

# Sage Pastel Version 14 Intelligence Reporting



## Exciting new features in Intelligence Reporting



Some of the exciting usability and performance enhancements to look forward to in the latest release of Sage Pastel Version 14 Intelligence Reporting (Previously called the Business Intelligence Centre) include:

### More control over your financial reports

The new Report Designer boasts a fresh new user interface, and has vast improvements in performance through its powerful new In-Memory technology\*, giving you a quick and responsive experience when designing reports in the familiar interface of Microsoft® Excel®.

The new Report Designer gives you two methods to create your financial reports depending on your Excel knowledge.

### Layout Generator

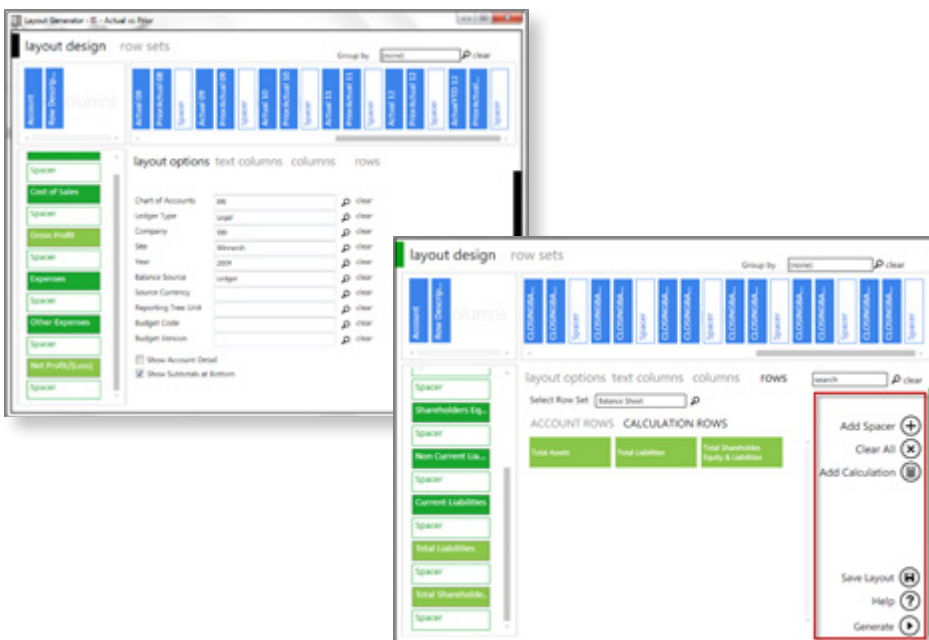
If you're still getting used to Excel, the Layout Generator, which used to be known as the Excel Genie, is easy to use and automates the design and generation of financial report layouts quickly and accurately within Excel. The Layout Generator provides you with a set of standard financial layouts to get you up and running immediately and these can then be edited to suit your unique requirements. The generated layouts have also been given a cleaner look and feel and are now easier to customize using the Task Pane once your layout is created.

### Benefits

- Get better **control** of your reporting.
- **Automate** your reporting processes.
- Easily **analyse** your data to make better decisions.

“It has become not only an indispensable financial resource, but an easy-to-use key strategic tool in the life of our business.”

Peter Moore, Managing Director,  
Mount Grace Country House and Spa

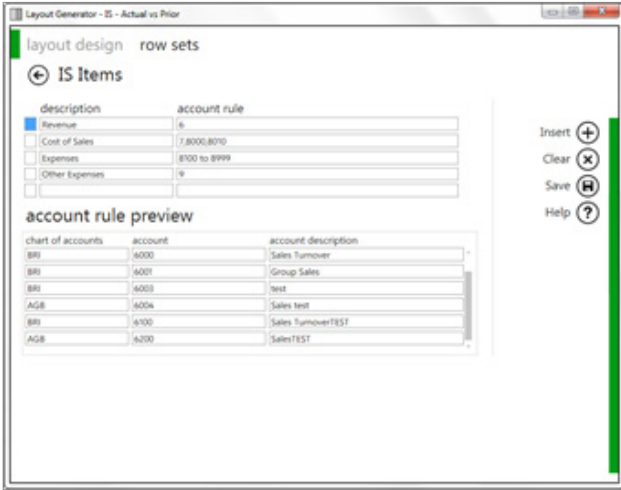


*The layouts generated from the Layout Generator have a more modern, cleaner look and feel to allow for easier customization.*

\*An In-Memory database system is a database management system that stores data entirely in your computer's RAM. Because working with data In-Memory is much faster, Intelligence Reporting is now able to report on larger data volumes, greatly enhancing the performance of your financial reporting

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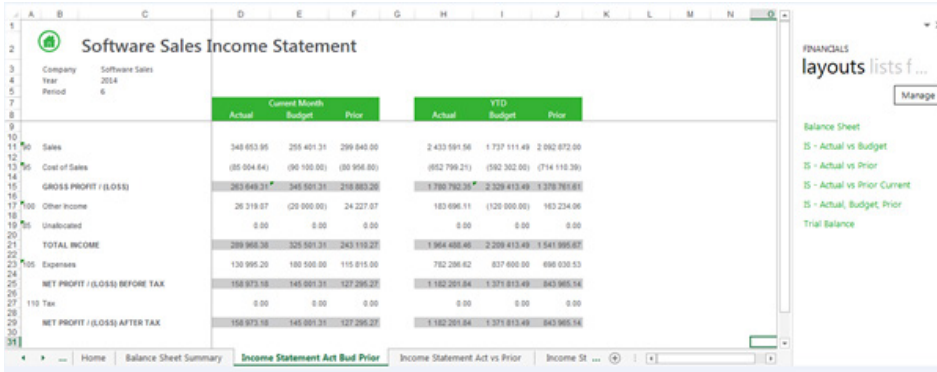
Another new feature on the Layout Generator are Row Sets\*. Do you find that your report creation time is exceeding the number of working hours that you have in a day? We can help you shorten your reporting process with the handy Row Sets feature in Sage Intelligence Reporting. Row sets can be set up once and used in multiple reports, saving you valuable hours.



Row Sets

## Task Pane

If you're more familiar with Excel, the new Task Pane greatly enhances your Excel reporting experience, by providing instant and dynamic access to data within the General Ledger. Just drag in data lists, formulas, or Reporting Trees from the Task Pane on the right hand side of the Excel window and the In-Memory technology will update results instantaneously. You can also change the level of detail seen at a row level by using account ranges, account wildcards and account exclusions giving you maximum control and flexibility over your financial report layouts.



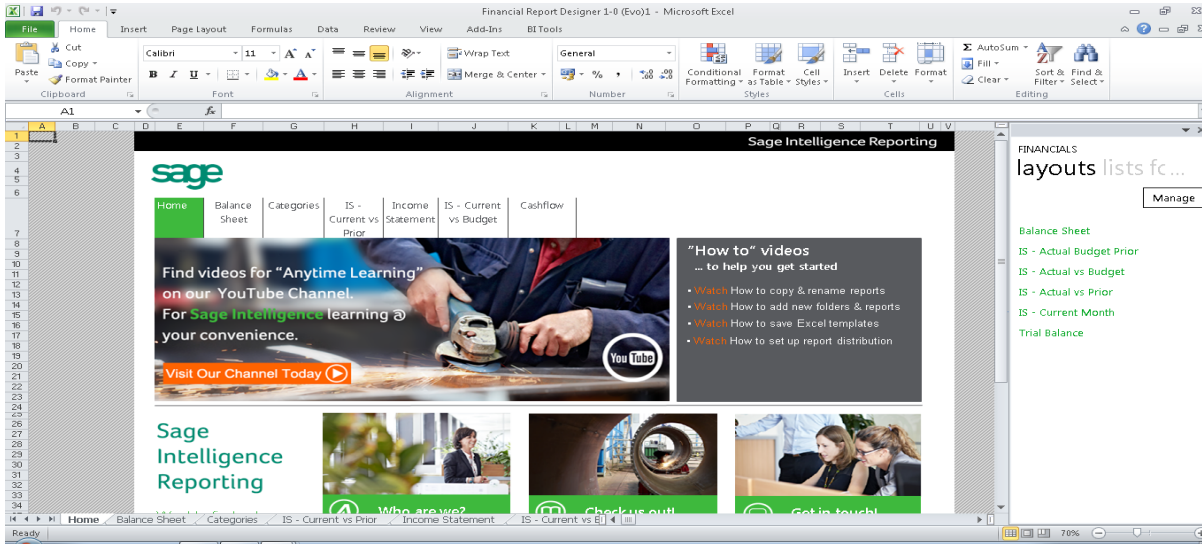
Enhance Task Pane interface with Income Statement.

\*Row Sets is a collection of row groupings based on account rules and ranges which you define according to your reporting needs.

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## Updated look and feel of Standard Reports

The standard reports have been modernized to give users a cleaner look and feel, and now also include a quick reference to helpful Sage Intelligence Reporting resources.



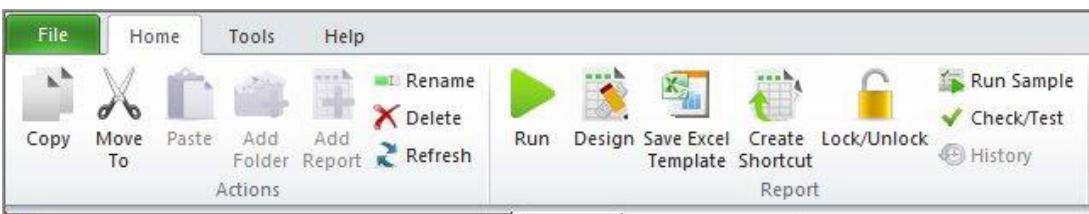
## Latest Microsoft Excel technology

Intelligence Reporting is now compatible with the 32-bit and 64-bit versions of Excel 2007, 2010, and 2013 to allow you to take full advantage of the latest Microsoft Excel functionality.

## Enhanced User Experience

### Easy access to commonly used features

The Report Manager and Connector modules boasts a new ribbon feature with informative icons and labels for each function aiding the user in easily identifying and accessing the features that you require. Menu items have been restructured and grouped and the more commonly used menu items are now accessible from the Home and Help tabs.



Easy to use common features-ribbon

### Simplified Right-click Menu

The right-click menus in the Report Manager have been simplified to provide you with a more concise list of options as well as option labels that are more informative.

- The right-click options “Run Sample” and “Refresh” on the Report Context right-click menu have been removed and are now accessible in the Report Manager Ribbon via the Home tab.
- The Labels ‘Create and Link Template’ and ‘Purge Instance History’ have been replaced by less technical, and therefore more easily understandable, labels of ‘Save Excel Template’ and ‘Clear Report History’ respectively.

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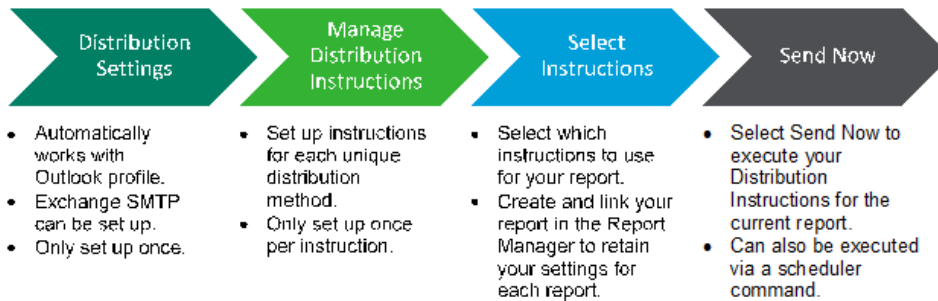
## Report Distribution

Improve workflow and speed up business processes by automating report delivery and distribution. Report Distribution is a powerful feature which saves time and effort by allowing you to send reports to a file, ftp site or email in a number of standard formats.

Merely set up which reports you would like to distribute, whether you would like them in Microsoft Excel, MHMTL or PDF and who they should be sent to. You can even create custom criteria for sending out reports.

The same report can be set up to be distributed to different destinations.

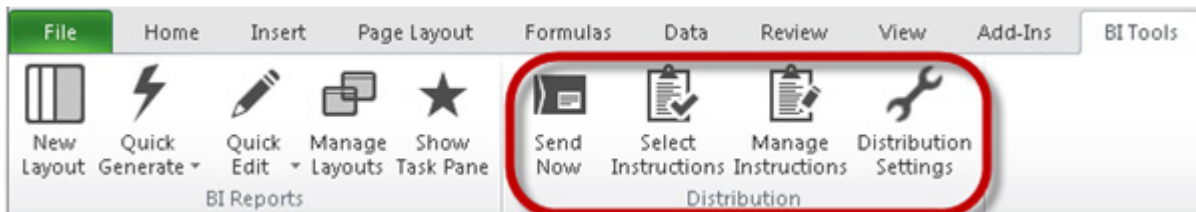
Distribution is ideal for sending reports out to line managers or providing corporate management with tailored reports. The distribution process works as follows.



To learn how to set up your Report Distribution, follow the link: <https://www.youtube.com/watch?v=tkxibtss1KKg>

## BI Tools Tab Extension

The BI Tools tab now contains an area which provides you with access to rReport Distribution features including setup and management of Report Distribution instructions.



BI Tools tab extension

## About The Sage Group plc

We provide small and medium-sized organisations with a range of easy-to-use, secure and efficient business management software and services—from accounting and payroll, to enterprise resource planning, customer relationship management and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia and Brazil. For further information please visit: [www.sage.com](http://www.sage.com)