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Adding a new report to the Sage 200 menu

Sage 200 Help Sheet

Overview

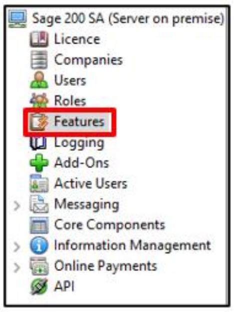
This help sheet will guide you through where to save your custom report on the network, adding it as a new feature in the Sage 200 System Administration tool and finally adding it to the Sage 200 menu.

Adding and configuring a feature

- Save your report within the reports folder on the Sage server e.g. \\sageservername\sage\reporting\custom\reports and then the folder that is relevant to your report e.g. Sales, Purchase, SOP etc.

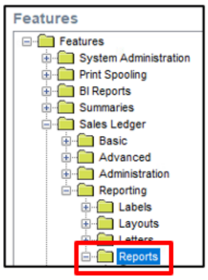
- Launch the Sage 200 System Administration tool. Use the shortcut icon on your desktop or browse to Start > Sage UK Limited > Sage 200 Administration if there isn't one. You must be a Sage 200 administrator to log into the Administration tool.

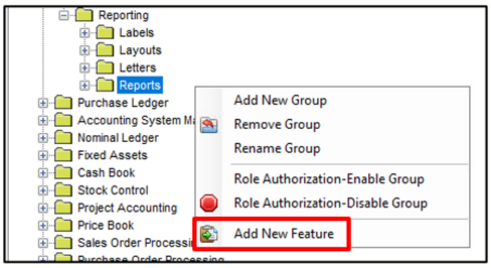
- Click on Features on the left-hand menu.



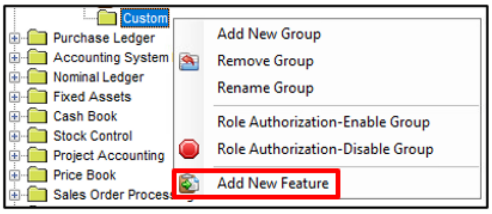
- Select the relevant folder for the new menu item.

  This would generally be the reporting folder but a new folder can be created for custom reports should you wish to file them separately. To do this, right-click on Reports under the appropriate module and select Add New Group and give it a name e.g. Custom.

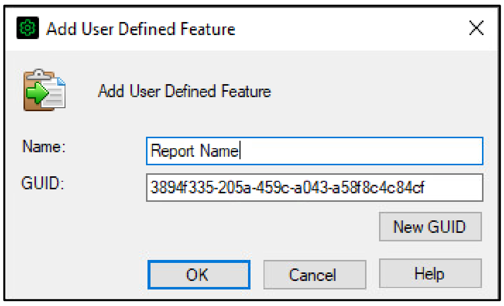




- Once the new folder is in place, right-click on it and select Add New Feature.



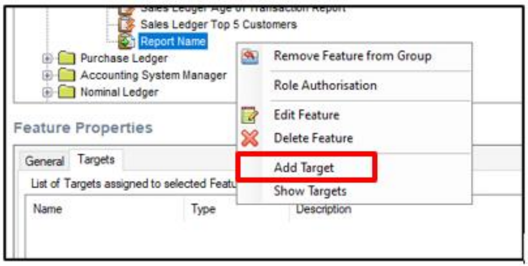
- Enter a name for the feature and click on OK.



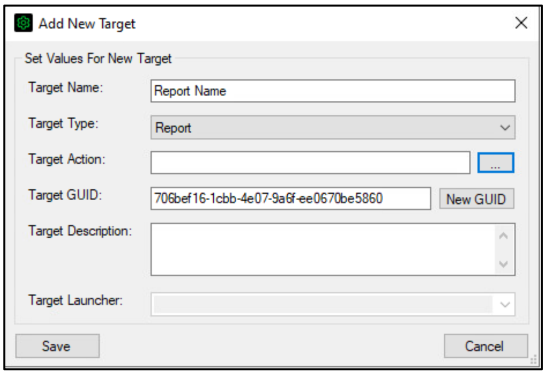
This will add the feature to the menus.

We now must point the new feature to the report layout.

- Right-click on the feature that has just been created and click Add Target



The following form is displayed.



Target Name: Enter a name for the target (again, enter the report name etc.)

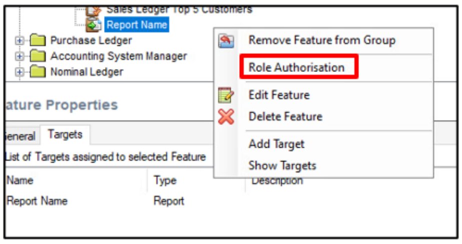
Target Type: Select the target type (if this is a report, select Report)

Target Action: Point this to the filename of the report you have saved
(e.g. \\sageserver\sage\reports\custom\reports\...)

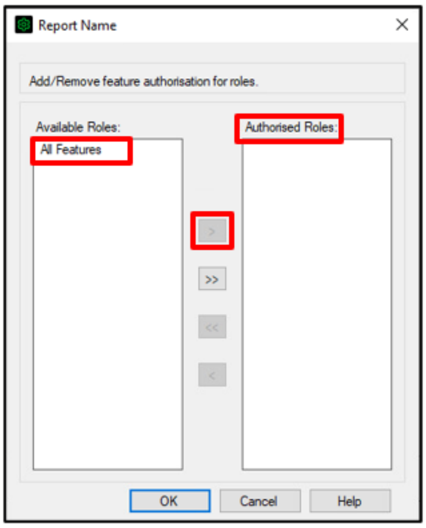
- Click Save.

We now need to select which groups can use this report.

- To do this, right-click the feature and select Role Authorisation



- Move the Roles you require to have access to this feature to the Authorised Roles side of the screen.



We have now completed the setup of the feature and assigned role permissions to it. However, it will not appear on the Sage 200 menu until we complete the following steps.

Adding the feature to the menu system in Sage 200

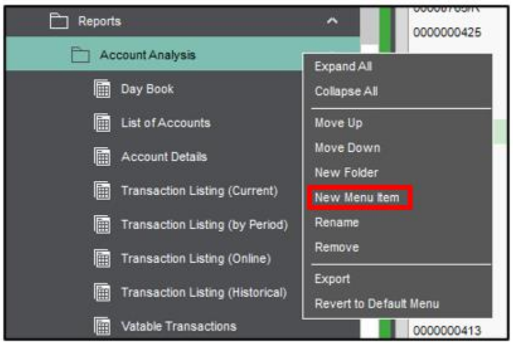
NOTE: You must be assigned to a role that has the new feature enabled to complete the next steps. If you log in to Sage 200 and your role does not have the new feature enabled, it will not be available for selection when adding a new menu item.

Your Sage 200 user must also have the "Can Edit Menu" permission enabled.

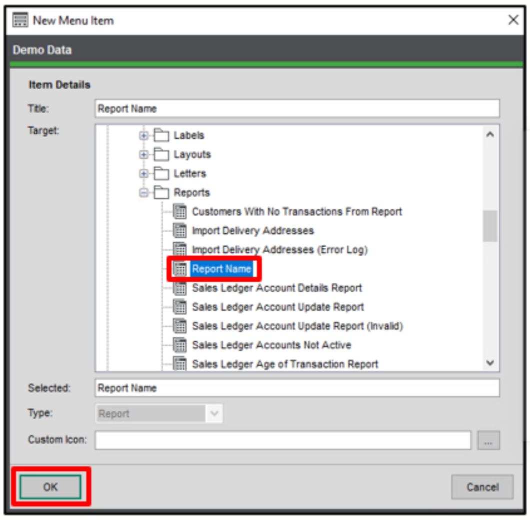
- Log in to Sage 200 and click on the pencil icon from the top left-hand of the menu screen.

This will take you into the Edit Menu:

- Browse to the Folder on the menu where you wish to add the new feature and right click e.g. Sales Ledger > Reports > Account Analysis and select New Menu Item.



- From the New Menu Item screen, browse to the new feature and click on OK.



The new feature will appear on the menu.

- Click on the “X” to exit edit mode. The report is now available for use on the menu.