



# Guide to getting information out of Sage 200

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## Introduction

Sage 200 provides you with a variety of ways to view information about your company. This guide is designed to provide a brief overview of the different options available. This guide consists of:

- A brief explanation of the reporting methods available.
- An example for each method, illustrating how they may be used.
- Demonstrates the best way to answer some common questions you have about your data.



## Methods available for viewing information in Sage 200

There are four main methods you can use to report and extract information from a Sage 200 database:

- Standard Reports and Enquiries
- Report Designer
- Workspaces
- Business Intelligence

All of these methods are available with a standard installation of Sage 200. The method that you use will depend upon the kind of information you require, and how you plan to use that information.

Sage 200 uses a reporting data model to make it easier for you to create and amend reports using the Report Designer, and to amend and create workspaces. The reporting data model simplifies the underlying database structure in Sage 200, making it easier to find the required fields without having to know the individual database tables.

## Standard Reports and Enquiries

Each module in Sage 200 has its own set of standard reports and its own set of enquiries.

Each report has a set of criteria allowing you to select the range of records from that module to include on the report. Each report can be printed, emailed and exported to an excel spreadsheet.

The enquiries allow you to view information about transactions that have been entered for each module. The available enquiry screens are different for each Sage 200 module. Some enquiries are view only and some can be printed.

### When to use standard reports and enquiries

- To print documents to send to your customers and suppliers.
- When you require a physical copy of the data to distribute.

### When standard reports and enquiries are not useful

- When you want to add to, or remove, the data included on the report.
- When you want to include data from different Sage 200 modules or from other sources (such as CRM or from an Excel spreadsheet).
- When you want to change how the data is displayed on the report. For example, change the report layout, or move individual data fields.

## Report Designer

Report Designer allows you to modify the existing Sage 200 standard reports, or to create your own reports. For example, you can change the layout of the report, add data fields and add criteria and filters.

### When to use the Report Designer

- When you want to customise the standard reports.  
For example, you can:
  - Add or remove criteria.
  - Divide information in the report into groups.
  - Sort the order that the information appears on a report.
  - Filter the information that appears on a report.
  - Change the styles that are applied to a report, such as the font and size of the text, headings etc.
  - Add images to your reports.
  - Generate your reports in a variety of file formats, such as pdf, html, csv.
- To create your own printable reports.

- To add information from other Sage 200 modules or other data sources to your reports.
- To add or move information to match your layout stationery such as invoices, credit notes, remittances etc.

### **When Report Designer is not useful**

- When you want to analyse trends in your data.
- When you want to action the information immediately.

### **How to access the Report Designer**

 **Open:** Report Designer > Report Designer.

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## Workspaces

The Sage 200 workspaces have been designed to help you view key business information in real time.

A workspace is a separate work area on your Sage 200 desktop. Each workspace displays information on a series of linked panels. A number of default workspaces have been provided for you. You can amend the default workspaces to suit your business or you can create your own workspaces.

### When to use workspaces

- When you want an instant view of your Sage 200 data in real time.  
The workspaces are updated each time you refresh Sage 200.
- When you want to view information from different modules or sources in the desktop.  
You can add information from any module in Sage 200 to a single workspace. You can also add information from CRM, a third party database or an excel spreadsheet.
- When you want to view information and act on it.  
You can open relevant Sage 200 forms from your workspaces.
- When you want to bring all related information together to perform a task.  
You can use a single workspace to view information that would normally require you to open several Sage 200 windows or reports.
- When you want to see the details of an item without opening other forms or reports.  
You can select an item on one panel and view information about it on another. For example, on the **Credit Control** workspace, you can select a customer on one panel and see all unpaid invoices for that customer on another panel.
- When you want to change the displayed information.  
You can add and remove the displayed columns and add filters to your workspaces.
- When you want to create a view of information that you use all the time.  
You can create workspaces for specific users and job roles.

### When workspaces are not useful

- When you want a printed copy of the information.
- When you want to analyse trends in your data.

### How to access workspaces

1. To use the default workspaces, select *Workspaces* from the Tool Bar or Navigation Bar.
2. To create or edit workspaces, select *Tools > Workspace Designer*.

## Business Intelligence

Business Intelligence (BI) is a separate module within Sage 200. It uses the data from the Sage 200 Financials, Commercials and Project Accounting modules. You use BI to view and manipulate data using Microsoft Excel.

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**Note:** You cannot currently use BI to view your CRM data.

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The information in the Sage 200 database is extracted into several pre-defined cubes. These cubes contain the most important business information from your Sage 200 data. This data already calculated and sorted, making it quick to retrieve and easy to manipulate information. This is contrast to the standard reports where calculations are made from a list of transactions while the report is created .

You can choose when the data contained in the cubes is updated, by setting up a scheduled task using the BI Administration tool. This is set to the previous night by default. The cubes can then be manipulated to allow you analyse your data.

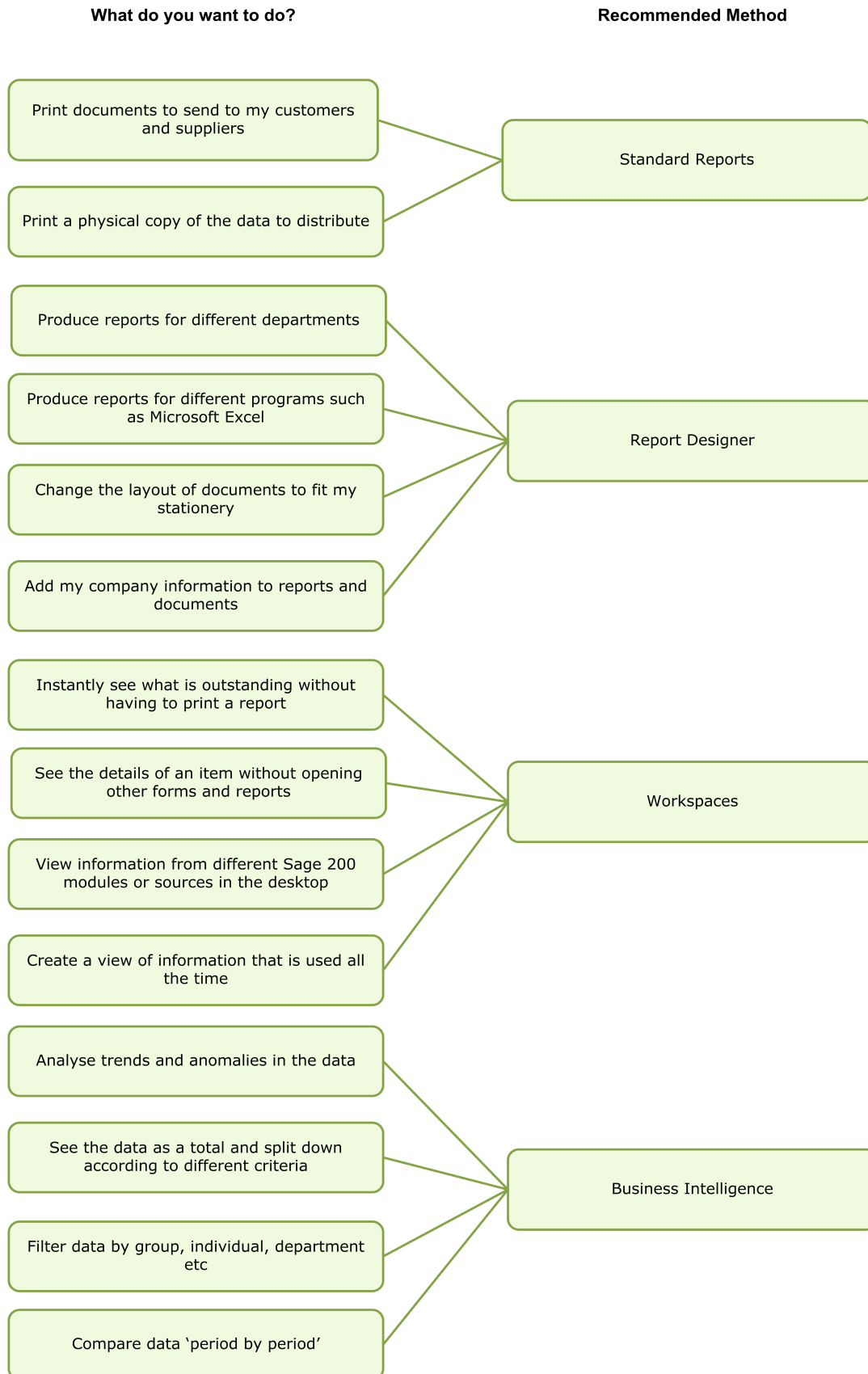
### When to use Business Intelligence

- When you want to analyse trends and anomalies in your data.
- When you want to see data as a total and then split it down according to different criteria, such as by department, manager, area etc.
- When you want to compare data period by period.

### When Business Intelligence is not useful

- When you want to use data from other sources such as CRM.
- When you want a physical copy of the data such as in a printed report or to send in an email.
- When you want to view data to action immediately.

## Which method should I use?



## Examples

This chapter contains an example for each method. These examples are designed to illustrate some of the features available for each method and how to use them.

## How to use standard reports and enquiries

Each module in Sage 200 has its own set of reports and enquiries. The reports are always created as a physical copy. The enquiries allow you to view information about the transactions that have been posted to that module.

Using the *Aged Debt* report as an example, this explains how to:

- Print a standard report.
- Save the report criteria to use again.
- Email a standard report.

### How to print a standard report

In this example, we will print the *Aged Debt* report from the Sales Ledger module

1. Choose *Sales Ledger > Reports > Credit Control > Aged Debtors (Summary)*.
2. Select the relevant criteria.
3. Click *OK*.
4. The report is sent to the *Printer, Spooler* or opens as a *Preview* depending on your *Default Output Mode*.

To change your *Default Output Mode*, choose *File > Choose Output Mode*.

### How to save the report criteria to use again

1. Open the report and select the relevant criteria.
2. Click *Save*.
3. Enter a *Name* for the criteria and click *OK*.
4. To print the report using the saved criteria, click *Load*.
5. Select the criteria name from the list, and click *OK*.
6. Click *OK* again to run the report.

### How to email a standard report

1. Choose to *Preview* the report.
2. Click *E-mail*.
3. Your e-mail program opens with the report attached in a new message.
4. Enter your e-mail details and send the message.

## How to use Report Designer

Using the Sales Order Profitability report as an example, this explains how to use Report Designer to:

- Add criteria to a report.
- Add a filter to a report.
- Add data to a report.
- Email a report as a .csv file.

The screenshot shows the Sage Report Designer interface for a report titled "Sales Order Profitability (Summary).report". The main report area displays a structured layout with the following sections and content:

- Page Header:** (Empty)
- Report Header:**
  - DESCRIPTION:** SOP\_Document\_Analysis\_3\_DISPLAY
- CustomerAccountNumber header:**
  - Customer: CustomerAccountNum Customer Account Name
  - Currency: Syst
- Document:**

Document	Sales Value	Order Status
Docum entNo	SOP OrderReturnTypename	Line Total Value
CustomerAccountNumber footer		Name
- CustomerAccountNumber footer:**
  - Totals for Customer: CustomerAcco
- Report Footer 2:**

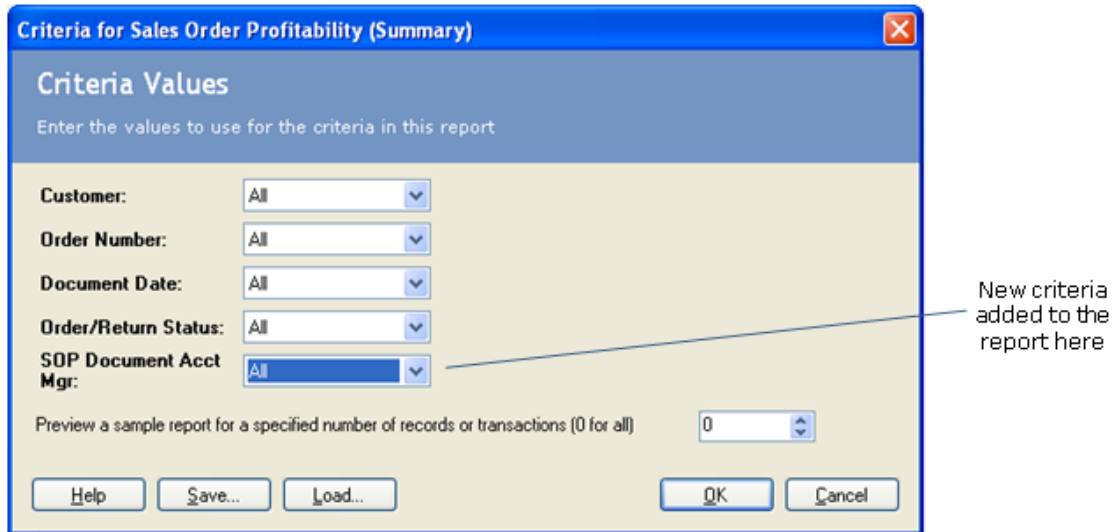
Customer	CustomerRef_DISPLAY
Order number	OrderNo_DISPLAY
Document date	DocumentDate_DISPLAY
Order Return status	OrderReturnStatusID_DISPLAY

On the right side of the interface, three panes are visible and labeled:

- Report Explorer pane:** Shows a hierarchical tree view of the report structure, including elements like Time, REPORT.TIM, CRITERIA, Report Header 2, CustomerAccount, DocumentNo header, Details, DocumentNo for CustomerAccou, Line, Totals for CU, SLCustomer, SOPOrderPri, and SOPOrderPri.
- Variables pane:** Lists various variables used in the report, such as ConfigurableNames, CRITERIA, CustDeliveryAddresses, DespRqptTraceableInItem, DespRqptTraceableInItem, DocumentPrintStatuses, and Expressions. A note states: "CRITERIA: Contain the values entered for each of the report criteria."
- Properties pane:** Contains settings for the selected report element, divided into Appearance (Character 0, Group Exp: \$CustomerAccou, Group Sor: Ascending, Keep Top: False, Filter, Print On F: False, Suppress I: False) and Behaviour (Page Area: False, Break on: False). A "Page Break Before" section is also present, stating "Makes each group start on a new page".

## How to add criteria to a report

This example shows how to add criteria to report. We will create a report to show the profitability of sales orders per Account Manager. To do this we will add SOP analysis Code 3 to the Sales Order Profitability report (SOP Analysis code 3 is Acct Manager).



1. Open Report Designer.
2. Select the Sales Order Profitability report from the SOP reports folder.
3. From the main toolbar, choose Data > Criteria. The Manage Criteria window appears.
4. Select SOP Document Analysis 3 from the list and click Modify.
5. Select Enabled from the Status drop-down list.
6. Click OK twice.

The Account Manager has now been added to the report criteria.

## How to add a data field to a report

We will add the selected Account Manager to the heading on the report. To do this we need to add a data field to the report header. We will also change the font, size and style.

Sales Order Profitability (Summary)					
Alan Ward					
Customer : ABB001	Abbey Retail Ltd	Currency : £		Estimated Profit	Estimated Profit %
Document		Sales Value	Order Status		
0000005108	Sales Order	14999.00	Live	7499.50000	100.00
Totals for Customer ABB001 :				7499.50000	
Customer : BIR002	Cook's Cookers Company	Currency : £		Estimated Profit	Estimated Profit %
Document		Sales Value	Order Status		
0000005109	Sales Order	7696.80	Live	5907.46000	330.15
Totals for Customer BIR002 :				5907.46000	


The selected criteria is added to the report header here

1. From the Variables pane select Criteria > SOP\_Document\_Analysis\_3\_DISPLAY and drag it to the Report Header section of the report.

**Note:** To open the Variables pane, choose View > Variables.

2. To change the font, size, style etc using the Properties pane on the right.

**Note:** To open the Properties pane, choose View > Properties.

- a. Select the SOP\_Document\_Analysis\_3 Display field on the report.
- b. From the Properties pane, select Text Style. Select the  icon to open the Text Style window.
- c. Select the relevant Font, Size and Colour. Click OK.

## How to add a filter to a report


In this example, we only want to show orders that have a *realised* profit value on the report. (For an explanation of how *realised* profit is calculated, see the Sage 200 help.) To do this, we can add a filter to the report.

1. From the main toolbar, choose **Data > Filter**. The **Modify Filter** window appears.
2. Select **SOPOrderProfitAnalyses.RealisedProfitValue Greater than 0.00** from the drop-down lists and click **OK**.

The filter has been applied to the report.

## How to email the report as a .csv file

This allows you to attach the report to an email. In this example, we want to email the report to the account manager as a .CSV file. This allows you to

1. From the **Report Explorer** pane, select the report title **Sales Order Profitability** at the top of the pane.
2. From the **Properties** pane, select **Email Options**. Select the  icon to open the email settings.
3. Select **To**.
4. Enter the email addresses for the people you want to send the report to and click **OK**.
5. Select **Send the report as an attachment**.
6. Select **CSV** from the drop-down list.
7. Click **OK**.
8. To send the report, choose **File > Email > Send with Current Settings**.

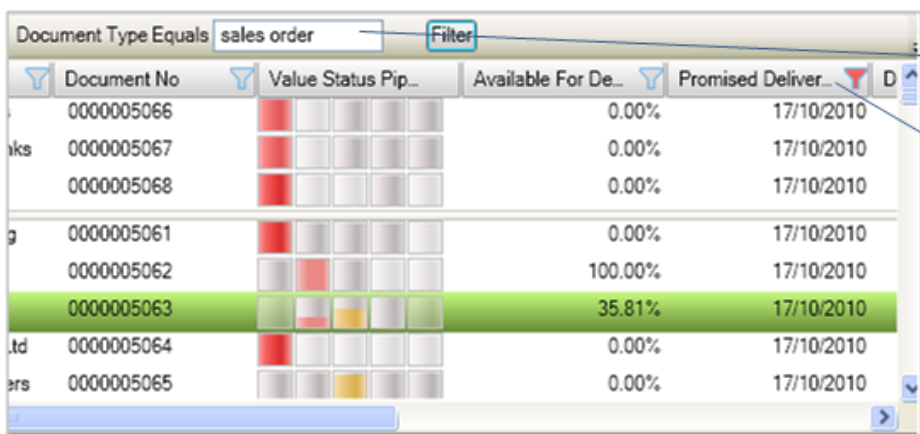
## How to use workspaces

Using the Sales Document Status workspace as an example, this explains how you can:

- Filter the information shown in a list.
- See at glance what is outstanding without printing a report.
- Action an item in a list.
- View relevant details about an item.
- Add a filter to a list of items.
- Add information to an information panel.

### How to use the information displayed on this workspace


In this example, we want to use the sales document workspace to find out which sales orders are due for delivery this week, but have not had stock allocated to them yet. Where possible, we want to allocate the stock so the orders can be delivered on time.



Filter the list to show sales orders only

Filter the column

Document No	Value Status Pip...	Available For De...	Promised Deliver...
0000005066		0.00%	17/10/2010
0000005067		0.00%	17/10/2010
0000005068		0.00%	17/10/2010
0000005061		0.00%	17/10/2010
0000005062		100.00%	17/10/2010
0000005063		35.81%	17/10/2010
0000005064		0.00%	17/10/2010
0000005065		0.00%	17/10/2010

1. We are only interested in sales orders, so we will filter the workspace.
  - a. Enter Sales Orders in the Document Type filter box.
2. We want to know which sales orders are due for delivery this week, so we will filter the Promised Delivery date column;
  - a. Right click the column filter icon .
  - b. Choose Between as the filter type.
  - c. Enter the relevant dates.

**Sales Document Status**  
Sales Document Status List Last Updated: 09:31 08/02/2011

Customer Name Contains [ ] Document Type Equals sales order [Filter]

Customer...	Customer Name	Document...	Value Status Pip...	Availabl...	Pror
MAN001	Cheadle Kitchens	0000005066	[Red]	0.00%	
MAN009	Just Taps and Sinks	0000005067	[Red]	0.00%	
MAN007	Kitchens U Like	0000005068	[Red]	0.00%	
MAN006	Padgate Plumbing	0000005061	[Red]	0.00%	
MAN007	Kitchens U Like	0000005062	[Red]	100.00%	
MAN004	[ ]	[ ]	[Green]	35.81%	
MAN003	[ ]	[ ]	[Red]	0.00%	
MAN005	[ ]	[ ]	[Red]	0.00%	

**Sales Document Line Status List** Last Updated: 09:33 08/02/2011

Item	Description	Quantity	Allocat...	Available Fo...	Despatched...
ACS/MEAT-SLI	Commercial Meat :	2.00000	0.00000	0.00000	2.00
ABFSE/13/0/2	AB Freestanding E	2.00000	0.00000	0.00000	2.00
ABFSG/14/21/2	AB Freestanding G	3.00000	3.00000	3.00000	0.00
PM/TAP/SINGL	Single Lever Mixer	1.00000	1.00000	1.00000	0.00

Annotations:  
 - See the percentage allocated (points to 0.00% in top table)  
 - Right click to action an item (points to Actions menu)  
 - View details for the selected item (points to Sales Document Line Status List)

3. We want to find the orders that do not have stock allocated. We can use the Value Status Pipeline to see this instantly;
  - a. The first block on the pipeline shows when stock is not allocated to an order. A solid red block means no stock has been allocated.
  - b. We can move these orders to the top of the list by selecting the freeze pane icon ⇄ .
4. We can check which items are on the individual sales orders by highlighting the order in the top panel. The order lines are displayed in the bottom panel.
5. We now want to allocate stock to these orders.
  - a. Right click a highlighted order and choose **Actions > Allocate stock**.

### How to add information to a workspace.

In this example, we only want to only want to display orders for a specific Account Manager. To do this we can add a filter for the relevant analysis code, although that analysis code is not displayed in the list.

We also want to see the contact details for the customer, in case there are queries with an order. We can add the customer contact details to the information pane.

The screenshot displays two main windows. The top window, 'Sales Document Status List', has a filter set to 'Contains' and shows a list of customers. The bottom window, 'Sales Document Line Status List', shows details for the selected customer. The Information Pane on the right shows details for the selected customer, including contact information.

The new filter is added here

Customer contact details are added here

### To add a filter to the workspace

1. Open Tools > Workspace Designer.
2. On ContentPanel1, select Edit Content Part.
3. In the List Definition section, find SOPDocumentAnalysis3. (In this example, the third SOP analysis code is Acct Manager).
4. Select Contains from the Filter drop-down list.
5. Click Save and close the window. Close the Workspace Designer window.

### To add information to the information panel.

You can add or remove information from the information pane. In this example, we will add the customer's contact details onto the information panel.

1. Open Tools > Workspace Designer.
  2. Select the ContentPanel1 tab on the right hand pane.
  3. Select Add Content Part at the bottom of the pane.
  4. Select Contacts from the drop-down list.
  5. In the Relationships section, select SLCustomrAccountID from both the Parent Field and Child Field drop-down lists.
  6. Click Save and close the window. Close the Workspace Designer window.
- The customer contact information has been added to the information pane.

## How to use Business Intelligence

Using the Customer Analysis report as an example, this explains how you can use BI to:

- Show the same data for a range of different periods.
- Show the same data for a range of customers.
- View the data in greater detail.
- Compare data year on year and month on month.

By default, the customer analysis shows the total balance of all transactions, for all of your customers, for the current period.

### How to show different transactions types

You can filter the data using the links at the top of the report. In this example, we only want to report on invoices. To do this, we will change the transaction type to Invoices.

	Gross Value	Net Value	Outstanding Value
↓ All Customers	8,781,700	7,570,698	1,762,034
A56 Plumbing	167,077	142,724	55,960
Abbey Retail Ltd	95,293	81,161	16,261
Airport Catering Services	226,502	193,488	60,786
All Things Black (Kitchens) Ltd	235,574	201,237	38,369
Barking Builders	184,655	157,740	59,299

1. Click the All Transaction Types link.
2. Expand All Transaction types.
3. Select Invoices.
4. Click OK.

### How to show a range of different periods

You can add to the information displayed on the columns. In this example, we want see the total gross, net and outstanding value per period in the current financial year.

To do this, we will add all periods in the current financial year to the columns on the report.

Customer Analysis				
Demo Data		Reporting data		
Transaction Type		User Defined Re		
	Invoices			
	Gross Value			
	Period 1 2010	Period 2 2010	Period 3 2010	Period 4 2010
↓ All Customers	1,093,404	887,036	905,713	1,152,495
A56 Plumbing	34,711	19,753	1,283	8,761
Abbey Retail Ltd	2,868	21,301	12,193	7,874
Airport Catering Services	7,948	21,701	14,820	31,614
All Things Black (Kitchens) Ltd	52,076	16,953	17,378	20,589
Barking Builders	10,763	15,562	12,752	13,451

Add periods as columns on the report

1. Open the Report Layout pane.
2. From the Slice/Filter pane, drag Posted Accounting Period to the Column pane.
3. In the Items pane, expand 2010.
4. Select periods 1 -12.
5. Click Apply.

## How to show values for each transaction type for each customer by period

You can also add information to the report rows. In this example, we want to compare period 1 with period 2. We also want to compare each transaction type; invoices, credit notes, payments and receipts. To do this, we will add periods 1 and 2, and the transaction types, to the report rows.

Customer Analysis		User Defined Report Template			
Demo Data					
			Gross Value	Net Value	Outstanding Value
↓ All Customers	↓ All Credit Notes	Period 1 2010	-14,611	-12,495	0
		Period 2 2010	-10,214	-8,785	0
	Invoices	Period 1 2010	1,093,404	939,988	0
		Period 2 2010	887,036	764,049	0
	Payments	Period 1 2010			
		Period 2 2010			
Receipts	Period 1 2010				
	Period 2 2010				
A56 Plumbing	↓ All Credit Notes	Period 1 2010	-375	-320	0
		Period 2 2010	-394	-336	0
	Invoices	Period 1 2010	34,711	29,652	0
		Period 2 2010	19,753	16,874	0
	Payments	Period 1 2010			
		Period 2 2010			
Receipts	Period 1 2010				
	Period 2 2010				

Add transaction types to the report rows

Add periods 1 and 2 to the report rows

1. Open the Report Layout pane.
2. From the Slice/Filter pane, drag Posted Accounting Period and Transaction Type to the Rows pane.

**Note:** If required, remove Posted Accounting Period from the Report Columns pane. to do this, drag Posted Accounting Period back to the Slice/Filter pane.

3. From the Row pane, select Transaction Type.
4. From the Items pane, expand All Transaction Types and select All Credit Notes, Invoices, Payments, and Receipts.
5. From the Row pane, select Posted Accounting Period.
6. From the Items pane, expand 2010 and select Period 1 and Period 2.
7. Click Apply.

### How to show the individual transaction details that make up the total

You can view the individual transactions that make up a total on the report. In this example, we will add the individual invoices entered in Period 1, for a selected customer, to a new worksheet.

	A	B	C	D	E	F
1	Customer Number	Customer Name	Date Account Opened	Settlement	Type of Transaction	Calendar Day Caption
2	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	1st January 2010
3	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	1st January 2010
4	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	8th January 2010
5	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	15th January 2010
6	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	15th January 2010
7	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	22nd January 2010
8	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	29th January 2010
9	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	29th January 2010
10	MAN002	A56 Plumbing	22nd September 2010	Settled within Discount Days	Invoices	29th January 2010

1. Right click the cell for the Period 1 row and Gross value column, for the customer.
2. Select Drill to Detail.
3. In the Place Results in section, select New Worksheet.
4. Click OK.

## How to show a period this year, compared to a period last year.

You can add non-consecutive periods to a report, allowing you to compare year on year. In this example, we want to compare the totals for Period 1 2010 and Period 1 2009. To do this, we will select to report on Transaction Dates and add the relevant periods to the report columns.

The screenshot shows a 'Customer Analysis' report with the following criteria:

- Transaction Type: All Transaction Types
- Transaction Date by Calendar: All Transaction Dates
- Transaction Date by Sales Trading Period: All Transaction Dates

The table below shows the data for Gross Value and Net Value across three periods: Period 1 2009, Period 1 2010, and Period 1 2009.

	Gross Value		Net Value
	Period 1 2009	Period 1 2010	Period 1 2009
↓ All Customers	1,035,292	1,078,792	870,561
A56 Plumbing	33,581	34,336	28,686
Abbey Retail Ltd	25,036	2,868	21,323
Airport Catering Services	18,804	7,948	16,063
All Things Black (Kitchens) Ltd	23,267	52,076	19,876

Annotations in the image point to the 'All Transaction Dates' criteria and the 'Period 1 2009' column header, with the text: 'Add the transaction dates to the report criteria' and 'Add periods to the report columns'.

1. To add the Transaction Date as criteria to the report, select the Transaction Date check box in the Slice/Filter pane.

**Note:** Transaction Type should also be selected.

2. From the Slice/Filter pane, drag Posted Accounting Period to the Column pane. Make sure it is selected.
3. From the Items pane, select 2009 > Period 1, and 2010 > Period 1.
4. Click Apply.



## How to answer some common questions

This sections provides some examples of how to use the reporting methods in Sage 200 to answer some common questions.

The solutions offered are intentionally brief. For detailed help with these procedures, see the relevant help files.

