

Contents

Welcome and Introduction.....	1
License Requirements	3
The Report Creation Process	4
Accessing Sage MAS Intelligence	5
Using the Predefined Financials Reports.....	6
The Predefined Financials Reports.....	7
Mapping Account Groups	11
Creating and Linking a Template	12
Report Tabs	13
Additional Hidden Worksheets	17
Adding Accounts to Financial Reports.....	20
Distributing Reports	22
How to Distribute Reports.....	23
Specifying Distribution Settings.....	24
Creating Distribution Instructions	25
Selecting Distribution Instructions	32
Executing Distribution Instructions.....	33
Using the Report Designer	34
What is Report Designer?.....	35
Accessing the Report Designer	36
Report Designer Interface.....	39
BI Tools Tab.....	44
Using Reporting Trees	47
Why Use Reporting Trees	48
Creating a Reporting Tree	51
Assigning a Reporting Tree.....	54
Creating Consolidated Reports.....	55
Consolidated Financial Reporting	56
Scoping a Report	59

Additional Customizations	61
Account Grouping	62
Other Customizations	68
Summary.....	71

Not For Reproduction or Resale

Contents

Lesson 1 – Welcome and Introduction.....	1
How to Use This Curriculum.....	2
Exercise 1 – Accessing Sage MAS Intelligence.....	3
Lesson 2 – Predefined Financial Report Exercises.....	4
Exercise 2 – Mapping the Financial Reports.....	5
Exercise 3 – Creating a Current Month Report.....	8
Lesson 3 – Distributing a Report Exercises.....	10
Exercise 4 – Creating a Distribution Instruction.....	11
Exercise 5 – Distributing a Report.....	14
Lesson 4 – Report Designer Exercises.....	16
Exercise 6 – Mapping in Report Designer.....	17
Exercise 7 – Creating a First Quarter Income Statement.....	18
Exercise 8 – Trying Out Report Designer Features.....	20
Lesson 5 – Reporting Tree Exercises.....	22
Exercise 9 – Creating Reporting Trees.....	23
Lesson 6 – Consolidated Report Exercises.....	26
Exercise 10 – Consolidated Mapping in Report Designer.....	27
Exercise 11 – Consolidated Reporting in Report Designer.....	28
Exercise 12 – Mapping Consolidated Financial Reports.....	31
Lesson 7 – Additional Customization Exercises.....	34
Exercise 13 – Grouping With Filters and Parameters.....	35
Exercise 14 – Consol Reporting in Report Designer.....	37
Exercise 15 – Custom Mapping.....	40
Exercise 16 – Including a Row Calculation.....	45
Exercise 17 – Referencing Another Excel Workbook.....	51
Lesson 8 – Additional Practice.....	55
Exercise 19 – Rolling Three-Month Report.....	56
Exercise 21 – Actual vs Future Budget Report.....	58

Not for Reproduction or Resale