

Bulk Import Report Procedure

Import existing reports into the latest version of Sage Intelligence

This procedure applies to the latest versions of the SAGE Intelligence Report Manager in Sage 100, 300 and 500.

The latest versions of Sage Intelligence do not overwrite existing versions, Report Manager settings, or existing reports when installed, however existing reports will need to be manually exported out of the existing version and imported into the latest version of Sage Intelligence.

IMPORTANT NOTE

Before commencing installation of the newer version of the ERP system, ensure that **all** custom reports have been exported.

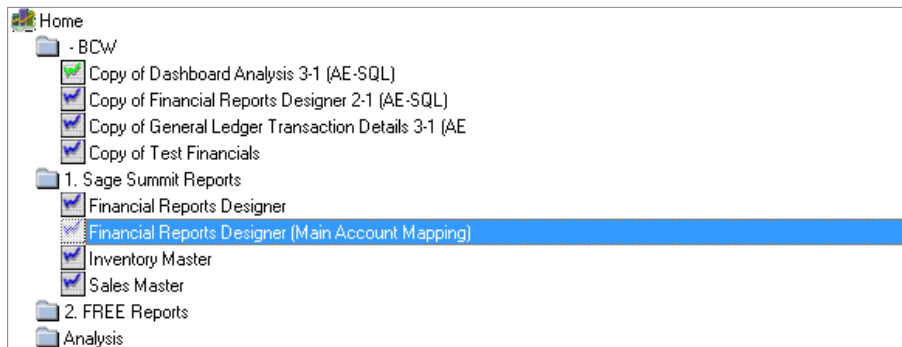
Export a Report Procedure:

NOTE: Before exporting the required reports, the directory structure which exists within the EXISTING version of the Sage Intelligence Report Manager must be duplicated in the “ReportUpdate” folder. This folder is part of the company data folder, usually found in the C:\Program Files (x86)\Sage\Sage program\ directory.

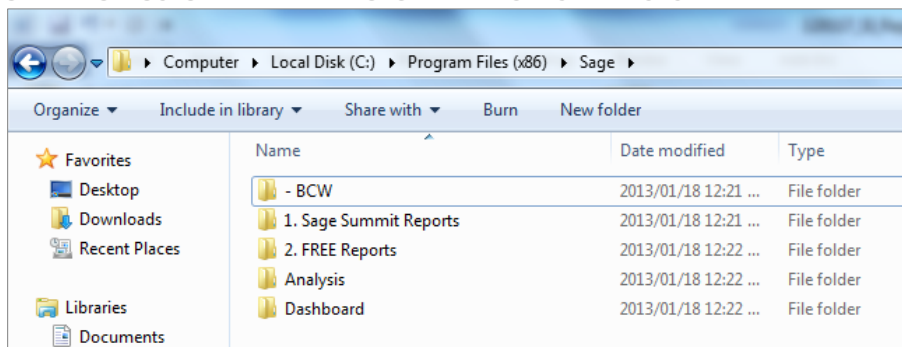
For example, “C:\Program Files\Sage\Sage 300 ERP\BX61A\ReportUpdate”, where “Sage 300” is the ERP and “BX61A” is the company name.

The duplicated folders represent the actual folder structure within the Sage Intelligence Report Manager.

SAMPLE STRUCTURE WITHIN THE SAGE INTELLIGENCE REPORT MANAGER

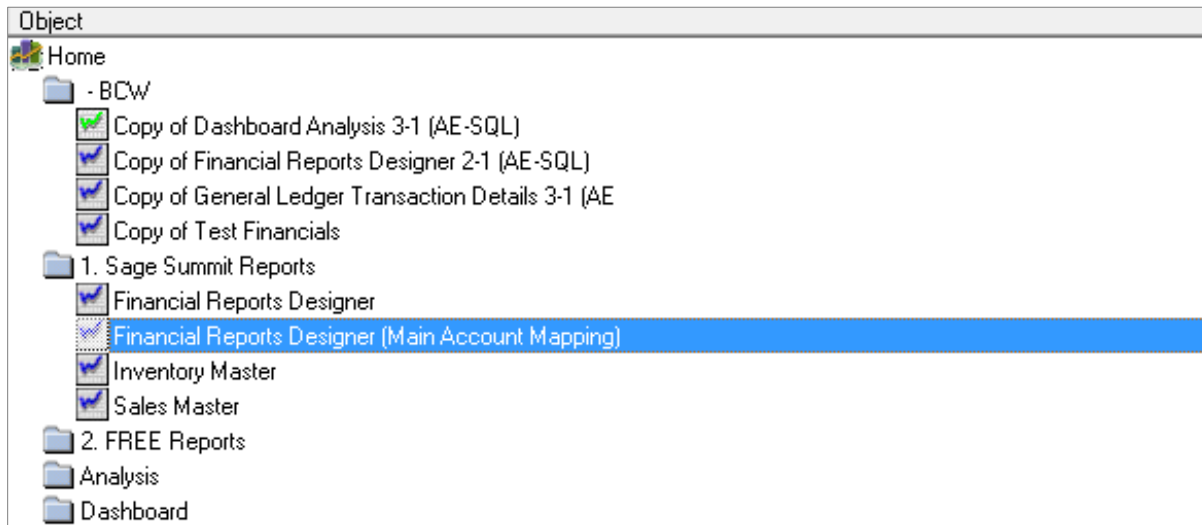


SAMPLE STRUCTURE WITHIN THE SAGE INTELLIGENCE DIRECTORY

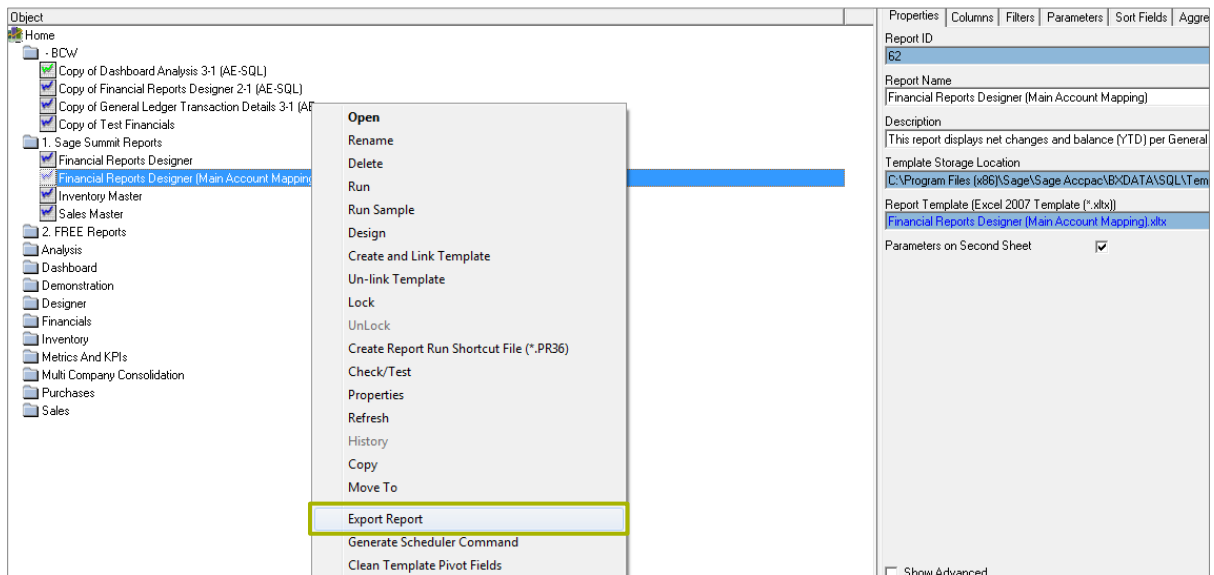


Before upgrading the ERP, go into Sage Intelligence Report Manager:

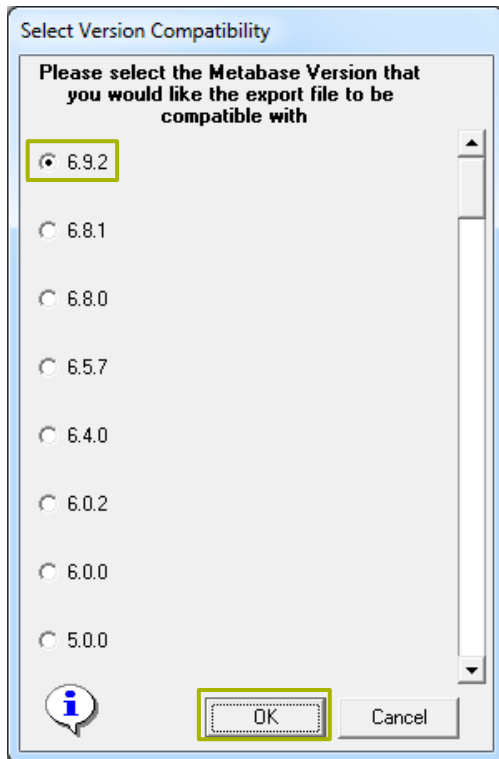
1. Click on the required report to be exported.



2. Right-click on the report and select Export Report.



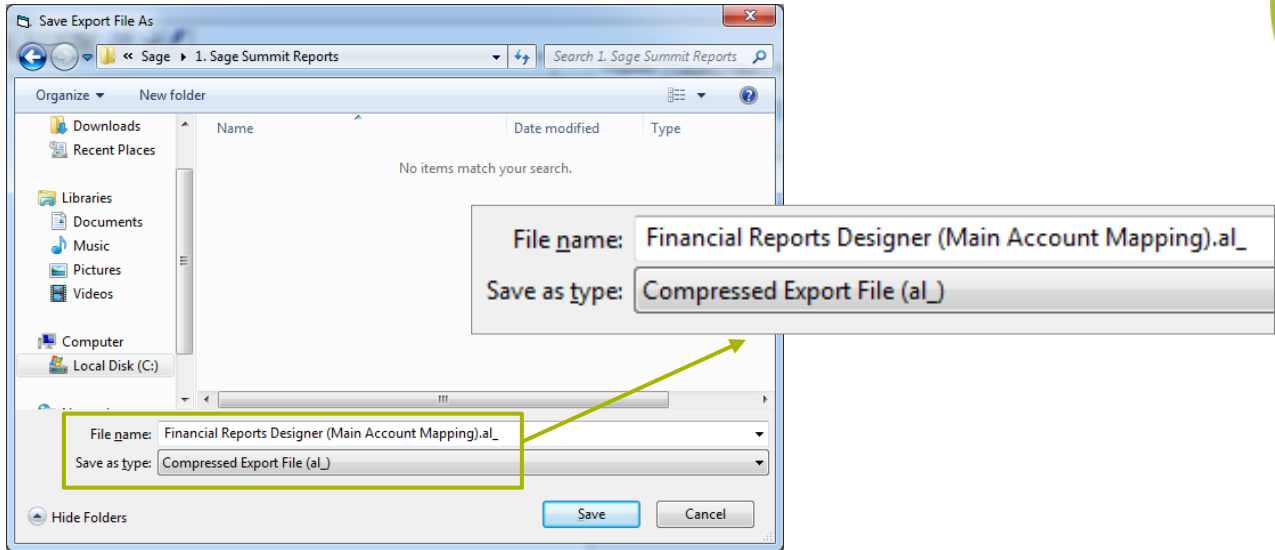
3. Select the Metabase Version which the exported file must be compatible with
Note: By default, the latest version will be selected.
(The Alchemex Metadata Repository contains the set of reports, containers, templates and rules that apply to your report.)
4. Select **OK**.



IMPORTANT NOTE

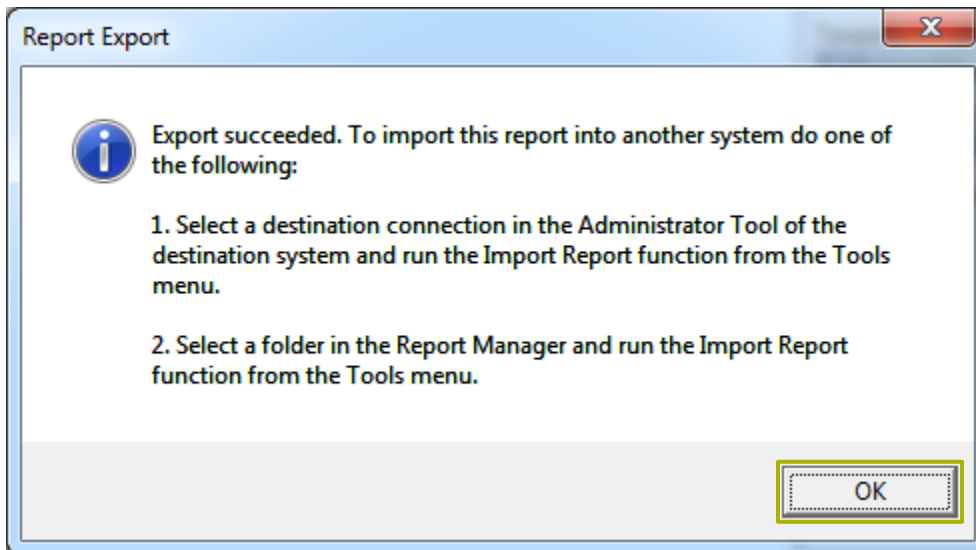
If you are using Sage Intelligence Reporting version **7.0 or later**, the “Select Version Compatibility” screen will not display. The system will automatically select the correct Metabase Version to use.

5. Browse to the relevant folder within the **C:\ProgramFile(x86)\Sage** directory.
6. Ensure the **Compressed Export File (al_)** file type is selected.
7. Select **Save**.



The Report Export confirmation screen displays.

8. Select **OK**.



9. Repeat this process for all the other reports, ensuring that they are exported to the correct Sage folder.

10. Install the new Sage ERP.

IMPORTANT NOTE

Sage ERP Intelligence Reporting ships with the Sage ERP product and does not require a separate installation. It will, however, require registration and activation.

Import existing reports procedure:

After registration and activation of the new version, reports can be imported individually or via the Bulk Import function within the Sage Intelligence Report Manager.

This manual focuses on **Bulk Importing** of reports. For information on how to import a single report, visit the BI Community at <http://community.alchemex.com/> or contact your Sage Intelligence Partner.

Note: Once imported, existing reports, which have been designed for older versions of Sage Intelligence, may need modification in order to function correctly.

Bulk Import

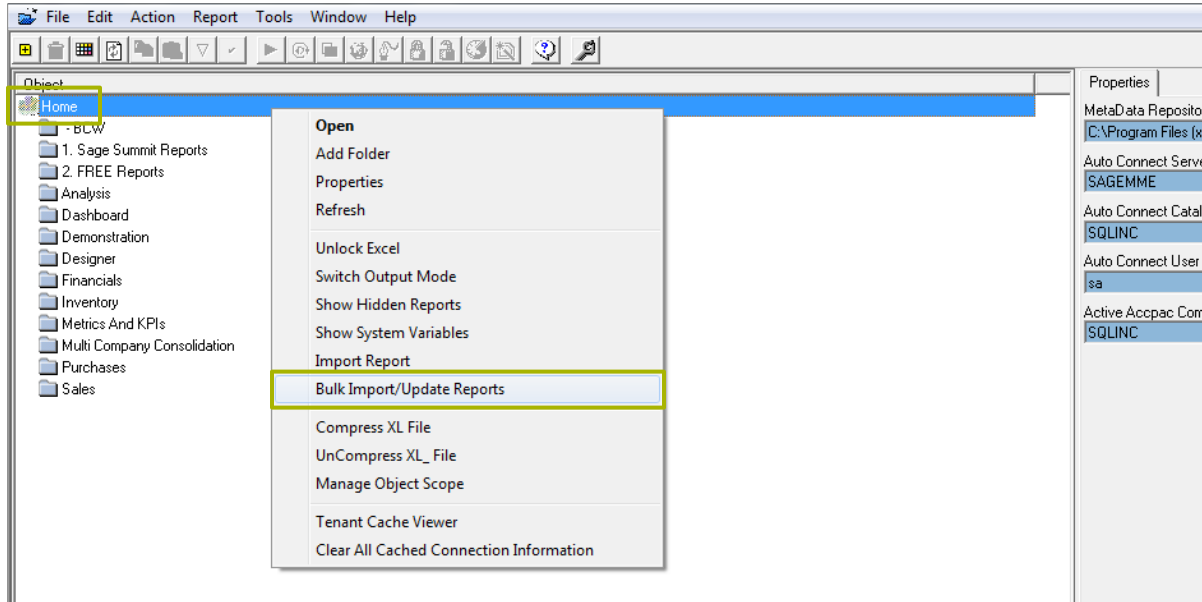
You can now use the Bulk/Import option to import the reports into the Sage Intelligence Report Manager.

IMPORTANT NOTE

The intention of bulk imports is to import new or updated custom reports into the current metadata repository and not to modify current versions of standard reports that were created by the new ERP upgrade.

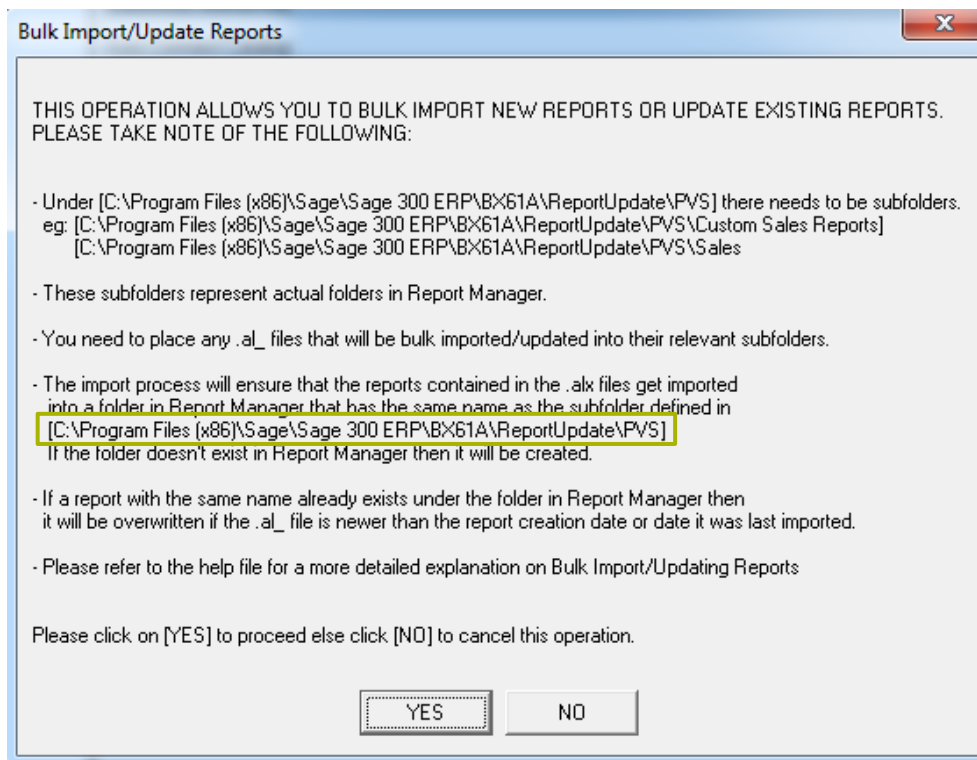
The import process will ensure that the reports contained in the .alx file, created by the Bulk Import process, are imported into a folder in the Report Manager that has the same name as the sub-folder defined in **C:\ProgramFile(x86)\Sage**

1. Launch SAGE Desktop.
2. Launch Report Manager.



3. Right Click the **Home** icon.
4. Select Bulk Import/Update reports.

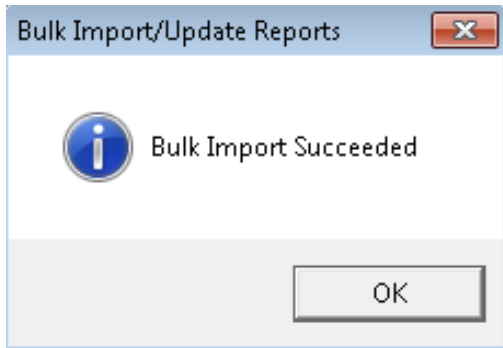
The Bulk Import/Update Reports screen displays:



5. Make a note of the folder path under “The import process will ensure...”

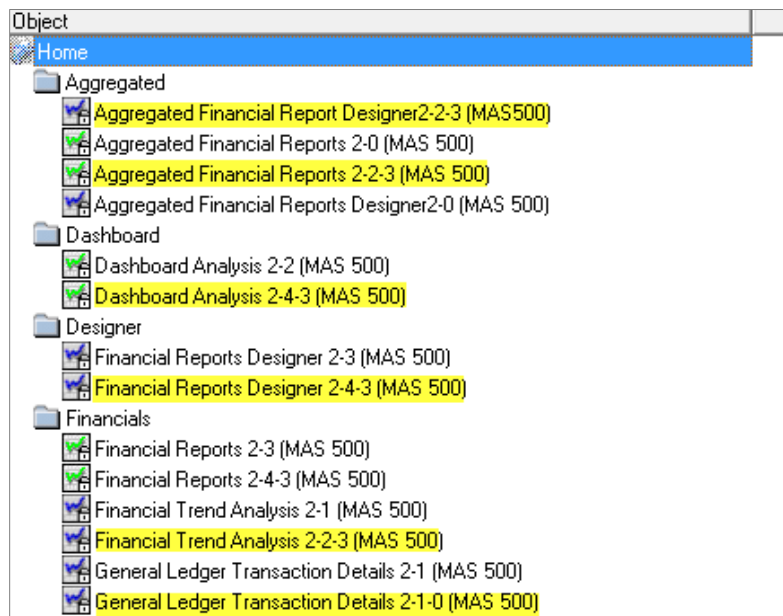
6. Select **Yes**.

The Bulk Import confirmation screen displays:



7. Select **OK**.

The imported reports are imported alongside any new reports.



IMPORTANT NOTE

On import, new folders are automatically created within the Report Manager, if they do not already exist, in order to duplicate the structure within the C:\ProgramFile(x86)\Sage directory.

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