

Instructions for Importing Reports into Sage 100 ERP Intelligence

This guide gives step by step instructions for importing Reports that have been download from the Free Report Templates Group on the Sage Intelligence Community.

1. On the destination workstation, open the **Report Manager**
2. From the **Object** window, **right-click** on **Home** icon or **right-click** on the applicable **Folder** in which you want to import the report and select **Import Report**
3. Browse and select the report you would like to import (an exported report file with the **.al_** file extension)
4. Click **Open**
5. The **Import Report** dialog box below will appear.

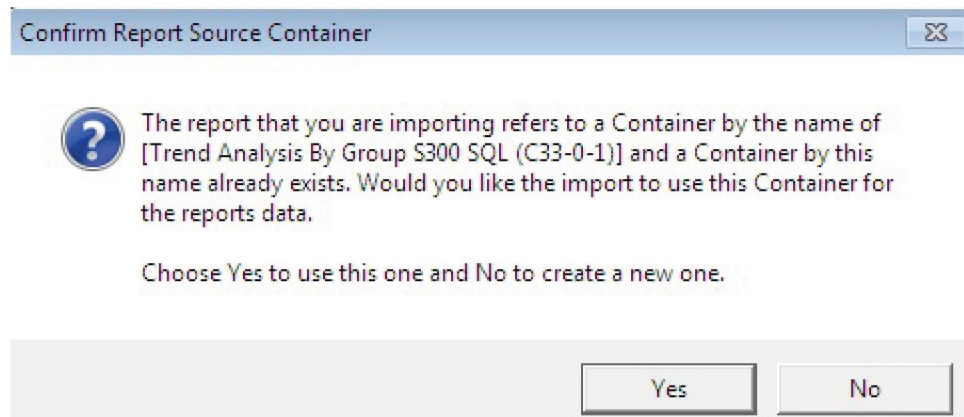
The screenshot shows the 'Import Report' dialog box with the following fields and values:

Report Name	Copy of Financial Report Designer 1-1
Created by Company	9000012930
Report Container Source	
Creation Time	5/27/2015 9:42:32 PM
Original Template Name	Copy of Financial Report Designer 1-1.xlsx
Template File Size (bytes)	876056
Original Connection Name	N/A
Original Connection Type	N/A
Target Connection	Sage MAS (Auto Connect)
Target Connection Type	
Report Destination	

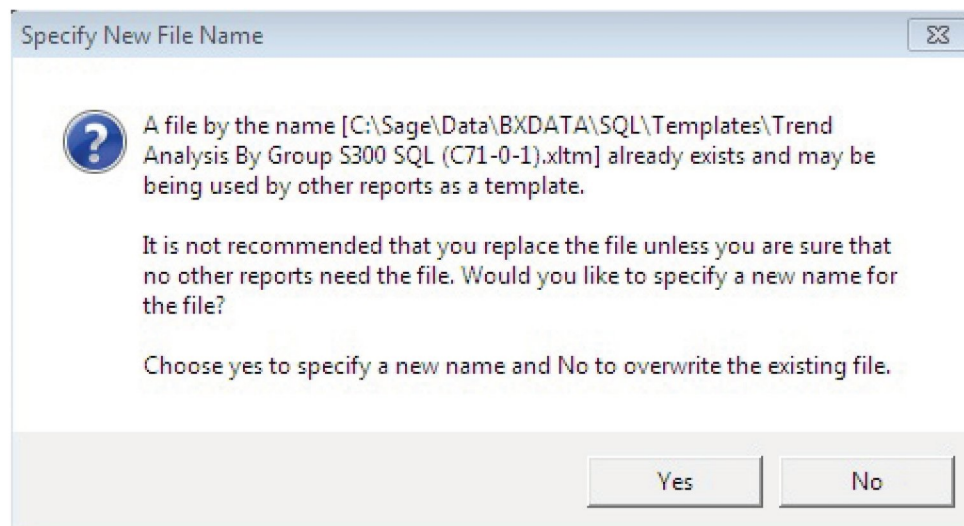
Buttons: Import, Cancel, New

6. In the **Report Name** field, you can change the name of the report if you want your imported report to have a different name to its current naming
7. In the **Target Connection** field, select the **Sage MAS (Auto Connect)** from the drop down list
 - **Note:** If importing a consolidated type of report, you need to select the **Sage MAS Consolidation** target connection
8. Select the appropriate **Report Destination** folder from drop down, which is the Report Manager folder where you want to save the report *i.e.* (**Sales**) or click **New** button to Create a New Folder
9. Click **Import**
10. Click **OK**

You may get a message **highlighting that the container may already exist**. While a container with the same name may exist, the container that is being imported may not necessarily have the same expressions in as the container of the same name. Its best practice to rename the Container here.



11. Click **No** to create a new container. Give the Container a **New Name**
12. A message may appear indicating that a template already exists – click **Yes** to specify a new name
13. If you are importing **Union Reports** or the Report that has a **Drill down** report you will repeat the naming process for each new Container and sub report. (Repeating step 12-13)



14. Once complete a confirmation that your **Import Succeeded** will appear. Click **OK**
15. **Double click** on the applicable folder **twice** to collapse and expand the folder, in order to display your new report.

acutedata

Software Consulting Services

800.761.3037

solutions@acutedata.com

www.acutedata.com