Sage One International Intelligence Reporting Cloud

Release Notes for May 2017 Release

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1.0 New Features: Online Designer

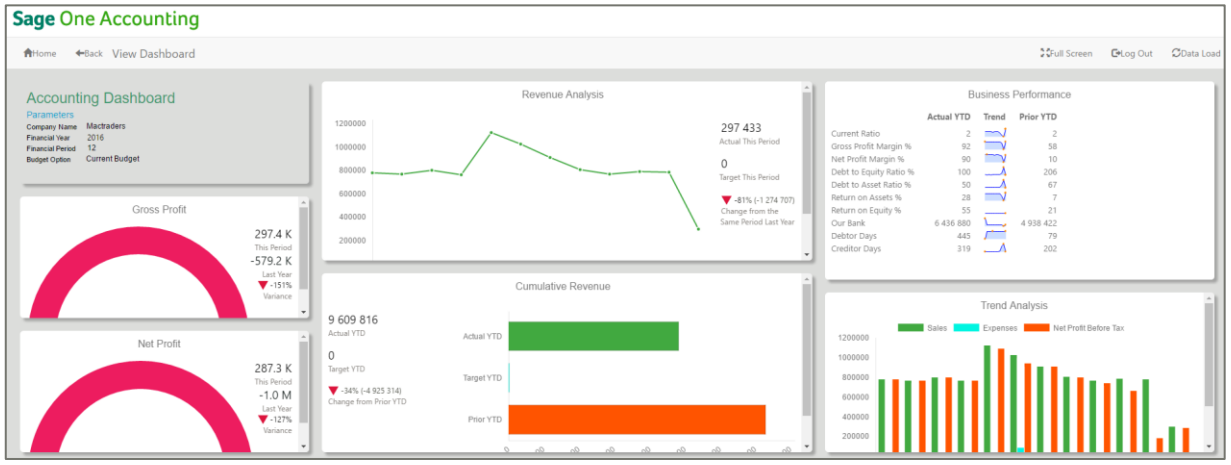
1.1 Online Financial Dashboards

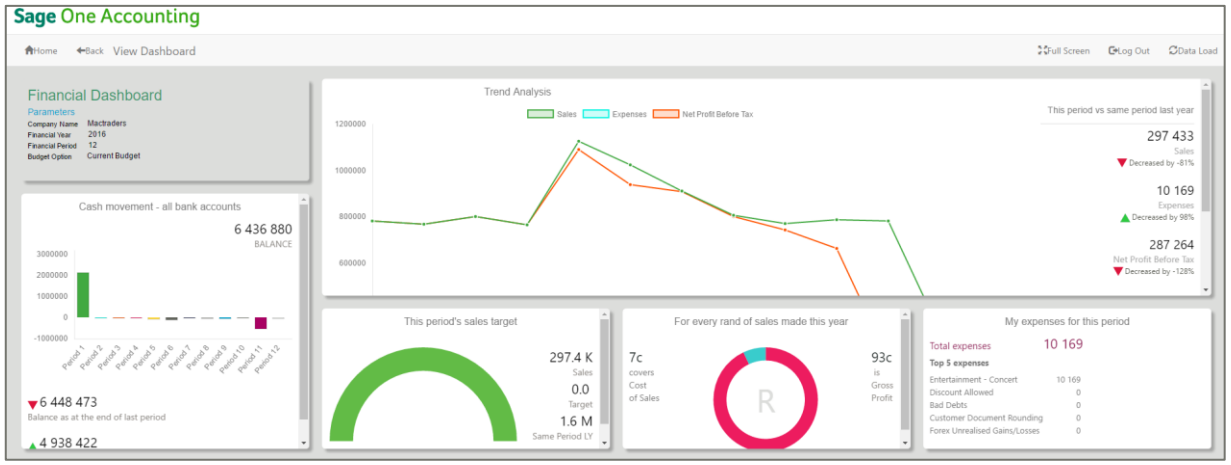
Having all the information you need to make smart business decisions is great! Being able to read and interpret it quickly and easily is even better!

This release of Sage One Accounting provides two out-the-box dashboard reports:

- Business Owner view of the business (Dashboard – Financial)
- Accountant view of the business (Dashboard – Accounting)

Each dashboard is carefully crafted to meet the needs of its intended audience.



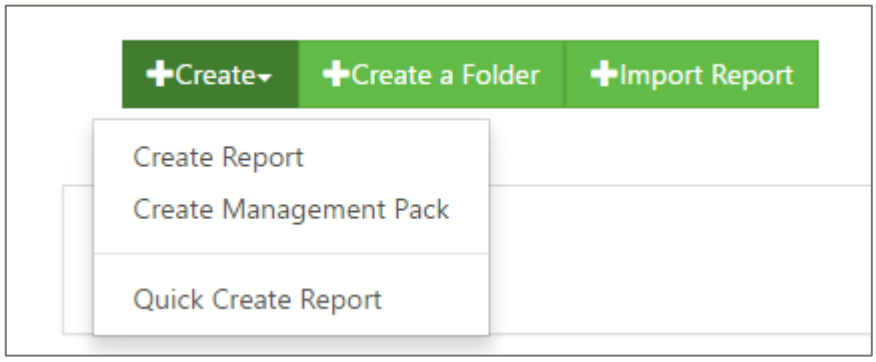


Please note these dashboards cannot be exported to Excel.

1.2 Creation of online financial dashboards

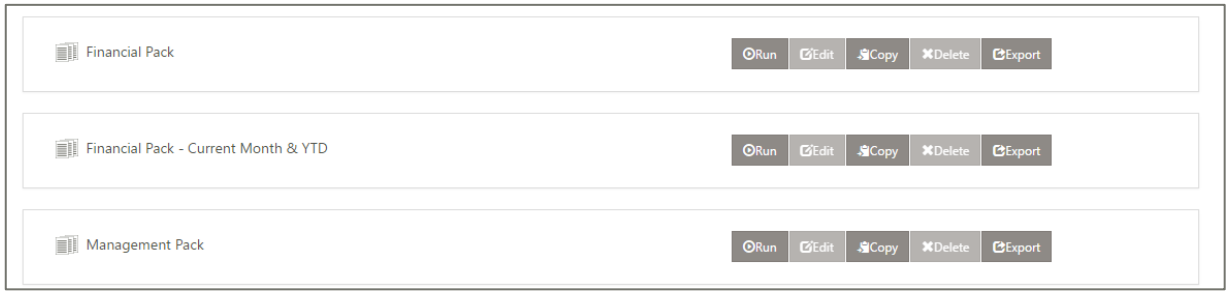
This feature is currently not available. It is important to note, that this release does not include the ability to create personalized dashboards. Currently only consumption of dashboards is provided.

1.3 Online Management packs



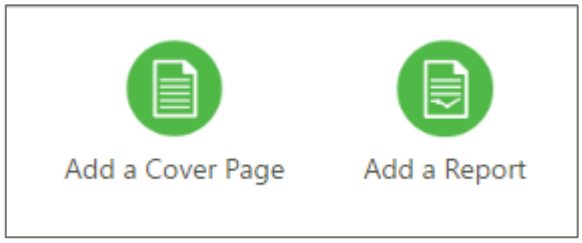
A financial report often needs to be consumed in conjunction with its fellow reports. To allow for reports to be grouped together, we have given the ability to use management packs.

Three management packs will be delivered as “ready-to-use” reports.



1.4 Editing and creating management packs

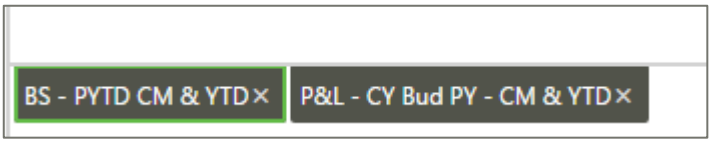
The management pack tools can be found in the design pane.



You can insert a cover page to introduce the management pack.

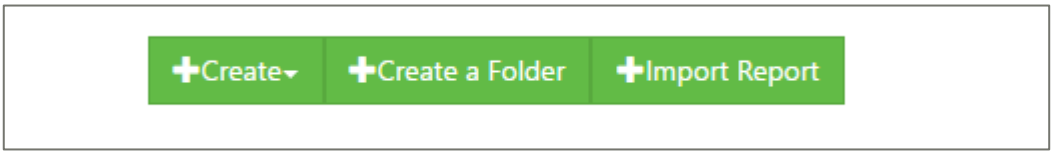
Please note when the management pack is exported to Excel, the cover page will not be displayed.

You can incorporate any report from your Sage Intelligence listing into the management pack. As the reports are added they will be displayed as tabs in the management pack report.



1.5 Personalized folder structures

Creating order out of chaos is a beautiful thing. So, don't get bogged down with lists of reports. Order them logically into a folder structure that is neat and easy to navigate around.



If you create a report and would like it to be displayed in the folder, you will need to export it from the existing folder and import it into the folder of your choice.

1.6 Storage of Excel Reports

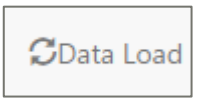
Don't waste precious time hunting for your Sage Intelligence Excel Reports. Import them into the online report designer and store them neatly with your online reports.

Our ready to use Excel reports are included in the Online Report Designer, so there is no need to have to look for them on the intelligence.com site anymore. However, the ready to use templates will still be here along with a backup of the ready to use reports for you.

It is important to note that Excel files up to 3MB can be stored in the Online Designer. Larger files will not be allowed to be imported for storage.

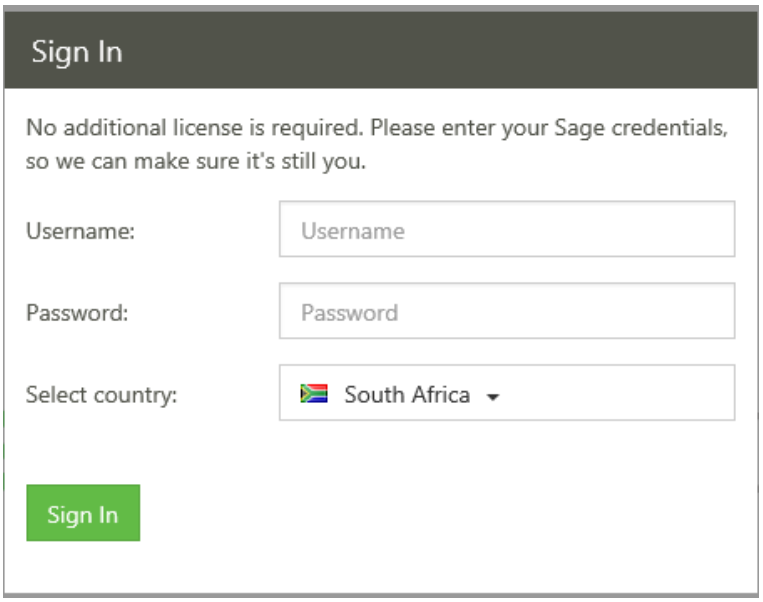
1.7 Data Load off the Bulk API

To accommodate for large data sets we have switched over to the bulk API. The boring technical detail won't be of interest to you, but all you need to know, is your data will now be loaded into Sage Intelligence much faster when using the Online Report Designer (Excel Report Designer is not impacted). You will notice the screen has changed so you will no longer see individual companies and years from the data load screen below.



1.8 Welcome message

We strive to make sure you know what to do each step of the way. We have updated the sign on screen to ensure you know to use your Sage One credentials.

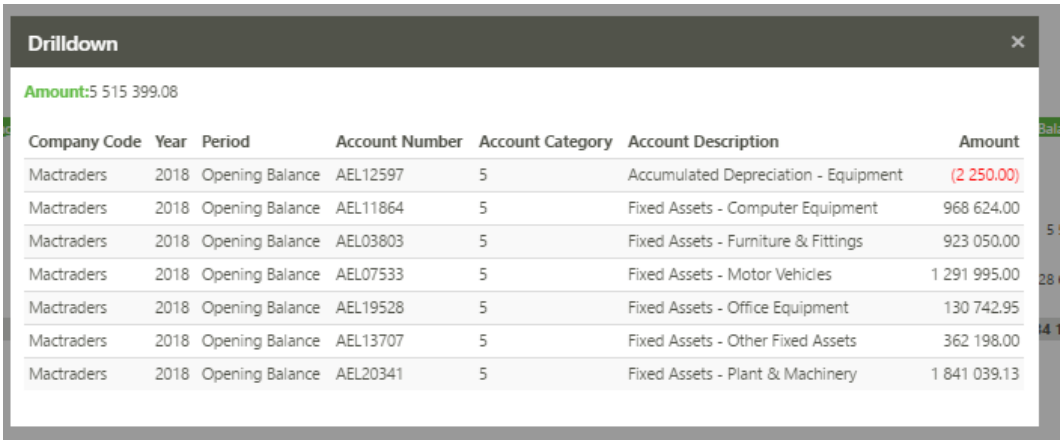


1.9 In product learning

A new feature we have added is the “learn more” button. This is a quick way to be able to access help from within the product. You can access the learn more button from the top tool bar.

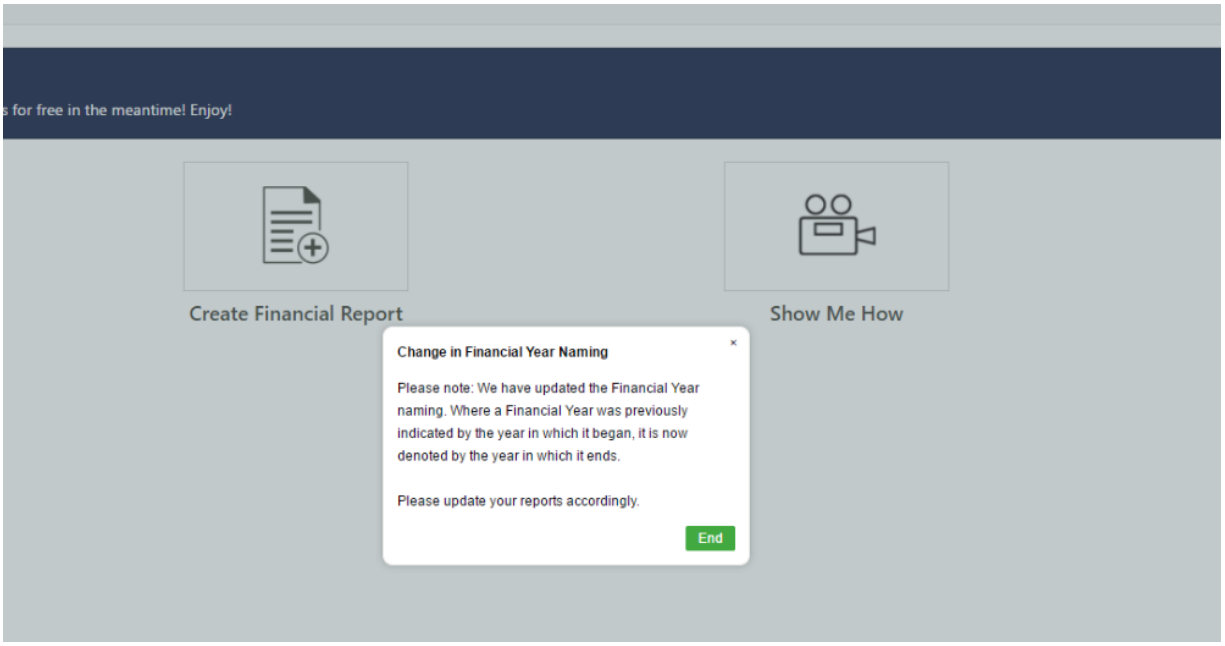
1.10 Drill Down from Online Report Designer

The ability to drill down on values to a Balance level has been enabled. The user can drill down on the following formulas: Actual, Actual YTD, Budget, Budget YTD, Opening Balance and Closing Balance. The user will be given detail regarding the respective company, the account number, the account category, the account description, the year, the period and period amount.



1.11 Fiscal Year Identification

Fiscal year is now identified by the calendar year in which the fiscal year period ends. For example, if the fiscal year ended in calendar year 2017, then the fiscal year would be identified as 2017. This change will be made evident by an in-product message that will appear for your first three logins – since the change is deployed.



1.12 Singapore

Along with South Africa, Malaysia and Australia, Singapore has been added as a server on the Task Pane login screen. This will allow users from Singapore to be authenticated and if authentication is successful then sign in will be possible.

2.0 Known Issues

Please note the following issues have been taken note of:

Issue	Impact	Workaround
Duplicate dashboard names	Currently you can have two dashboards with the same name. This can cause confusion when identifying which report you would like to run out.	Please choose unique names for your dashboards.
Validation on run dashboard screen	If you do not enter, any parameters (such as company, year, and budget) in the dashboard run our still. I will not stop you from clicking run.	Please ensure you have entered parameters for the dashboard you would like to run out.
Parameters persistence when running out dashboards	When you enter parameters for running out a dashboards. The parameters are not persisted in the menu for next time you run the report out.	Please enter the parameters you would like to run dashboards for, each time you run the report.
Reports can be run out with undefined rows	If you create new rows in a report and do not specify an account for them, the report can be run out with “new row” in the final report.	Please delete any “new rows” you are not requiring in your report.
Responsive design on Dashboards	Dashboards are designed to work on a laptop screen (as this is majority of the user’s screen of choice). When a dashboard is run on a much larger (1366x768) or much small screen (iPad and mobile), the dashboards will appear with slight UI imperfections on the sizing of the screens. You will see scroll bars and minor instances of over lapping text on charts. In some instances, the graphs will buffer whilst they adjust to the unexpected screen size.	Please bear with us as we smooth out these imperfections; we look forward to presenting you with a flawless UI in the future. For now, please keep to a laptop screen for viewing of dashboards.
Drill down on “full screen” mode	The dashboards offer the ability to view in “full screen” mode. This mode is designed for presentations where you do not want the URL bar to be	Please keep drilling down to the normal view mode.

	visible. Currently drill downs do not work in this mode.	
Exporting a management pack with a cover page	Please note than when you export a management pack, the cover page of the management pack will not be exported.	In the interim, please bear with us and create an Excel cover page if required.

3.0 Technical Enhancements

3.1 Modifications in Storage Manager Components to hit API less often

In the Storage Manager objects in the core the most significant areas to improve were the saving of a report (this is also called when a report is run from in design mode) and copying of a report.

Saving: A reduction from 25 calls to 18 calls

Copying: A reduction of 24 calls to 19 calls

3.2 Repository String Caching in Core

The most often requested object by the core against the API is requesting the actual serialized string of the LIME repository. Since this is only changed via the core and sent and retrieved through the storage objects it is quite simple to cache.

Saving: A reduction from 18 calls (as per first change) down to 12 calls

Copying: A reduction from 19 calls (as per first change) down to 9 calls

3.3 Caching in the Sage One Int Configuration Layer

A change was made to the API storage class that cache's all object data (Objects are compressed string representations of: Layout Definitions, Row sets, Column Sets, Dashboard Definitions etc.) whenever one is requested. If it is requested again then it is retrieved from the cache as opposed to the API being re-hit. This is safe for a User as they each have their own User Repository data. If a user was editing his layouts from two different devices at the same time then he /she could overwrite changes made from one device. This would happen currently though even without caching as it is assumed a user is not trying to overwrite his own work from various devices. When we start exposing Shared Repository information we will have to apply something more advanced way to prevent overwrites. But for now with User repositories this is not a problem.

This brings down the number of calls drastically. When an object is accessed for the first time, many hits on the API will happen but subsequent calls, when using the same object, result in minimal or zero API hits.

Applying this to all integrations would benefit the other integrations but for now it is just for Sage One to prove the concept. The good thing about this one is it requires zero changes to the core and thus no risk to other integrations with the change.

Saving: A reduction from 18 calls (as per first change) down to 12 and then to 8 on first save and 5 on subsequent saves

Copying: No further reduction from 9 calls

Total API hit reduction:-

Saving: 25 à 8 (and 5 on subsequent saves of same object) à 80% reduction

Copying: 24 à 9 à 63% reduction

	CURRENT CALLS	AFTER C1	AFTER C2	AFTER C3	SUBSEQUENT		% Reduction
SAVING	25	18	12	8	5		80%
COPYING	24	19	9	9	9		63%

Also this is just showing improvements for Saving and Copying. C1 will only effect these but C2 and C3 have an effect on every function that hits then storage API.