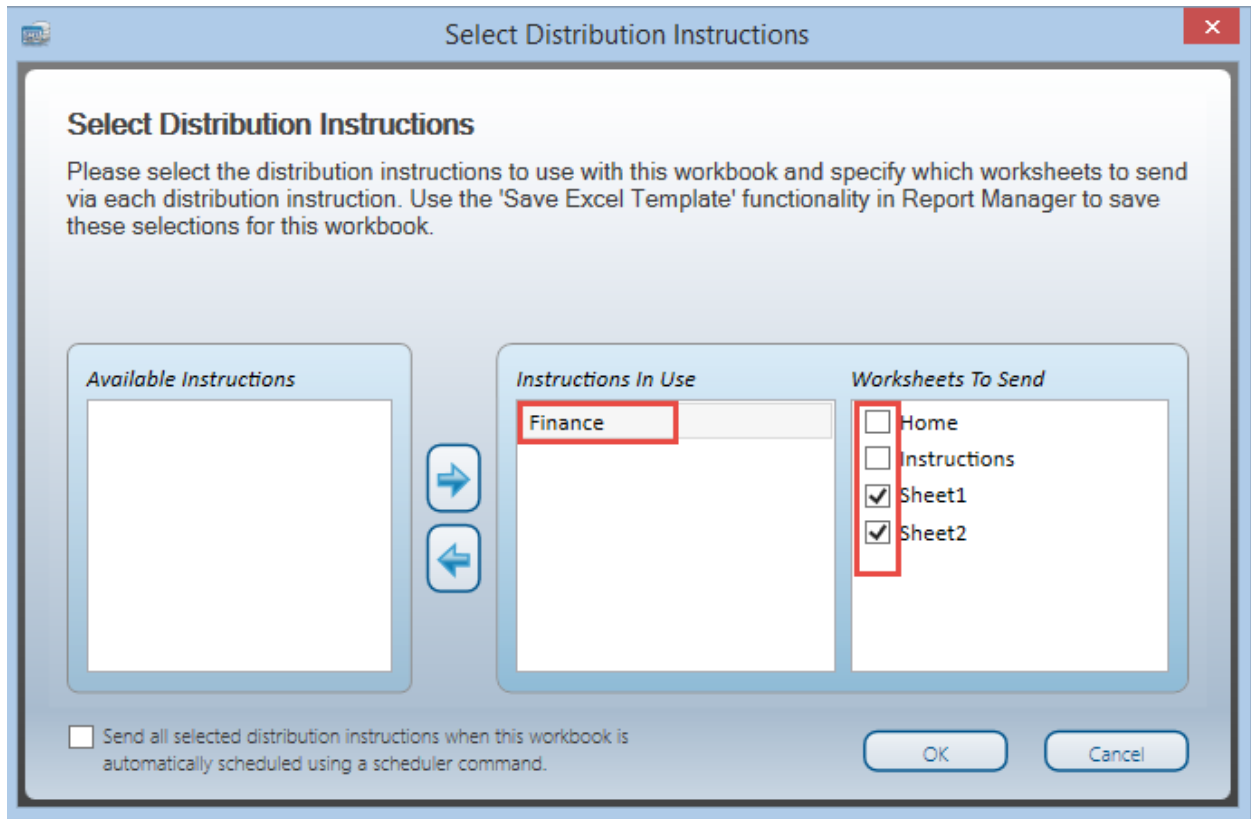
Select the Select Instruction from the BI Tools tab.

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

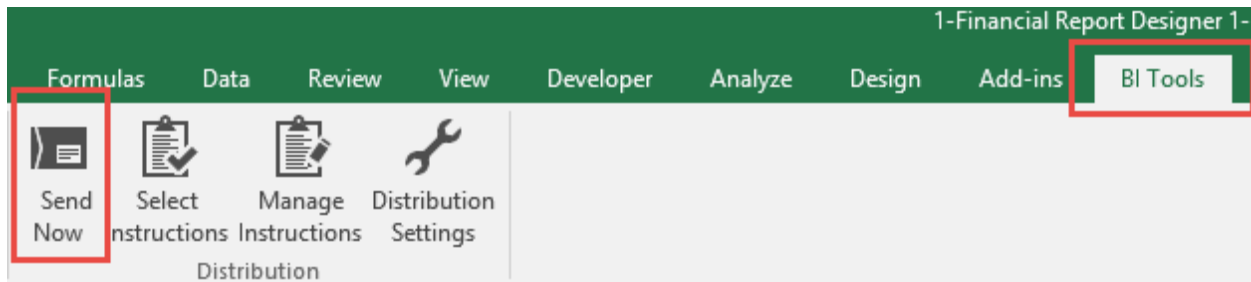Select the worksheets that are to be included in this distribution instruction.

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.