



# Sage One Intelligence (UK)

## Release Notes

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01 12 2017

# 1.0 Introduction

## 1.1 Document Purpose

This document has been created to clearly articulate updates made to the Sage One Intelligence product. This will, in turn, highlight the changes you can expect to see when the product is released live in the market.

## 1.2 Intended Audience

This document will be of interest to users and advisors of Sage One in the UK, so they are aware of features which they can take advantage of.

## 1.3 Project purpose

This project was undertaken to upgrade the Sage One Intelligence build from an older version of Sage One Application Programming Interface (API), to the latest version. This will bring with it improvements and enhancements of the latest Sage One API technology.

An added benefit of the release is the implementation of new value-adding features that have been added to sage intelligence software. Such as:

- Dynamic report Title variables & Month Names in column headers
- Calculator improvements
- A fresh new user interface

## 1.4 Supported Environments

Browser	Version	Sage Intelligence
Internet Explorer (Windows Environment)	Version 11	Excel
		Online
Chrome (Windows Environment)	61.0	Excel
		Online

## 1.5 User Access

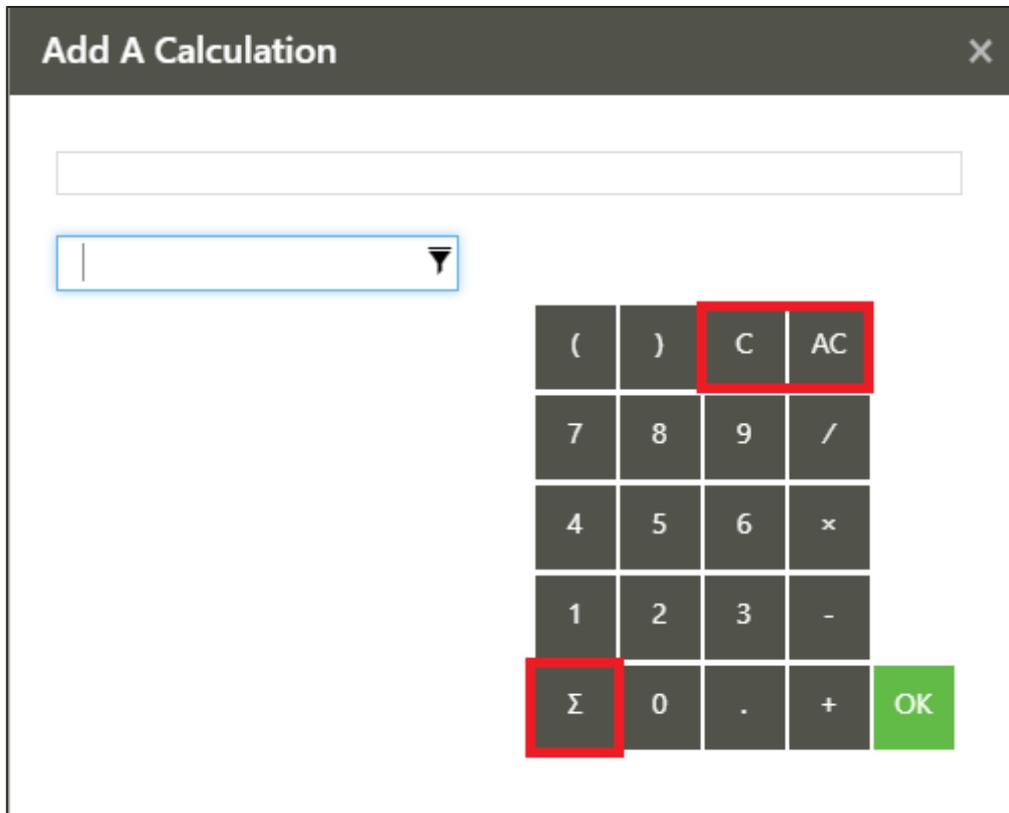
Users will need the following permissions within Sage One to be able to access Sage One Intelligence.

Sage One User	Access
Business Owner	System Manager, Full Access
Invited Business Owner	System Manager, Full Access
Business User	Full Access

## 2.0 New Features

### 2.1 Calculator Enhancements

Value adding functionality has been added to the Sage Intelligence calculator. The features, as listed below, lead to a greater user experience as well as faster calculation and report generation.



#### 2.1.1 AC – All Clear

This clears all the columns or rows previously selected in the calculation.

#### 2.1.2 C – Clear

Clears individually selected columns or rows in the calculation.

#### 2.1.3 $\Sigma$ - Sum All

Selecting Sum All without selecting any columns or rows will automatically sum all the columns and rows available.

Using Ctrl+ or Shift+ and selecting rows and columns followed by Sum All will sum the selected columns or rows.

#### 2.1.4 Ability to edit within a calculation

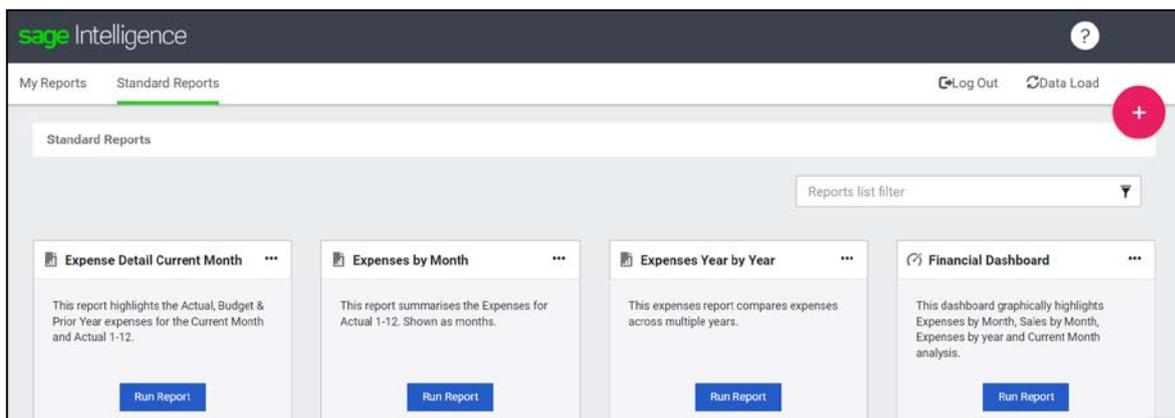
Previously, to edit a column or row in a calculation, the user would have to delete the entire calculation. Now, the user can select within the calculation and add or remove the columns or rows at that point using the Clear button on the calculator.

Please Note: Keyboard shortcuts are not compatible with this feature as of yet.

## 2.2 A fresh new UI

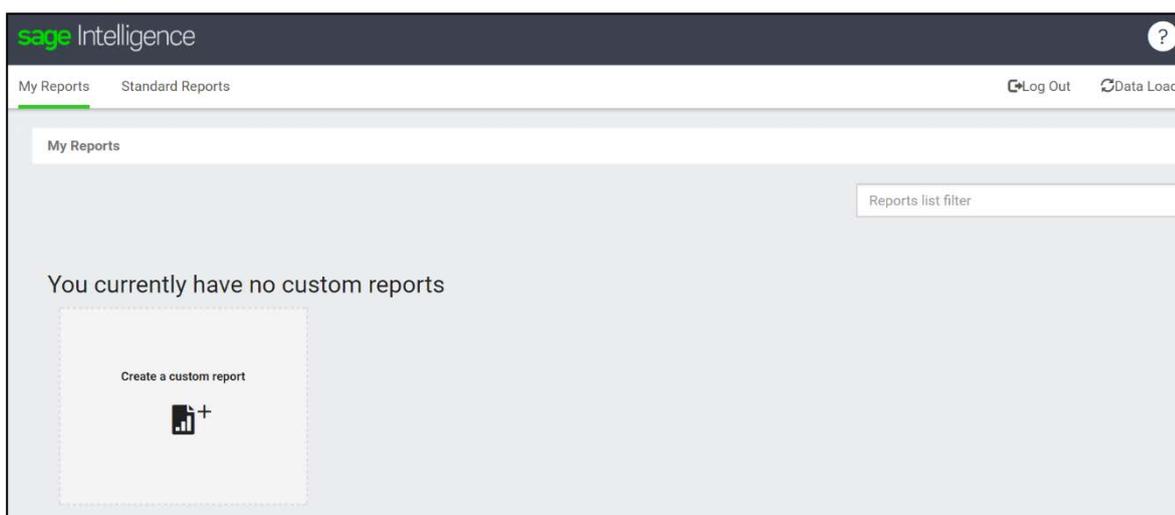
### 2.2.1 Standard Reports Page

On opening Sage Intelligence, you will now land directly on the Standard Reports page below. The Standard Reports page helps create a clear distinction between out the box reports (Standard Reports) and custom reports (My Reports). The Standard Reports page includes all the standard reports that ship with Sage Intelligence. These standard reports can't be edited. To edit these reports, you will need to make a copy of them. You can run all standard reports from this page.



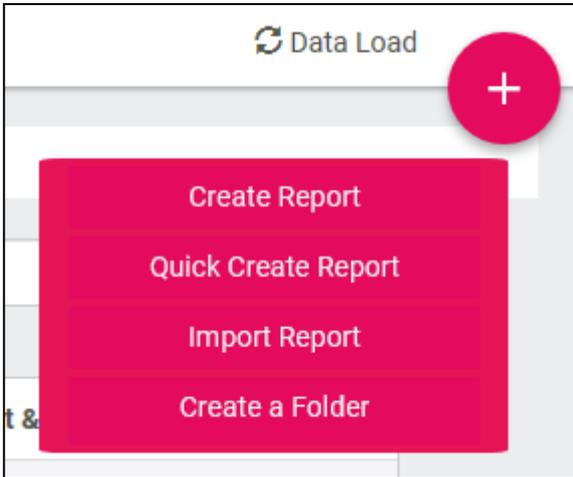
### 2.2.2 My Reports Page

The My Reports page is a new page that will include any copied, custom or imported reports that you create, creating a clear distinction between your own reports and those that are shipped with Sage Intelligence. You can create folders and reports on the My Reports page below. The reports can be organised into folders. Custom reports can be edited and deleted. Any custom reports you already have will appear on this page.



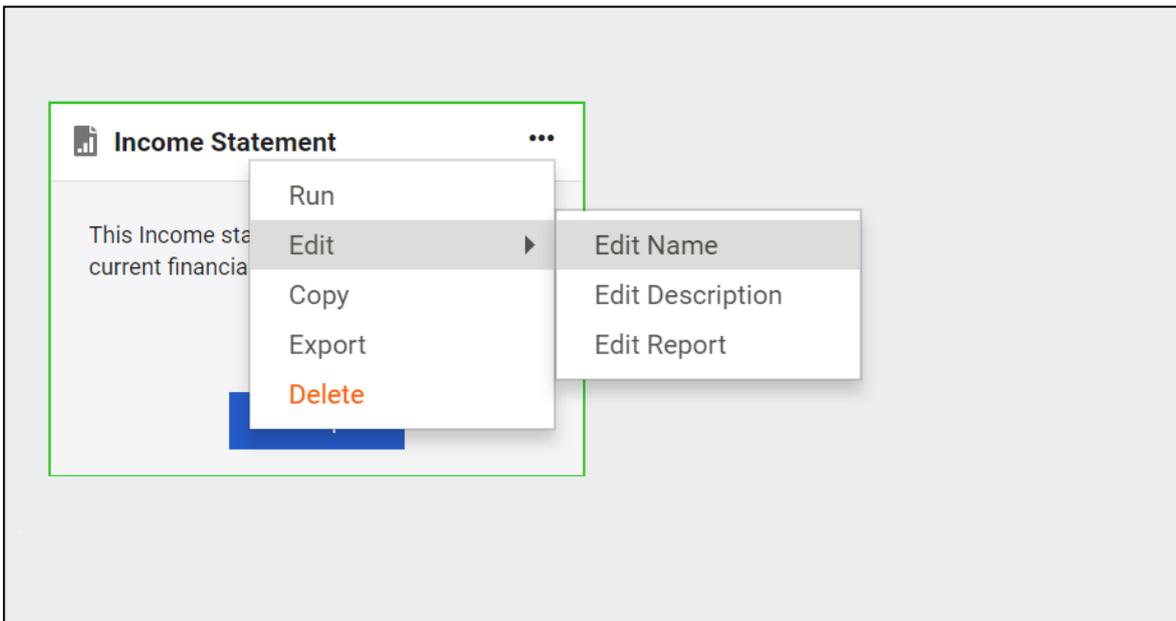
### 2.2.3 Options Button

The new (+) Options button is available on the top right-hand side of the screen. This makes it quick and easy to find and create reports. From this menu, you can select actions. Certain of these actions are only available on specific Sage Intelligence integrations.



### 2.2.4 Report Options- Edit Name

The ability to edit the name on any custom reports has been introduced. This allows you to rename a report, or edit errors in existing report names.



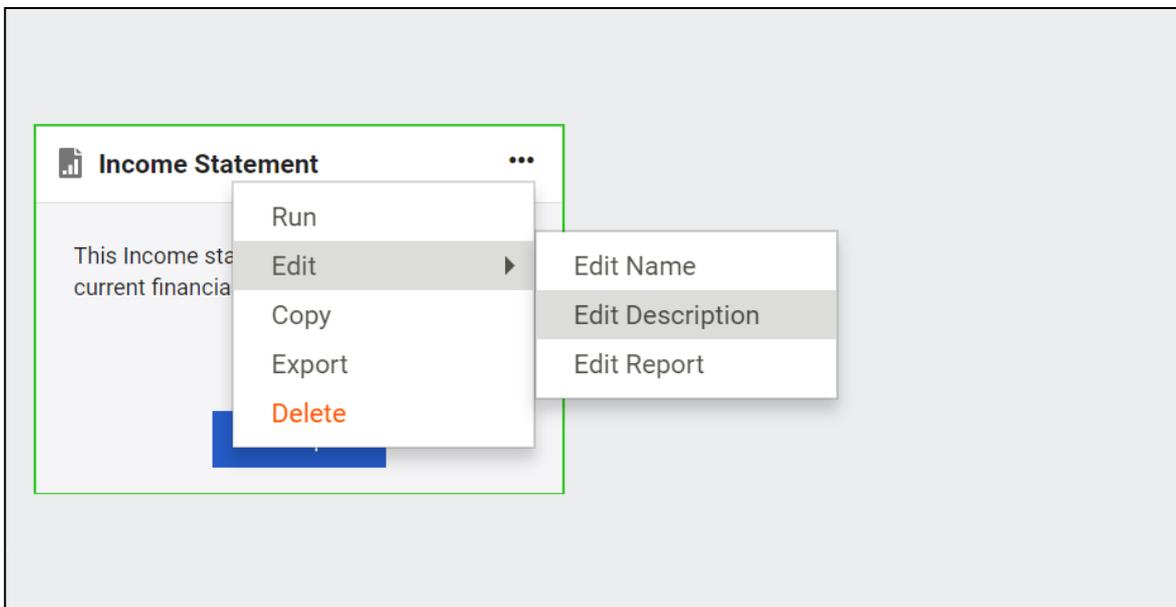
### 2.2.5 Report Options – Add Description

On your custom reports, there is an option to add a description to the report. The report description option will be available when you create a new report, copy a report or import a report. Reports descriptions can assist in clarifying the output of a report and may refer to specific periods, companies or account categories. The report description is optional and has a 160-character limit.

Report Name	Profit & Loss
Report Description	An optional Report Description can be added in this section

### 2.2.6 Report Options – Edit Description

There is also the option for you to edit the description on a report if required. Simply select on the report options and select Edit Description.



## 2.2.7 Ability to Save Reports to Folders

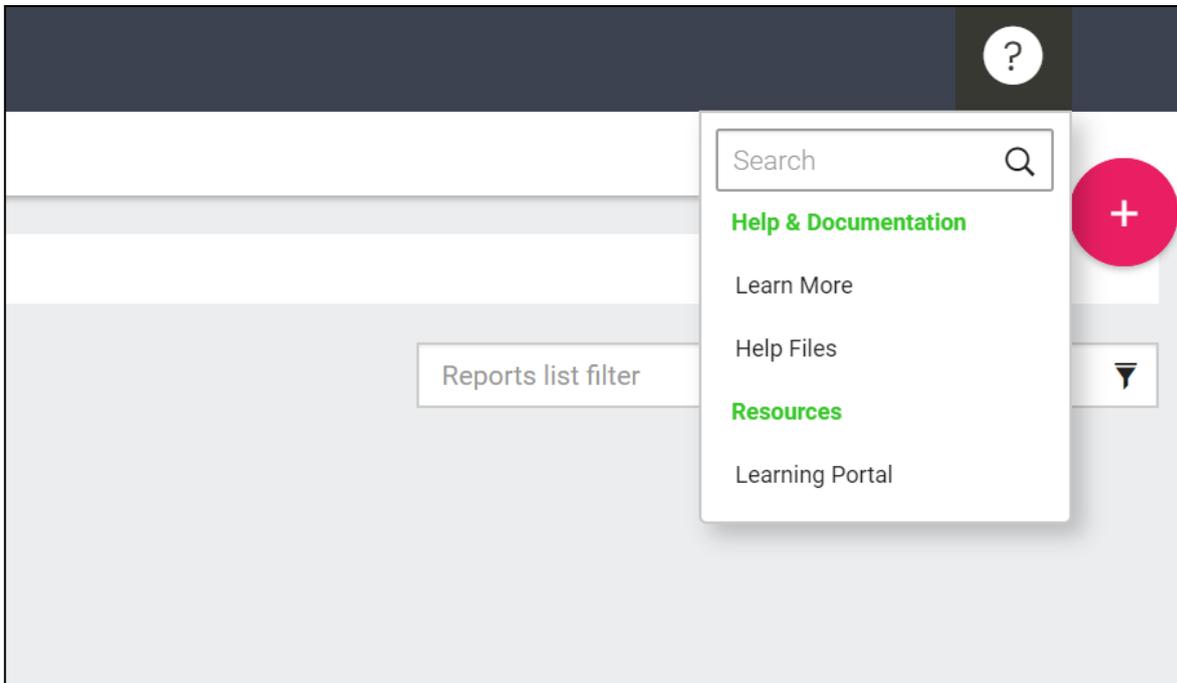
There is now the ability to Save reports to a selected existing folder when creating, copying, importing or editing a report. One of the main advantages of folders & saving reports to folders is that they make it easier to locate and access reports. This benefits the you by providing a structured navigation to find reports or folders.

### Quick Create New Report ×

Report Name	<input type="text" value="Income Statement"/>
Report Description	<input type="text" value="Income Statement showing the figures for the Current Year."/>
Columns	<input type="text" value="Actual vs Budget"/>
Rows	<input type="text" value="Profit &amp; Loss Rows"/>
Select Folder	<input type="text" value="My Reports / UK Financials"/>

## 2.2.8 Help

All the help resources have been logically grouped together, no more searching in different areas of Sage Intelligence to find your help resources. They are now all found on the easily accessible help icon in the header bar.



## 2.2.9 Export to PDF

An amazing new feature is the ability to export a report to PDF. Once you have run your report out, click on PDF in the top right of the screen.

The screenshot shows the 'Expense Detail Current Month' report in Sage Intelligence. The report is displayed in a table format with the following columns: Actual, Budget, Actual vs Budget Var, Prior Actual, Actual vs Prior Vari, Actual 1, Actual 2, Actual 3, and Actual. The data is for Company RKL\_DBN and Year 2016. The PDF export button in the top right corner is highlighted with a red box.

	Actual	Budget	Actual vs Budget Var	Prior Actual	Actual vs Prior Vari	Actual 1	Actual 2	Actual 3	Actual
Returns & allowances	110	105	(45)	79	(1 031)				
Returns & allowances - East	5 102	4 847	205	3 653	(2 449)	2 422	4 843	5 085	
Returns & allowances - West	1 754	1 666	88	1 256	(1 498)	833	1 665	1 748	
Purchases	219 837	208 845	10 942	157 411	(63 426)				
Freight	750	713	(18)	587	(1 218)				
Freight - East	4 546	4 319	177	3 255	(2 291)	1 623	3 246	3 311	
Freight - West	2 031	1 929	52	1 454	(1 577)	721	1 442	1 471	
Warehouseman payroll - East	51 765	49 177	2 530	37 066	(15 699)	20 385	40 770	41 170	
Warehouseman payroll - West	12 181	11 572	559	8 722	(4 459)	4 909	9 818	9 917	
Warehouse supplies	1 400	1 330	70	1 003	(1 398)	386	773	788	
Driver payroll - East	42 385	40 265	2 069	30 349	(19 036)	17 722	35 444	35 799	
Driver payroll - West	16 138	15 331	757	11 555	(5 588)	6 512	13 024	13 154	

You will notice a PDF document will download (the location of the download will depend on your computer settings).

**Expense Detail Current Month**

Company: RKL\_DBN  
Year: 2016

	Actual	Budget	Actual vs Budget Var	Prior Actual	Actual vs Prior Variat	Actual 1	Actual 2	Actual 3	Actual
Returns & allowances	110	105	(45)	79	(1 031)				
Returns & allowances - East	5 102	4 847	205	3 653	(2 449)	2 422	4 843	5 085	
Returns & allowances - West	1 754	1 666	38	1 256	(1 498)	833	1 665	1 748	
Purchases	219 837	208 845	10 942	157 411	(63 426)				
Freight	750	713	(13)	537	(1 213)				
Freight - East	4 546	4 319	177	3 255	(2 291)	1 623	3 246	3 311	
Freight - West	2 031	1 929	52	1 454	(1 577)	721	1 442	1 471	
Warehouseman payroll - East	51 765	49 177	2 538	37 066	(15 699)	20 385	40 770	41 178	
Warehouseman payroll - West	12 181	11 572	559	8 722	(4 459)	4 909	9 818	9 917	
Warehouse supplies	1 400	1 330	20	1 003	(1 398)	386	773	788	
Driver payroll - East	42 385	40 265	2 069	30 349	(13 036)	17 722	35 444	35 799	
Driver payroll - West	16 138	15 331	757	11 555	(5 583)	6 512	13 024	13 154	

Expense Detail Cur...pdf

Opening the PDF document will open a new tab in the browser.

**Expense Detail Current Month**

Company: RKL\_DBN  
Year: 2016  
Budget Code: ORIGINAL  
Title Period:

	Actual	Budget	Actual vs Budget Var	Prior Actual	Actual vs Prior Variat	Actual 1	Actual 2	Actual 3	Actual 4	Actual 5	Actual 6	Actual 7	Actual 8	Actual 9	Actual 10	Actual 11	Actual 12
Returns & allowances	110	105	(45)	79	(1 031)												
Returns & allowances - East	5 102	4 847	205	3 653	(2 449)	2 422	4 843	5 085	4 984	4 984	5 233	4 448	4 070	5 371	5 102	5 868	7 921
Returns & allowances - West	1 754	1 666	38	1 256	(1 098)	833	1 665	1 748	1 713	1 713	1 799	1 529	1 906	1 846	1 754	2 017	2 723
Purchases	219 837	208 845	10 942	157 411	(63 426)				226	214 725	225 461	191 642	201 224	231 407	219 837	252 813	341 297
Freight	750	713	(13)	537	(1 213)				733	769	654	687	790	750	863	1 164	
Freight - East	4 546	4 319	177	3 255	(2 291)	1 623	3 246	3 311	3 377	4 440	4 662	3 963	4 161	4 785	4 546	5 228	7 057
Freight - West	2 031	1 929	52	1 454	(1 577)	721	1 442	1 471	1 500	1 983	2 082	1 770	1 859	2 187	2 031	2 385	3 150
Warehouseman payroll - East	51 765	49 177	2 538	37 066	(15 699)	20 385	40 770	41 178	35 863	50 561	53 090	45 126	47 382	54 490	51 765	59 530	80 366
Warehouseman payroll - West	12 181	11 572	559	8 722	(4 459)	4 909	9 818	9 917	7 714	11 898	12 493	10 619	11 150	12 823	12 181	14 009	18 912
Warehouse supplies	1 400	1 330	20	1 003	(1 398)	386	773	788	804	1 368	1 436	1 221	1 282	1 474	1 400	1 611	2 174
Driver payroll - East	42 385	40 265	2 069	30 349	(13 036)	17 722	35 444	35 799	26 895	41 399	43 469	36 949	38 796	44 615	42 385	48 742	65 802
Driver payroll - West	16 138	15 331	757	11 555	(5 583)	6 512	13 024	13 154	11 136	15 762	16 551	14 068	14 771	16 987	16 138	18 558	25 054

## 2.3 Title Variables

### 2.3.1 What are title variables?

Title variables can be inserted into the report title via the Sage Intelligence Design Pane as to allow for a more dynamic means to report production, and minimizing the effort required to update a report. These variables, along with column heading variables, are best used for reports that are run out in a successive and frequent manner.

You are now able to add 2 types of Title Variables:

#### Company

The company variable will display the company name chosen from the report filter.

#### Date

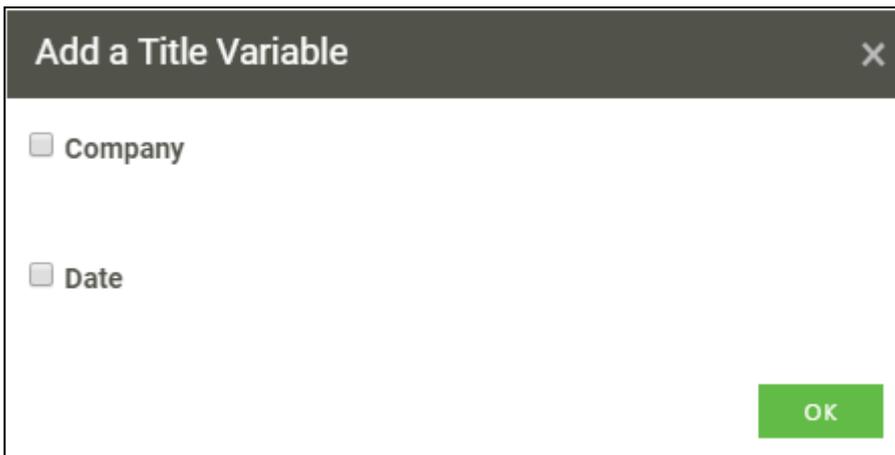
The date variable will display a date in the report title based on the different report filters chosen. This will be explained in detail in the subsequent sections.

### 2.3.2 Editing a report to insert title variables

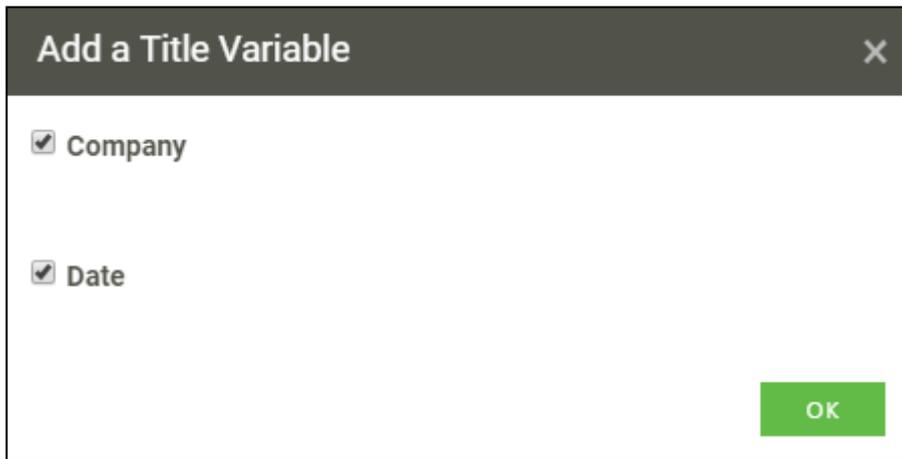
1. Click on the *Add* icon next to the report Title tile in the Online Design Pane.



2. The *Add a Title Variable* screen will appear, enabling you to select the variable you want displayed in the report title.



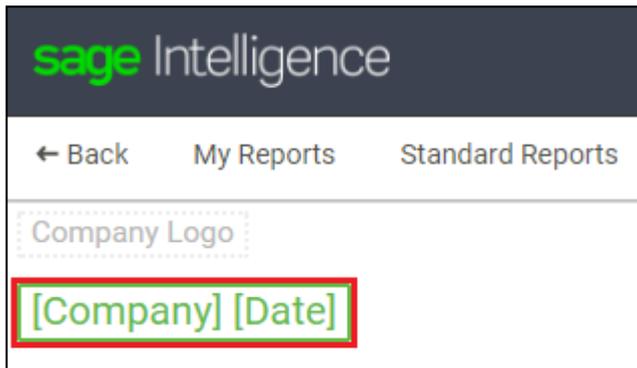
3. Select which variables you would like to add by checking the desired option.



4. Click on OK. Within the Title field, the outcome is:



5. Within the design screen, the outcome is:



### 2.3.3 Editing the report title

You are able to place the cursor before, in-between and after any title variable and add text within the title tile as a means to produce a valuable report title.



### 2.3.4 Explaining the title variables

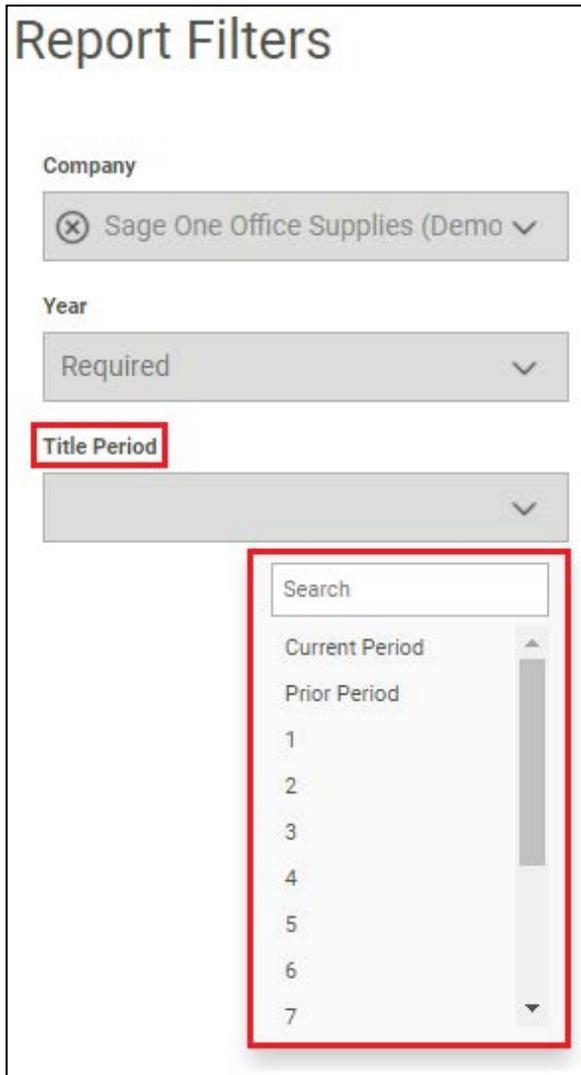
## Company

This variable will reference and display the company name chosen in the report filter in the report title. This will be shown in the subsequent section of the document.

## Date

When the report is run out, a date will be displayed (e.g 31 December 2018) in the report title.

To do so, you will have to specify which period you would like displayed in the title, by selecting an option from the *Title Period* drop-down within the report filter screen.



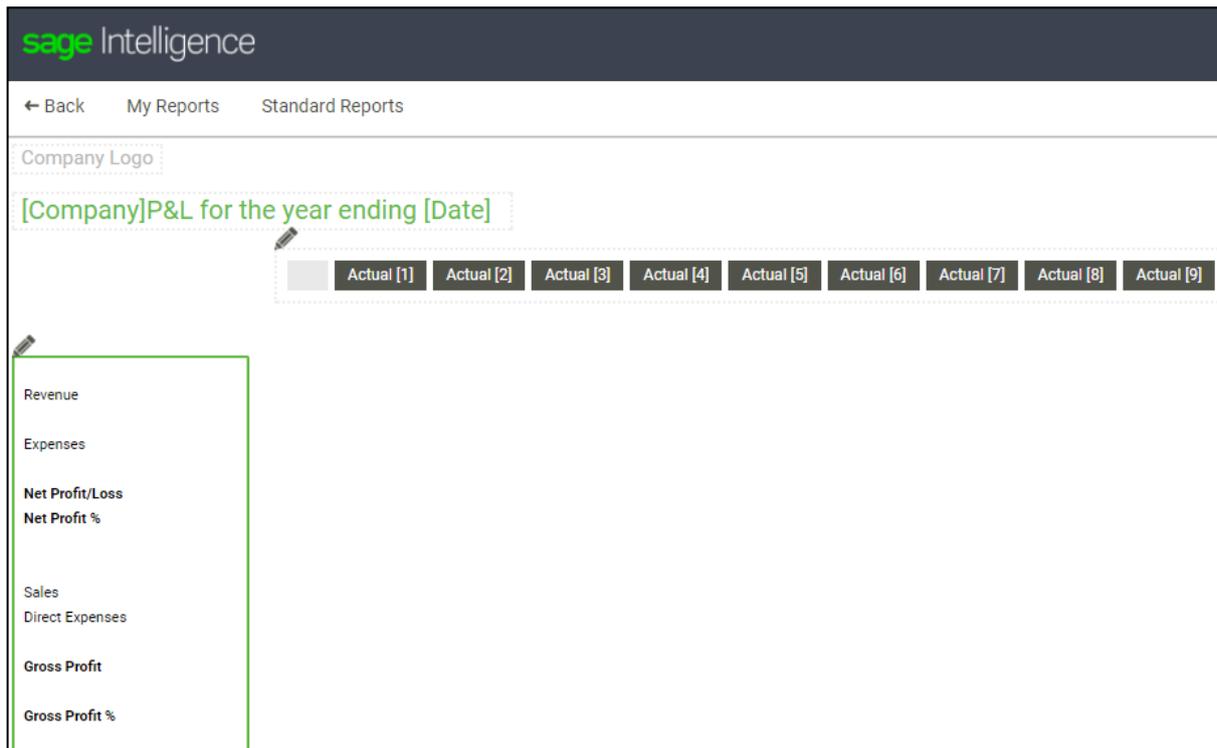
The screenshot shows the 'Report Filters' interface. It includes three main sections: 'Company', 'Year', and 'Title Period'. The 'Company' section has a dropdown menu with 'Sage One Office Supplies (Demo)' selected. The 'Year' section has a dropdown menu with 'Required' selected. The 'Title Period' section has a dropdown menu that is currently open, showing a search bar and a list of options: 'Current Period', 'Prior Period', and a list of numbers from 1 to 7. The 'Title Period' label and the dropdown menu are highlighted with red boxes.

There are both dynamic and static options

1. Dynamic: Current Period, Prior Period. This is best used for reports that are run out in a successive and frequent manner. You will not have to change the title period each time the report is run out, as the title will always reference the current or prior period.
2. Static: Period 1 – 12/13.

## 2.4 Running a report with title variables

After adding the title variables, columns, rows and report logo, the report can be run out.



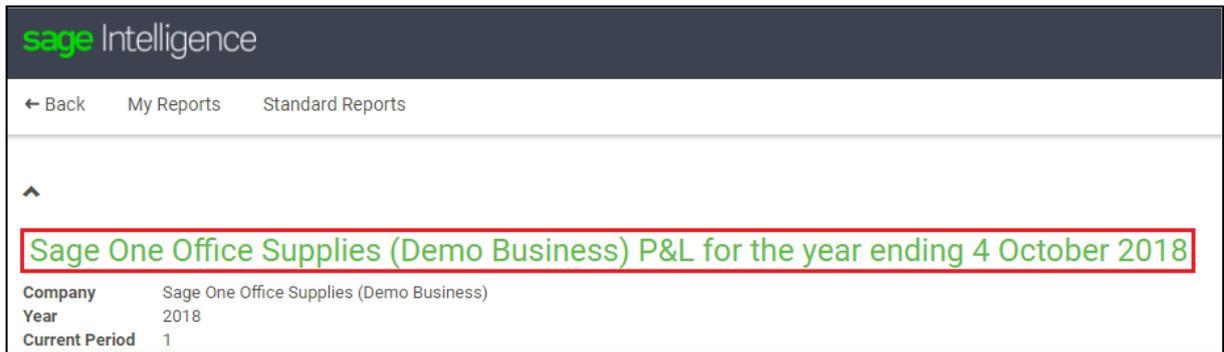
The screenshot shows the Sage Intelligence report editor interface. At the top, the Sage Intelligence logo is displayed. Below the logo, there are navigation links: "← Back", "My Reports", and "Standard Reports". The main area is titled "Company Logo" and contains a report title "[Company]P&L for the year ending [Date]". Below the title, there is a row of column headers: "Actual [1]", "Actual [2]", "Actual [3]", "Actual [4]", "Actual [5]", "Actual [6]", "Actual [7]", "Actual [8]", and "Actual [9]". On the left side, there is a list of row items: "Revenue", "Expenses", "Net Profit/Loss", "Net Profit %", "Sales", "Direct Expenses", "Gross Profit", and "Gross Profit %".

You would have to enter report filters.



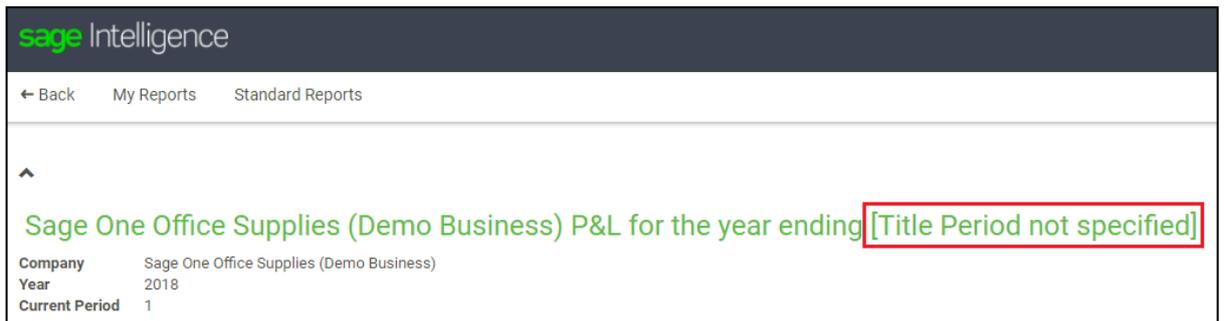
The screenshot shows the "Report Filters" dialog box. It contains three filter sections: "Company" with a dropdown menu showing "Sage One Office Supplies (Demo)", "Year" with a dropdown menu showing "2018", and "Title Period" with a dropdown menu showing "12". Each dropdown menu has a close button (X) and a dropdown arrow (v).

Report (cropped)



The screenshot shows the Sage Intelligence interface. At the top, the logo 'sage Intelligence' is displayed. Below it, there are navigation links: '← Back', 'My Reports', and 'Standard Reports'. A red box highlights the report title: 'Sage One Office Supplies (Demo Business) P&L for the year ending 4 October 2018'. Below the title, the following details are listed: 'Company Sage One Office Supplies (Demo Business)', 'Year 2018', and 'Current Period 1'.

If you do not select a *Title Period*, the following will be displayed



The screenshot shows the Sage Intelligence interface. At the top, the logo 'sage Intelligence' is displayed. Below it, there are navigation links: '← Back', 'My Reports', and 'Standard Reports'. A red box highlights the report title: 'Sage One Office Supplies (Demo Business) P&L for the year ending [Title Period not specified]'. Below the title, the following details are listed: 'Company Sage One Office Supplies (Demo Business)', 'Year 2018', and 'Current Period 1'.

## 2.5 Logic used to identify which date to display

SI looks at the following parameters when identifying the date

- Company
- Title Period (report filter)
- Year
- Title Period End Date

If, for example, you have the following settings in the Sage One Accounting system:

Company - Sage Supplies			
Fiscal Period	Start Date	End Date	Fiscal Year
1	01-Mar-17	31-Mar-17	2018
2	01-Apr-17	30-Apr-17	2018
3	01-May-17	31-May-17	2018
4	01-Jun-17	30-Jun-17	2018
5	01-Jul-17	31-Jul-17	2018
6	01-Aug-17	31-Aug-17	2018
7	01-Sep-17	30-Sep-17	2018
8	01-Oct-17	31-Oct-17	2018
9	01-Nov-17	30-Nov-17	2018
10	01-Dec-17	31-Dec-17	2018
11	01-Jan-18	31-Jan-18	2018
12	01-Feb-18	28-Feb-18	2018

If you choose period 12 from the *Title Period* report filter, and also select 2018 as the *Year* parameter, then the date displayed will be 28 February 2018.

If you choose period 4 from the *Title Period* report filter, and also select 2018 as the *Year* parameter, then the date displayed will be 30 June 2017.

The day displayed in the date will ALWAYS be the last day of the period selected in the *Title Period* filter, subject to the *Year* selected.

## 2.6 Exporting to Excel

Because the report title and column headings are a static drop of text when the report is exported into excel, it will not dynamically update according to report parameters chosen using the Excel Design Pane.

## 3.0 Column Variables

### 3.1 What are column variables?

Column variables can be inserted into column headings via the Sage Intelligence Design Pane as to allow for a more dynamic means to report production, and minimizing the effort required to update a report. These variables are best used for reports that are run out in a successive and frequent manner.

You are now able to add 3 types of Column Heading Variables:

#### **Amount Type**

This variable will display the amount type (Actual, Actual YTD, Opening Balance, Closing Balance et cetera) in the column heading when the report is run out.

#### **Period**

This will display the name of the month associated to the fiscal period and selected *Year* column property when the report is run out.

#### **Year**

This variable will reference the *Year* column property.

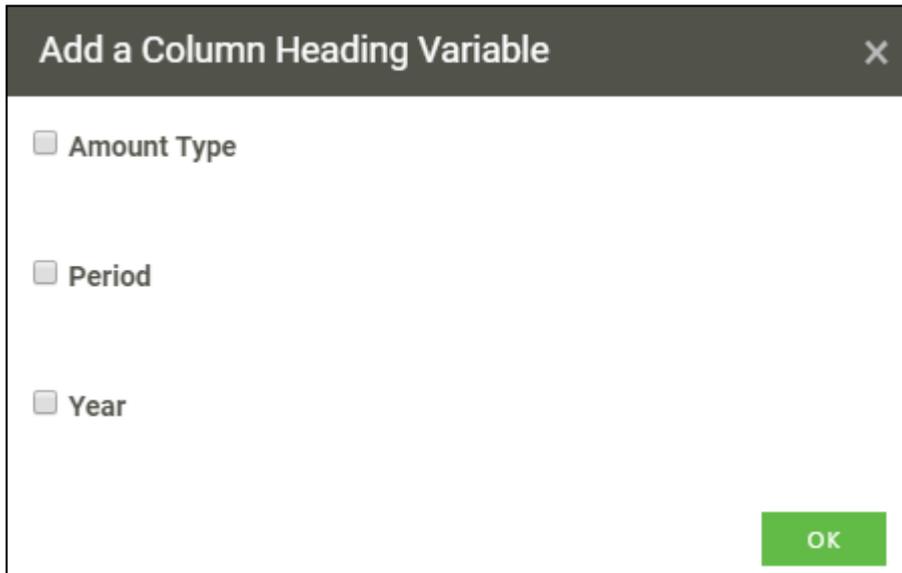
Note: By default, column headings will be populated with the Amount Type and Period variables.

### 3.2 Editing a report to insert column variables

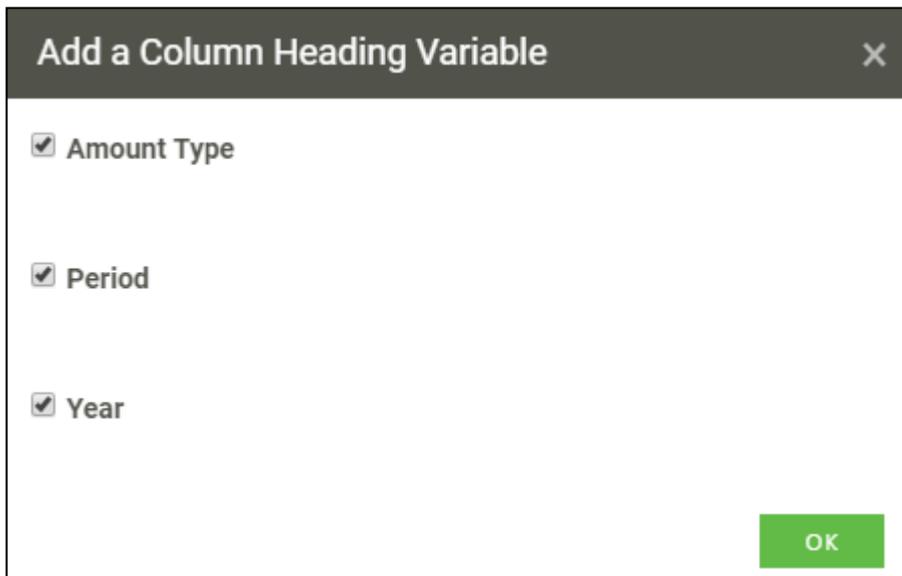
3. Click on the Add a Column Variable icon next to the report Column Heading tile in the Online Design Pane.



4. The *Add a Column Heading Variable* screen will appear, enabling you to select the variables you want to insert into the column heading.



5. Select which variable you would like to add by checking the desired option.



6. Click on OK. Within the Column heading tile, the outcome is:



Within the design screen, the outcome is:



### 3.3 Editing the column heading

You are able to place your cursor before, in-between and after any column heading variable and add text within the column heading tile.



### 3.4 Explaining the column variables

#### Amount Type

This variable will reference the Amount Type chosen in the column property field.



This is dynamic, and updates instantaneously when you change the column Amount Type.

### Column Properties

Column Heading:  +

Column Type: Amount ▾

Amount Type:  ▾

**Period**

This variable will reference the Period chosen in the column property field.

### Column Properties

Column Heading:  +

Column Type: Amount ▾

Amount Type: Actual Ytd ▾

Year:

Period:

1	2	3	4
---	---	---	---

This is dynamic, and updates instantaneously when you change the column Period.

### Column Properties

Column Heading:  +

Column Type: Amount ▾

Amount Type: Actual Ytd ▾

Year:

Period:

1	2	3	4
5	6	7	8

When the report is run, the column heading will display the month name associated with the fiscal period and fiscal year chosen in the column properties.

Please note that for Sage One, there is no Period variable available for the Opening Balance Amount Type.

**Year**

This variable will provide the fiscal year based on the year column property selected, as well as the year report filter.

The screenshot shows a dialog box titled "Choose the Fiscal Year" with a close button (X) in the top right corner. It contains three radio button options: "The year filter for my report" (which is selected and highlighted with a red box), "A year prior to the year filter", and "Enter my own year". A green "OK" button is located in the bottom right corner.

The screenshot shows a "Column Properties" dialog box. It has four input fields: "Column Heading" with "Year" entered (highlighted with a red box), "Column Type" set to "Amount", "Amount Type" set to "Actual Ytd", and "Year" with "Year" entered (highlighted with a red box). A green plus sign (+) is visible to the right of the "Column Heading" field.

Please note that the Year variable ONLY displays the fiscal year based on the column property chosen and report filter chosen.

For example, if you have the following column (Actual, Period 1, Year in the filter),

The screenshot shows a "Column Properties" dialog box. The "Column Heading" field contains "Actual 1 Year" (with "1" highlighted in green and "Year" highlighted with a red box). The "Column Type" is "Amount", "Amount Type" is "Actual", and "Year" is "Year". At the bottom, there is a "Period" section with four buttons labeled "1", "2", "3", and "4". The "1" button is highlighted in green.

...with the following settings in the Sage One Accounting system,

Fiscal Period	Start Date	End Date	Fiscal Year
1	01-Mar-17	31-Mar-17	2018

...and select 2018 fiscal year from the report filter, the output will be: **Actual Mar 2018**  
(Actual March 2018), not Actual March 2017.

This is because the Year variable ONLY references the fiscal year chosen in the column property and report filter. Although period 1 for the fiscal year 2018 is March 2017, the year variable will still produce 2018.

### 3.5 Running a report with column heading variables

Below is an example of a report that contains the Amount Type and Period column headings.

The screenshot shows the Sage Intelligence interface for a report. At the top, there is a navigation bar with '← Back', 'My Reports', and 'Standard Reports'. Below this is a 'Company Logo' placeholder. The main title of the report is '[Company]P&L for the year ending [Date]'. Below the title, there is a row of column headings: 'Actual [1]', 'Actual [2]', 'Actual [3]', 'Actual [4]', 'Actual [5]', 'Actual [6]', 'Actual [7]', 'Actual [8]', and 'Actual [9]'. On the left side, there is a list of report items: 'Revenue', 'Expenses', 'Net Profit/Loss', 'Net Profit %', 'Sales', 'Direct Expenses', 'Gross Profit', and 'Gross Profit %'. The 'Net Profit/Loss' and 'Net Profit %' items are highlighted with a green border.

Running out the report from within the Design Screen, you would have to enter report filters.

**Report Filters**

**Company**  
⊗ Sage One Office Supplies (Demo) ▾

**Year**  
⊗ 2018 ▾

**Title Period**  
⊗ 12 ▾

Report (cropped):

sage Intelligence

← Back My Reports Standard Reports

^

**Sage One Office Supplies (Demo Business) P&L for the year ending 4 October 2018**

Company Sage One Office Supplies (Demo Business)  
Year 2018  
Current Period 1

Actual Nov	Actual Dec	Actual Jan	Actual Feb	Actual Mar	Actual Apr
------------	------------	------------	------------	------------	------------

As can be seen, the period number is changed to the respective month name based on the parameters chosen in the Report filter.

### 3.6 Logic used to change period number into month name

SI looks at the following parameters when identifying the fiscal period's month name:

- Company
- Period Number
- Year
- Period End Date

If, for example, you have the following settings in the Sage One Accounting system:

### Company - Sage Supplies

Fiscal Period	Start Date	End Date	Fiscal Year
1	01-Mar-17	31-Mar-17	2018
2	01-Apr-17	30-Apr-17	2018
3	01-May-17	31-May-17	2018
4	01-Jun-17	30-Jun-17	2018
5	01-Jul-17	31-Jul-17	2018
6	01-Aug-17	31-Aug-17	2018
7	01-Sep-17	30-Sep-17	2018
8	01-Oct-17	31-Oct-17	2018
9	01-Nov-17	30-Nov-17	2018
10	01-Dec-17	31-Dec-17	2018
11	01-Jan-18	31-Jan-18	2018
12	01-Feb-18	28-Feb-18	2018

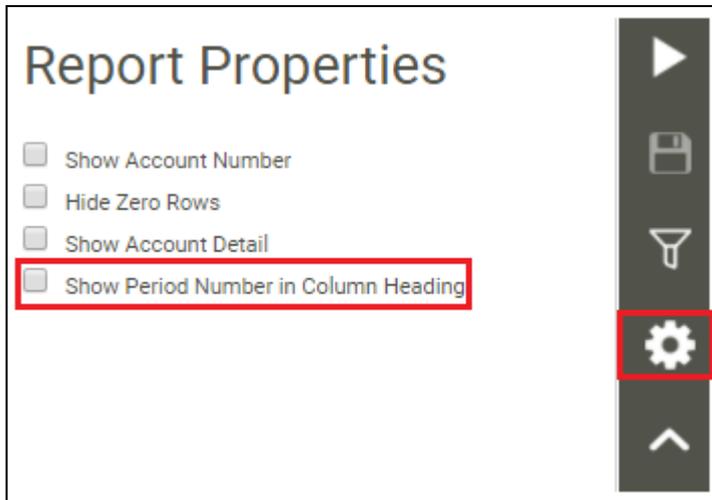
If you select period 12 and run the report for fiscal year 2018, then the name of the month displayed in the column heading will be **Feb**.

If you select period 5 and run the report for fiscal year 2018, then the name of the month displayed in the column heading will be **Jul**.

SI uses the End Date to determine the month name shown.

### 3.7 Showing period numbers

By default, the month name of the period will be shown when the report is run out, however, if you to keep the report number in the column heading, you can do so selecting the “Show Period Number in Column Heading” report property.



### 3.8 Exporting to Excel

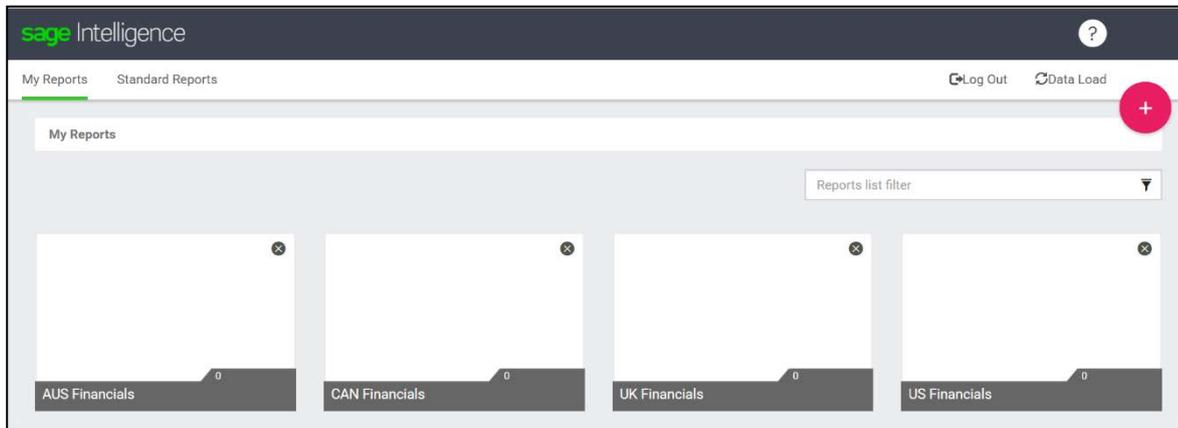
Because the report title and column headings are a static drop of text when the report is exported into Excel, it will not dynamically update according to report parameters chosen using the Excel Design Pane.

It is therefore advised to select the “Show Period Number in Column Heading” report property when you aim to export the report to excel.

## 4.0 Enhancements

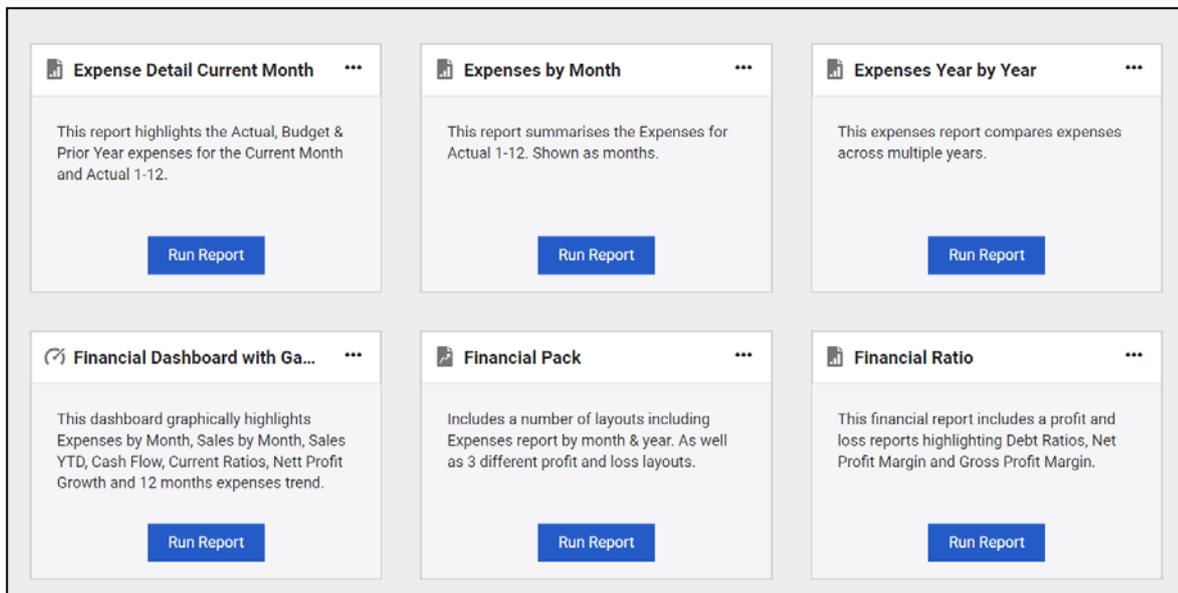
### 4.1 Folder UI updated

The look and feel on folders has been updated significantly. Folders now appear as folders, and the number on the folder alerts you to how many reports exist in a folder. A parent folder can only be deleted if there are no other folders or reports in the parent folder. One of the main advantages of folders is that they make it easier to locate and access reports.



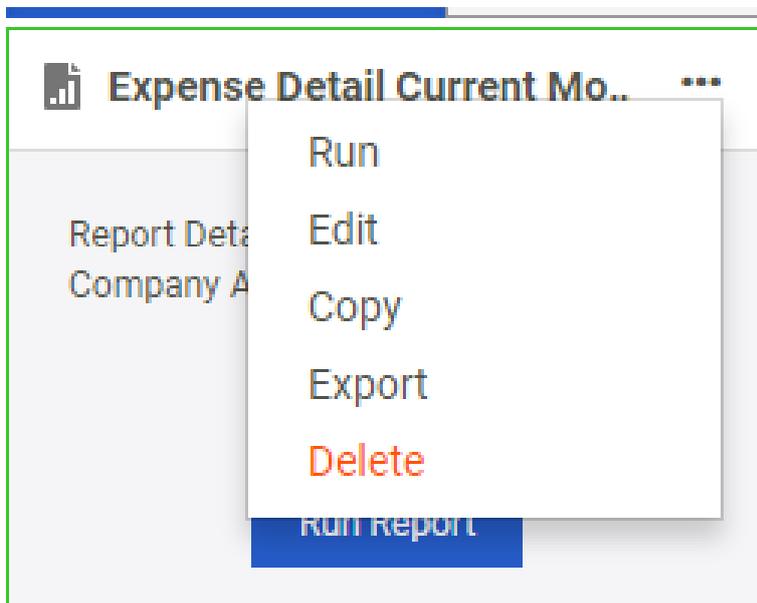
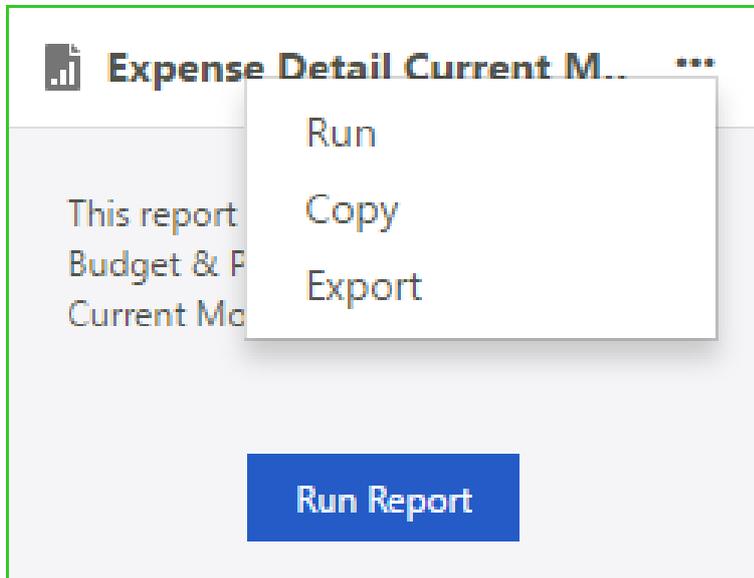
### 4.2 Report Tiles

Another significant update has been done to the report library user interface. The long list of reports has now been replaced with a cleaner, fresher report tile look.



### 4.3 Report Options

The report options no longer take up valuable real estate on the reports. The report options are now found on the ellipsis. And only the report options that are applicable to the actual report type show. For example, on standard reports there are currently 3 options (run, copy and export) on custom report there are more options (run, edit, copy, export & delete).

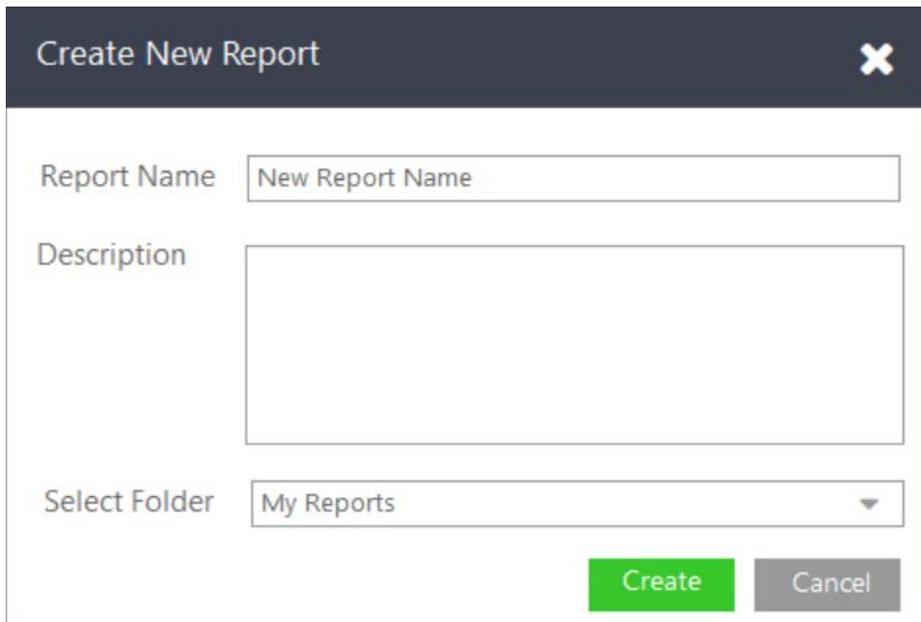


## 4.5 Dialog Boxes

All Dialog boxes have been updated to be more intuitive and user friendly by adding the appropriate action button. An action specific button will enable you to do tasks much more quickly and accurately.

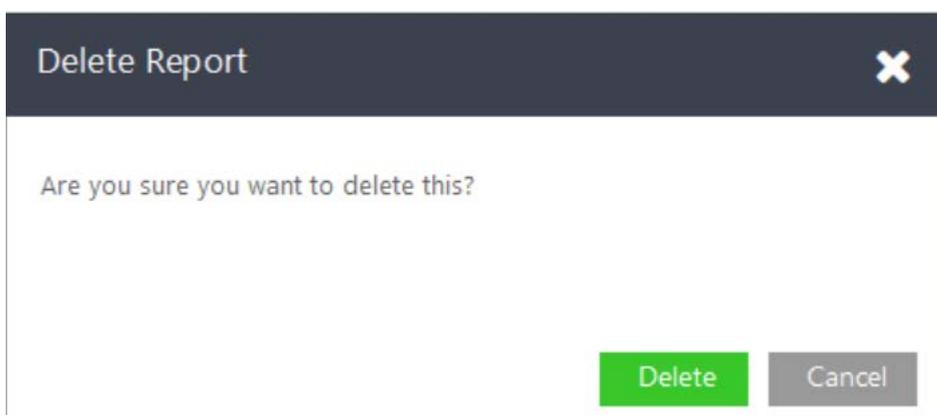
The OK button in Sage Intelligence has been replaced with more specific action buttons, you will be able to see what action you are about to do without having to read the dialog box & have the option to cancel the action.

Example: Create New Report



The screenshot shows a dialog box titled "Create New Report" with a close button (X) in the top right corner. The dialog contains three input fields: "Report Name" with the text "New Report Name", "Description" with an empty text area, and "Select Folder" with a dropdown menu showing "My Reports". At the bottom right, there are two buttons: a green "Create" button and a grey "Cancel" button.

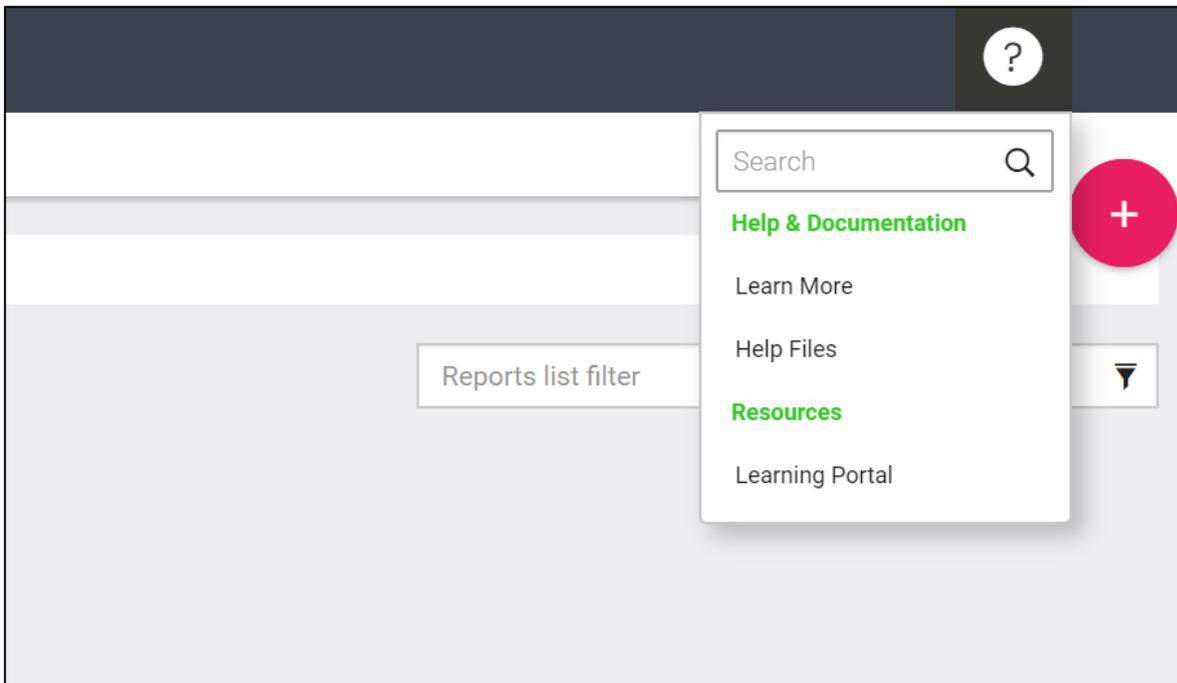
Example: Delete Report



The screenshot shows a dialog box titled "Delete Report" with a close button (X) in the top right corner. The dialog contains a single line of text: "Are you sure you want to delete this?". At the bottom right, there are two buttons: a green "Delete" button and a grey "Cancel" button.

## 4.6 Learn More

If you require information regarding the new process, you can make use of the in-product tour by selecting “Learn More” from the top toolbar.



# 5.0 Removed Features

## 5.1 Home Page & My Reports

The Home Page & My Reports have been removed which reduces the number of steps required to get to the reports.



## 5.2 The learn more tab

The learn more tab has been removed in favour of the new learn more tab at the top of the screen in the tool bar.

## 6.0 Known Issues

### Excel Design Pane

#### 6.1 Excel Design Pane inconsistently hangs when reload (in the top right) is clicked.

Workaround: Please save and close the workbook. Reopen the workbook and sign into Sage Intelligence.

#### 6.2 Session Error when reopening a workbook immediately after closing a workbook.

Opening a workbook immediately after closing will result in a session overlap and you will see the below issue.

