Sage One International Intelligence

Release Notes

Jessica Mack
05 09 2017

1.0 Introduction

1.1 Document Purpose

This document has been created to clearly articulate the following:

- Changes made to Sage One Intelligence in this September 15th Delivery.

1.2 Project Purpose

This release of Sage Intelligence will update the existing UI of Sage Intelligence to the latest UI (Phase 2) that is in accordance to the latest Sage Branding and Design standards, and allow users to view reports in a PDF viewer.

1.3 Target Audience

This release of Sage Intelligence is targeted to Sage One users in the following regions:

- South Africa

- Malaysia

- Australia

1.4 Supported Environments

- We recommend that you use Chrome when using Sage Intelligence
- The Excel add-in is designed to work in Excel 2013 (PU1) and above.

1.0 New Features

1.1   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.
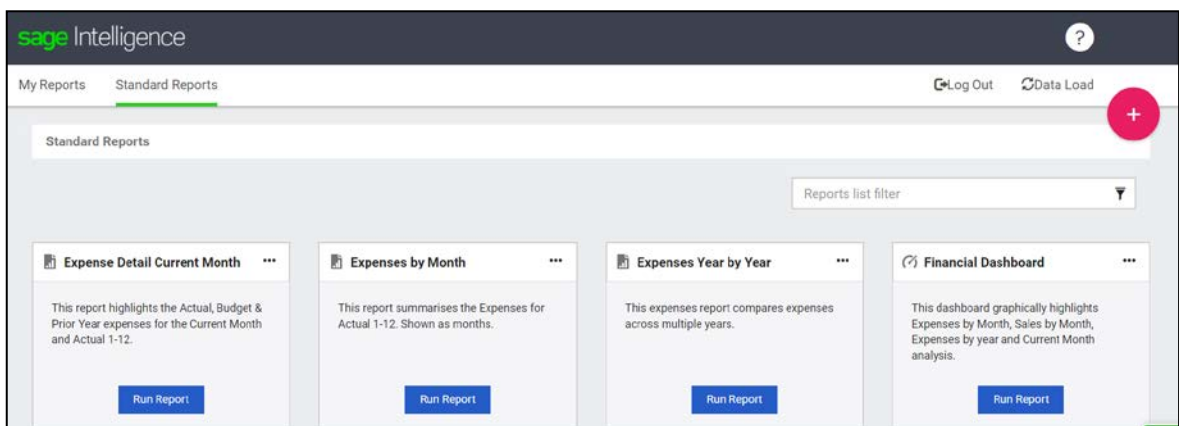

1.2   My Reports Page

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 organized into folders. Custom reports can be edited and deleted. Any custom reports you already have will appear on this page.
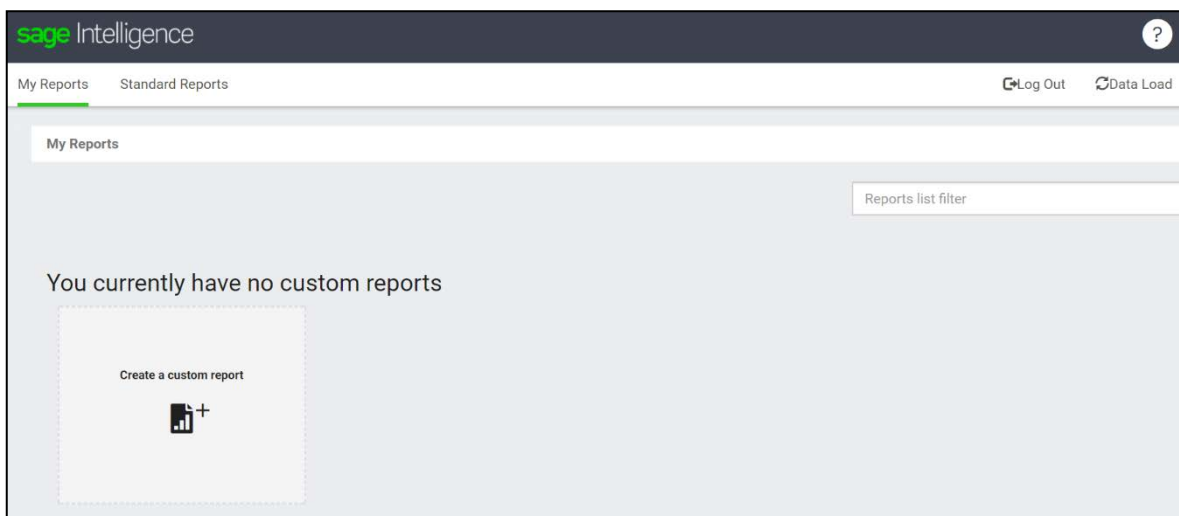
1.3   Options Button

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. Sage One users will not see the Create Dashboard item.
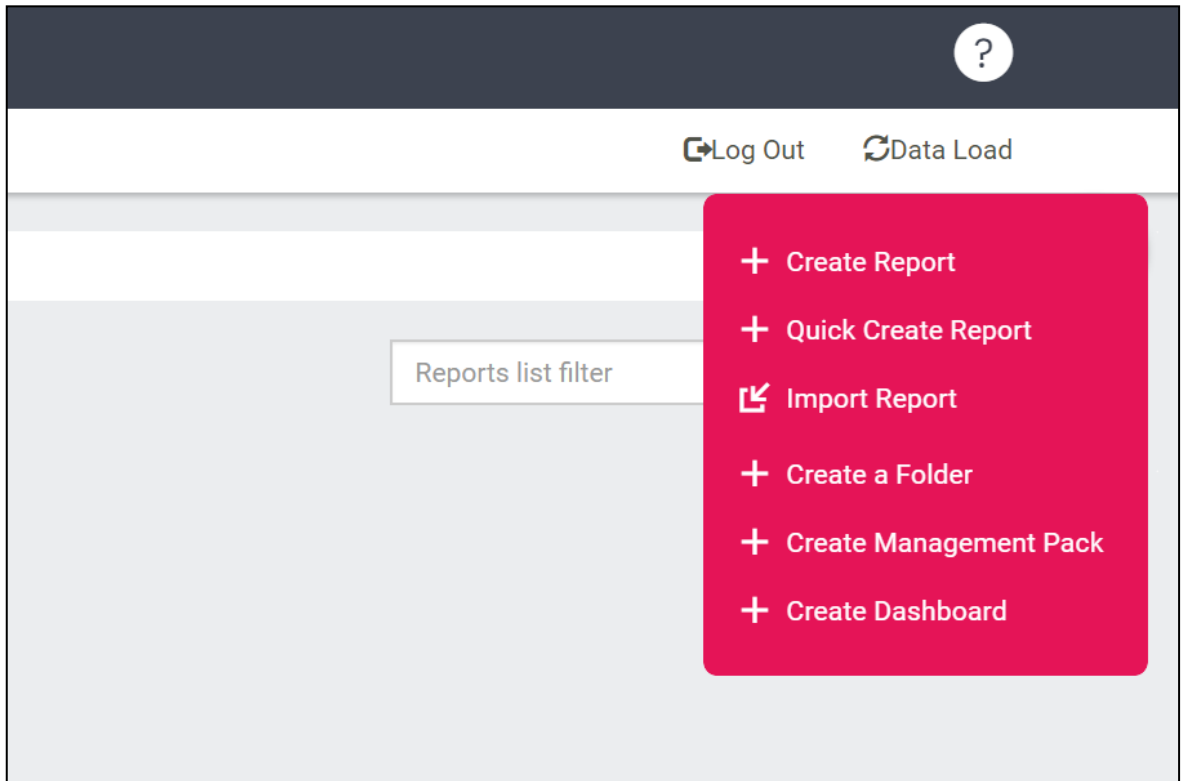
1.4   Report Options- Edit Name

The ability to edit the name on any custom reports has been introduced. This allows users to rename a report, or edit errors in existing report names.
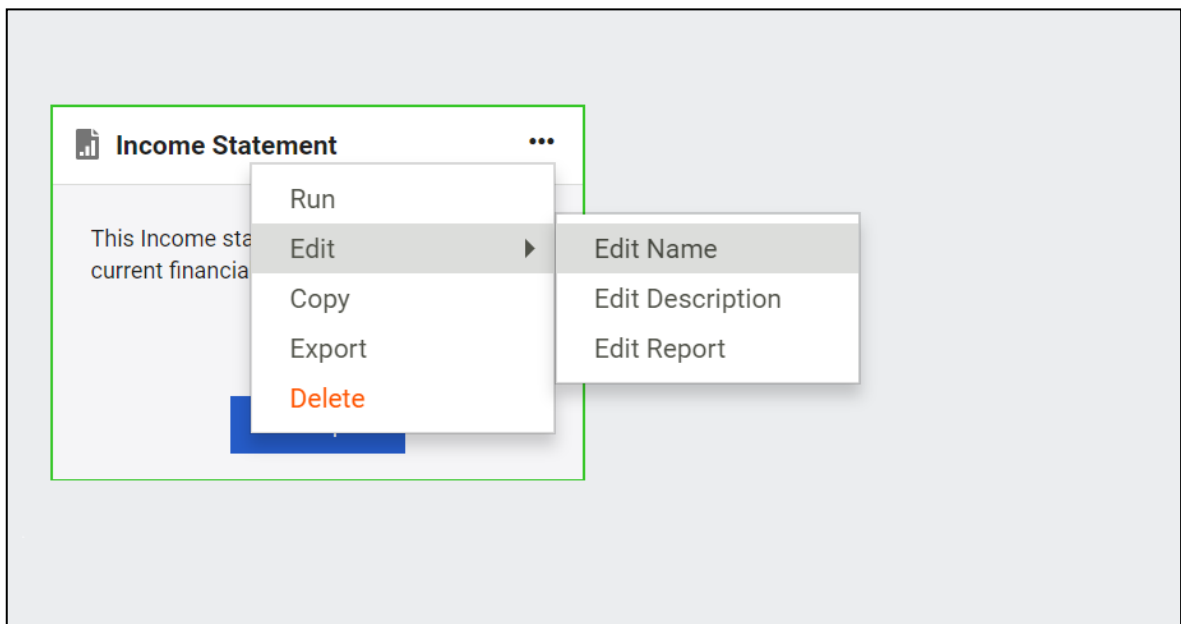
1.5   Report Options – Add Description

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.

1.6   Report Options – Edit Description

There is also the option for users to edit the description on a report if required. Simply select the report options ellipsis and select Edit Description.
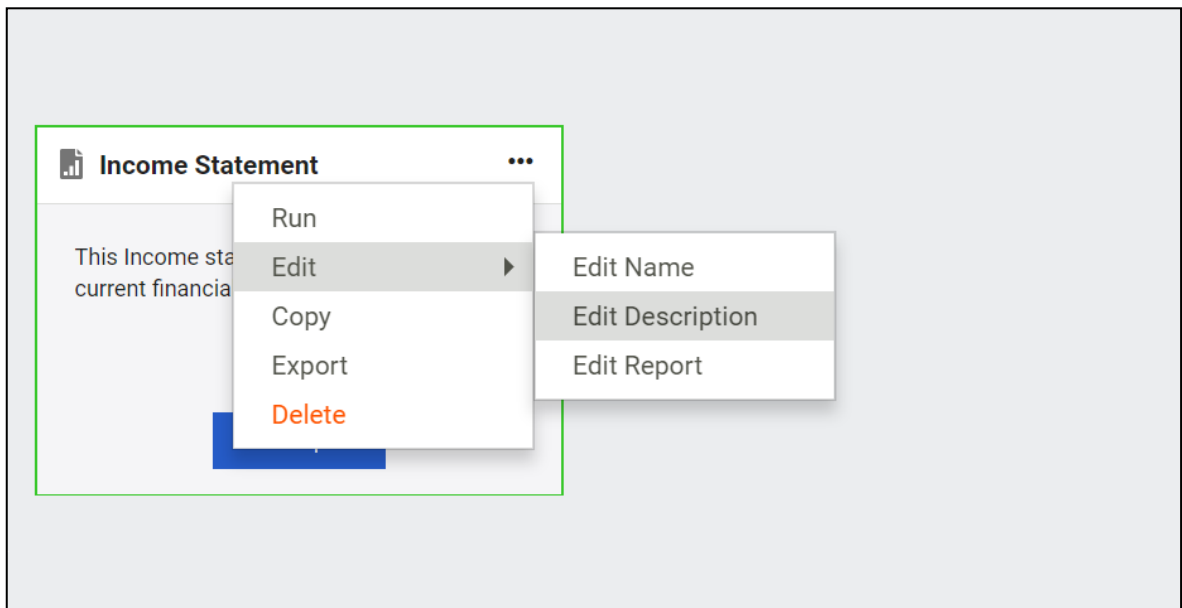
1.7   Ability to Save Reports to Folders

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 and saving reports to folders is that they make it easier to locate and access reports. This benefits you by providing a structured navigation to find reports or folders.

Quick Create New Report   ✕

Report Name	Income Statement
Report Description	Income Statement showing the figures for the Current Year.
Columns	Actual vs Budget ▾
Rows	Profit & Loss Rows ▾
Select Folder	My Reports / UK Financials ▾

1.8   Help

All the help resources have been logically grouped together. They are now all found on the easily accessible help icon in the header bar.
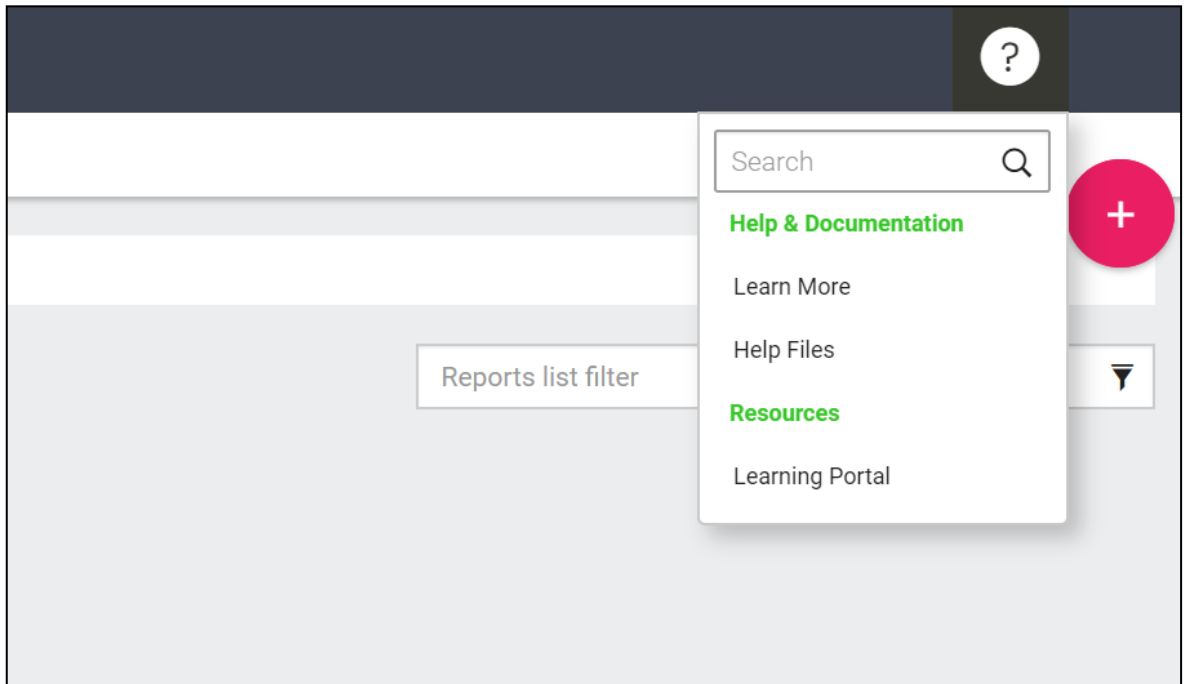
1.9   Export to PDF

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

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

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

2.0 Enhancements

2.1   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 the user 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.
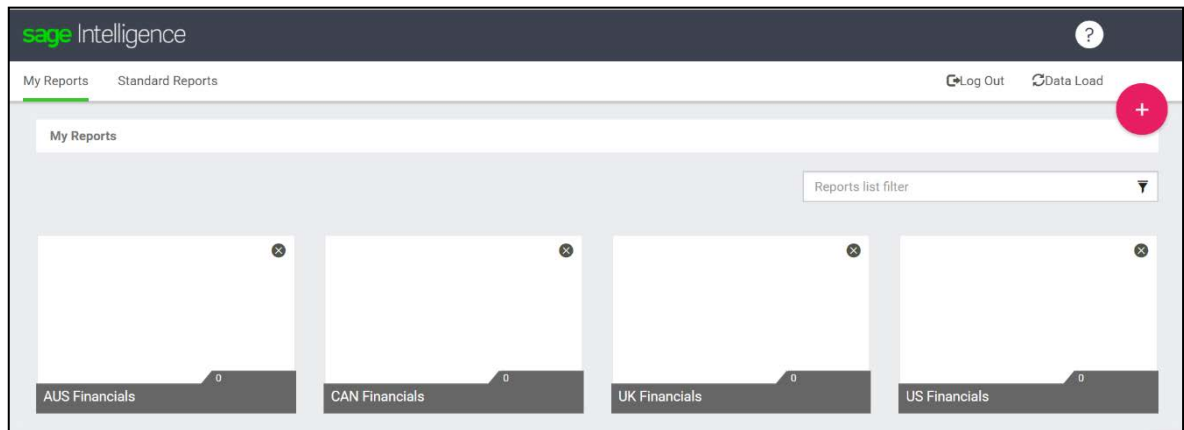

2.2   Report Tiles

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.
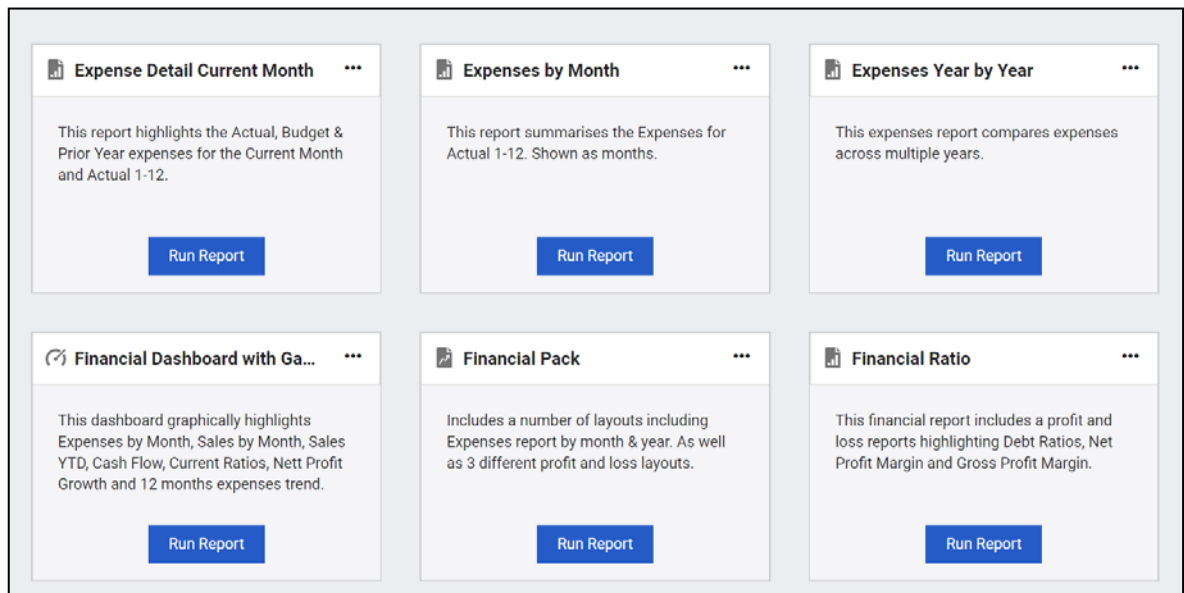
2.3 Report Options

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 reports there are more options (run, edit, copy, export and delete).
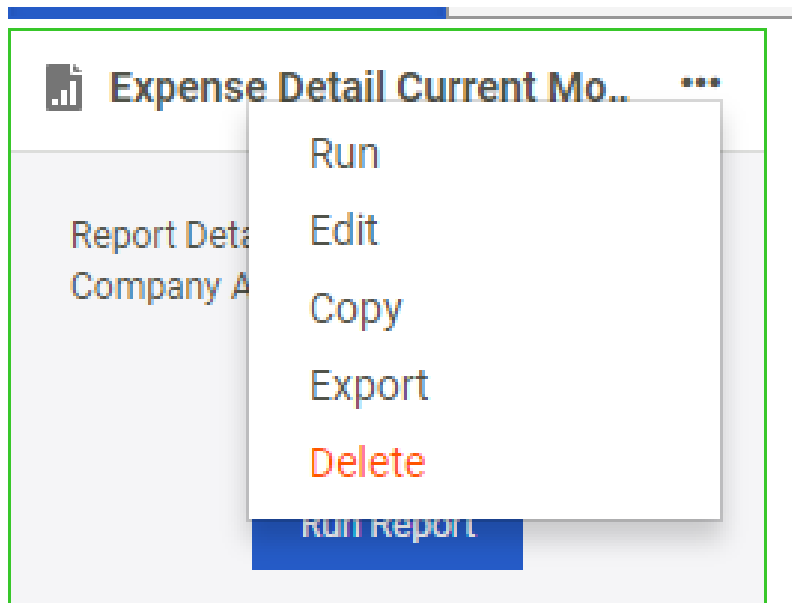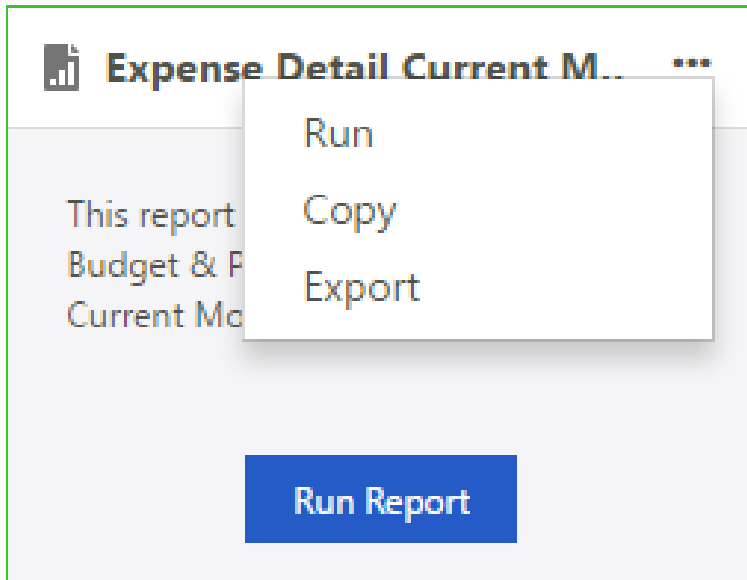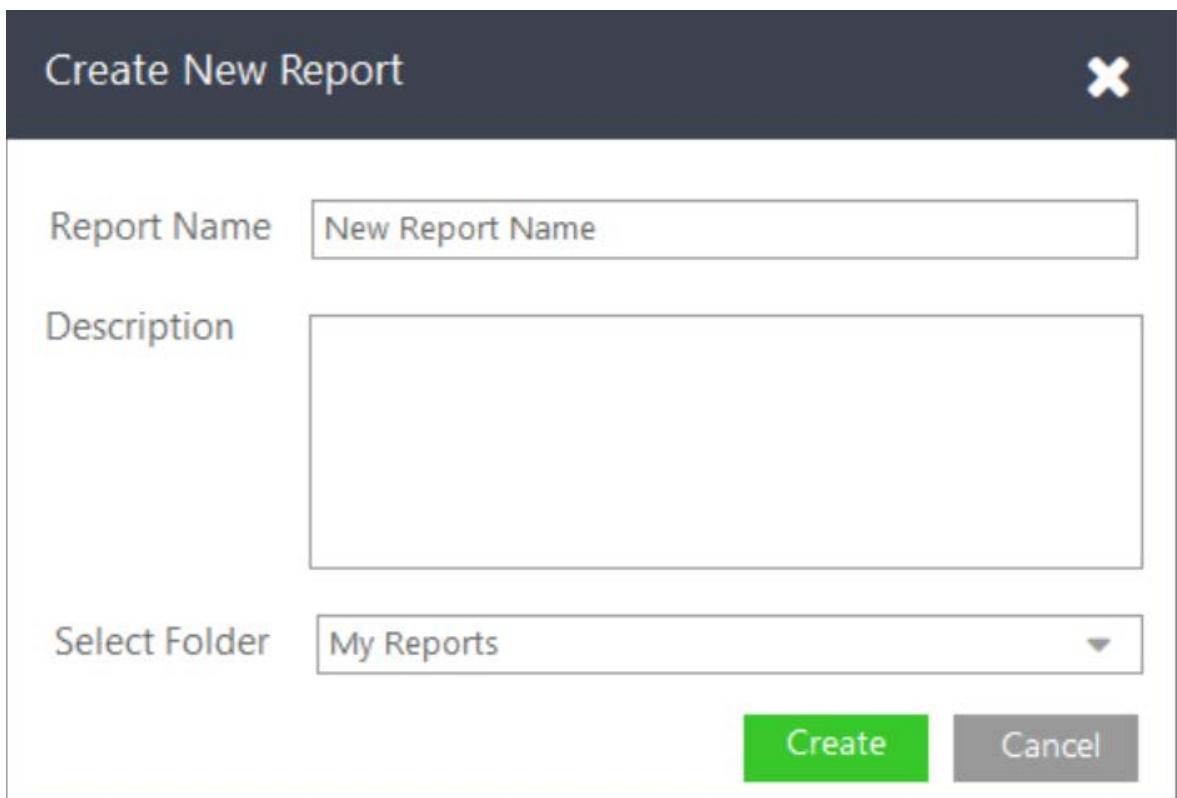
2.5 Dialog Boxes

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 our users to do their task much more quickly and accurately.
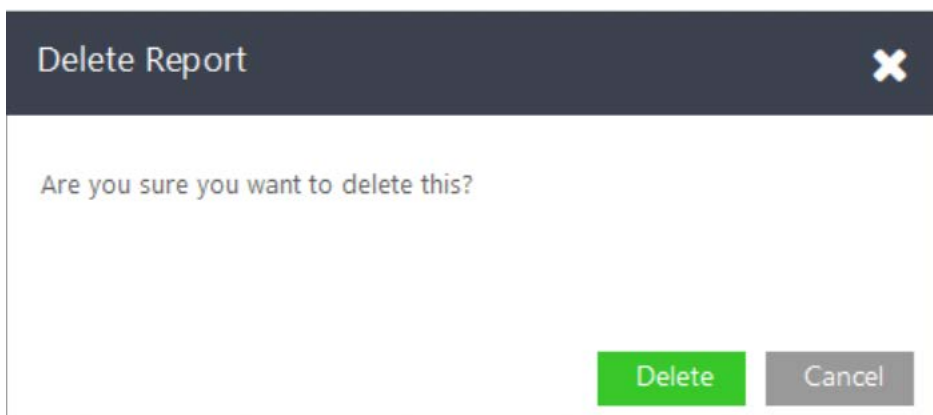
The OK button in Sage Intelligence has been replaced with more specific action buttons; you will be able to see what action you are about to do without having to read the dialog box and have the option to cancel the action.

Example: Create New Report

Example: Delete Report

3.0 Removed

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

4.0 Known issues

4.1 PDF

Due to the special restriction on a PDF page, you will see the following issues, when you have a large amount of space taken with columns:

- Overlapping of columns when downloading to PDF caused by PDF trying to fit all the columns onto the page.

- Overlapping of columns with long names when downloading to PDF caused by PDF trying to fit all the columns onto the page.

- The export to PDF option is not available for Management Packs.

4.2 Environmental Issues

Please note we have seen software performance issues in Internet Explorer, which will be addressed in a future release. We recommend that you use Google Chrome.