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sage software
Authorized Partner

TechnoClarity, Inc.

**501 Shatto Place, Suite 403
Los Angeles, CA 90020**

(213) 784-5330 X-105

**info@TechnoClarity.com
www.TechnoClarity.com**

Leverage Your Data With FRx Report Designer

The need for financial accountability is greater than ever—driven by standards such as Sarbanes-Oxley. Financial reports should no longer be simply printed and filed until audit or tax time. Included with every Sage MAS 90 ERP General Ledger is Microsoft FRx Report Designer (FRx), an industry-standard financial reporting tool. Taking full advantage of FRx, you can share information and encourage fiscal responsibility at all levels of the organization. It is easy to build and format financial reports within FRx. In this article, we'll cover tips for getting the most out of FRx and then we'll take a brief look at the add-on solutions available for FRx, including templates from Sage Extended Solutions.

Give your staff the data they need for informed decision making with FRx.

Getting The Most Out Of FRx

Here are some tips to maximize the power of FRx and get the most out of your financial reporting system. Think of FRx as a spreadsheet with individual columns representing actual and budget amounts for various fiscal periods, and rows representing General Ledger accounts, account groups, totals, and subtotals.

Column Headings

Variable Column Headers are a powerful feature of FRx. With Variable Column Headers, when you change the Base Period for the report, each column and column heading automatically changes to the correct period.

To use Variable Column Headers, choose the Insert Code button from the Column Header Options Window, and select a predefined code beginning with the @ symbol.

You can customize the column heading by combining text with any of the codes. First select the code, then type the desired text before or after the code, making sure to leave the @ symbol intact.

Tip: the @PERDESC header code uses the period description from your Sage MAS 90 General Ledger. This is especially useful if your company has periods that do not close on the last day of the month.

Enhanced Report Appearance

Does your company have a standard set of fonts it uses in its communications? You can customize your fonts in FRx Report Designer to match your company's preferred fonts or to make your reports easier to read and understand. Here's how to customize a font:

1. From the FRx Report Designer, select *Catalog of Reports.*
2. From the Catalog window, open an existing report.
3. On the menu at the top of the screen, point to Edit, and then click *Font Styles.*

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4. In the Font Styles window, click *New.*
5. Click the *Font* button, and select the type of font, whether it should be bold or italic, and the size and color.
6. To add custom shading or color to the style, click the *Shading* button.
7. In the Font Style Name box, type a description of the font for future reference.
8. Click *Save.*

The new font will now be available for use in the Font Style setting of any FRx report. To make the font the default for all new reports created, click the *Find* button in the Font Styles window, select the *Default Font Style*, and select your new font.

FRx Reporting Tree

Would you like to automatically generate and send a financial report for a particular department, division, or location to the appropriate manager? The FRx Reporting Tree allows you to define the relationship between reporting units, so you can quickly and easily deliver the information managers need to make better business decisions. You can use the tree to automatically send reports by e-mail to all of your management team at once. You can incorporate the e-mail addresses directly into the Reporting Tree, as follows:

1. In the report to be sent, open the Tree.
2. In the *Security/E-mail* column enter the e-mail address for that unit's reports.
3. Save the Tree.
4. In the Report Catalog, click the *Output* tab.
5. If the recipient does not have FRx Drill-Down Viewer, click *Send as Excel File* on the Output Options tab.
6. Click the *E-mail Options* tab.
7. Select the *Enable E-mail* check box.
8. Select the *Use Tree* check box.
9. Run your report.

Drill-Down Options

The FRx DrillDown viewer is a popular add-on for FRx. It's important to note that to enable drill down, the original report must be created with the Detail Level of something other than *Financial*. Any of the other settings can be used, such as *Financial and Account.*

Once the report is created in this way, drilling into a financial row will display all of the individual accounts. If you have a large chart of accounts, this may be an overwhelming amount of information. Here's a tip on how to use the Subtotal option to display an intermediate level of detail:

1. Open a report in the FRx DrillDown Viewer that includes account detail.
2. Click on *View*, then *Subtotals.*
3. Select the check box *Subtotal On Segment.*
4. Specify which segment to subtotal.
5. Click *OK.*
6. Drill into the report.

This subtotal setting also can be applied in the Catalog of Reports, Report Options, or Account/Transaction Detail tab.

Optimize FRx With Add Ons

A number of add ons for FRx can enhance your ability to securely and automatically put the right information in the hands of the right people in your organization.

The array of add-on tools for FRx give you the ability to securely and automatically get the right information to the right people.

FRx DrillDown Viewer

The FRx DrillDown Viewer gives users view-only access to FRx reports and the ability to get more information for items they have questions about. In this way, the user can locate the source of an entry without the risk of modifying the report. You also can e-mail completed reports.

FRx Report Launcher

FRx Report Launcher is useful for those who need to be able to select pre-designed reports, specify output options, and generate the report on demand. The user does not have the ability to create or modify the original report.

FRx Report Server

The FRx Report Server allows you to schedule reports to be generated and distributed automatically. This is useful if you send reports very frequently, such as a daily revenue report to your sales team. With the FRx Report Server, you can also off-load the processing from your desktop workstation to your server — very handy if you generate a large volume of reports.

FRx WebPort

As its name implies, the **FRx WebPort** allows you to distribute FRx (and other, non-FRx) reports via the Web. This capability is useful if you have remote users or locations, or executives who travel and require access to FRx reports. The remote users may run reports, including the ability to drill down to transaction detail, with no FRx client software installed — only a Web browser is required to use FRx WebPort.

FRx Report Manager

If you need to deliver a group of individual reports as one comprehensive book, the FRx Report Manager is the tool you need. You can combine FRx and non-FRx reports into your report book, and distribute it via e-mail, hard copy, or the Web. Report books can be scheduled to print and distribute automatically.

Report Templates

Trend reports can be very useful for getting the big picture of how your business is doing over an extended period of time. Two new FRx report templates are available from **Sage Extended Solutions**. The **Monthly Trend Report** is an income statement comparing all fiscal periods for the current year side by side. The **Rolling Trend Report** shows the same information for any 12 successive periods you specify.

We have only given a brief description of the FRx add-on options. Give us a call with your questions on FRx add-on modules or for assistance creating and generating FRx reports. ☆