Sage Intelligence Tips and Tricks Vol. 1 2012

sage

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Sage Intelligence: Copying, Pasting and Renaming Reports

You can copy and paste a report, at any stage, in the Report Manager. These functions are useful in Sage Intelligence because all the Master reports are locked and you need to make a copy of these master reports. Use the copy, paste, and renaming methods to create new reports from an existing report and therefore not corrupt the master report.

Method

To create a new report from an existing report

1.   Launch Sage Intelligence Report Manager.

2.   Right-click on the report you want to make a copy of; e.g. Sales Analysis

3.   Select Copy, to copy that report to the Clipboard.

OR

4.   Click on the Copy icon in the menu bar.
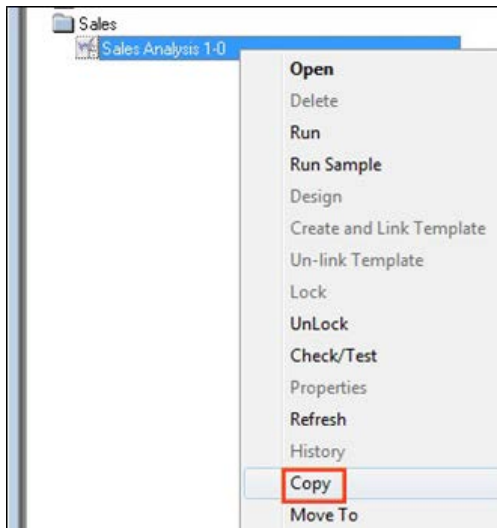
5.   Now paste the copied report into a folder.

6.   Select a folder. You can choose the same folder that contains the original report or a different folder.

7.   Right-click on the selected folder and select Paste.

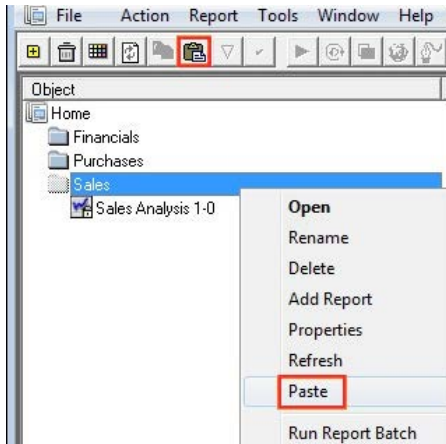8.   Rename the newly copied report. By default, the report's name is Copy of <report name>.

Note: You can use the short-cut keys, Ctrl+C to copy the report, and Ctrl+V to paste instead of using the menus.
Right-click on the report and select Rename to give the report a different name. You now have an exact duplicate of the original report that will obtain its data from the same place, and deliver it in the same format, until you make any changes to this new report.

Sage Intelligence: Creating and Linking a Report

It is entirely possible to customize the look and layout of the Sage Intelligence Standard Reports. Although these reports are designed to encompass the needs of most business organizations, you may want to change the appearance (colors, text style, etc.) to reflect your company image, and perhaps change the order or inclusion of columns to suit your company processes. These changes can be saved for the next time you run the report. Creating Microsoft Excel templates enables the user to create a template from an open Microsoft Excel workbook and link it to an existing report so as to standardize the output format of the chosen report for every run instance in future.

Note: If you are unsure of making changes to any of the Standard Reports, you should create a copy of the report before you make any changes. Sage Intelligence users must make a copy of a report in order to edit the standard reports.

Method

To copy a report

1.   Open the Sage Intelligence Report Manager.

2.   Right-click the report you want to copy, select **Copy**.

3.   Right-click on the report folder in which you want to paste the copy, select **Paste**. The copy of the report is renamed as Copy of and the original report name.

To create and link the report

1.   Open the Sage Intelligence Report Manager.

2.   Select and run the report you want to customize.
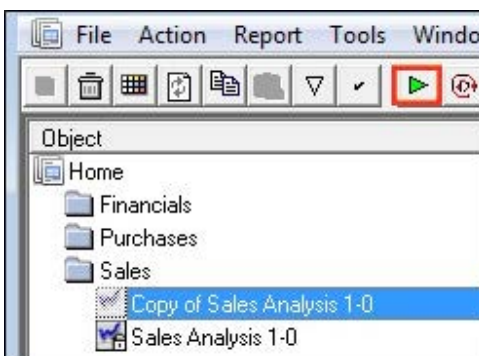
Make the changes to the report; ensure that Sheet1 (where Sage Intelligence puts the Raw Data) and Sheet2 (where Sage Intelligence puts the report parameters) are unchanged.

4.   After completing the changes, leave the workbook open and go back to the Report Manager.

5.   Right-click on the report for which the changes were made and select Create and Link Template.
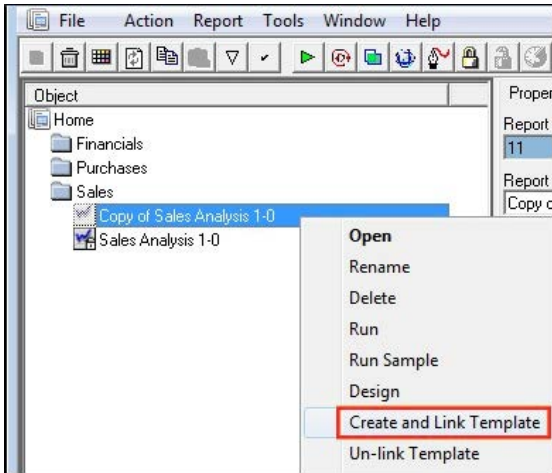
6.   Select the Microsoft Excel workbook with the changes in the window that appears. Please note that all Microsoft Excel workbooks that you have open will be listed in the pop up window, so make sure you select the correct Microsoft Excel workbook to create and link.
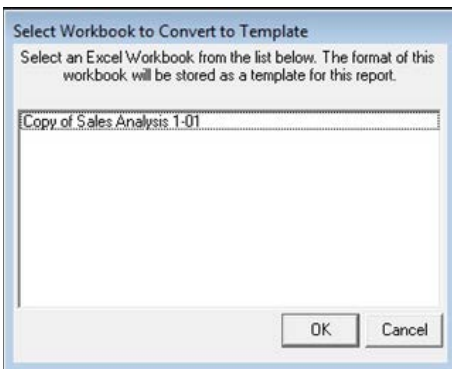
7.   Click OK.

8.   When prompted with the following message, click Yes to link the workbook. Clicking No will not link the workbook.
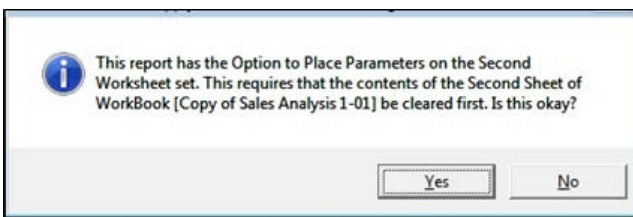
9.   When prompted to specify the template name, change the name of the template. Doing so ensures that the original template is not over written with the copy.
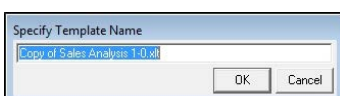
10.   Click OK. Once the template has been successfully linked, a message is displayed.

Bulk Import of Sage Intelligence Reports

This operation allows for the bulk importation of new reports that are obtained either from newer versions of Sage Intelligence or from existing reports.

- When doing a bulk import of new reports, current reports and settings are not deleted. The intention of bulk imports is to import new reports into the current metadata repository only and not modify current versions of reports and settings that were created and saved prior to the bulk import.

To run the bulk import:

1. Open your Report Manager.

2. Click Bulk Import/Update Reports either on the Tools menu or by right clicking on the Home icon in the Object window.
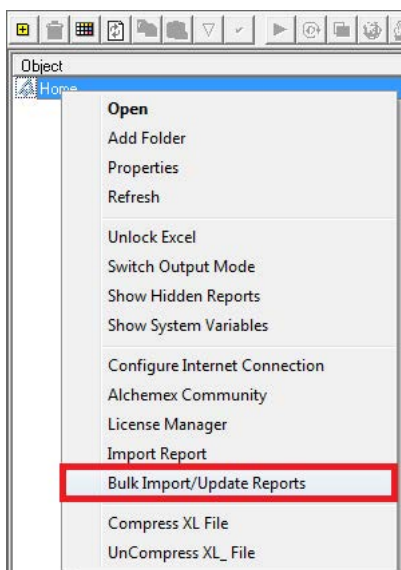
3. You will need to place any .al_ files that will be bulk imported/updated into their relevant subfolders as per the instructions that appear within the 'Bulk Import/Update Reports' dialog form, if not a new folder will automatically be created in the Report Manager for the new imported reports.

Bulk Import/Update Reports

THIS OPERATION ALLOWS YOU TO BULK IMPORT NEW REPORTS OR UPDATE EXISTING REPORTS. PLEASE TAKE NOTE OF THE FOLLOWING:

- Under [C:\Alchemex7SR\ReportUpdate\en] there needs to be subfolders.
  eg: [C:\Alchemex7SR\ReportUpdate\en\Custom Sales Reports]
      [C:\Alchemex7SR\ReportUpdate\en\Sales

- These subfolders represent actual folders in Report Manager.

- You need to place any .al_ files that will be bulk imported/updated into their relevant subfolders.

- The import process will ensure that the reports contained in the .alx files get imported into a folder in Report Manager that has the same name as the subfolder defined in [C:\Alchemex7SR\ReportUpdate\en]
  If the folder doesn't exist in Report Manager then it will be created.

- If a report with the same name already exists under the folder in Report Manager then it will be overwritten if the .al_ file is newer than the report creation date or date it was last imported.

- Please refer to the help file for a more detailed explanation on Bulk Import/Updating Reports

Please click on [YES] to proceed else click [NO] to cancel this operation.

YES   NO

4.   Once the files are in the correct location, click YES to proceed.
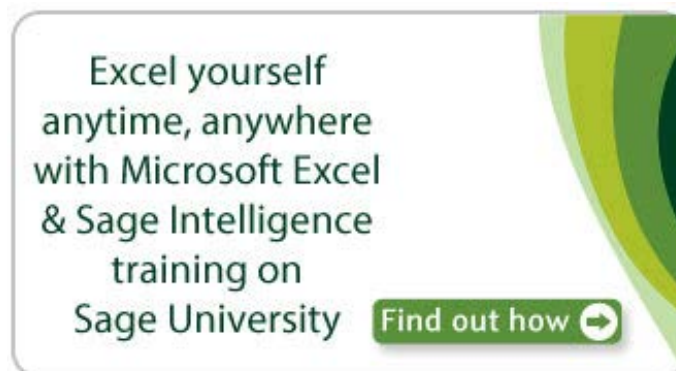
5.   The new reports will be imported alongside any existing reports, if desired old reports may now be removed via the report manager.


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Converting an Excel 2003 template – (xlt), to a Excel 2007/2010 template – (xltx)

Question: I would like to convert my Sage Intelligence Report templates from Excel 2003 to Excel 2007

Process:

1. Run your existing Excel 2003 report out as normal in Excel 2007

2. Minimise Excel 2007

3. Go back to Report Manager and unlink the xlt template from the report by selecting the Unlink Template [icon] button on the Toolbar
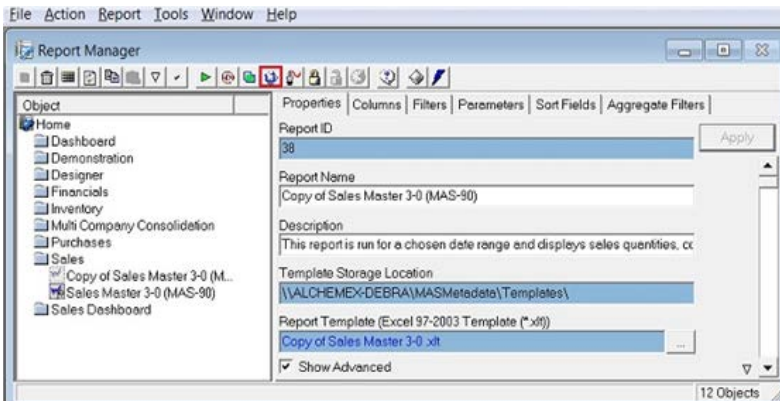
4. Confirm that you would like to unlink the template

5. Notice that there is now no Template linked to your report

6. While your report is still selected, select the Create and Link [icon] button on the Toolbar

7. Select the Workbook to link as Template (the Excel workbook you've minimized) and click OK
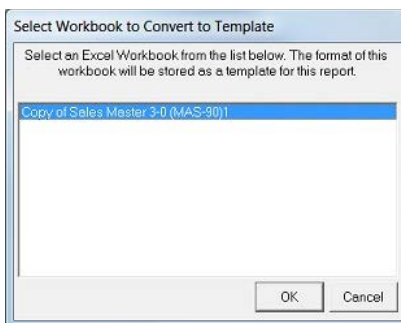
8. Confirm that you would like the Parameters on the Second Worksheet by clicking Yes

9.   You will now be given the option to select the Template File Format
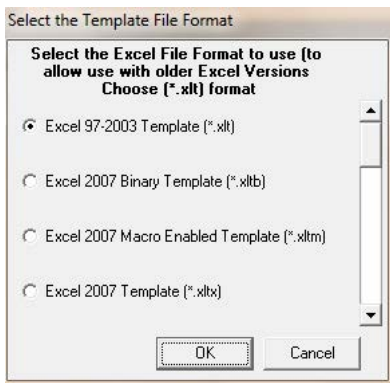
Select the Excel 2007 Template (*.xltx) and click OK

10.   Click OK

The new template is now successfully linked to the report

Report Manager Toolbar Icons

Question: I am using the Sage Intelligence Report Manager Module, there are a lot of icons on the toolbar, but I am unsure of what their functionality is?

The Report Manager Toolbar has various Icons:
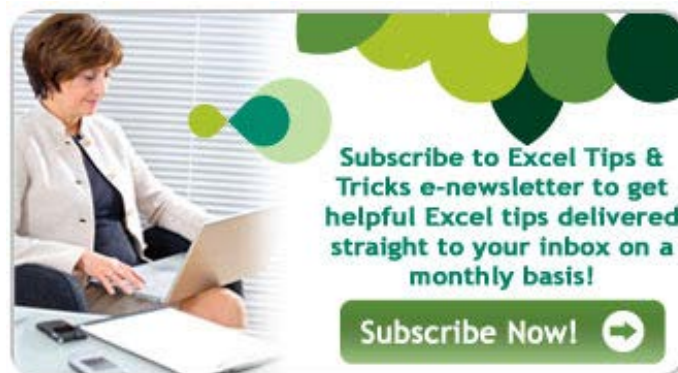
To activate the icons you need to select a specific report in the report manager.

Icon	Name	Description
	Add	Add Enables the user to add new folders and reports.
	Delete	Delete Enables the user to delete their selection.
	Properties	Properties Displays context specific object properties.
	Refresh	Refresh Refreshes on screen properties of the selected object
	Copy	Copy Copies the selected object to the clipboard
	Paste	Paste Pastes an object from the clipboard into the selected object
	Move To	Move To Moves a connection or a container
	Check/Test	Check/Test Use this to check that a report satisfies minimum requirements to function correctly. Minimum requirements are that at least one Column is selected and that if a template has been assigned to the report then that the template exists.
	Run	Runs a report.
	Run Sample	Run Sample Runs a report using just a sample of the data (sample size is specified by the user). Useful when designing and testing reports that are data intensive.
	Create template	Create Template Enables the user to create a template for the current report from an open Excel workbook

	Un-link Template	Unlink Template Enables the user to unlink a template from the current report
	Design	Design Allows the user to design a report by opening its template in Excel for modification
	Lock	Locks the current report
	Unlock	Unlocks the current report
	History	Displays a Reports Run History
	Create Report Shortcut	Automatically creates and files a report shortcut file.
	Help	Display Help Files
	Export a Report	Export a Report Enables the export of reports for import to other Sage Intelligence systems
	Generate Scheduler Command	Generate Scheduler Command Generates the command to run the report unattended
	Add Consolidation report	Runs a report that contains macros with the purpose of consolidating data from various other workbooks
	Unlock Excel	It is possible that if a report runs into rendering problems Excel can be left locked. Clicking this will unlock Excel and allow user interaction
	Security Manager	Opens the Security manager

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Using Excel as a Data Source for Reports

Question: I have added an Excel file as a data connection and tested the connection successfully. The excel file has 4 columns of data which I was instructed to create as "Named Fields". When I go to add a container, type = table, I see all 4 fields and they are each listed as "Table" under the type column. If I select them all, each are defined as individual tables. I'm trying to create 1 table with all fields to add as an expression for my report.

Answer: The process you are using is correct but you need to Name the Data Range in Excel rather than name the fields in Excel. All the fields will then be available in 1 table for reporting.

How: In order to use an existing Excel Workbook as a data source for a report, the data needs to be organized into named ranges.

Example

Excel Data Source

	A	B	C	D
1	Date	ProductID	ProductName	Qty
2	10/30/2003	ARCH01	Archies Red Apples	-3
3	7/1/2003	ARCH02	Archies Red Chillies	-4
4	3/31/2003	BLUF02	Bluff Finger Snack - Sausages	-6
5	11/3/2003	BOHE01	Bohemian Grapey Tea	-3
6	3/23/2003	BOHE01	Bohemian Grapey Tea	-5
7	10/28/2003	BX0009	B & X Wholenuts	-3
8	7/29/2003	BX0009	B & X Wholenuts	-3
9	11/9/2002	BX0009	B & X Wholenuts	-3
10	10/25/2003	CPTV01	Captain Vital Signs Cane	-3
11	3/22/2003	CRYS02	Crystal Puddle Grape Juice	-3
12	5/17/2003	CRYS03	Crystal Puddle Ranberry Juice	-3
13	4/6/2003	CRYS03	Crystal Puddle Ranberry Juice	-3
14	4/5/2003	CRYS03	Crystal Puddle Ranberry Juice	-3
15	3/23/2003	CRYS03	Crystal Puddle Ranberry Juice	-3
16	3/22/2003	CRYS03	Crystal Puddle Ranberry Juice	-4
17	3/23/2003	PADD04	Paddys Rock Spice	-3

1.   Open the workbook in Excel

2.   Make sure that the data is stored with accurate headings so that when expressions are added, the data remains meaningful

3.   Select the data required for report writing purposes by highlighting it

4.   Select Formulas, Name Manager
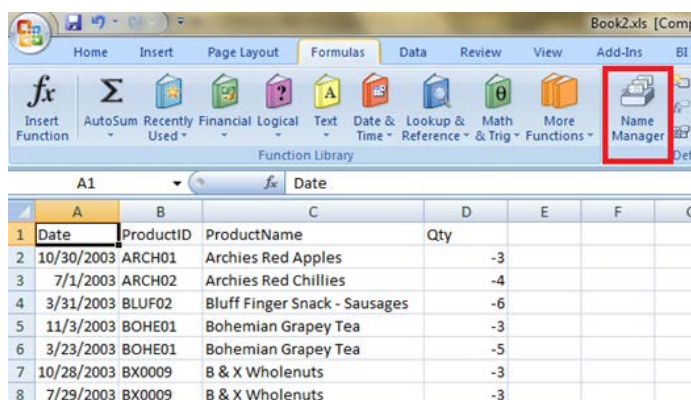
5.   Select New

6.   Give the data a name, and select the data you are naming
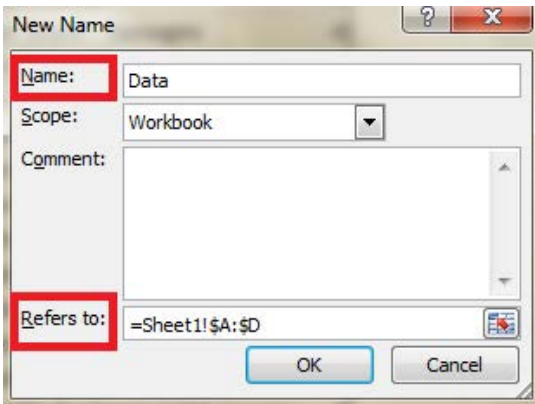
7.   You have now given the data a Named Range
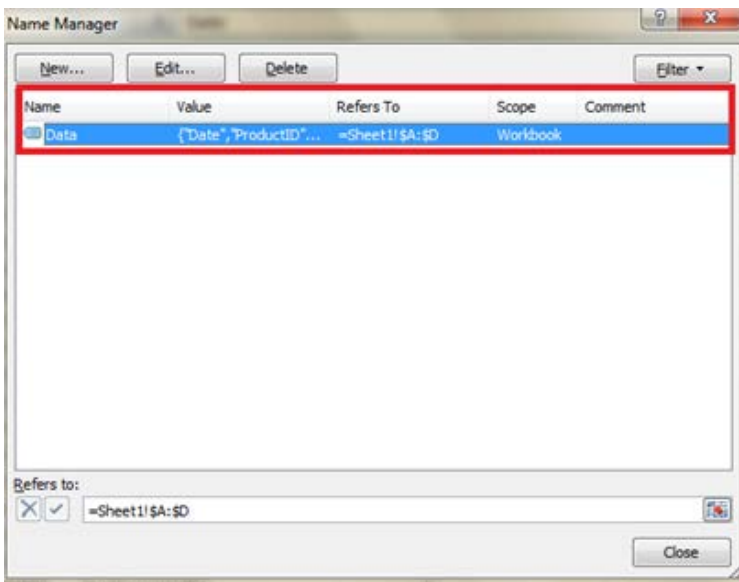
8.   This range will now be available for selection when you add new data containers within the Connector module

Creating a new connection to the Excel Workbook

To add a new data connection to an Excel workbook, you will need to ensure that you have selected the applicable data in Excel and have named the range prior to adding the connection within the Connector tool.

1.   Open the Connector

2.   Select the ODBC driver for Excel
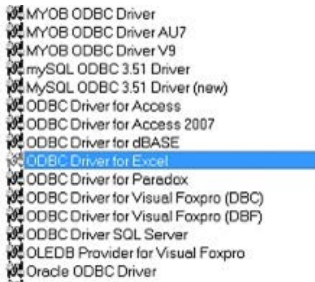
3.   Click on the Add Icon   which will display the Connection Info window
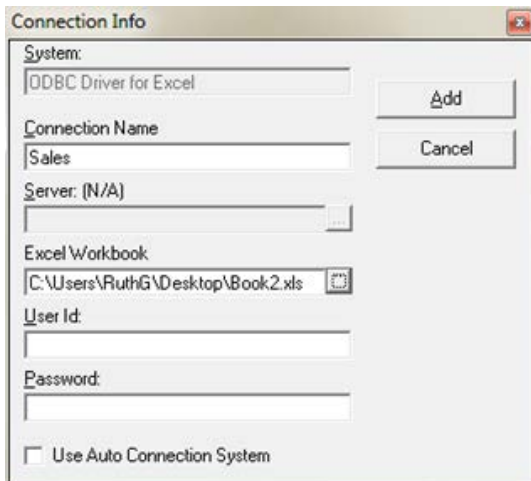
Connection Name – give the connection a name. i.e. Sales

Excel Workbook: Browse to the Excel Workbook

4.   Name the connection and specify the Excel workbook that you will be accessing. If the workbook has been protected, you will need to add the relevant user id and correct password

5.   Click Add

6.   Now add the data container
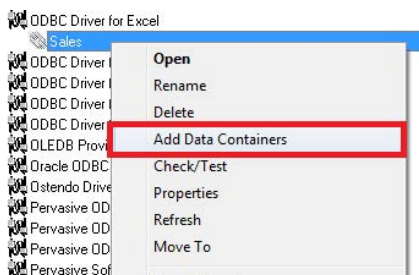
7.   Select Table
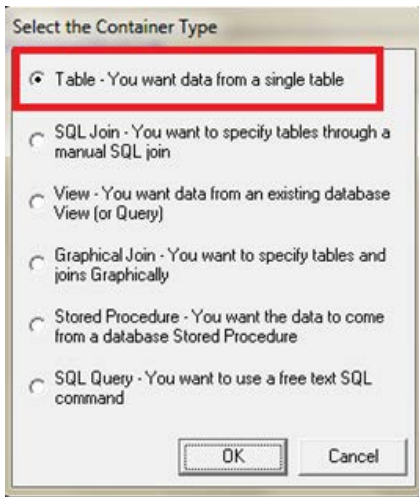
8.   The option to select the table, (the data that you named in Excel workbook- DATA), will come up. Select ok
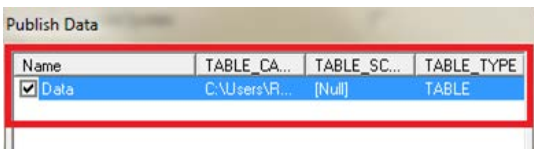
9.   If you sample the container you will see all the data from your Excel workbook is available to report on

10.   You can now use this container and create reports off it in the report manager

Auto-emailing a report on a chosen parameter

Question: I am seeking a way to automatically email a report dependent upon the parameter chosen for the report.
I would like to use the email plug-in but I want the report to run for a set of parameters and dependent upon the parameter chosen it will look up the appropriate email address from a SQL table.

How: Using a Pass Through Variable

The key is that Pass Through Variables can be used to affect the syntax in the Add-In property (as well as macros) on a report.

1.   Add a Pass through variable to the Container for the report and call it EmailTo

2.   When prompted for the code for the pass through variable call it @EMAILTO@

3.   Add a new Parameter to the report and select EmailTo expression for the parameter

4.   In the Run-Add In property on the report put an add-in to this effect (you can use the add-in wizard to construct it as well)
        PLPLUGA.E.MailSMTP(smtpservername,@EMAILADD@,fromperson@555.com,Test,Test,1)

5.   Note in the TO parameter to the Add-in instead of a hard code email address use the pass through variable

6.   Schedule your report and choose the rep for one of the parameters and enter the corresponding email for the rep in the other.

You can however take it one step further and get a lookup button working for the email addresses by going to the Pass through variable in the Connector module and on the Pass through variable expression modify the Lookup Type. You can then allow the list to be driven from a select statement against the table that you have the email addresses in.

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IS IN Comparison Method

Question: Is it possible to create a parameter that allows one to select one or multiple customers from a given list when running a report? This will enable our debtor's clerk to run the customer balances for select customers at run time.

Answer: Yes, by using the IS IN comparison method.

1.   Select the desired report

2.   From the properties window, select the parameters tab

3.   Click on the Add button

4.   Select the customer name or the field you would like to parameterize by

5.   From the choose comparison method box, select IS IN
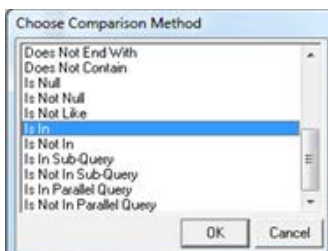
6.   Click OK

7.   Leave the resultant box empty, so that you can select the customer names at run time

8.   Click Ok

9.   When you run your report the parameter screen will open. Select the lookup button
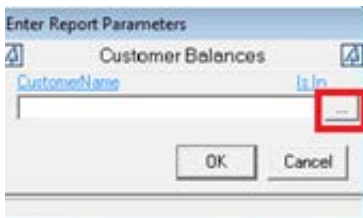
10.   The selection of Customer names will be available. Select the Customers you would like to run the report for

Locking Sage Intelligence Reports

Locking a report freezes the properties of a report so that it cannot be modified by other users. Users can then only run and view the report.

1.   To lock a report, select the report that you want to lock

2.   Right click and select Lock from the Drop down menu
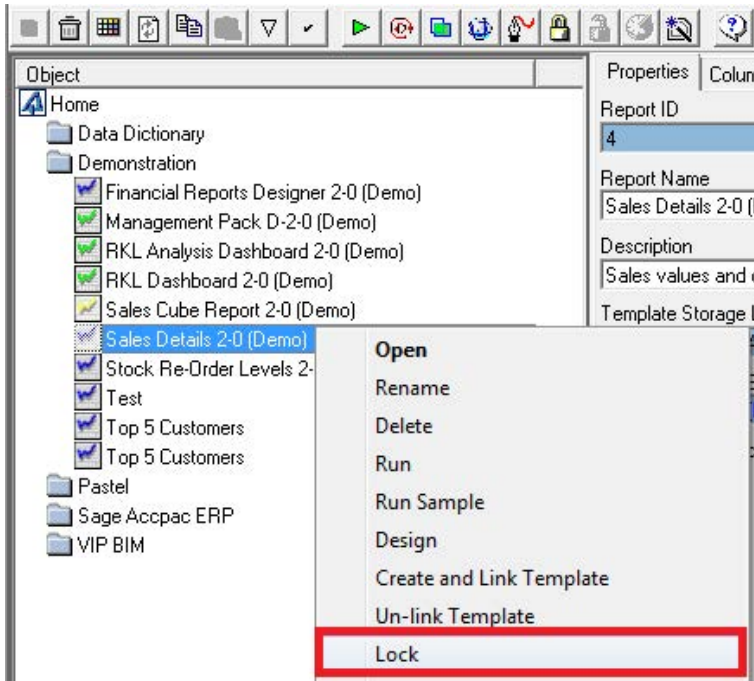
3.   You will be prompted to enter an Unlock password. Enter the Password and confirm

4.   The selected Report will now be locked. Users will be able to run and view it, but will not be able to alter the properties of the report. To unlock a report you will need to enter the password

Generating an Sage Intelligence Report to an Output File

There may be some employees in your organization that need to view Sage Intelligence reports, but do not need access to the Sage Intelligence software. All Sage Intelligence reports can be generated to a specified output file on a Server or network location. The employees can then access this specified output file and access the required reports.
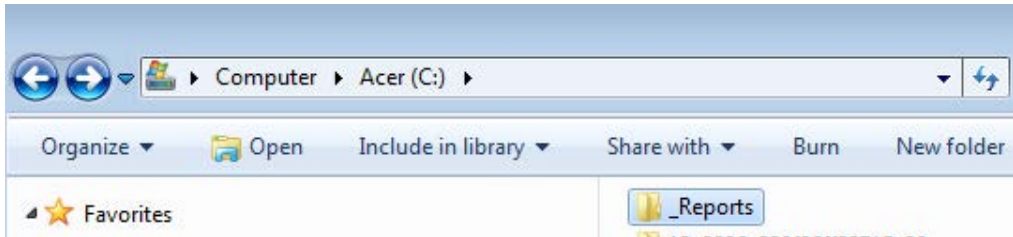
How to Generate a Report to an Output File

1.   First Setup the folder you would like to generate the reports to. (Example: Reports Folder on C drive). Make sure that the specified employees have access rights to this folder

2.   Select the Report in your Report Manager you would like to generate to an output file

3.   Select Show Advanced properties of the Report

4.   Add the specified file path to the Generate Output file command in the advanced properties

        (Example: C:_Reports\ Sales Reports.xls)

        • C = Network Location
        • _Reports = Folder Name
        • Sales Reports = Report Name
        • .xls = generation type (Excel, PDF etc.)
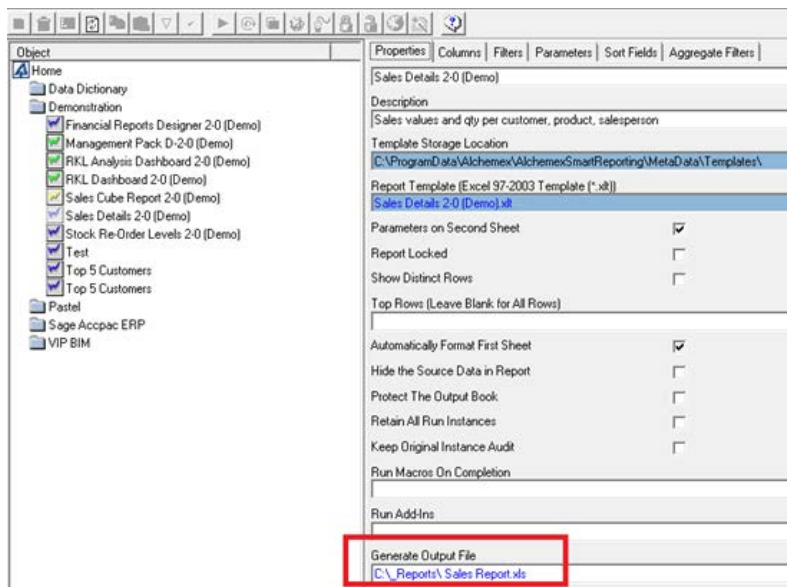
5.   Select Apply button to confirm changes to the Advanced Properties of the report

6.   When you run the report it will now be saved to the specified output file

7.   People who have been assigned access to the output file will now be able to access the reports

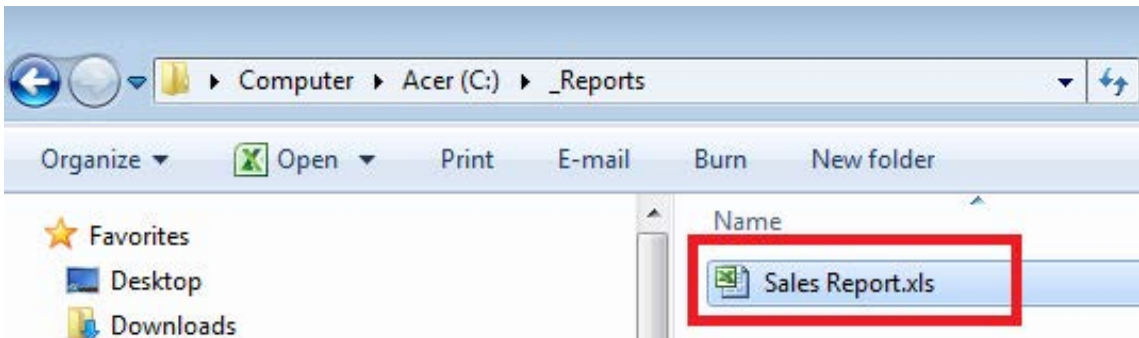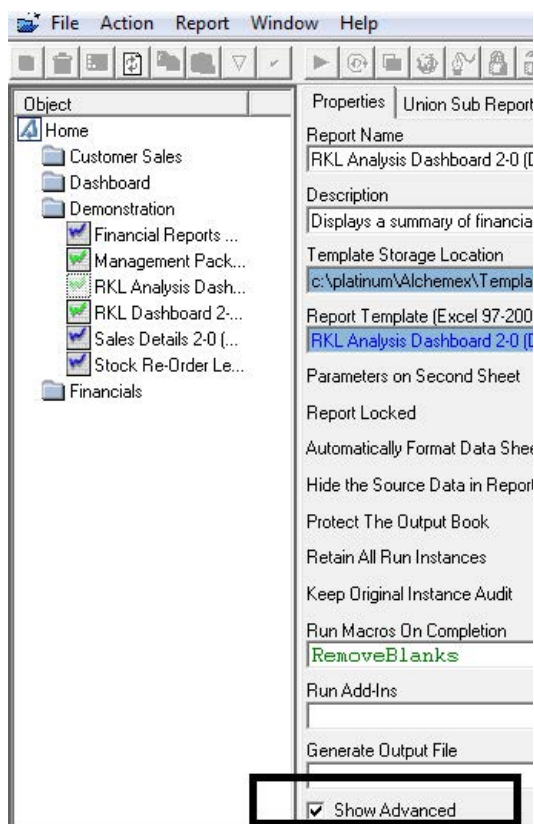## Is there a way to convert a Sage Intelligence report automatically to a PDF file?

This can be done by using the Generate Output file option that can be made available by selecting your report in the Report Manager and checking the Show Advanced Checkbox on the Properties Tab

1. Select your report and make sure that you check the show advanced checkbox to reveal all the report properties

2. Click on the ellipses button opposite the "Generate Output File" field from within the report manager and select a file name and file location to save the file to. (For the example suggest using the name Test and saving to the desktop i.e. C:\Users\Vmtester\Desktop\Test. xls). You can also check the box Close Book on Completion

3. To have this saved to the Desktop in PDF; change the file extension of .xls to .pdf
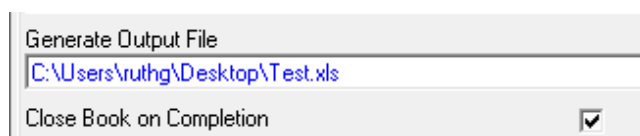
4. Run the report and the output will be saved as a pdf to the chosen location
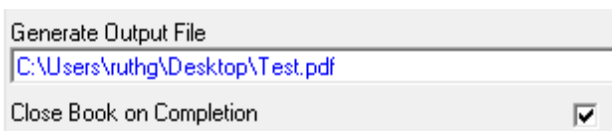
PLEASE NOTE:

- The page properties of the pdf document will be inherited from that of your report's template file i.e. Test.xlt - So to get the pdf to display as you wish, say for example on a single page in landscape format, you must set that up in the original Test.xls Excel output, and create and link that workbook back to the original report that was run in the Report Manager. These page settings will then be used when saving your report output to pdf

- If you have several Excel worksheets in a report, only the sheet that is currently displayed when the report is run will be converted and saved to pdf

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Retaining Items Deleted from the Data source

If you create a new report, in PivotTable format, using Sage Intelligence, off a standard container then when you export this report and import it into another database, by default it will retain the filter fields that were used in the original report. To see, use the filter fields that relate to the new database you need to change the Data Options of the PivotTable before exporting the report and importing it into your new database.

1.   Run your report

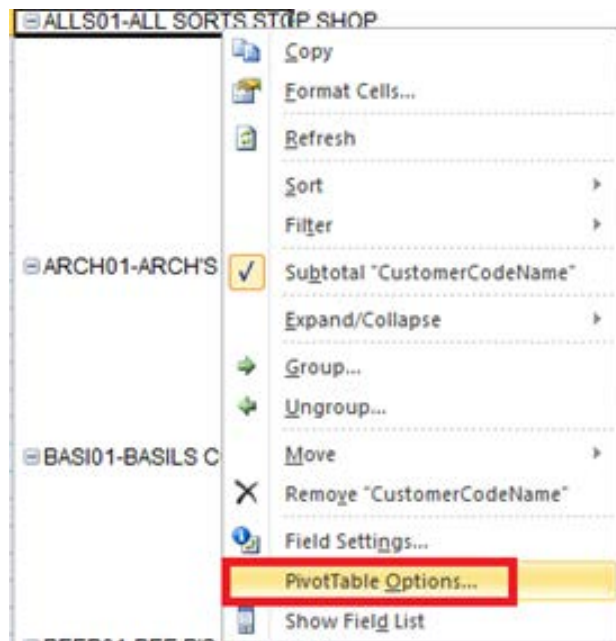2.   Right click on PivotTable. Choose PivotTable Options

3.   Go to the Data Tab, then Select None from the Number of Items to retain per field. (The default is always set to Automatic)
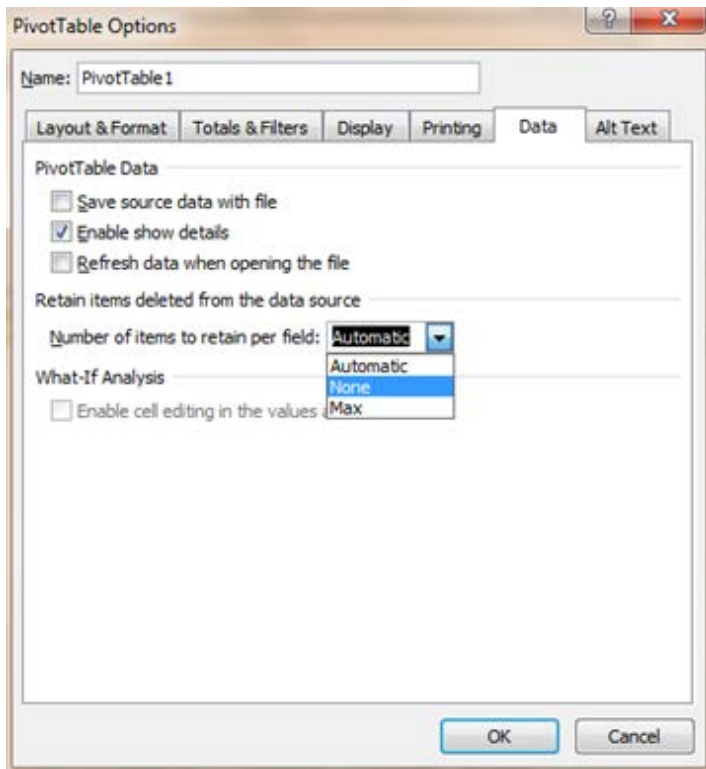
4.   Select OK and create and link your template

Enabling the BI Tools Tab in Microsoft Excel

Note: This applies only to the Report Designer or Excel Genie Enabled Reports

If the BI Tools tab is missing in Microsoft Excel it could be due to the following:

- BI Generator could be inactive
- BI Generator could be disabled
- BI Generator Installer files may need to be run

Complete the following steps:

1. Open the Add-ins Manager in Microsoft Excel Options
2. In Microsoft Excel 2007, select the Office Logo in the top left of the window, and go to Excel Options. (In Excel 2010, select File > Options)
3. Select Add-Ins
4. Locate the BI Generator Add-in
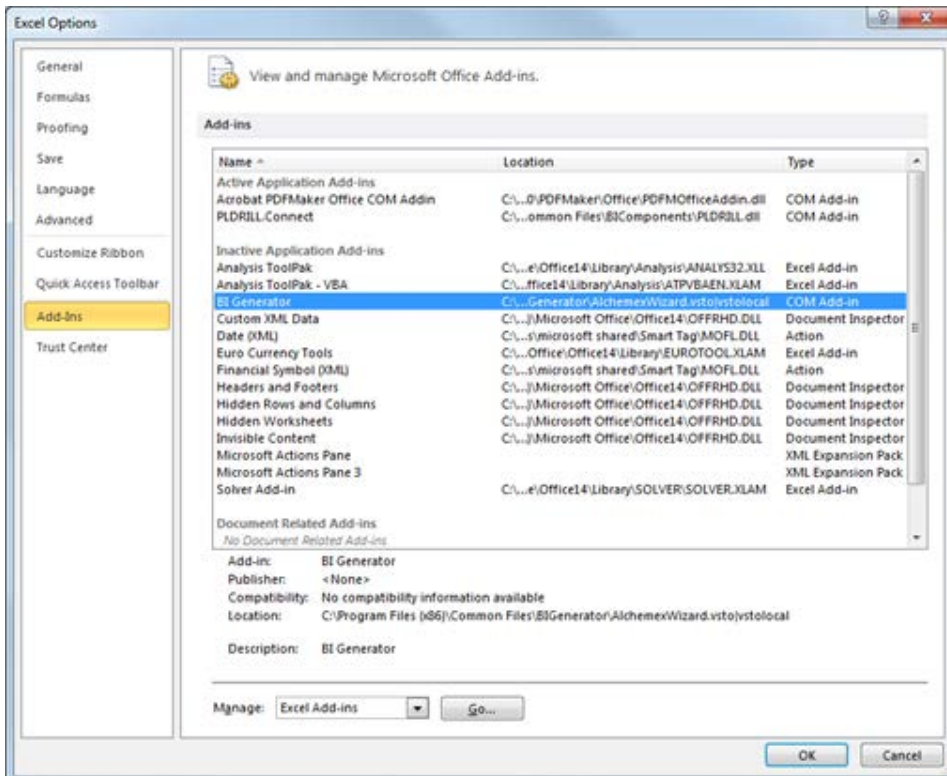
5. If it is listed in Inactive Application Add-ins, then it must be enabled. At the bottom of the window, select Manage COM Add-ins, then select Go
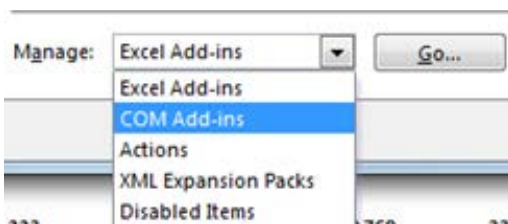
6.	If it is listed in Disabled Application Add-ins, then it must be enabled. At the bottom of the window, select Disabled Items, then select Go

7.	If Inactive, select the BI Generator Add-in and click OK
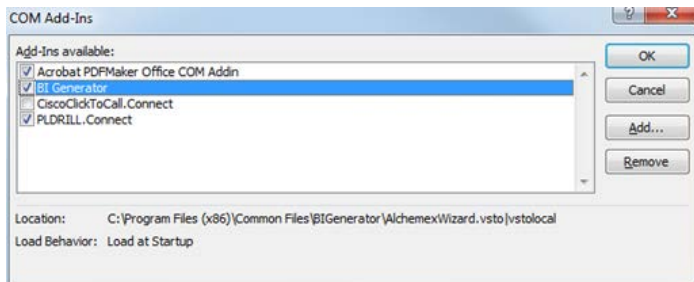
8.	If Disabled, select the BI Generator Add-in and click Enable
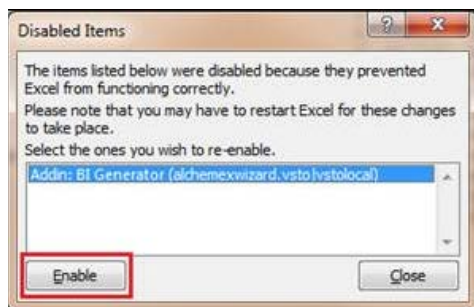
9.	Typically, the BI Tools tab immediately appears. If it does not, close down all instances of Microsoft Excel that you have open, and re-do these steps

10.	To ensure all instances of Microsoft Excel are closed, complete the following steps:
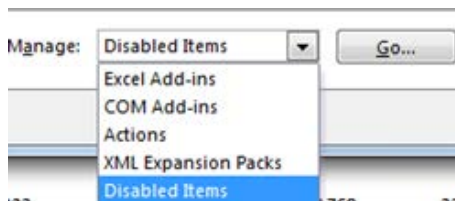
a.	Open Task Manager. (Right click on your Task bar and select Start Task Manager)
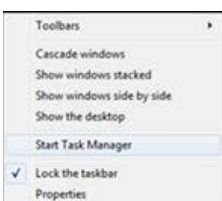
b.	Select the Processes Tab and locate any EXCEL.EXE items and (for each one) right click on the item and select End Process
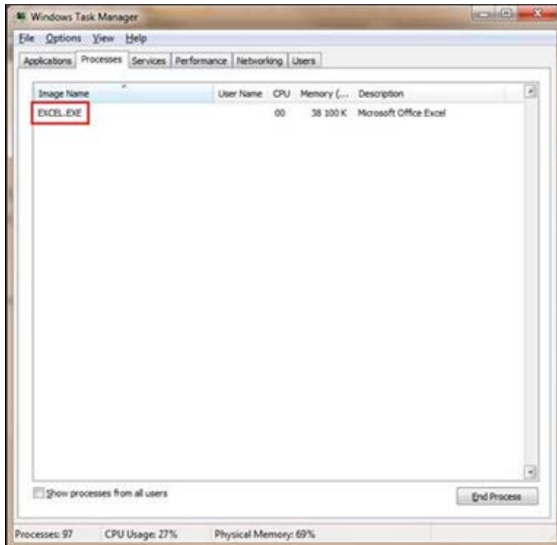
If the BI Tools tab is still not available, follow the process below:

1.   Navigate to C:\Program Files\Common Files\BIGenerator\Installers

2.   Install o2007pia.msi
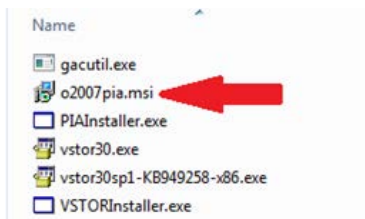
3.   Install VSTORInstaller.exe
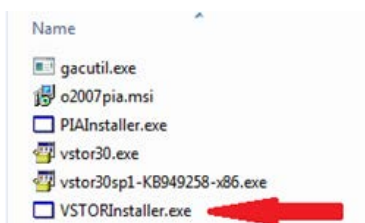
Repeat the Process as detailed previously for activating and enabling the BI Generator using the Excel Options. The BI Tools should be available in Excel.

Run All Reports in Folder

The Run Report Batch facility allows users to run a sequence of reports one after the other from top to bottom.
The option Run Report Batch aborts the batch of reports if any of the reports return no data. The second option Run Report Batch (Mode 2) will run all reports regardless of there being no data for any of the reports.
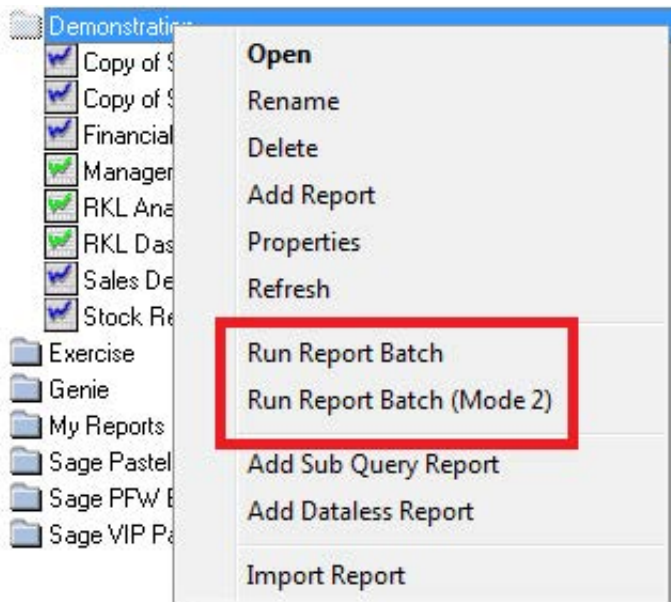
Note: The run sequence will always be top to bottom so it is important to name your reports in a way that will ensure that the report you want run first is at the top of the batch.

For example: if you have an existing group of reports in a folder which will not run in the sequence that you would like, then rename your reports numerically viz:

Report Name = 1. (First Report)
Report Name = 2. (Second Report)
Report Name = 3. (Third Report) and so on until you have the reports running in the sequence that you would like.

Once you have named your reports in sequential order, select the folder that contains your reports, right click and select Run Report Batch or Run Report Batch (Mode 2).

Sage Intelligence Smart Reporting will automatically run each report in sequence.

Using System Variables

System variables can be used with Parameters and Filters to dynamically determine a comparison Value at report Run Time. An example of this is where a report is run and expected to return data for the current day. In this exa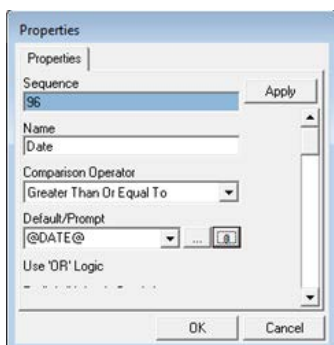mple a Filter could be set on the report for a Date field and the filter comparison value (or comparator) could be set to the system Variable @DATE@. When the report is run the system variable @DATE@ in the filter comparator will be replaced with the current date.

To select a System Variable when adding a Filter or Parameter click the System Variable button on the Enter Comparison Value screen.

The Select System Variables screen (shown below) will appear. Select the required System Variable and click OK.
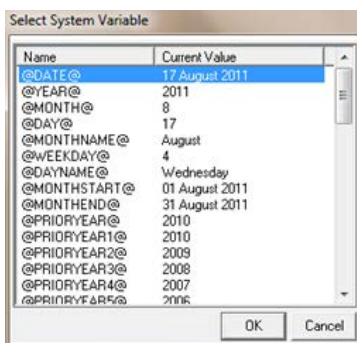
Custom System Variables

Note that the set of available System Variables defined can be extended by adding Custom System Variables to the Sage Intelligence.ini file under the section [GlobalSysVars]. These Custom System Variables are hard coded values in the Sage Intelligence.ini file and cannot contain script logic. Each Variable must be added on a separate line under the section and must also be added to the comma separated list defined in the Active key under the [GlobalSysVars] section. An example of two Custom System Variables defined in the Sage Intelligence.ini file is shown below. With this example the System Variables @FINYEARSTART@ and @FINYEAREND@ will be available to all reports in the Sage Intelligence 7 Smart Reporting system.

[GlobalSysVars]

Active=@FINYEARSTART@,@FINYEAREND@

@FINYEARSTART@=01 March 2004

@FINYEAREND@=28 February 2005

System Variable Format

System Variables must always be prefixed and suffixed with a single @ symbol and must contain no other occurrences of an @ symbol. System Variable names must be unique. System Variables that do not comply with this format will not be recognized by Sage Intelligence 7 Smart Reporting.

Considerations when using System Variables in Reports

It should be noted that Custom System Variables are defined in the Sage Intelligence.ini file. Due to this the set of Custom System Variables will vary from site to site. If Custom System Variables are used on a report intended for distribution then the same definitions will have to be created at the destination sites. Ordinary System Variables are available to all Sage Intelligence 7 Smart Reporting sites without the requirement to create them. This means that Reports intended for distribution should avoid using Custom System Variables where possible.

Listing Available System Variables

To obtain a list of all available system variables (Standard and Custom) select the Sage Intelligence 7 Smart Reporting Home object in the Report Manager and from the Tools menu choose Show System Variables. A list of all available System Variables will be displayed.
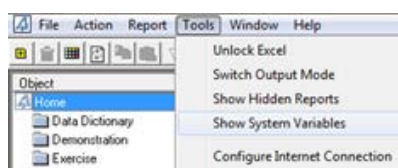
Using Variables in Other Report Properties

Variables (System and Pass Through) variables can also be used in certain properties on a report to dynamically affect them when a report is run. Some scenarios where this might be useful are listed below:

Example 1

You are specifying an output file in the "Generate Output File" property on a report and you want the file name to not be totally hard coded but to be effected by the System Variable such as the today's date (@DATE@).
In the "Generate Output File" property specify a file name such as C:\MyReports\Sales_@DATE@.xls
Whenever the report is then run a copy will be saved with the name "Sales_" plus the date.

Example 2

You are specifying an output file in the "Generate Output File" property on a report and you want the file name to not be totally hard coded but to be effected by a Pass Through Parameter on the report named @REGION@
In the "Generate Output File" property specify a file name such as C:\MyReports\Sales_@REGION@.xls
Whenever the report is then run a copy will be saved with the name "Sales_" plus the Parameter specified for the @REGION@ pass through variable.

Example 3

You are using the PublishSheet Add-In on a report to publish to an HTML output file using the "Run Add-Ins" property on the report. You want the HTML file name to be effected by a Pass Through Parameter on the report named @REGION@
In the "Run Add-Ins-" property specify something similar to this : PLPLUGA.C.PublishSheet(Pivot,\\myserver\intranet\reports\Sales_@REGION@.htm)

Whenever the report is then run a copy will be published with the name "Sales_" plus the Parameter specified for the @REGION@ pass through variable.

Creating Excel Formulae in your Report

Did you know you can create Excel formulae as data expressions in the Connector module? This can be very useful if you have a Formula you need to be extended as far down the sheet as the rest of the data.

How to create an Excel Formula in your Report

1. Open your Connector Module and Browse to the container in which you want to add the Excel Formula

2. Right Click on the Container and select Add Expression
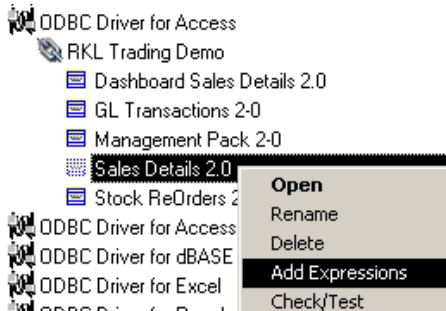
3. Select Excel Formula option
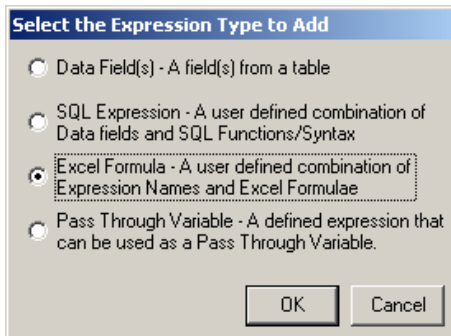
4. Give the Excel Formula a name e.g. "GrossProfit" then type in the Excel Formula (Do Not put an = sign in front of the formula, Sage Intelligence automatically puts it in when you run the report), click OK

5. Open your Report Manager and Browse to the Report associated to the above container and Double click on it

6. Right Click on Columns and select Add Columns
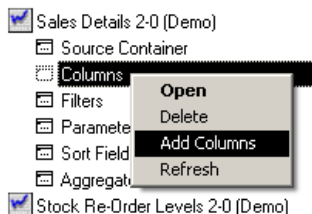
7.   Select the Excel Formula you created and click OK
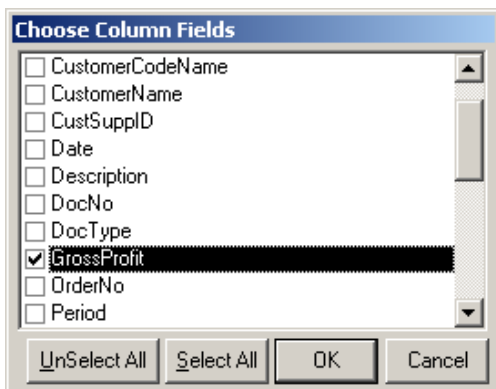
8.   Run the report out, you will see your Excel Formula in the Data sheet (e.g. Sheet1)

Notes:

•   If you create an Excel Formula with a specific cell reference (e.g. Sheet1!A2) it will not be changed as the Formula moves down the rows, (e.g. All the rows Formula will refer to Sheet1!A2). Alternatively you can use the Column reference Sheet1!A:A

•   It is advisable to use Named ranges in your Excel Formula

•   Sage Intelligence automatically creates a Named Range for each Column in the Data Sheet of a Report based on the name of the Column

Tip: It is easier to create the Excel Formula on the Data Sheet of a run out report and then copy the Formula back to the Connector Module

Viewing the SQL code passed by Sage Intelligence to the ODBC Driver for a Report

Did you know you can view the SQL code passed by Sage Intelligence to the ODBC driver in the Connector? This can be very useful if you are developing a report but keep getting a "Report Execution Error", you will be able to see exactly what is passed to the ODBC driver, including Table joins, Sort Criteria, Field Expressions, and Filters etc.

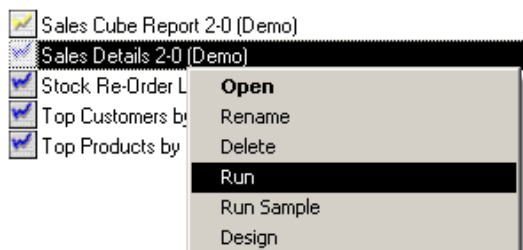**How to Switch the Output Mode to SQL View**

1.   Open your Report Manager

2.   Right click on Home and select "Switch Output Mode"
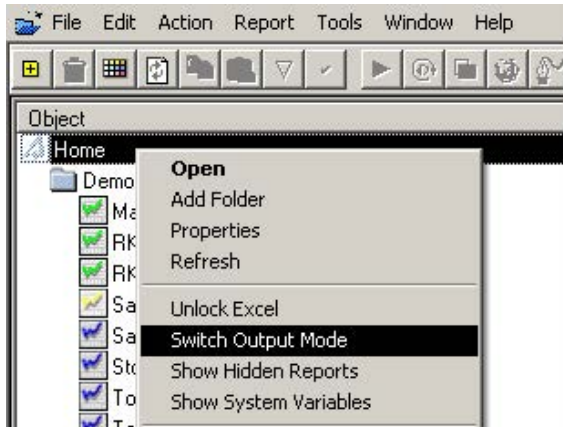
3.   Select the Report Data Output mode - "Screen (SQL Debug)" and click OK
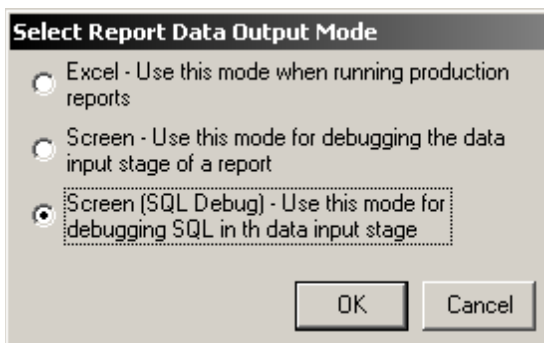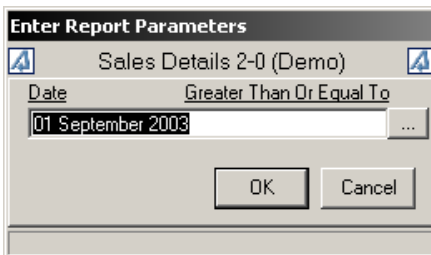

4.   Now highlight the Report that you would like to view in SQL and run as normal
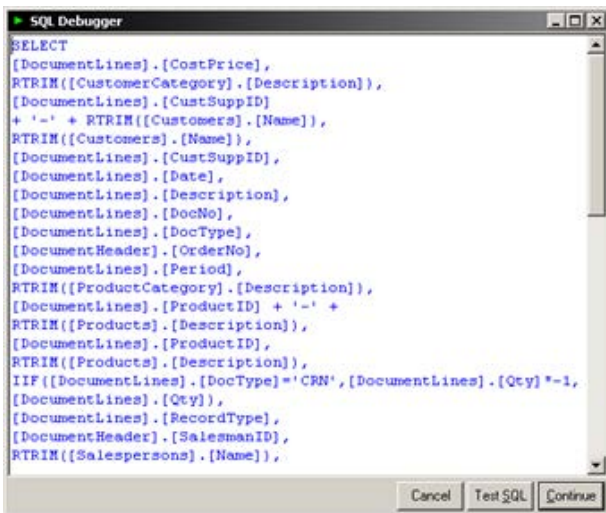

5.   Enter any Parameters the report might have and click OK

6.   The SQL Debug window will pop up with the SQL code that gets passed to the ODBC driver

7.   You can go through the SQL code to try find the problem, then make the relevant changes to the container (Connector) of the report (Table joins, Field expressions . . .) or to the Report (Report Manager) itself (Filters, Aggregate Functions . . .)

NOTE: You will not be able the edit the SQL code in the Debug mode, you have to correct / make changes to the Container or Report directly.

8.   From the SQL Debug window you can
      Test SQL – Test the SQL code to see if it runs out successfully or not
      Continue – To see what the raw data will look like in a Data output window

Things to Keep in Mind

•   When you open the Report Manager it defaults the Output mode to Excel every time, regardless of the state you closed the Report Manager in

•   In a networked environment of Sage Intelligence, the Output mode you select will only be affective on the PC it was set on

Automatically Running Macros

Did you know that you can automatically run macros you have created when you run your report in Sage Intelligence?
Why would you want to do this? Macros can be very powerful for doing many different things in Excel (e.g. formatting, filtering and securing data.)

This makes the report one step closer to being ready to go as soon as it's run out.

1.   Open your report manager.

2.   Select the report that you want the macro to run in, run the report or open the Excel template in Design mode.
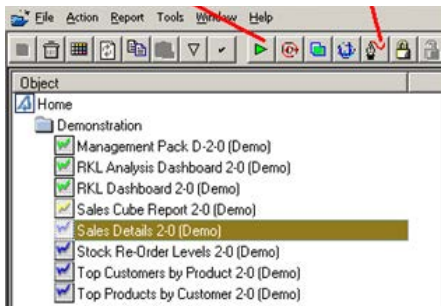
3.   Create the macro you want to run automatically, ensuring that in your macro you specify which sheet you need the macro to work in.
        (This will help by forcing the macro to select the correct sheet even after you Create and Link the workbook with a different active sheet)
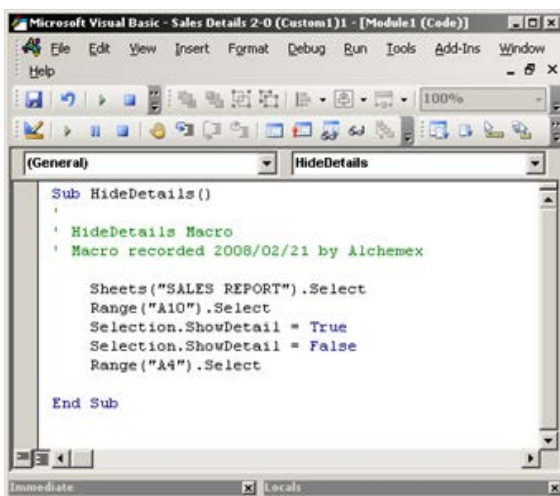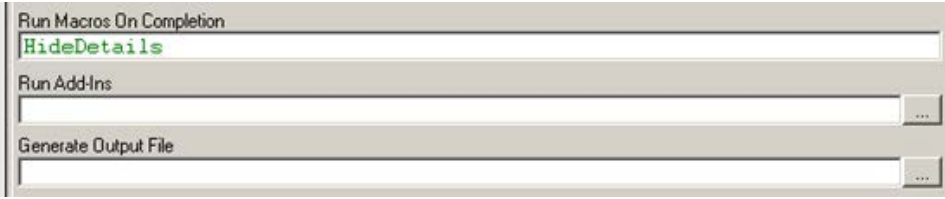

4.   Once you have created and tested your macro, save the template back or create and link the workbook back to the report.

5.   Highlight the report in which you have created the macro, under the Properties tab, tick the Show Advanced option at the bottom of the screen.
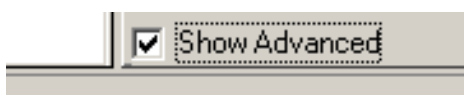
6.   In the advanced options list that is now available, locate the Run Macros on Completion option
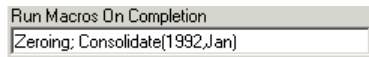
In the text box type the name of the macro you created.

Additional Notes:

- • If there is more than one macro that needs to be run, then separate their names with semi-colons.
- • If a Macro takes parameters then place these in brackets after the macro name in a comma separated list.

- • Macros will always run after any Add-Ins should you have any Add-Ins placed in the "Run Add-Ins" property.
- • Combine macro names and Add-Ins in the same property to ensure the correct order thereof when running the report.
  Example: To have a macro run before an Add-In, place the macro name in the "Run Add-Ins" property before the Add-In.

7. Once you have entered the name of the macro, make sure you Apply the changes to the report

8. Run the report out and your macro will automatically run.

# Quick Navigating between Report Manager and Connector

Did you know you can quickly navigate from the Report Manager to the Connector tool, taking you directly to the appropriate container or expressions that need changes made?

1.   How to Quickly Navigate to the Appropriate Container

a.   Open your Report Manager

b.   Double click on the report, double click on Source Container, right click on the report container name and select Go to Container In Connector Tool
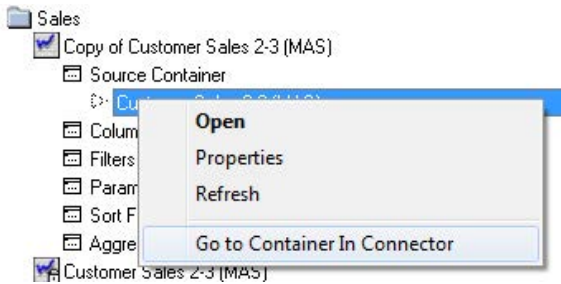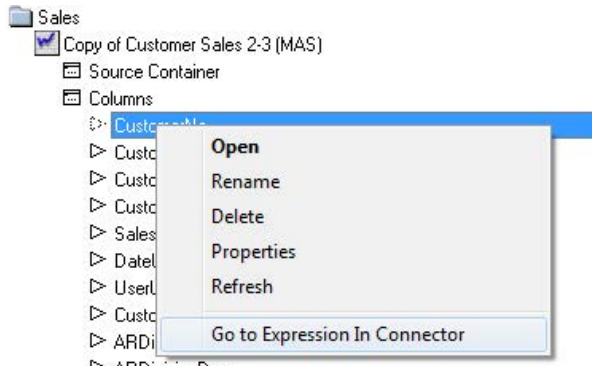

c.   A message will pop up to launch the Connector, select Yes

d.   The Connector will open and navigate directly to the container of the report you selected, where you can make the appropriate change/ checks you need
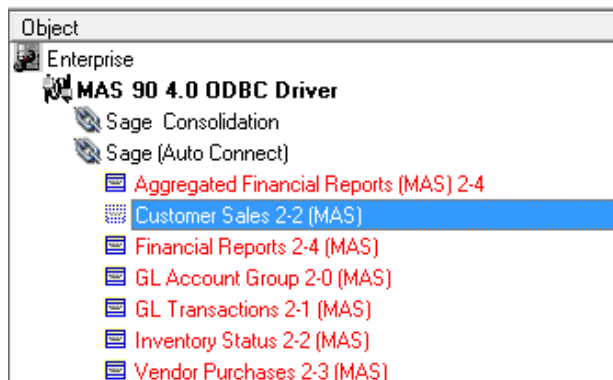

2.   How to Quickly Navigate to the Appropriate Expression

a.   Open your Report Manager

b.   Double click on the report, double click on Columns, right click on the column name and select Go to Expression In Connector Tool

c.   A message will pop up to launch the Connector, select Yes

d.   The Connector will open and navigate directly to the Expression of the Column you selected, where you can make the appropriate
            changes/checks you need
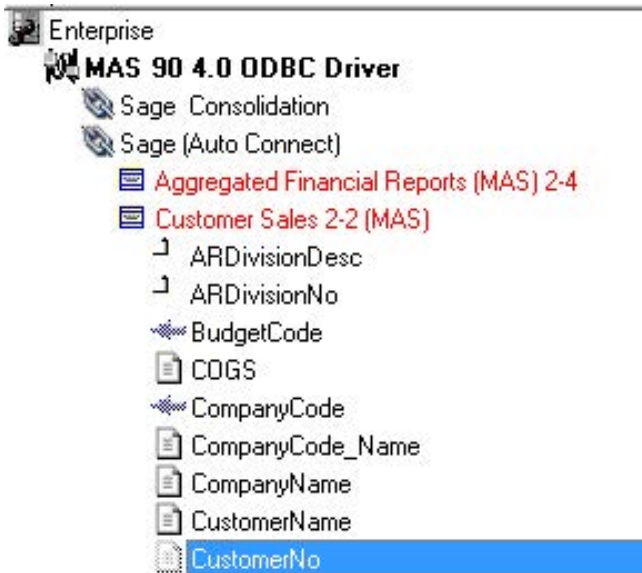
Contact Information

Sage Intelligence	sageintelligence.alchemex.com
BI Community	http://community.alchemex.com/
Sage University	www.sageu.com
Sage Intelligence Webinar Schedule	www.alchemex.com/Webinars.aspx
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