



Business Insights Overview Document

for Sage 100 ERP

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Introduction

This document includes overview information about each task in the Business Insights module that is accessible from the menus. You can print this document to use as an offline reference.

The information in this document is also available in the Help system in the overview Help topics.

For additional information about the software, refer to the Help system, which also includes the following:

- Overview information for windows that cannot be accessed directly from menus
- Procedures that guide you step-by-step through common activities
- Explanations of important concepts
- Field descriptions
- Flowcharts
- FAQs

Dashboard Menu

Dashboard Options

Navigation

Select Business Insights Dashboard menu > Dashboard Options.

Overview

The settings entered in the Dashboard Options window are used for creating the Home and Web pages that can be accessed from the menu within each user's Home page.

Each module can be customized to fit your company's specific accounting requirements. Dashboard Options presents a series of options that allow you to select features most appropriate for your business. You can enter the company name and logo to display on the Home page. You can also define the number of segments to use in pie charts and the number of detail lines to appear in tables.

Dashboard Maintenance Wizard

Navigation

Select Business Insights Dashboard menu > Dashboard Maintenance Wizard.

Overview

Use Dashboard Maintenance Wizard to configure, modify, or delete Home pages for each user within the current company. You can determine the data elements to show or hide on the Web pages for users on a user-by-user basis.

NOTE Crystal Reports must be installed on your workstation to modify or add new templates.

Dashboard Maintenance Wizard - Options

Navigation

Select Business Insights Dashboard menu > Dashboard Maintenance Wizard. In the third wizard page, click Options.

This task is available only for data elements with detail lines or pie segments.

Overview

Use Dashboard Maintenance Wizard - Options to set options for a data element, such as the number of pie chart segments and table lines to display.

Dashboard Maintenance Listing

Navigation

Select Business Insights Dashboard menu > Dashboard Maintenance Listing.

Overview

Use Dashboard Maintenance Listing to list the Home page configuration for users for the current company.

Display Dashboard

Navigation

Select Business Insights Dashboard menu > Display Dashboard.

Overview

Use Display Dashboard to launch the Home page. When launched, the data elements appear in the Desktop if the Detail View is selected. If the Desktop is in the Collapsed View, the data elements appear in Internet Explorer. A user's Home page must be configured in the Dashboard Maintenance Wizard and an update must be performed before accessing Display Dashboard.

NOTE Purchase and payment history for credit card vendors do not display in the data elements. To view purchase and payment history for credit card vendors, use the Accounts Payable Vendor Purchase Analysis Report.

WARNING The accuracy of Business Insights data is dependent on when the last update was run and whether or not data is updated in the modules.

Start Automatic Dashboard Update

Navigation

Select Business Insights Dashboard > Start Automatic Display Update.

Overview

Use Start Automatic Dashboard Update to check the status of the polling program, start/stop the polling program, and view the date that the Business Insights data and Web pages were last updated. After the polling program starts, the polling program waits until the number of hours specified in the Number of Hours Between Executions field in the Dashboard Options window is met and then updates Business Insights.

NOTE This task is available only if the Perform Automatic Update and Page Generation check box is selected in the Dashboard Options window.

Reporter Menu

Business Insights Reporter

Navigation

Select Business Insights Reporter menu > Business Insights Reporter.

NOTE This task is not available for Sage 100 ERP Online.

Business Insights Reporter is available only if at least one report already exists.

Overview

Use Business Insights Reporter to create a new report or delete, modify, or copy an existing report. You can also use this task to launch reports that you have created.

To make further modifications to the report layout at another time, Crystal Reports Designer must be installed on your computer. If you select the Access the Crystal Designer after Clicking Finish check box in the last wizard page, your report will automatically launch in Crystal Reports Designer when you have completed the wizard pages. You can also modify the report layout in Crystal Reports Designer by clicking the Design Report button.

WARNING If you customize a Business Insights Reporter report in Crystal Reports Designer, modifying or copying the report in the Business Insights Reporter wizard will cause your Crystal Reports Designer changes to be lost. To modify the report and retain all changes, click the Design Report button and modify the report in Crystal Reports Designer.

Business Insights Reporter – Add Links

Navigation

Access this window using one of the following methods:

- Select Business Insights Reporter menu > Business Insights Reporter. Start completing the wizard pages. On the Select Fields wizard page, click Add Links.
- If a report already exists, in the Business Insights - Reporter selection window, highlight the report you are modifying and click Modify. On the Select Fields wizard page, click Add Links.

Overview

Use Business Insights Reporter – Add Links to create a link between another database source and the view you selected for the report.

NOTE The database source files are not linked until you complete the fields on this window and click OK. The linked file then displays in the Available Fields list (at the bottom of the list) on the Select Fields page.

Business Insights Reporter – Advanced Logic

Navigation

Select Business Insights Reporter menu > Business Insights Reporter.

- If a report does not exist, the Business Insights Reporter Wizard appears. On the Define Filters wizard page, click Advanced Logic.
- If a report does exist, the Business Insights Reporter selection window appears. Select a report and then click the Modify Report or Copy Report button, or click Create a New Report to launch the Business Insights Reporter Wizard. On the Define Filters wizard page, click Advanced Logic.

Overview

Use Business Insights Reporter - Advanced Logic to enter complex filters using the And, Or, and Not conditions.

This task is available only if the Run Time check box on the Define Filters wizard page is cleared on two or more rows for the values in the Field column.

Custom Report

Navigation

Access this window using one of the following methods:

- Select Business Insights Reporter menu > Business Insights Reporter. In the Business Insights Reporter window, double-click the report name to launch the report window.
- If you selected the Add this report to the Custom Reports menu... check box on the Define Report Name wizard page, the new report is added to the Custom Reports menu for the selected module. Select the Custom Reports menu for the module and then click the report menu for the report you created.

Overview

After using the Business Insights Reporter window to create a new report or to copy an existing report, you can access the report from the specified module's Custom Reports menu, or access it from the Business Insights Reporter Wizard. You can also use the Business Insights Reporter window to launch reports that you have created.

NOTE To make further modifications to the report layout at another time, Crystal Reports must be installed on your system. If you select the Access the Crystal Designer after Clicking Finish check box in the last Business Insights Reporter wizard page, your report will automatically launch in Crystal Designer when you have completed the wizard. You can also modify the report layout in Crystal Designer by clicking the Design Report button in the Business Insights Reporter window.

Custom Report – Print Summary

Navigation

Access this window using one of the following methods:

- Select Business Insights Reporter menu > Business Insights Reporter. In the Business Insights Reporter selection window, double-click the report name to launch the report window.
- If you selected the Add this report to the Custom Reports menu of the selected module check box and the Print Summary Report check box on the Define Report Options wizard page, the new summary report is added to the Custom Reports menu for the selected module. Select the Custom Reports menu for the module and then click the report menu for the report you created.
- If you selected the Run this report after clicking Finish option on the Completion wizard page, the report window automatically launches after clicking Finish in the Business Insights Reporter Wizard.

Overview

Use the print summary version of the custom report window to print a summary report consisting only of subtotal break information. If the Print Summary Report check box is cleared, all detail information prints on the report.

NOTE You must use a template type other than Labels.

After using the Business Insights Reporter window to create a new report or to copy an existing report, you can access the report from the specified module's Custom Reports menu, or access it from the Business Insights Reporter Wizard. You can also use the Business Insights Reporter window to launch reports that you have created.

NOTE To make further modifications to the report layout at another time, Crystal Reports must be installed on your system. If you select the Access the Crystal Designer after Clicking Finish check box in the last Business Insights Reporter wizard page, your report will automatically launch in Crystal Reports in Design mode when you have completed the wizard. You can also modify the report layout in Crystal Reports by clicking the Design Report button in the Business Insights Reporter window.

Business Insights Reporter Export

Navigation

Select Business Insights Reporter menu > Business Insights Reporter Export.

NOTE This task is not available for Sage 100 ERP Online.

Overview

Use Business Insights Reporter Export to export a report definition to a text file. The report definition is saved in a new text file located in the \MAS90\Reports\BIReporter folder with a .BIR extension.

NOTE Roles cannot be exported because the roles defined at one office site may vary with the roles defined at another office site. After importing the report, be sure to modify the report using the Business Insights Reporter Wizard and select the applicable roles on the Select Roles wizard page. Additionally, any report selected for export that contains a chain-to report will not export to the chain-to report definition.

NOTE If you modify the report off-site, copy the report definition file (.BIR) and the Crystal Reports file (.RPT) from the MAS90\Reports\BIReporter folder. Both files have the same report name, making them easy to locate.

Business Insights Reporter Import

Navigation

Select Business Insights Reporter menu > Business Insights Reporter Import.

NOTE The report definition file (.BIR) must first be copied to the \MAS90\Reports\BIRReporter folder. Although the Crystal Report file (.RPT) is not needed for importing, it should also be copied to the \MAS90\Reports\BIRReporter folder, because it is required for printing.

NOTE This task is not available for Sage 100 ERP Online.

Overview

Use Business Insights Reporter Import to import a report definition. The report definition is imported from the .BIR file located in the \MAS90\Reports\BIRReporter folder. After a report is imported, you can modify, copy, or print it using Business Insights Reporter.

If a report already exists and you do not want to lose the existing report, copy the existing report to a new report using the Business Insights Reporter Wizard and then import the report.

New and existing reports can be imported. After a report is imported successfully, the .BIR file and the .RPT file are deleted from the Import folder within the BIRReporter folder.

NOTE If you modify the report off-site, copy the report definition file (.BIR) and the Crystal Report file (.RPT) from the MAS90\Reports\BIRReporter folder. Both files have the same report name, making them easy to locate.

Explorer Menu

Business Insights Explorer

Navigation

Select Business Insights Explorer menu > select a view.

Overview

Use Business Insights Explorer to navigate through data, and preview and drill into related data for the selected row to follow a transaction from beginning to end. Business Insights Explorer provides predefined views of commonly used sets of data, such as the Customer view, Sales Orders view, and Open Invoices view. Data can be exported to a variety of output types, including Microsoft Excel, Microsoft Access, Microsoft Word, XML, and Web pages.

The Business Insights Explorer window is comprised of three major areas: the Navigation pane, the Data View grid, and the Preview pane. All of these areas provide ways to navigate to related data or preview information for the selected view.

You can use the Navigation pane to explore data related to the selected view. The Navigation pane is located to the left of the main Data View grid in the Business Insights Explorer window.

Data in the Data View grid can be filtered, sorted, grouped, and summarized. You can also modify the columns in the grid by showing and hiding columns, changing the column order, changing the column names, and formatting the data that appears in the columns. Changes to the Data View grid can be saved to a setting. The information in the Data View grid can also be printed and saved to a report.

The Preview pane allows you to view related data in the Data View grid. The Preview pane is located below the Data View grid. The data in the Preview pane is filtered by the selected row in the Data View grid and by the option selected in the Preview group on the Navigation pane.

Save Setting As

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select File menu > Save Setting As.

Overview

Use Save Setting As to save customized changes to the current setting as a new setting with a specific name. The new setting can be saved as a public or private setting. You can also save the new setting as the default setting.

NOTE Settings are global across all companies.

Format Settings

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select Edit menu > Format Settings.

Overview

Use Format Settings to specify the default formats to apply to columns of data in the Data View grid based on the format type. The types of data that can be formatted include Date, Number, Currency, Boolean, and Named Value. This allows you to change the format for a type in one location while affecting all columns of data with the format type applied.

NOTE You can override the global formatting of columns by using the Columns Setting window for the selected column.

Column Settings

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select Edit menu > Column Settings.

Overview

Use Column Settings to modify the captions and other attributes of columns in the Data View grid. Column Settings also allows you to modify formatting for columns at the column level rather than globally across all columns.

Add Column

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select Edit menu > Column Settings. In the Column Settings window, click Add.

Overview

Use Add Column to select a field from any one of the tables that are part of the data source for the view. Once selected and confirmed, the field is added to the Columns list and can be included in the Data View grid.

NOTE User-defined fields (UDFs) that are added with the Add Column task are displayed the next time you open the Business Insights Explorer window.

NOTE You can only add fields from the tables displayed in the Add Column window. Additional tables cannot be added to this window.

Calculated Field

Navigation

Access this window using one of the following methods:

- Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select Edit menu > Column Settings. In the Column Settings window, click Calculated to create a new field.
- Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select Edit menu > Column Settings. In the Column Settings window, click Edit to modify an existing field.

Overview

Use Calculated Field to add or edit calculated fields to the Data View grid. Calculated fields are expressions that can be based on fields, driver functions, or constant values.

Add Toolbar

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select View menu > Toolbars menu > Customize. In the Customize window, on the Toolbars tab, click New.

Overview

Use Add Toolbar to add toolbars in the Business Insights Explorer window. After creating the toolbar, you can click and drag button from the Commands tab to the toolbar.

Customize

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select View menu > Toolbars menu > Customize.

Overview

Use Customize to customize menus and toolbars in the Business Insights Explorer window. You can add, remove, and rename buttons and menus on the toolbars, create your own custom toolbars, show or hide toolbars, and move toolbars to a different location.

NOTE Each toolbar has a drop-down button that allows you to show, hide, and customize the toolbar. You can also reset the toolbar to the default setting.

Filter Builder

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select Data menu > Filter Builder.

Overview

Use Filter Builder to build filters to apply to the data in the Data View grid. The data can be filtered by any column included in the Data View grid even if the column is not visible in the grid. Multiple filters can be applied to the view. Filters are saved with the setting when you click the Save button on the Business Insights Explorer toolbar.

Options

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, select Tools menu > Options.

Overview

Use Options to maintain global settings that apply to Business Insights Explorer. These options allow you to set cell focus preferences, display navigation buttons, data loading preference, row count limits, grid formatting, and e-mail format options.

Custom Filter

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, click the drop-down arrow at a column header in the Data View grid, and then select (Custom...).

Overview

Use Custom Filter to define a custom filter. The custom filter is applied to the data in the Data View grid.

Column Selection

Navigation

Select Business Insights Explorer menu > select a view. In the Business Insights Explorer window, on the Business Insights Explorer toolbar, click the Column Selection button. A floating Column Selection window appears.

Overview

Use Column Selection to show or hide columns in the Data View grid. The Column Selection window displays all columns that were previously hidden from the grid.