



Sage Business Cloud Accounting

Sage Intelligence Release Notes
28 September 2018

1.0 Introduction

1.1 Document Purpose

This document has been created to clearly articulate updates made to the Sage Intelligence for the Sage Business Cloud Accounting application.

1.2 Intended Audience

This document will be of interest to users and advisors of Sage Accounting in the **United States, United Kingdom** and **Canada** regions.

Sage Intelligence supports the following languages:

- English
- fr-CA – Only for the Canada region

1.3 Project purpose

This project was undertaken to complete the new feature(s):

- Embedded Excel
- Known Issues Updates

1.4 Tested Environments

Browser	Version
Chrome (Windows Environment)	TBC
Edge (Windows Environment)	TBC
Safari (Mac Environment)	TBC

NOTE: It is strongly advised to access Sage Intelligence using Google Chrome.

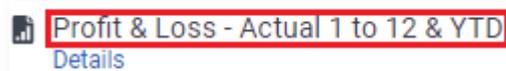
2.0 What is New?

2.1 Embedded Excel

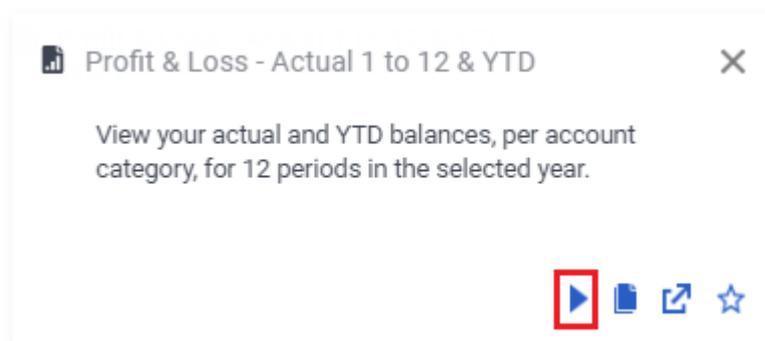
Sage Intelligence now allows you to generate reports into an Embedded Excel Workbook. The report will generate into a new browser tab, allowing you to perform side-by-side comparisons, ultimately providing a heightened user experience in terms of report production and overall application navigation.

How it works:

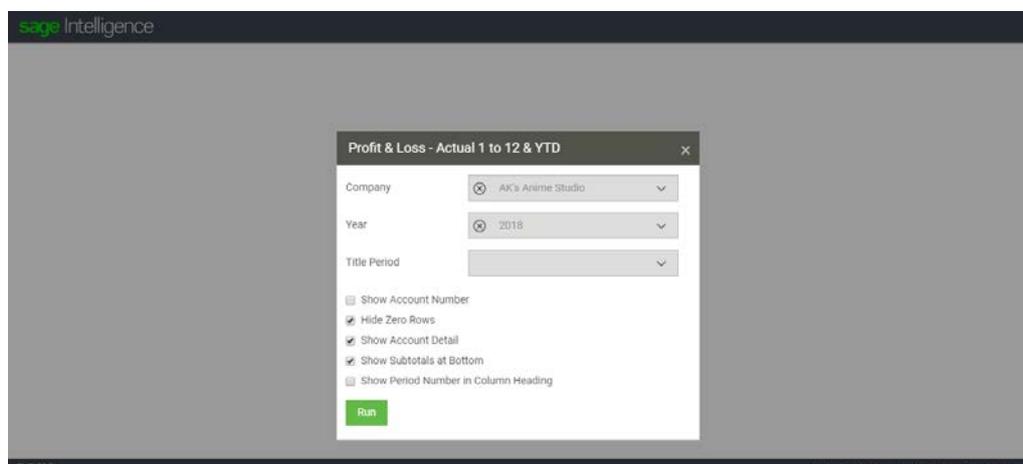
1. Run the desired financial report by clicking on the report's name, or by clicking on the Run button from the report's Details tile.



or



2. A new Browser Tab will open and your usual report filter and settings dialog will be displayed. From the dialog, select your desired report parameters and settings, and click on the Run button.



3. Your report will generate into an Embedded Excel Workbook.

Profit & Loss Report for the period ending 30 September 2018

Company: AK's Anime Studio
Year: 2018
Current Period: 9

	Actual Jan	Actual Feb	Actual Mar	Actual Apr	Actual May	Actual Jun	Actual Jul	Actual Aug	Actual Sep	Actual Oct
Sales		5 788		23 444	43 545	454 353	4 534	45 677		87 654
Gross Profit		5 788		23 444	43 545	454 353	4 534	45 677		87 654
Gross Profit %	0%	100%	0%	100%	100%	100%	100%	100%	0%	100%
Other Income	50 000		98 888						787 009	
Total Income	50 000	5 788	98 888	23 444	43 545	454 353	4 534	45 677	787 009	87 654

4. To close the report, simply close the respective browser tab.

2.1.1 The New Filter Pane

With this new approach to report generation, a filter pane has been introduced as a means to ensure that the process of changing report parameters and updating report values is optimised.

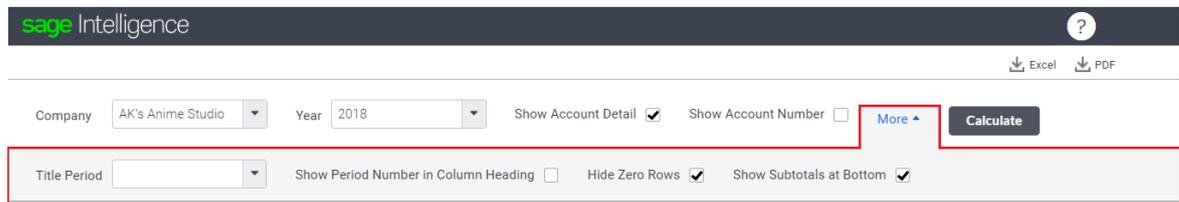
Design:

The filter pane contains the same list of parameters and report settings as seen on the report filter and settings dialog when you initially ran the report.

At the top of the filter pane, frequently used parameters and settings have been placed, which include Company, Year, Show Account Detail and Show Account Number.

NOTE: When clicking **Show Account Detail**, an additional **Show Subtotals at Bottom** settings checkbox will be displayed. This option is placed in the **More** section.

By clicking on the **More** button, the filter pane will expand, providing you with additional settings. These include Title Period, Show Period Number in Column Heading, Hide Zero Rows and Show Subtotals at Bottom.



If you want to change parameters to generate new values or a layout (for example, hiding unnecessary zero-value rows), you can simply select the desired parameters from the top filter pane. By making your selection and clicking on the **Calculate** button, your report will regenerate within the same browser tab.

The Calculate button will only be enabled if the required parameters, Company and Year, have been selected, as well as if changes have been made to the parameters and settings.

A disabled Calculate button will have the following design:



An enabled Calculate button will have the following design:



A note on parameter persistence: The parameters and report settings that you applied in the previous report generation or report calculation will be applied in your next report generation.

2.1.2 Drill Down

Please note that you will not be able to Drill Down by clicking on the respective amount/value. You can simply export the report to Excel (Desktop) by clicking on the Excel button in the top action pane, and utilize the powerful Excel Design Pane to delve into the details.

2.2 Online Report Designer Changes

Please note that the following changes have been applied in the Online Report Designer.

1. The Report Filters and Report Settings icons in the action pane have been removed.

You can apply these after running out the report into the new tab from the report filter dialog modal.

2. Please note that you will only be able to run a report, after you have saved it. Any changes made to the report will result in the Run button being disabled. Only after saving your layout (by clicking on the Save Button), will you be able to click on Run and generate your report.

3.0 Known Issues

3.1 Power BI reports: English only

It is acknowledged that the content of Power BI reports are only in English.

3.2 Report name allowing duplication when copying a report

If a report is copied in additional reports, the system will allow you to name the report an existing name. For your own filing clarity, it is not recommended to do so. Rather give each report a unique name.

3.3 Close button dysfunctional when editing a report name or description

When the edit fields are enabled, the report close button is not functioning as expected. Please close the editor to resume usual functionality; alternatively click off the report.

3.4 Report details on right-hand side report

Report details screen cut off when viewing details on the far right of the screen.

3.5 Copying a Power BI Report and adding a full stop character to the Report Name

Please note that the full stop is a non-supported character for Power BI report Name.

3.6 Refreshing Report Tab

In the event that you refresh the browser tab, and the report seizes to generate, or you are taken to the Sage Intelligence login screen, it is advised that you close the browser tab, and re-run the report.

3.7 Report Session Expired

In the event that you receive a report generation error message within the Embedded Excel iframe, it is advised that you close the browser tab, and re-run the report.

3.8 System Error: Sorry an error has occurred

In the event that you receive an error modal titled System Error when generating a report, it is advised that you close the browser tab, and re-run the report.

3.9 Concurrency

Please note that in the event whereby there are two users logged in simultaneously using the same login credentials, the user who logs in last will assume report viewer rights.

3.10 Copying of report URLs

Please note that Sage Intelligence does not support the copying of report URLs across different browsers.