Sage Intelligence Reporting
Report Distribution

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1.0 Distribution

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This guide will provide you with an understanding of how to distribute your reports once they are run.

In this, you will learn how to:

- Specify distribution settings.

- Manage distribution instructions.

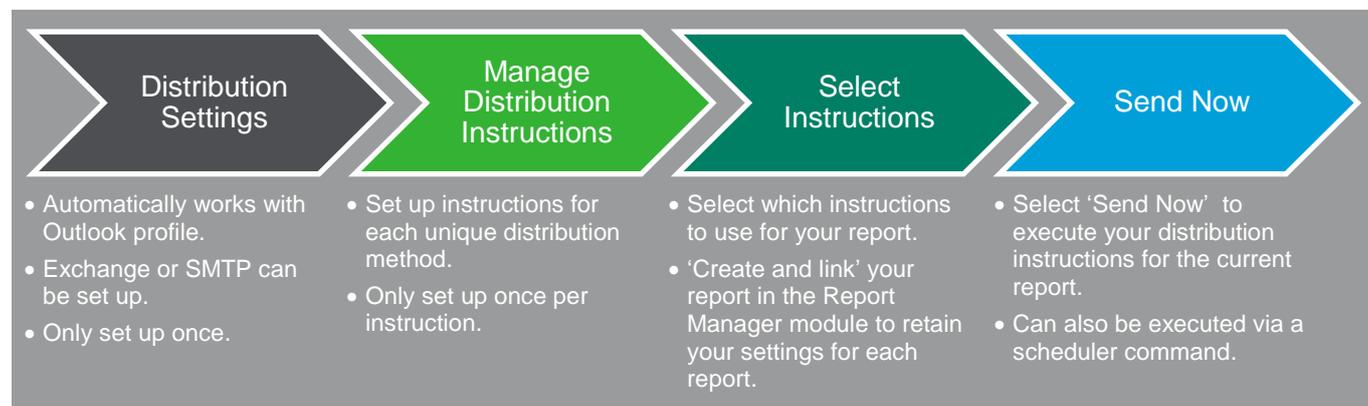- Select distribution instructions to use.

2.0 Introducing distribution

Report distribution is a powerful feature that saves time and effort by allowing you to send reports to a file, FTP site, or email in a number of standard formats.

Simply set up which reports you would like to distribute, whether you would like them in Microsoft® Excel®, MHMTL or PDF, and whom it should be sent to. You can even create custom criteria for sending out reports.

Features include the ability to customize each email format, use your existing Outlook profile and address book, or specify a SMTP or exchange server. The same report can be set up to be distributed to different destinations.

Distribution is ideal for sending reports out to line managers or providing corporate management with tailored reports.

Distribution Settings	Manage Distribution Instructions	Select Instructions	Send Now
• Automatically works with Outlook profile. • Exchange or SMTP can be set up. • Only set up once.	• Set up instructions for each unique distribution method. • Only set up once per instruction.	• Select which instructions to use for your report. • 'Create and link' your report in the Report Manager module to retain your settings for each report.	• Select 'Send Now' to execute your distribution instructions for the current report. • Can also be executed via a scheduler command.

2.1   Distribution settings

Email is the most popular distribution channel. By default, your Microsoft Outlook profile settings will be used by Sage Intelligence Reporting to send emailed reports automatically, however, if this is not preferable, or you do not have Microsoft Outlook installed, an exchange or SMTPs may be specified. These details will have to be obtained by your network administrator.

The **SMTP / Exchange Server** option is recommended for an unattended distribution, as the **Use My Outlook Profile** option requires Outlook to be open at the time of distribution.
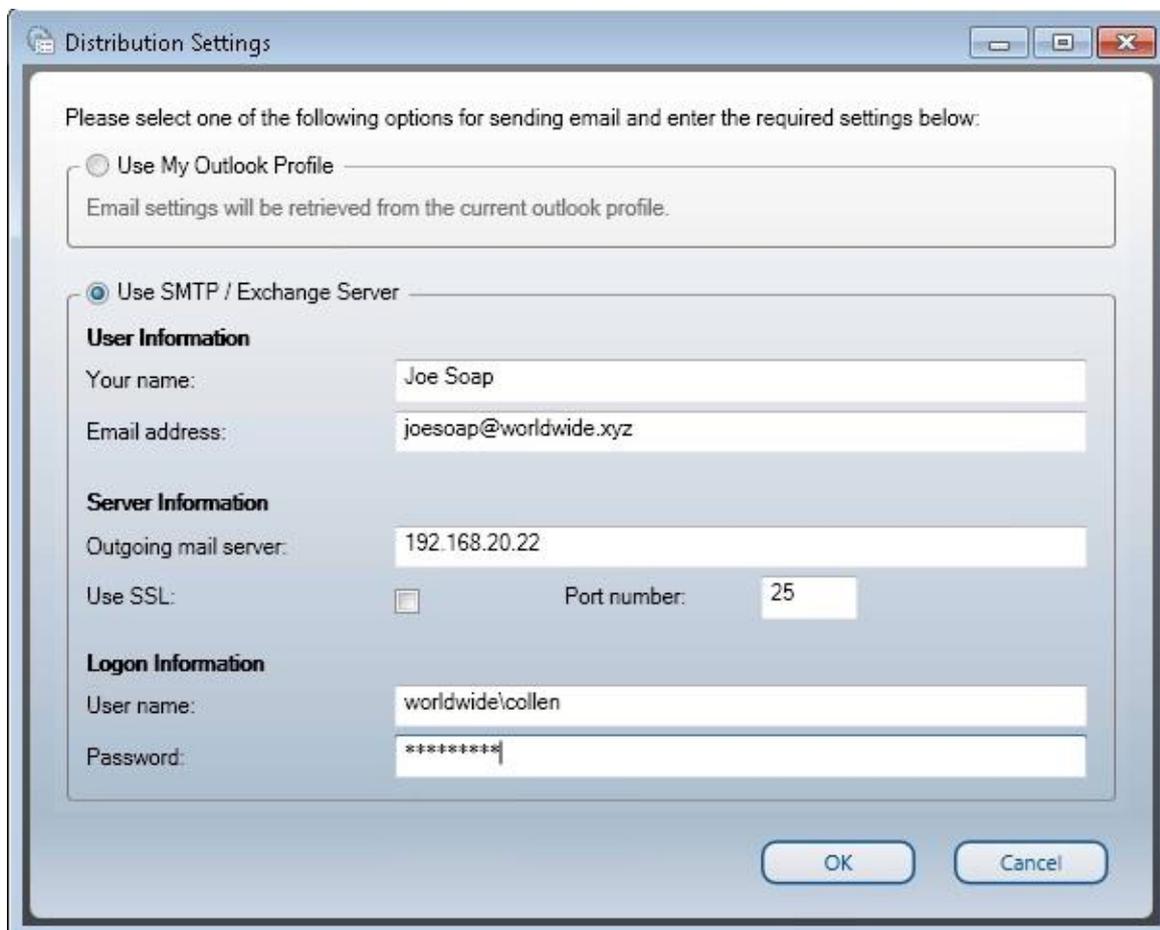
3.0 Manage instructions

3.1 Accessing distribution instructions

Distribution instructions save time by sending reports, along with pertinent information, automatically to the right person/people using the chosen electronic method. Use **Manage Distribution Instructions** to set up different instructions for each report that requires a unique distribution method, i.e. distributed to different people or via different methods, for example, Email, FTP, or saved to a folder.
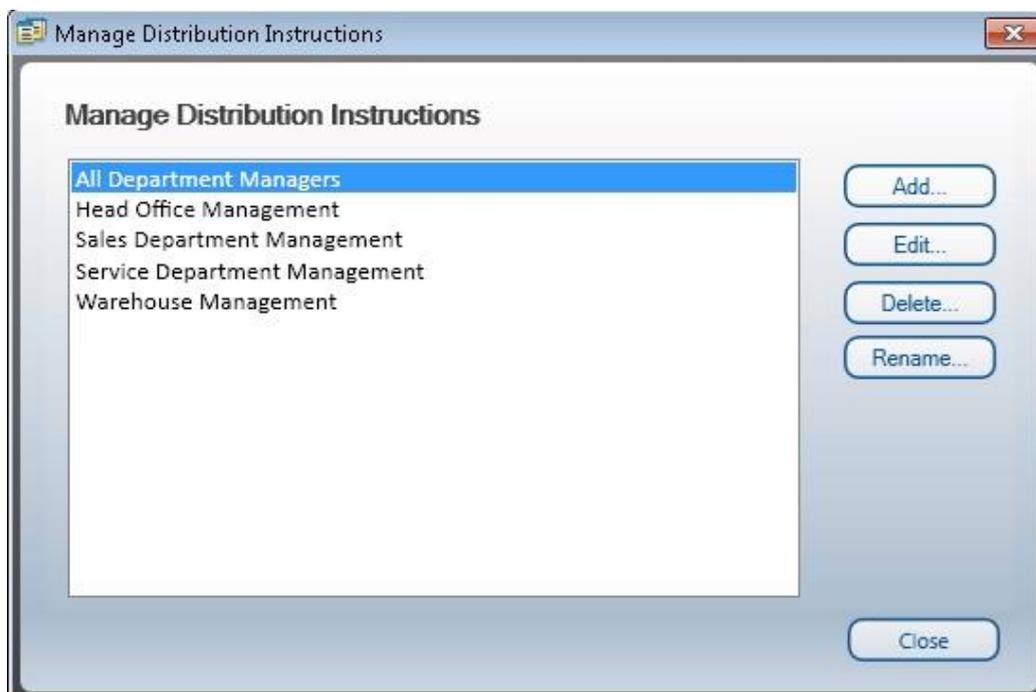
3.1.1 Manage distribution instructions

Complete the following steps to **manage distribution instructions**:

1. Run a report from the Sage Intelligence Report Manager to Microsoft Excel.
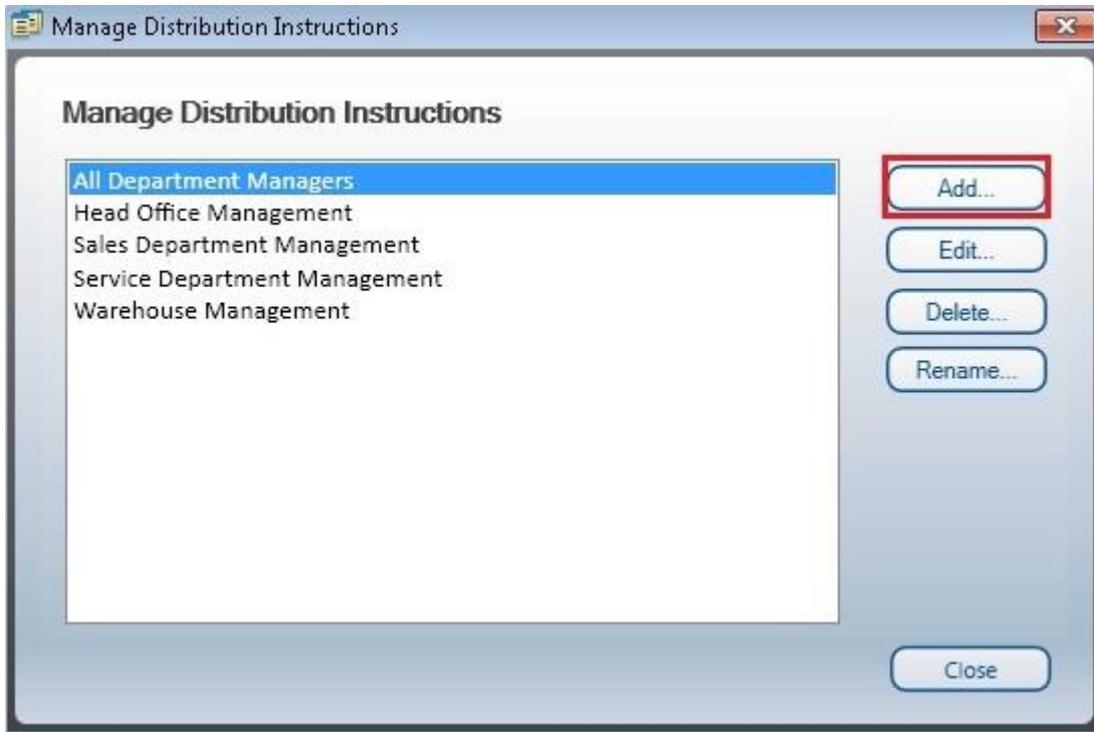
2. Select the **BI Tools** tab.

3. Click **Manage Instructions**.

4. From the **Manage Distribution Instructions** window, you can now **Add**, **Edit**, **Delete**, or **Rename** your Instructions.
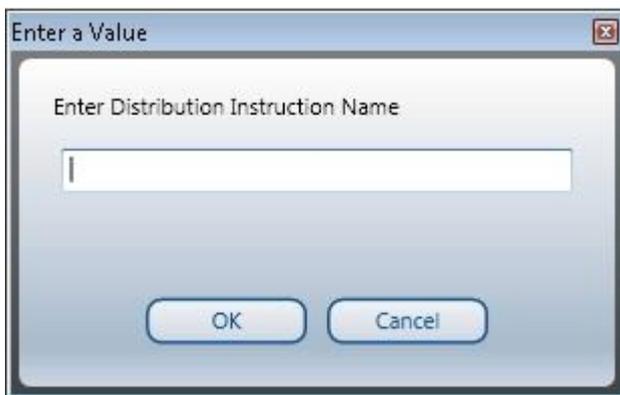
3.1.2 Add distribution instructions

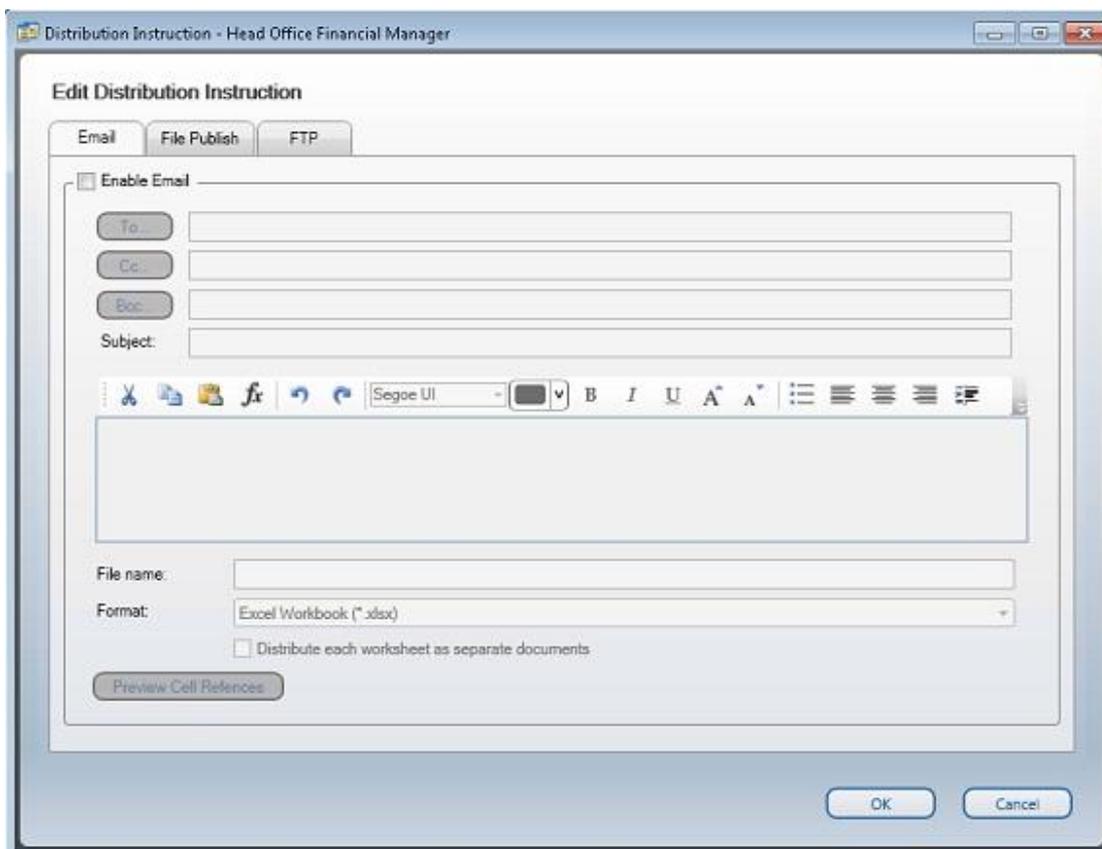Complete the following steps to add a distribution instruction:

1. From the **Manage Distribution Instructions** window:
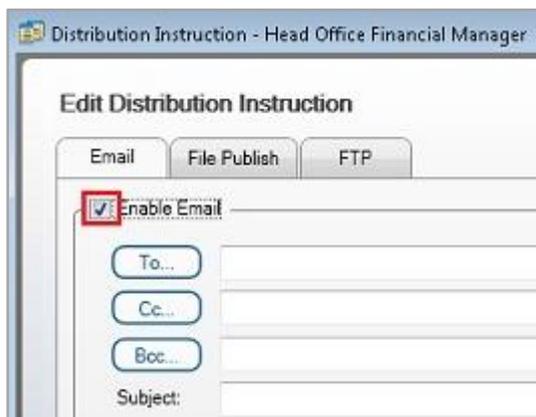
2. Click **Add**.

3. Enter a distribution instruction name.

5. You will be presented with a window that has three distribution methods, namely **Email**, **File Publish** and **FTP**.

6. By default, the methods are disabled. You may enable one or multiple options by selecting the **Enable** box/es.

4.0 Email distribution instruction

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4.1 Add email distribution instruction

When the **Enable Email** box is selected, you will be able to fill in the email details.

To add email distribution instructions, do the following:

1. Enter the recipients' email addresses or names in the **To**, **Cc**, or **Bcc** box.

    Always separate multiple recipients with a semicolon. To select from your Outlook address book, select the **To**, **Cc** or **Bcc** buttons and select the name/s. If you do not have Microsoft Outlook installed, you will need to enter the recipients full email address.

    -   **To…**   A message is sent to the recipients in the **To** box.

    -   **Cc…**   A copy of the message is also sent to recipients in the **Cc** box.

    -   **Bcc…**   A copy of the message is also sent to recipients in the **Bcc** box; however, it is a blind carbon copy so the names of the recipients in the Bcc box are not visible to other recipients.

2. In the **Subject** box, type the subject of the message.

3. In the message body, type in the required text to accompany your report.

    You may also use cell references to reference any data in your report. This is covered later in this guide. All of the standard formatting commands are also available from the menu bar.

4. Specify a file name for your report in the **File name** box.

5. In the **Format** box, select the format you would like the report to be emailed in.
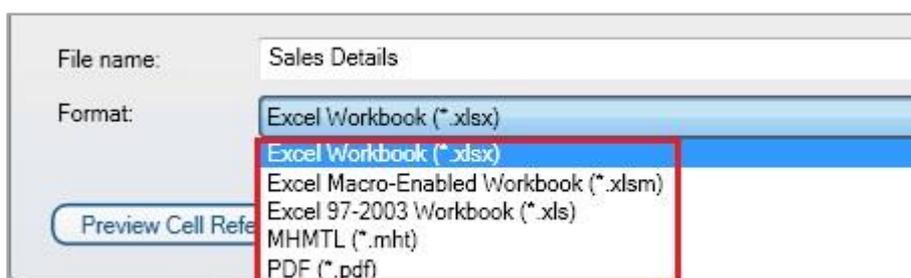
6. You also have the option to distribute each worksheet as separate documents or leave this option disabled to send worksheets in one workbook.
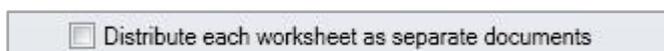
7. Click **OK**.

4.2   Adding cell references to the body of an email message

A cell reference refers to a particular cell or range of cells in your worksheet. Cell references are used to identify data for use in formulas to calculate results based on your data. From your **Email Distribution** form, you can add cell references to the body or headers of your email message. For example, you could reference the gross profit for the month.

To manage distribution instructions, do the following:

1.   Whilst in the **Email Distribution Instruction** window, at the point where you would like to reference the Excel cell reference, click on the **fx** button.

2.   The **Select a Cell** window will appear in Microsoft Excel.

3.   Type the cell reference/s, or click on the cell/s you would like to add and you will notice that its reference is automatically inserted into the window.
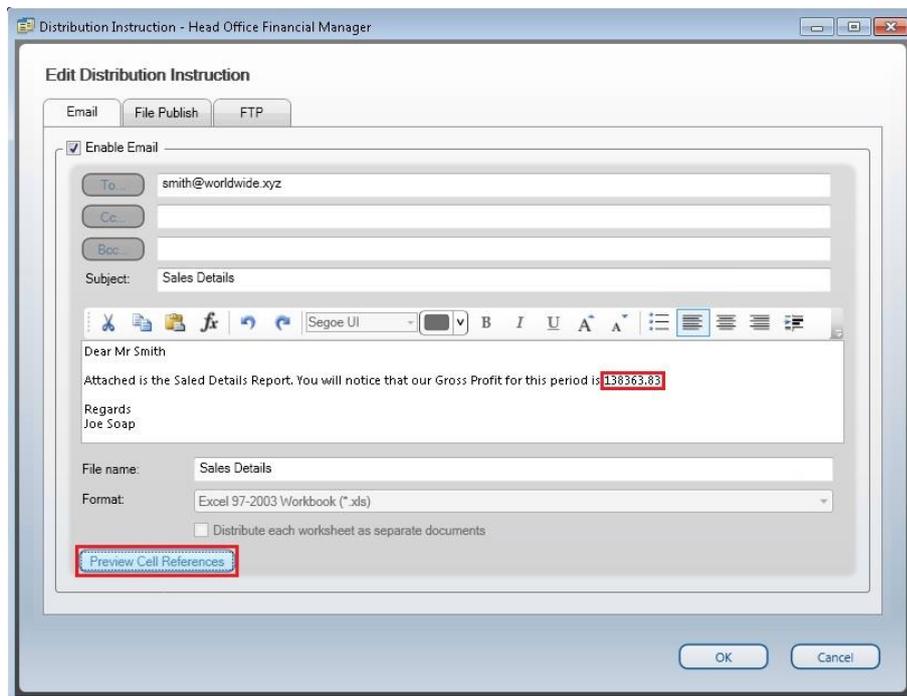

4.   Click on the **Expand Dialog** box.

5.   You will be returned to your email distribution instruction and you will notice that the cell reference has been added to your message text.
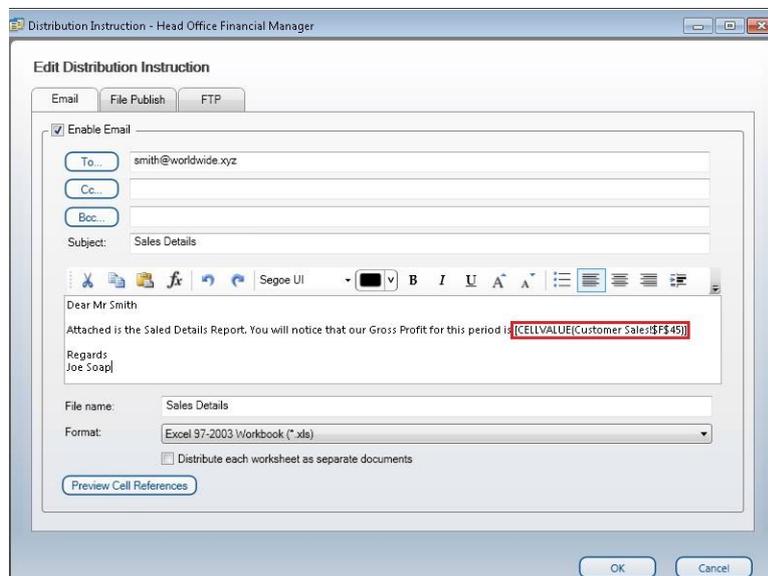
6. If you click on the **Preview Cell References** box, you will be able to see the text that would be inserted for the report that is currently open in Microsoft Excel from cell **F45** for this example:

> **NOTE:** You cannot edit the window whilst in **Preview Cell References** mode. To exit, select the **Preview Cell References** box again.

4.3   Adding Cell References to Email Headers

Cell references can also be added to the headers of your email message. For example, you could email a particular person if a condition was true. For example, in Microsoft Excel you could specify that if the sales revenue was above a certain amount, then the sales manager would receive a congratulatory email with the financial report.

Complete the following steps to add cell references to email headers.

1.   In your Excel report, add an **IF** formula in a blank cell, for this example we will add it into cell **N2**,

   =IF(B12>1000000,"jones@worldwide.xyz", ";")

   where cell **B12** represents your sales revenue and **jones@worldwide.xyz** represents the email address of the sales manager.

2.   In the **Manage Instructions**, email message header, right-click in the **To...** box, select **Insert**, **Cell Reference**.
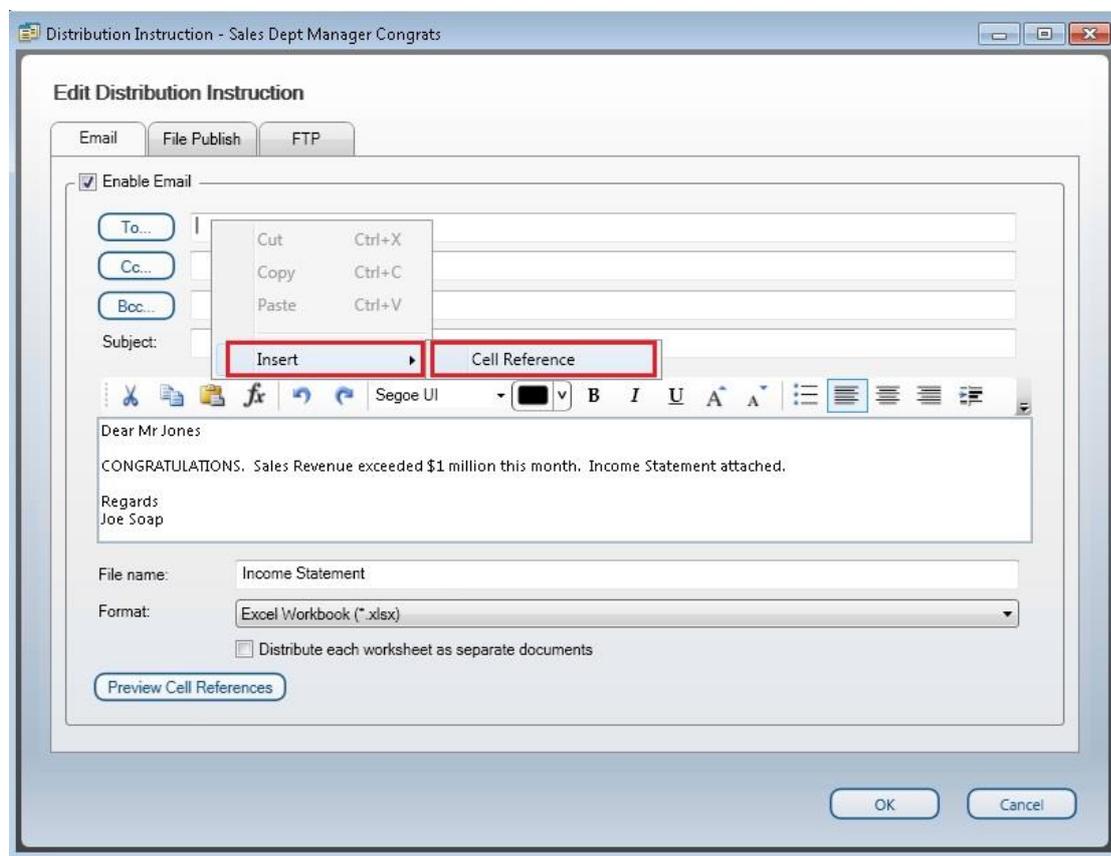
3.   In Microsoft Excel, select cell **N2**.

4.   Select the **Expand Dialog** box.

5. In your distribution instruction, you will notice the cell reference has been inserted into the **To...** box.

6. If you now select the **Preview Cell References** box, you will be able to see the value that will be inserted if your Sales Revenue exceeds $1,000,000.

7. If your sales revenue does not exceed $1,000,000 the email will not be sent to the sales manager as your **Preview Cell References To…** Box will show you that the sales manager's email will not be inserted.
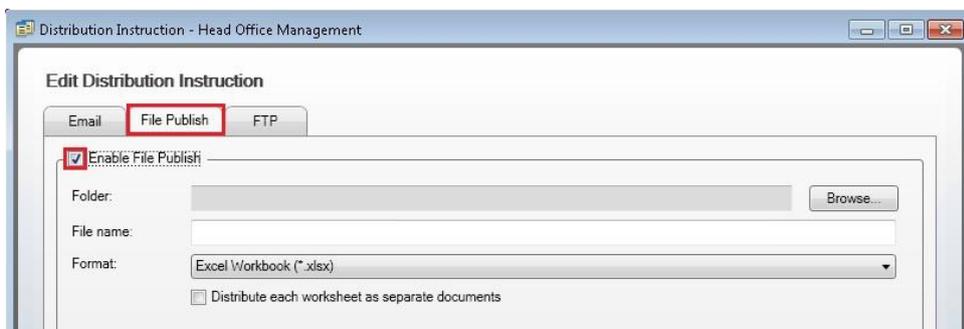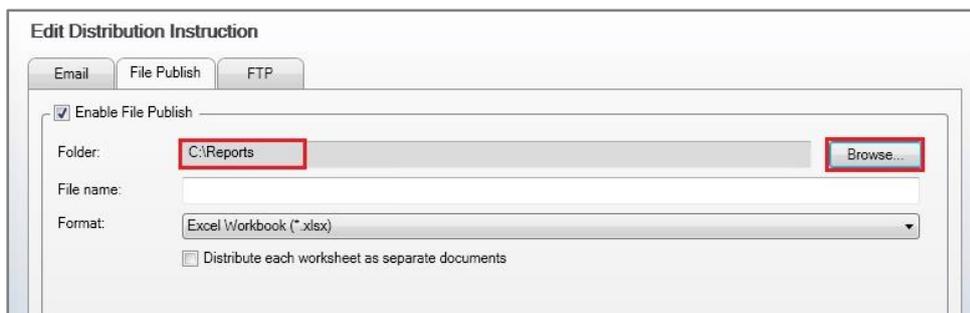
4.4 Add File Publish instruction

In order to save a report to a specified location, the file publish option can be enabled.

Complete the following steps to add a File Publish distribution instruction:

1. Click the **File Publish** tab.
2. Select the **Enable File Publish** box.

3. Click the **Browse** button to locate the folder where you would like the reports to be saved to and click **OK**.

4. Type in the file name you would like to save your report to, and select the format you would like the report to be in.

5. For the Excel and MHMTL format, you will have the option to save each worksheet as separate documents.
6. Select the box to apply the option.

7. Click **OK**.

4.5   Add FTP instruction

In order to FTP a report to a specified location, the FTP option can be enabled.

Complete the following steps to add an FTP distribution instruction:

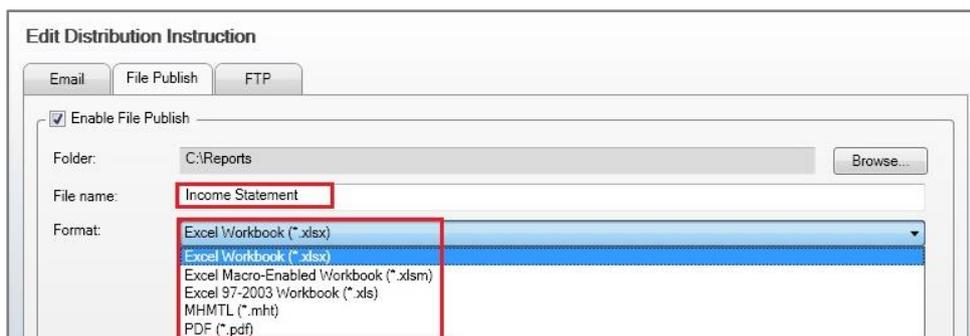1.   Select the **FTP** tab.

2.   Select the **Enable FTP** box.

3.   The server information can be obtained from your IT administrator as well as the logon information.

4.   Specify a file name you would like the report to be saved to.

5.   Specify the format you would like the report to be saved in.

6.   For the Excel and MHMTL format, you will have the option to save each worksheet as separate documents.

7.   Select the box to apply the option.

8.   Click **OK**.

5.0 Edit distribution instructions

To Edit distribution instructions, do the following:

1.   In Microsoft Excel, select the **BI Tools** tab.

2.   Click **Manage Instructions**.

3.   Select the distribution instruction you would like to edit.

4.   Click **Edit**.

5.   Make the necessary changes.

6.   Click **OK**.

5.1 Rename a distribution instruction
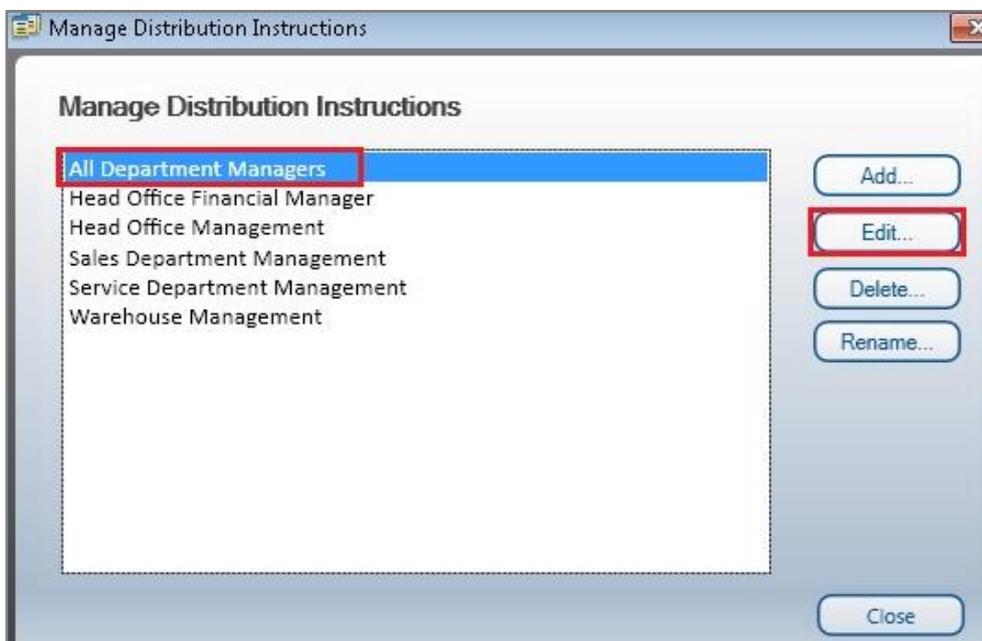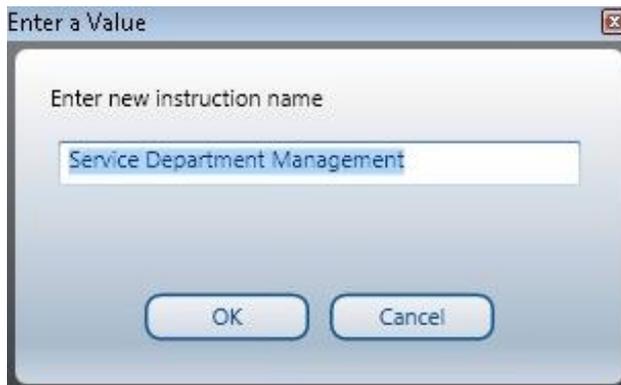
To rename an existing distribution instruction:

1. In Microsoft Excel, select the **BI Tools** tab.

2. Click **Manage Instructions**.

3. Select the distribution instruction you would like to rename.

4. Click **Rename**.

5. Type in the new name for the distribution instruction.

6. Click **OK**.

5.2   Delete a distribution instruction

To delete an existing distribution instruction:

1.   In Microsoft Excel, select the **BI Tools** tab.

2.   Click **Manage Instructions**.

3.   Select the distribution instruction to be deleted.

4.   Click **Delete**.

A confirmation message box displays:

Delete Distribution Instruction

Are you sure you want to delete this Distribution Instruction?

Yes   No

5.   Click **Yes**.

NOTE: Once a distribution instruction is deleted, it cannot be undone.

5.3   Select instructions

Once the distribution instructions have been set up, the instructions need to be linked to the report, and the worksheets which the instructions must apply to, need to be selected.

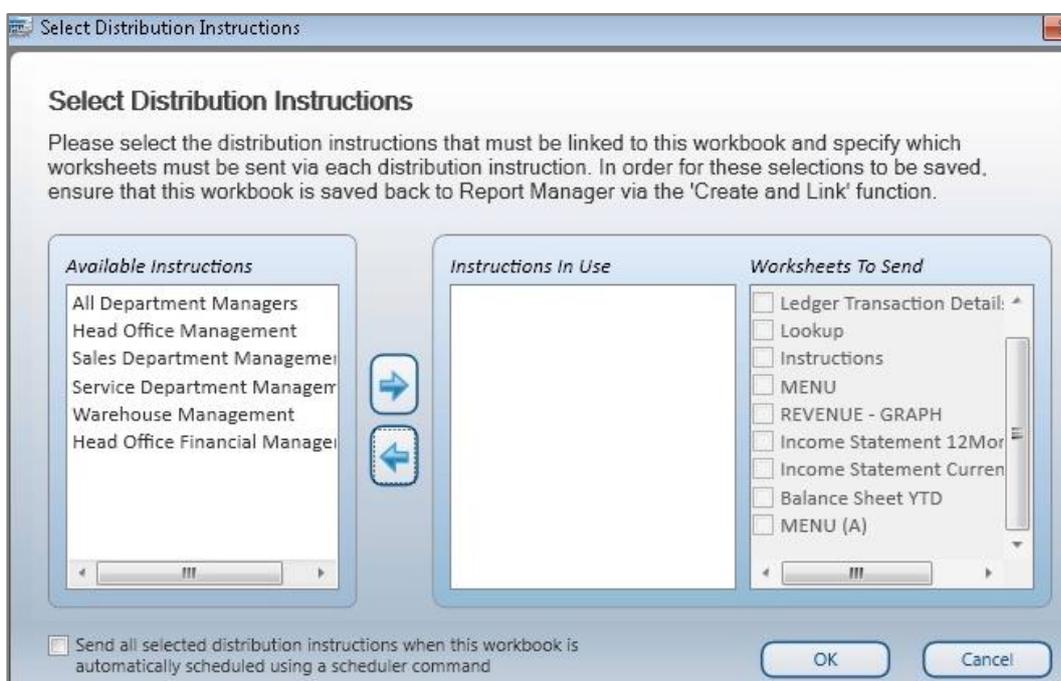To Select distribution instructions, do the following:

1.   Run the relevant report from Sage Intelligence Report Manager.

2.   In Microsoft Excel, click the **BI Tools** tab.


3.   Click **Select Instructions**.

The **Select Distribution Instructions** window appears:


> **NOTE:**   The left pane contains all the instructions you have set up. The right pane contains all the worksheets available in the current Excel report which you have run out from the Sage Intelligence Report Manager.

4.   Select the instruction from the left that you would like to apply.

5.   Click the **right arrow** button to add the instruction to the **Instructions in Use** box.
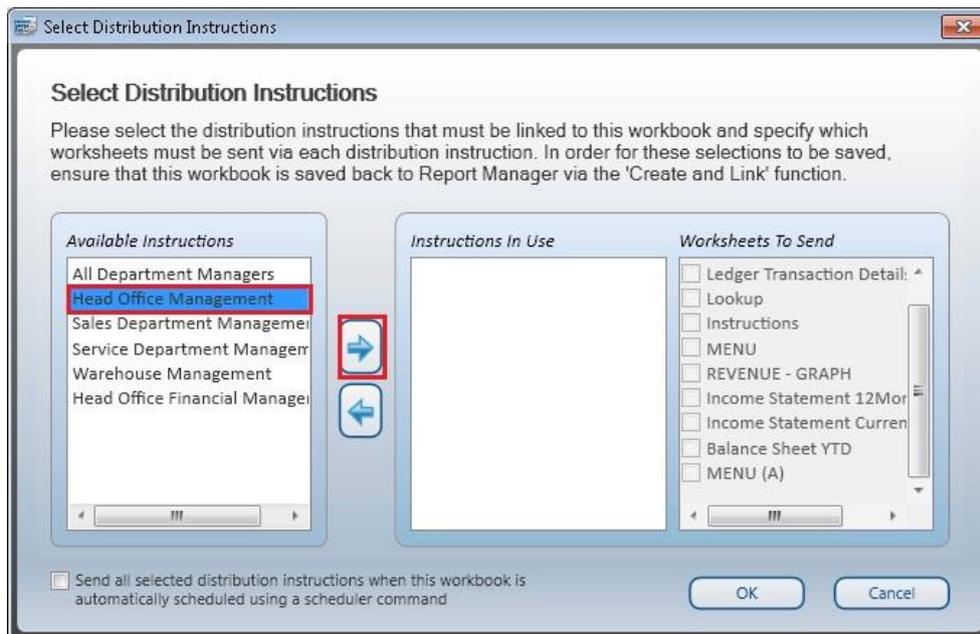
6.   Select the worksheets you would like to include in your distribution instruction.
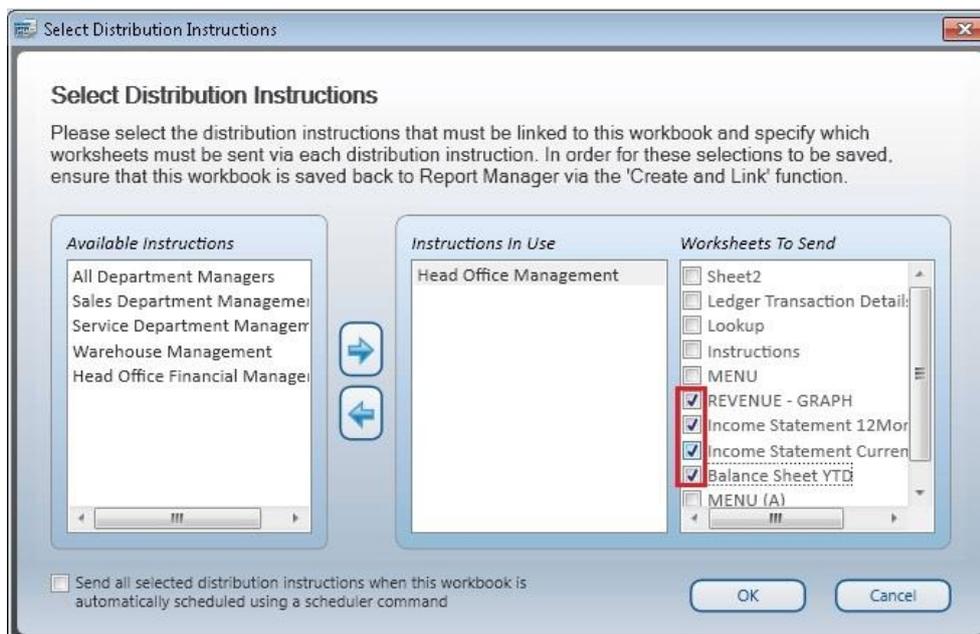
7.   If you would like to include an additional instruction, **repeat from step 4**.

8.   If you would like any selected distribution instruction/s to be executed when a report is automatically scheduled via a scheduler command, refer to the next section.
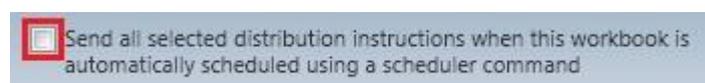
9.   Click **OK**.

> **NOTE:**   If you would like the distribution instruction to be permanently linked to the report, you will need to **Create and Link** the report in Sage Intelligence Report Manager.

6.0 Automated distribution

In order to use automated distribution it is recommended that you use the **SMTP / Exchange Server** option in your distribution settings as the **Use My Outlook Profile** option requires Microsoft Outlook to be open at the time of distribution.

For automated distribution instructions, do the following:

1. From your **Select Distribution Instruction** window, if you would like the distribution instruction to be executed when scheduling the report, select the check box at the bottom of the screen:

2. You will then need the distribution instruction to be permanently linked to the report, so you will need to **Create and Link** the report.

3. You can then schedule the report as per the normal procedure.

6.1 Send now

Once the distribution instructions have been selected for a report, you can execute the instructions immediately by selecting the **Send Now** button.

To execute distribution instructions, do the following:

1. Click the **BI Tools** tab.

2. Click **Send Now**.

3. The distribution instructions will then be validated. If there are any errors, these will be displayed; thereafter the distribution instructions will be executed.