Sage 50c Intelligence

Release Notes

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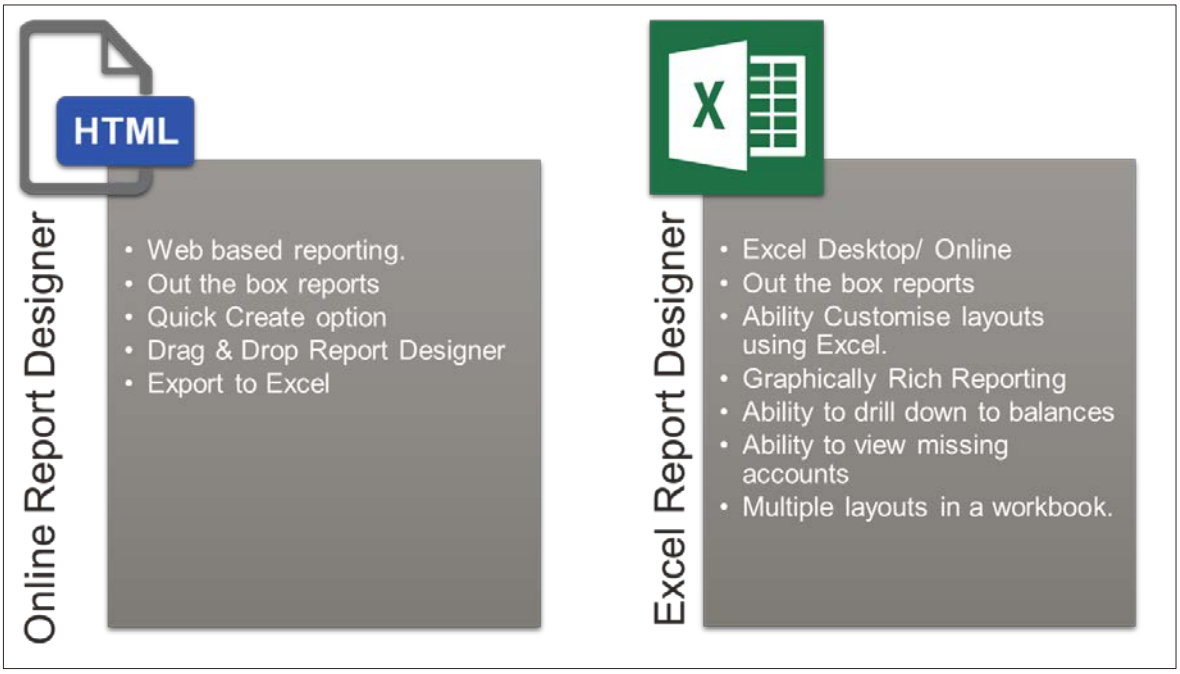
1.0 Sage 50c Intelligence Reporting Cloud

There are 2 options for using Intelligence Reporting with 50c.:

- Online Report Designer
- Excel Report Designer

The Online Report Designer generates reports in a web page (HTML) and the Excel Report Designer has report layouts in Microsoft Excel.



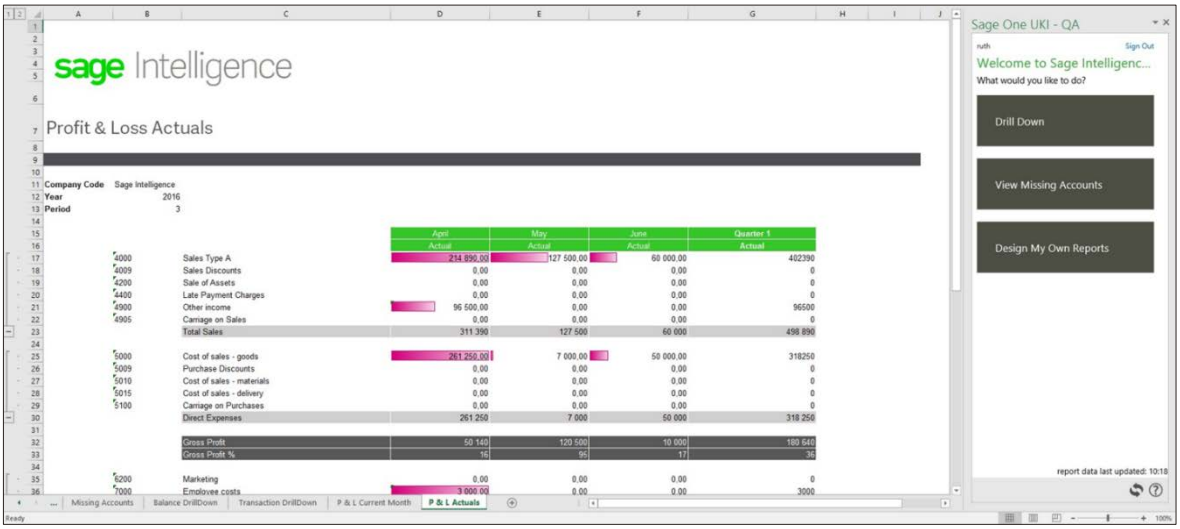
1.1 Online Report Designer

The Online Report Designer is a web based reporting tool allowing users to easily create their report in a drag and drop format. This gives users out the box financial reports, such as Profit & Loss and Asset and Liability Reports. With the Online Report Designer users can access the Quick create or Create option to create your financial layouts by dragging and dropping the required rows and columns for your specific report. Report layouts can be downloaded to Excel.

		Actual 1	Actual 2	Actual 3	Actual 4	Actual 5	Actual 6	Actual 7	Actual 8	Actual 9	Actual 10	Actual 11	Actual 12	Actual YT
	Total Sales	**987 418**	**326 907**	**311 390**	**127 500**	**60 000**	**20 400**	**20**	**35 000**	**50 000**			**228 425**	**2**
4000	Sales Type A	404 983	295 380	214 890	127 500	60 000	20 400	20	35 000	37 000			215 717	1
4200	Sale of Assets	8 945	1 086											
4900	Other income	578 773	36 984	96 500									12 708	
4905	Carriage on Sales	5 160	(466)							13 000				
4009	Sales Discounts	(5 865)	(5 555)											
4400	Late Payment Charges	(4 578)	(522)											
	Direct Expenses	**801 943**	**266 182**	**261 250**	**7 000**	**50 000**				**375 000**			**218 875**	**1**
5000	Cost of sales - goods	802 165	270 392	261 250	7 000	50 000				875 000			218 875	1
5010	Cost of sales - materials	(1 245)	555											
5009	Purchase Discounts	1 256	(566)											
5015	Cost of sales - delivery	2 356	(8 543)											
5100	Carriage on Purchases	(2 589)	4 344											
	Gross Profit	**185 475**	**60 725**	**50 140**	**120 500**	**10 000**	**20 400**	**20**	**35 000**	**(325 000)**			**9 550**	
	Gross Profit %	**19**	**19**	**16**	**95**	**17**	**100**	**100**	**100**	**(650)**			**4**	
	Overheads	**5 721**	**(12 831)**	**3 000**	**3 000**					**3 400**			**3 000**	
6200	Marketing	7 894	(4 354)											
7000	Employee costs	(1 589)	7 342	3 000	3 000								3 000	
7006	Employers NI	7 894	(4 422)											
7007	Employer's Pension	(4 570)	6 223											
7009	Other Deductions	7 892	(444)											
7010	Statutory Sick Pay	(1 245)	4 222											
7011	Statutory Maternity Pay	7 845	(3 242)											
7012	Statutory Paternity Pay	(7 845)	444											
7013	Statutory Adoption Pay	4 578	(44)											
7100	Rent and rates	(4 578)	4 553											
7200	Gas and electric	1 425	(6 645)											
7300	Motor Expenses	(4 248)	4 643							3 400				

1.2 Excel Report Designer

The Excel Report Designer as the name suggests has the pre-formatted reports set up in Excel for the users. Users can view them in either Excel Desktop or Excel Online versions. This includes out the box layouts for Profit & Loss, and Asset & Liability reports, however being in Excel it allows the user the freedom to customise and format the layouts. Using the powerful features available in Excel such as graphs, conditional formatting, grouping and spark lines users can customise reports to suit their specific reporting requirements. There are other added features in the Excel Report Designer such as ability to drill down to balances, view missing accounts and have multiple layouts in 1 workbook.



		April Actual	May Actual	June Actual	Quarter 1 Actual
4000	Sales Type A	214 890,00	127 500,00	60 000,00	402390
4009	Sales Discounts	0,00	0,00	0,00	0
4200	Sale of Assets	0,00	0,00	0,00	0
4400	Late Payment Charges	0,00	0,00	0,00	0
4900	Other income	96 500,00	0,00	0,00	96500
4905	Carriage on Sales	0,00	0,00	0,00	0
	Total Sales	311 390	127 500	60 000	498 890
5000	Cost of sales - goods	261 250,00	7 000,00	50 000,00	318250
5009	Purchase Discounts	0,00	0,00	0,00	0
5010	Cost of sales - materials	0,00	0,00	0,00	0
5015	Cost of sales - delivery	0,00	0,00	0,00	0
5100	Carriage on Purchases	0,00	0,00	0,00	0
	Direct Expenses	261 250	7 000	50 000	318 250
	Gross Profit	50 140	120 500	10 000	180 640
	Gross Profit %	16	95	17	36
6200	Marketing	0,00	0,00	0,00	0
7000	Employee costs	3 000,00	0,00	0,00	3000

Application Requirements

- A Microsoft 365 License
- A 50c License

If a download to Excel is required requirements are:

- Sage Intelligence Reporting is supported in Microsoft Excel 2013 (with Service packs) and 2016, as well as Excel Online
- A basic knowledge of Microsoft Excel formulas

Browser Support:

The following browsers have been tested and the software stabilised on:

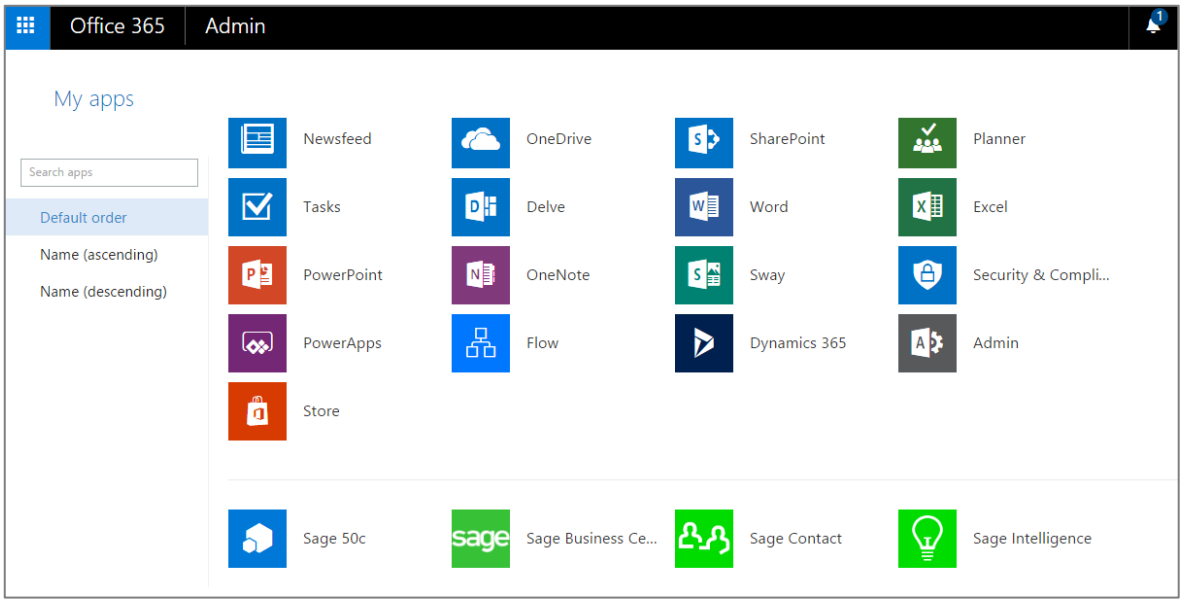
Browser	Version	Sage Intelligence
Internet Explorer (Windows Environment)	Version 11 Edge	Excel Report Designer in Excel online Online
Chrome (Windows Environment)	48.0	Excel Report Designer in Excel online Online

2.0 Online Report Designer

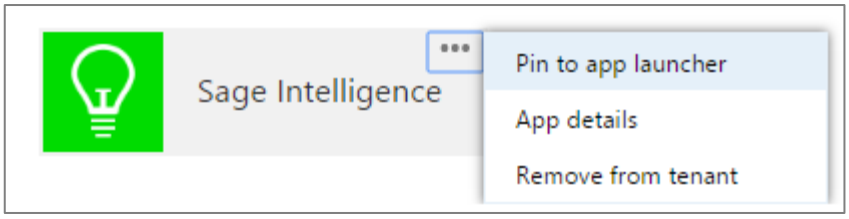
2.1 Accessing the Online Report Designer

Note: You will need to be authorised to access Sage Intelligence for the tile to appear in your 365 menu.

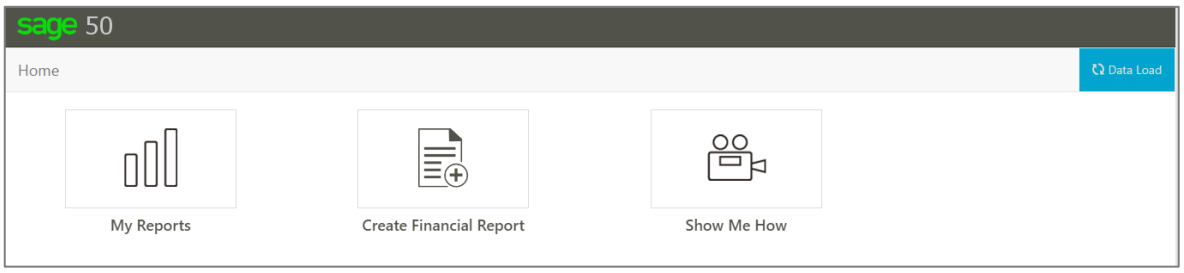
The Online Report Designer is accessed from the Microsoft App menu.



If you would like it to be available from the shortcut menu, chose to pin the app



1. Selecting the Sage Intelligence option will launch the online report designer

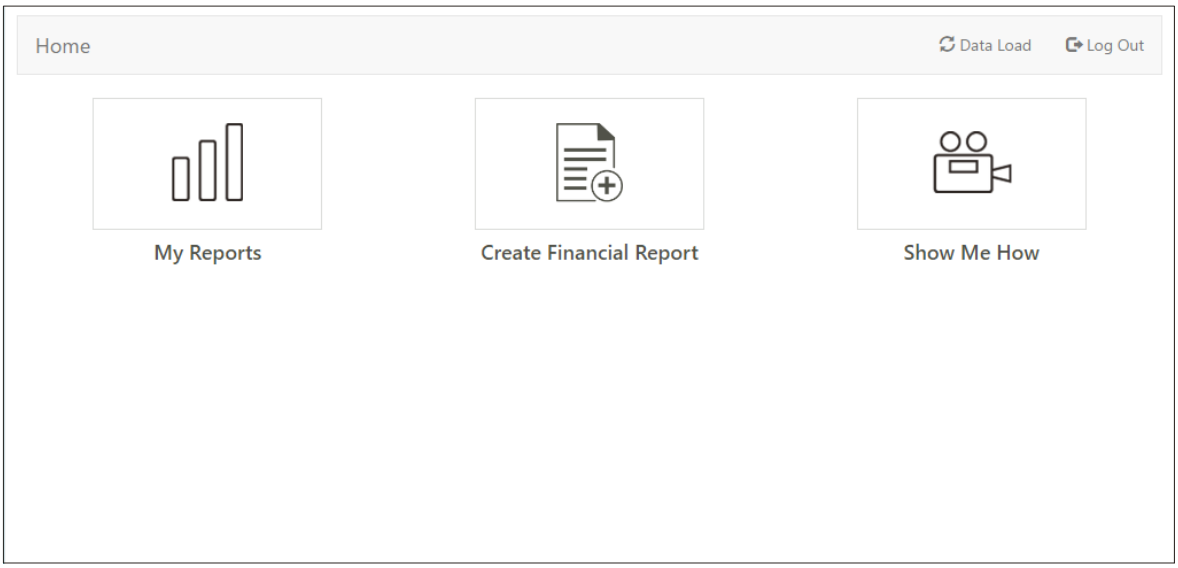


Note: If you have a single company Sage Intelligence will start the load automatically. If you have more than one company available, you will need to click on the dataload button and select the companies you would like to load. Data load will begin as soon as you select the tick box. If you would like to change the order the company data is loaded, you can drag and drop them.

3.0 Online Report Designer Features

3.1 Intelligence Reporting Home Page

Once the user has successfully signed in Sage Intelligence will give you a page that is simple to navigate and easy to understand.



The page will offer the following options:

Button label	Description	Current Availability
My Reports	This folder contains all the out the box and customised report layouts	Available
Create a Report	Once you click on this tab, you will be requested to name your new report. Once named the creation deck will open up for you to start designing	Available
Show Me How	Contains help videos to assist you in using the software	Available

3.1.1 My Reports

This folder contains all your standard out the box and customised reports.

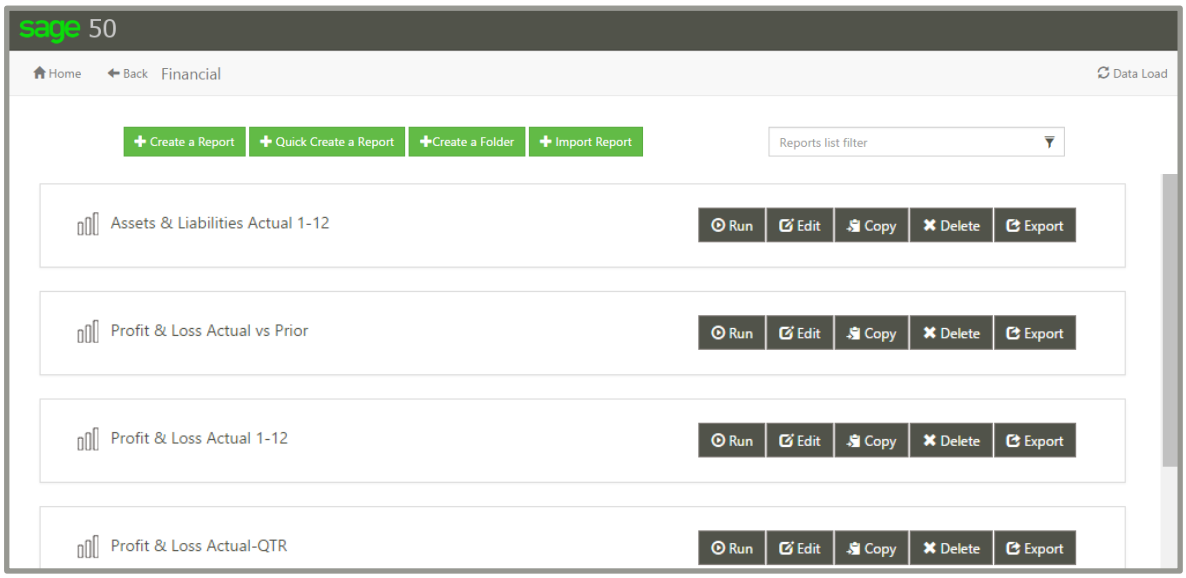
For ease of navigation, the reports have been sectioned into folders.

- Financial Folder

Financial

When you open the financial folder you will notice, there are already reports there. These reports are termed “Out the box reports” – these are reports that are created by the Sage Intelligence team to get you started and give you instant answers.

To ensure these reports are always in pristine state, they cannot be edited. If you would like to customise them, simply copy the report of your choice, give it a unique name, and make your edits.



Button Label	Description	Current Availability
Run	Allows you to run out the selected report. Once selected, the system will prompt you for filters to ensure the report is run out for the information you would like to see.	Available
Edit	Not available for out the box reports. This option will allow you the ability to make changes to an existing report.	Available
Copy	Make a copy of the report, so you can make changes without changing the existing report.	Available

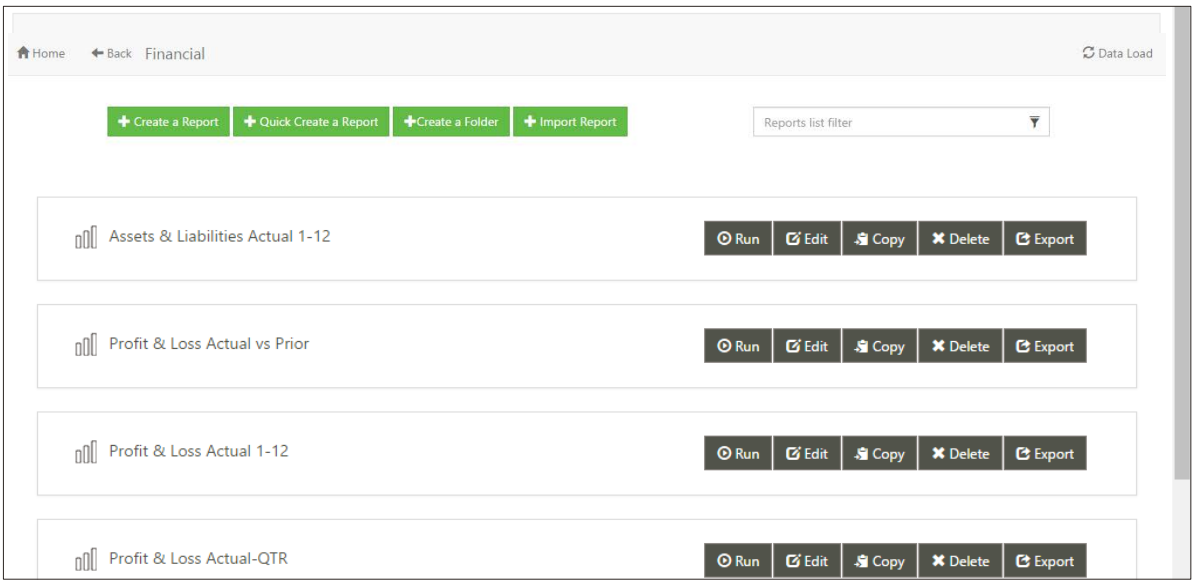
	When this option is clicked you will be asked to name your new report – it may not be given the same name as an existing report.	
Delete	Not available for out the box reports. Allows you to delete a reports. Once a report is deleted, it cannot be recovered.	Available
Export	Allows user to Export a Report to share with other Intelligence Reporting Users	Available
Shortcuts available from this page		
Create a Financial Report	Click this shortcut to create a new report from scratch	
Create a Folder	Create your own folder structure to store your custom reports into.	
Quick Create a Financial Report	Use the quick create tools to create a new report – using predefined rows and columns	
Import Report	This option will allow users import reports. Type rep.def and xlxs. Note: Reports cannot be larger than 3MB	

Please note: report and folder names can not contain any of the below special characters:

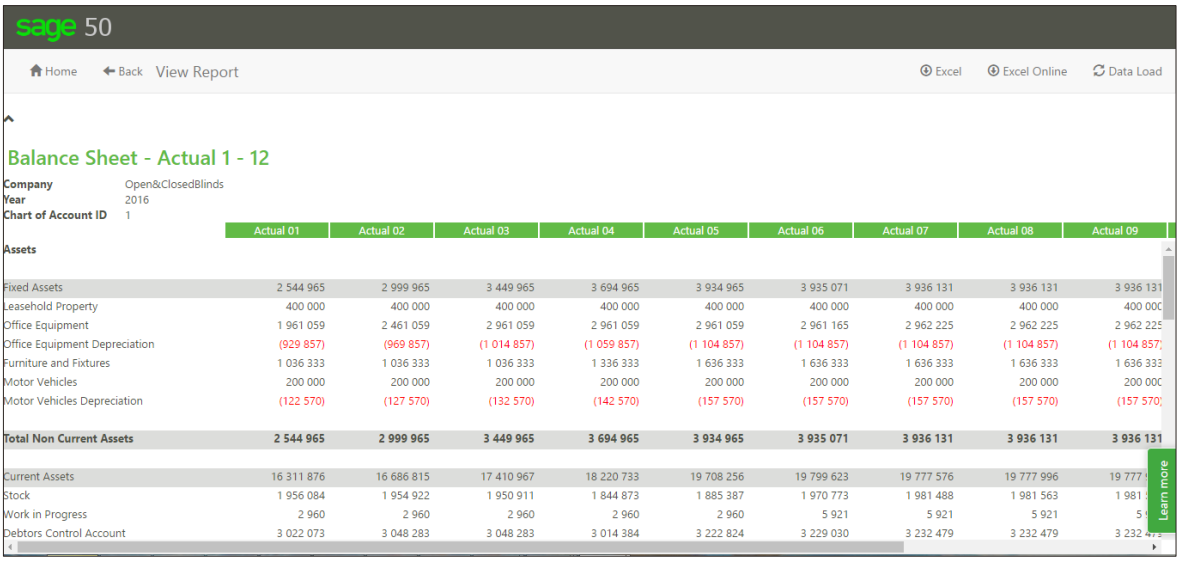
Symbol	Name
<	Less than
>	Greater than
:	Colon
"	Double quote
/	Forward slash
\	Backslash
|	Vertical bar or pipe
?	Question mark
*	Asterisk

3.2 Running Reports

1. To run the standard ready to use reports. Select **My Reports**>**Financial.**
2. The Financial Report Folder will open and a list of standard and any custom reports will be available.



3. Select a report and click on the Run button.
4. Select the required parameters.
5. An online report will be generated.



Assets	Actual 01	Actual 02	Actual 03	Actual 04	Actual 05	Actual 06	Actual 07	Actual 08	Actual 09
Fixed Assets	2 544 965	2 999 965	3 449 965	3 694 965	3 934 965	3 935 071	3 936 131	3 936 131	3 936 131
Leasehold Property	400 000	400 000	400 000	400 000	400 000	400 000	400 000	400 000	400 000
Office Equipment	1 961 059	2 461 059	2 961 059	2 961 059	2 961 059	2 961 165	2 962 225	2 962 225	2 962 225
Office Equipment Depreciation	(929 857)	(969 857)	(1 014 857)	(1 059 857)	(1 104 857)	(1 104 857)	(1 104 857)	(1 104 857)	(1 104 857)
Furniture and Fixtures	1 036 333	1 036 333	1 036 333	1 336 333	1 636 333	1 636 333	1 636 333	1 636 333	1 636 333
Motor Vehicles	200 000	200 000	200 000	200 000	200 000	200 000	200 000	200 000	200 000
Motor Vehicles Depreciation	(122 570)	(127 570)	(132 570)	(142 570)	(157 570)	(157 570)	(157 570)	(157 570)	(157 570)
Total Non Current Assets	**2 544 965**	**2 999 965**	**3 449 965**	**3 694 965**	**3 934 965**	**3 935 071**	**3 936 131**	**3 936 131**	**3 936 131**
Current Assets	16 311 876	16 686 815	17 410 967	18 220 733	19 708 256	19 799 623	19 777 576	19 777 996	19 777
Stock	1 956 084	1 954 922	1 950 911	1 844 873	1 885 387	1 970 773	1 981 488	1 981 563	1 981
Work in Progress	2 960	2 960	2 960	2 960	2 960	5 921	5 921	5 921	5
Debtors Control Account	3 022 073	3 048 283	3 048 283	3 014 384	3 222 824	3 229 030	3 232 479	3 232 479	3 232

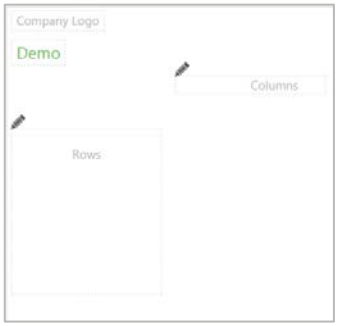
3.3 Create Financial Report

This menu items takes you through to the Online report designer design screen. This screen houses all the tools you need to create financial reports.

When this Created Financial report is first clicked, users will be prompted to give their new report a name. This is the name that will appear in the “My Reports” menu.

Adding a logo to your report

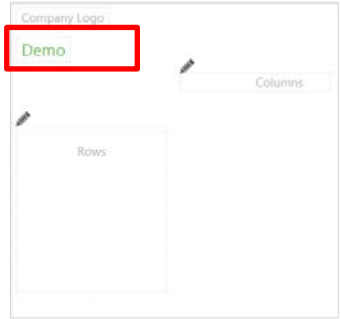
To allow users to customize their report in such a way that it displays a logo on the top right they can click on the area labelled “Company Logo” in the top right of the screen.



Changing the title of the report

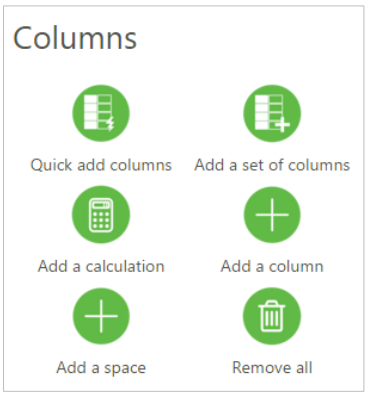
If at any time a user would like to change the title of the report, simply click on the title and type in the new name.

Note: The new name will only appear here, it will not change in the My Reports listing



Inserting columns into your report

The Online Report Designer Columns Task Pane allows users to add various options for columns.



Users have a selection of options to give them the ability to add columns to the report. The different options give the flexibility that bests suit users reporting requirements.

Columns are the line items that run vertically in your report.

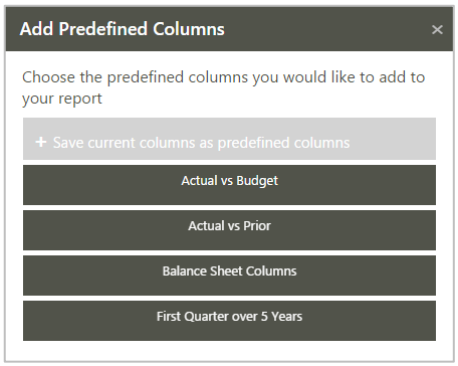
Examples: Actuals, Prior, Budget

Quick add columns

This option gives the quick and easy option to add a collection of columns that have already been pre-defined - both by the Sage Intelligence team and by yourself.

Best practice would be to use this option, when you already have a collection of columns in mind for the report you would like to create.

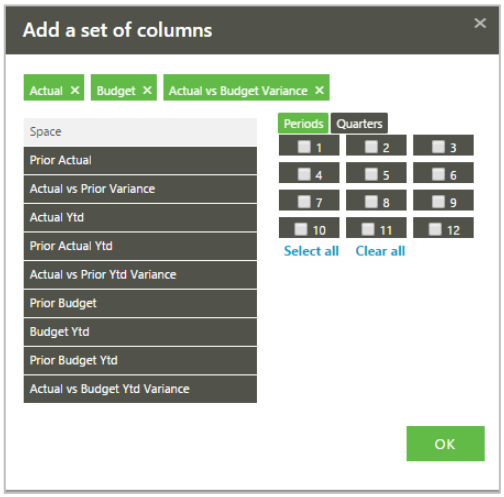
The software will arrive with options that have been created for by the Sage Intelligence team. If a user would like to save their own collection of columns in this list, they can click "Save current columns as pre-defined columns", one they have given the collection a name, the option will be added to the list for re-use again and again.



Add a set of columns

This option allows users to choose from available columns. To select a column, simple click on it and it will be automatically added to the preview pane at the top.

Best practice would be to use this option, when users know what report they would like to create and need full customization ability.



Once users are happy with their column selection, they can choose a time scale for the report – they can filter your options by periods and quarters.

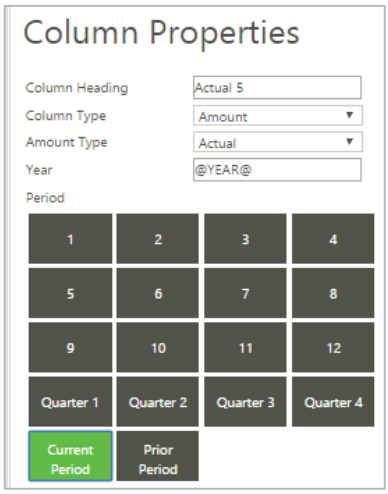
Note: Once you have added a set of columns you can then save them into the quick add menu for re-use on other reports

Add a column

This option is available if you would like to add one column at a time.

Recommended if you know the exact column you need to see and want full control and customizing ability.

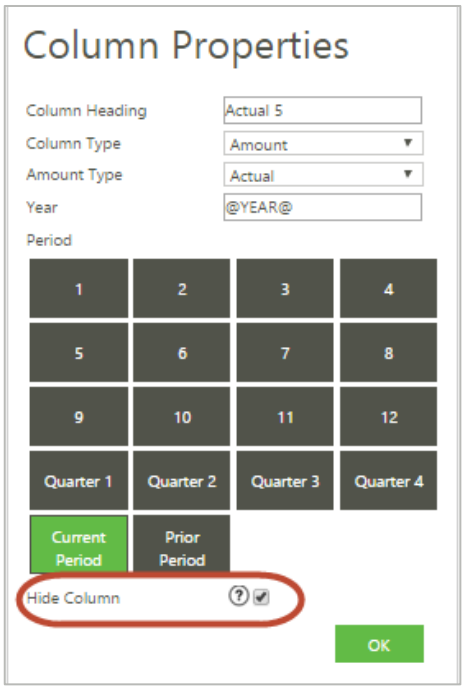
Current / Prior Period Parameters - This fun feature allows columns to always reference a current period. Rather than select an individual period in a column property.



The same methodology can apply for a prior period

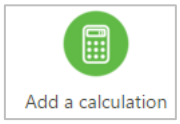
Column Property	Description
Column Heading	This is the name will be displayed on the report
Column Type	Will the column be used to display a specific **amount**, or will it show a **calculation**
Amount Type	It amount is select, this option will let you determine the type i.e. actual, actual YTD, Opening balance, Closing balance etc.
Year	What year would you like the column to represent? • The year selected for the report filters • The year prior to the year filter • A specific year
Period	What period would you like the column to represent?

Hide Columns - When creating a calculation column, the (Online) calculator will only allow users to insert columns that exist in the report. However, in certain instances users may not want to see these columns in the generated report. To resolve this issue, users can now hide the column they would not like to be visible in the report



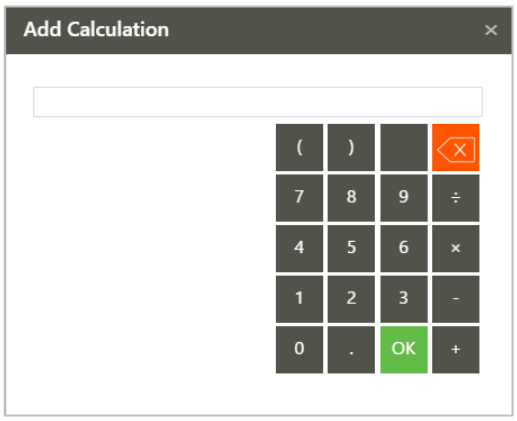
Once a column has been hidden it is greyed out on the preview screen.

Add a calculation

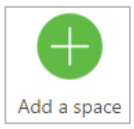


This option is used when a calculated column is required.

When the option is clicked users will see all the columns in their report that can form part of a calculation. If the column needed in the report does not appear in this list. Add the column to the report.



Add a space



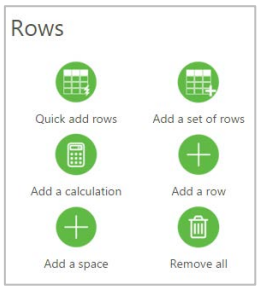
Use the space to make your reports easier to read in the Online Report output. When you click on this option it will insert a space column into the report.

Remove all

Remove all the columns in the report.

Inserting rows into your report

The Online Report Designer Rows Task Pane allows users to add various options for rows.



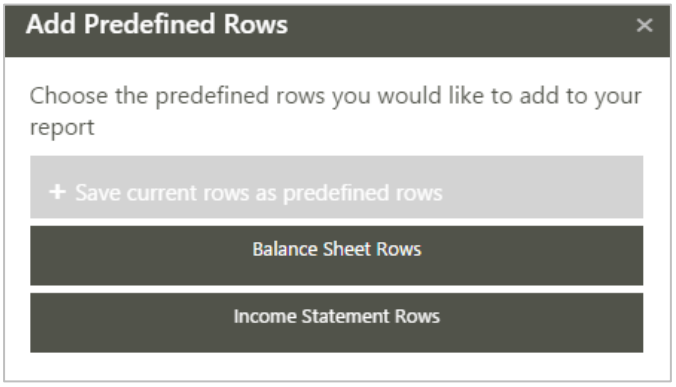
Use the rows menu to select a method of inserting rows into the report.

Rows are the line items that run horizontally in the report.

Quick add rows

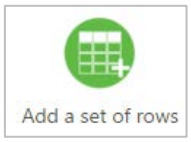
This option gives a quick and easy option to add a collection of rows that have already been pre-defined - both by the Sage Intelligence team and by the user.

Best practice would be to use this option, when the user already has a collection of rows in mind for the report they would like to create.



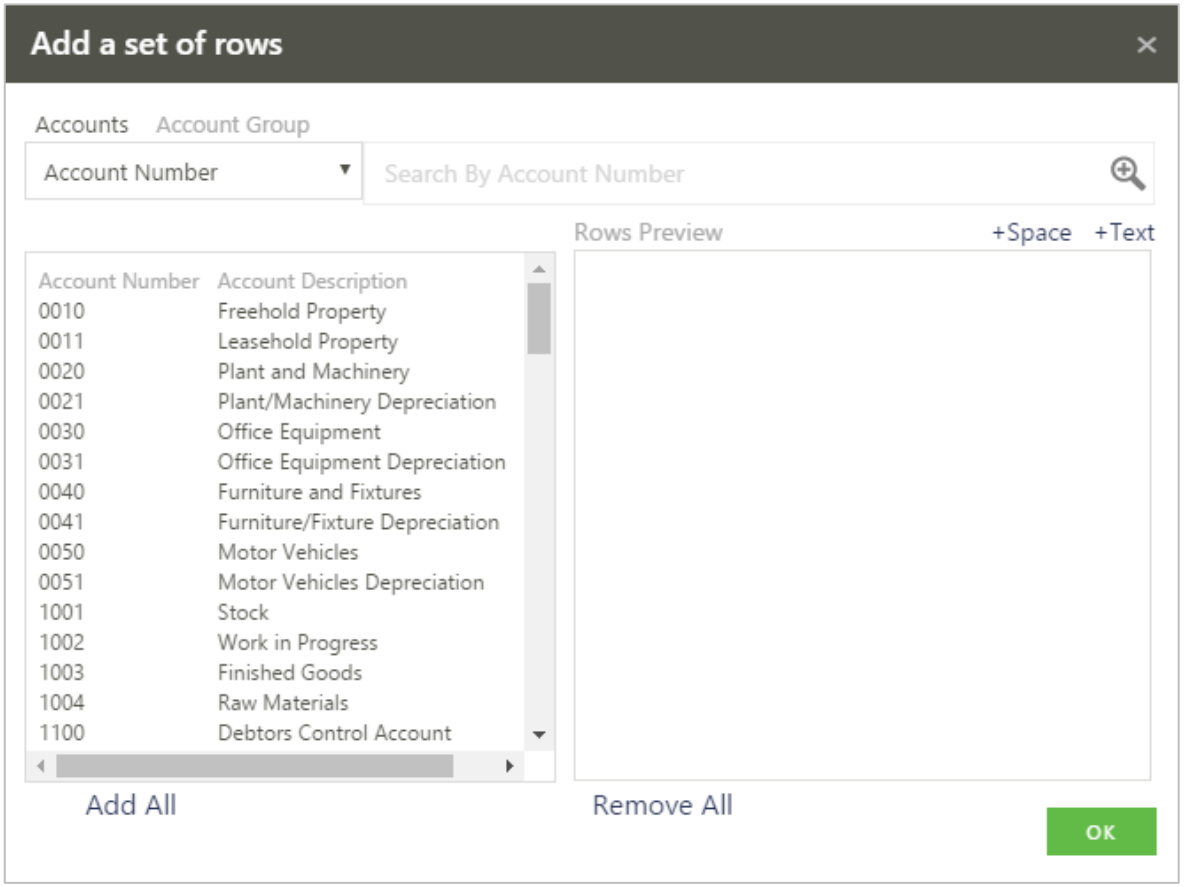
The software will arrive with options that have been created by the Sage Intelligence team. If the user would like to save their own collection of rows in this list, they can click “Save current rows as pre-defined rows”, one they have given the collection a name, the option will be added to the list for re-use again and again.

Add a set of rows



This option will allow users the ability to search the General ledger for accounts/ account categories to add into the report.

This option is recommended when users need full control over what accounts they want to add. This feature is designed for users who have very specific customization requirements.



To make it easier to find the specific account, users can use the search options to search by accounts or account category group. With search, users will notice that the options in the boxes below decrease to match your search.

The preview pane will show how the rows will appear in the report.

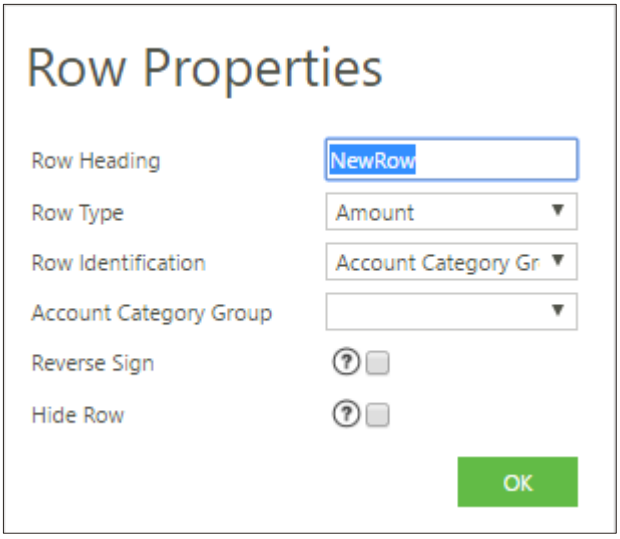
Use the space and the text shortcuts on the top right, to make the report easier to read and understand.

Once users are happy the preview has everything they need, click okay to insert the rows into the report.

Add a row

This option is available if users would like to add one row at a time.

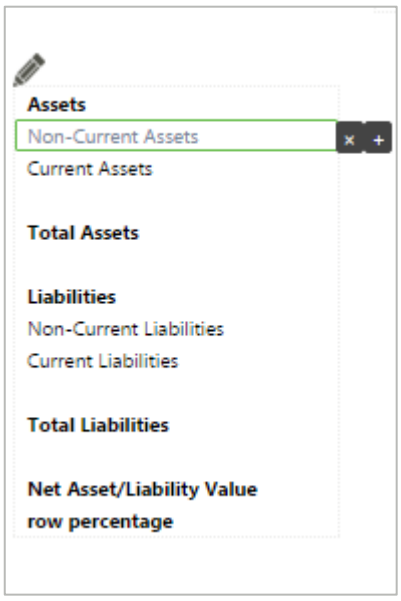
Recommended if users know the exact row they need to see and want full control and customizing ability



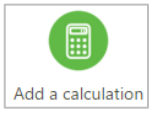
Row Properties Menu	Description
Row Heading	This is the name that will be seen in the report
Row Type	Which of the following would you like this row to display? • **Amount:** Either a specific account or an account category. • **Calculation:** This row is a calculated, made up of one or more other rows used in a calculation. • **Text:** Used for heading rows
Row identification	Is displayed when the amount row type is selected. To allow you to select either account or account category
Account category	You will need to choose account or account category to represent the row
Reverse sign	Allows you to reverse the sign for the row. For example, if a row is reflecting as a credit account and you do not want a negative value in your report, you can click on the reverse sign box.
Hide Row	Will hide this row on a generated report

Hide Rows - When creating a calculation row, the (Online) calculator will only allow users to insert rows that exist in the report. However, in certain instances users may not want to see these rows in the generated report. To resolve this issue, users can now hide the rows they would not like to be visible in the report.

Once a row or column has been hidden it is greyed out on the preview screen.

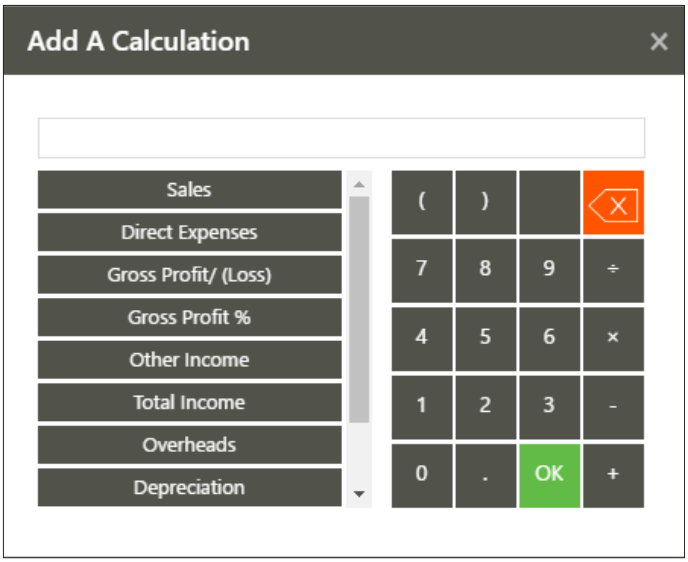


Add a calculation

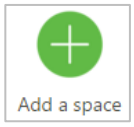


This option is used when a calculated row is required.

When the option is clicked users will see all the rows in your report that can form part of a calculation. If the row you need in your report does not appear in this list. Add the row to the report.



Add a space



Use the space to make the reports easier to read. When users click on this option it will insert a space row into the report.

Remove all

Remove all the rows in the report.

3.4 Reporting Action Panel

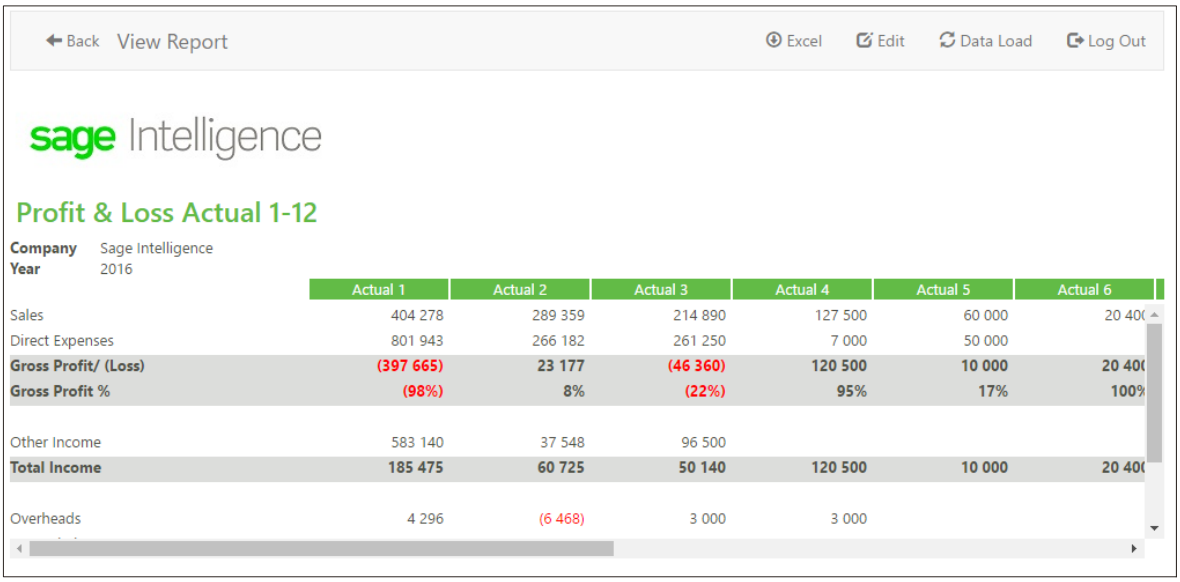
The Action panel provides quick access to general reporting functions.

Functions available from the action panel are:

Button	Action
Run	Use this button to run out your report into the Online report
Save	Use this button to save your report
Filter	Filters are required to determine the information you will see in the run out report
Settings	Set the properties for the entire report. This will determine the information that will be displayed on the report.
Help	Use this button to launch the help file
Expand / Collapse	Use this button to increase/decrease the number of action panel buttons you can see.

3.5 Online Report

Once the report is run out, the screen will change to a full page in an HTML format.



Note: In the online report, figures are rounded up to the nearest whole

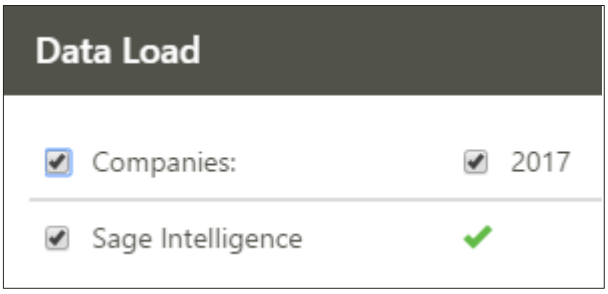
Along the top of the report is a tool bar with action options.

Button	Action
Home	Takes you back to the Sage Intelligence home screen
Back	Takes you back to the Report Designer editor
Excel	Download this report into Excel. Once the Excel report opens, the Excel Online Report Designer Task Pane app will appear on the right hand side of all the screen. The numeric value are formulas so they will be refreshed when you sign into the Task Pane, with your Sage One ID user name and password.
Excel Online	Download this report into Excel Online. Once the Excel report opens, the Excel Online Report Designer Task Pane app will appear on the right hand side of all the screen. The numeric value are formulas so they will be refreshed when you sign into the Task Pane, with your Sage One ID user name and password.
Edit	If you see something in the report that you would like to change, you have the option to go back and edit the report. Simply click on edit and make the changes you deem fit.
Data Load	Data Load allows users the ability to select for which companies and years they would like data to be loaded for.

Data Load - The data load functionality in Online Report Designer has been included to allow users the ability to select for which companies and years they would like data to be loaded for. While a data load is occurring the user has the ability to navigate in the system.

Note: While a data load is occurring, report setup options available will be based on data already loaded. You will however not be able to run a report until all data has been loaded as incomplete results may be generated otherwise.

The Data Load icon found in the top right corner of the Online Report Designer will appear blue while a data load is in progress and grey when this is complete.



The year at the top of the data will represent the current financial year. If you have loaded multiple company's, the greatest year will show on the dialogue.

Should additional company data be required but was not part of the initial data load, the user is able to navigate back to the Data Load screen and initiate a data load for the additional data.

Note: Company and year data already loaded will not be refreshed if already loaded and another load is initiated. Only new company and year data will be loaded.

3.6 Exporting Reports

As well as creating reports, users can Export / Import reports. This makes it possible to import reports into different user accounts. i.e. Create a report then share the downloaded file with another user.

They will be able to import the downloaded file

Note: Only repdef or an .xlsx file can be imported into Sage Intelligence

Remember if any changes are made to an Excel file, you will need to import the updated file back into Sage Intelligence. The existing Excel file will not automatically update.

4.0 Online Report Designer Known Issues

These are issues that exist in the software

4.1 Screen resizing

When the window size is reduced, tile alignment is thrown off into a vertical alignment

4.2 Report changes lost if the system times out

If the system has been inactive for 57 minutes, the session will expire. This is a security feature built into the software to ensure your data is kept safe and secure.

When creating or editing a new report, if the system is left unattended for 57 minutes. Your changes will be lost. To avoid this, please ensure that you save your changes.

4.3 Export in Safari

We do not currently support export of reports or export to Excel on Safari. This will be updated in future releases.

4.4 Logo Size

The recommended Logo size for reports is 200 x 100. Using larger logos, the logo may overlap on the generated report.

4.5 Report run out parameters

When running out a report, please ensure you select the correct company, year and chart of accounts. That you wish to see data for. It is important to note this, as you will be able to select any chart of accounts, company or year. To help assist you in selecting the correct option, we have included the company name in the selection boxes where applicable.

5.0 Excel Report Designer

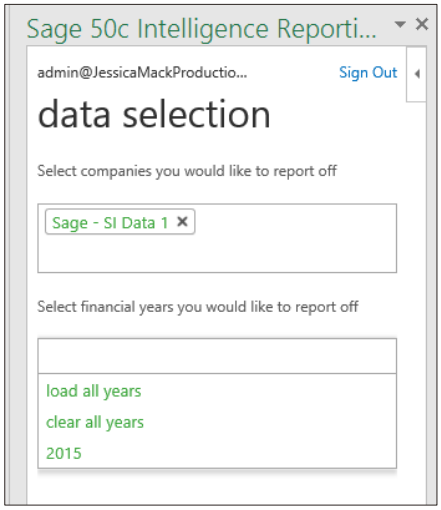
5.1 Accessing the Excel Report Designer

The Excel Report designer can be accessed via two methods.

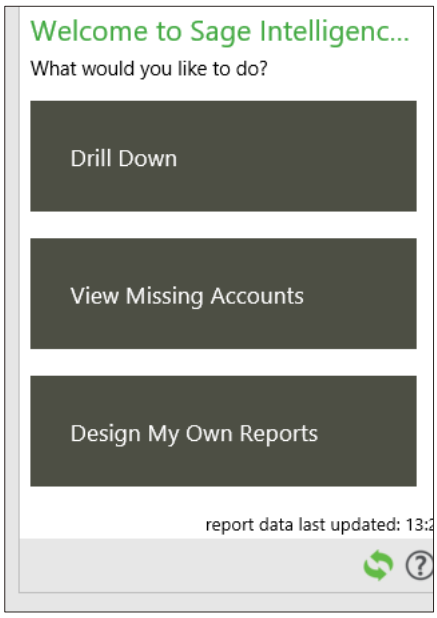
1. Export an Online report into Excel
2. Open an Excel report directly from the Reports menu

Once the Excel Report is open then:

1. Sign in with Microsoft credentials in the Task Pane of the Excel workbook.
2. From the data selection option in the Task Pane of the Excel report designer, the user will select the Company and years to load from Sage 50.



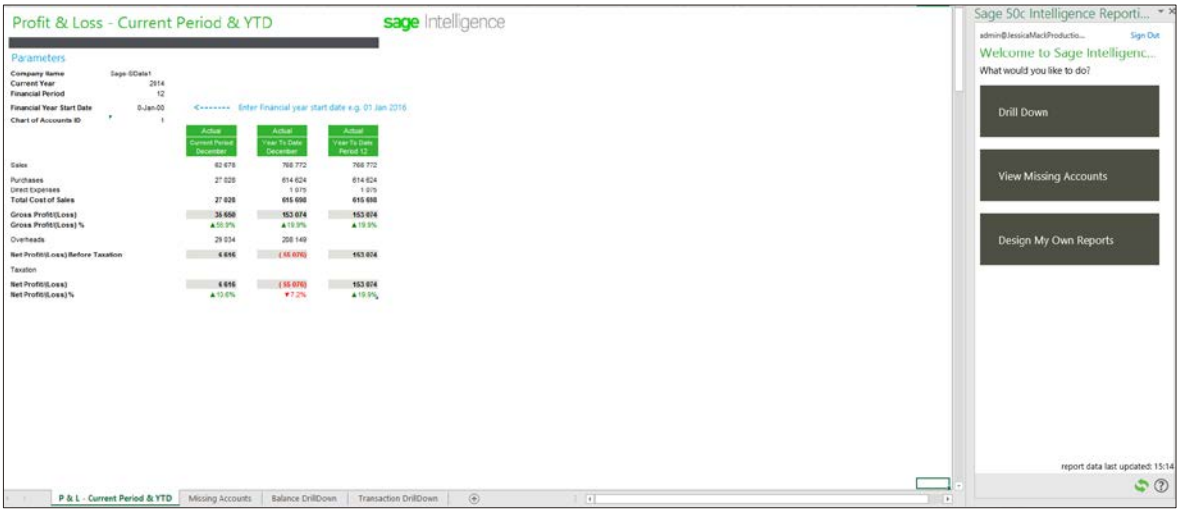
3. Select the Load button. Data from Sage 50 will be loaded & the data in the Excel reports will be automatically updated.



4. Users can now utilize the powerful features within Microsoft Excel to further analyse and customise the report layouts.

5.1.1 Running an Excel Report

Once you have opened the Excel report, you report will automatically update with your company data.



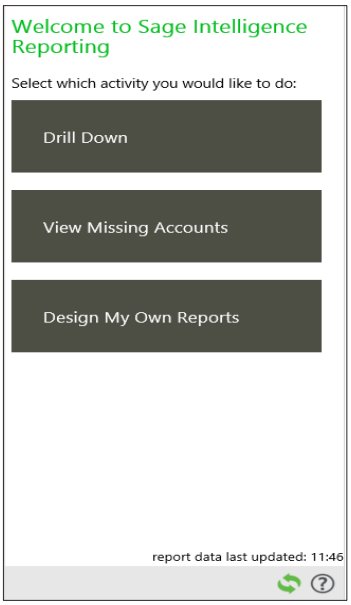
Note: you will need to insert your financial year start on all the worksheets.

6.0 Excel Report Designer Features

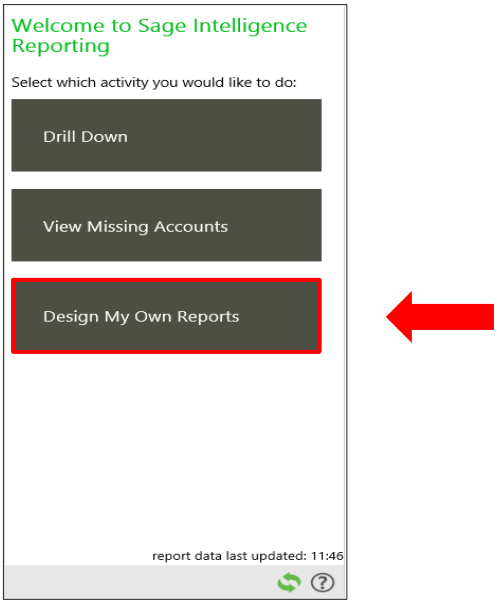
6.1 Table based reporting

6.1.1 Report Viewer / Report Designer Separation

Users have the option to choose between only viewing existing reports or designing new reports and viewing existing reports. By default, you will have the Report Viewer Task Pane shown when logging in.



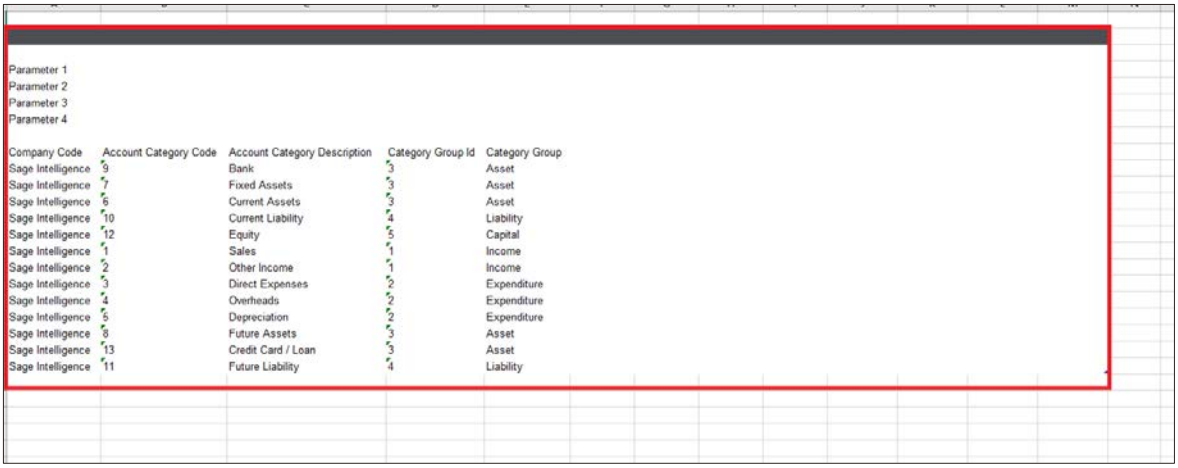
Should users wish to customize your reports, the Designer functionality is available to users through the Designer License. Users can select 'Design My Own Reports' on the Excel report designer Task Pane to access the designer functionality.



6.1.2 Table based lists

Lists dragged into the Excel report from the Task Pane will appear with a white table around it. This is because Intelligence Reporting is table based. This means that users can now harness this functionality such as: auto-refreshing data (when users change a parameter), allow for cell referencing (this is great for dynamic reports).

It's important for users to take note of that reporting area, because any formulas inserted outside of that reporting area will not work. You can only insert a formula inside the reporting area. This also applies to parameters, users can only reference parameters that are inside the reporting area.



Parameter 1
Parameter 2
Parameter 3
Parameter 4

Company Code	Account Category Code	Account Category Description	Category Group Id	Category Group
Sage Intelligence	9	Bank	3	Asset
Sage Intelligence	7	Fixed Assets	3	Asset
Sage Intelligence	6	Current Assets	3	Asset
Sage Intelligence	10	Current Liability	4	Liability
Sage Intelligence	12	Equity	5	Capital
Sage Intelligence	1	Sales	1	Income
Sage Intelligence	2	Other Income	1	Income
Sage Intelligence	3	Direct Expenses	2	Expenditure
Sage Intelligence	4	Overheads	2	Expenditure
Sage Intelligence	5	Depreciation	2	Expenditure
Sage Intelligence	8	Future Assets	3	Asset
Sage Intelligence	13	Credit Card / Loan	3	Asset
Sage Intelligence	11	Future Liability	4	Liability

6.1.3 Refreshing of Data

The refresh options are streamlined. You can switch auto refresh on or off in the Excel Report Designer from the Task Pane.

When auto refresh is switched on, the refresh logo found on the Task Pane will be indicated as a green icon. 

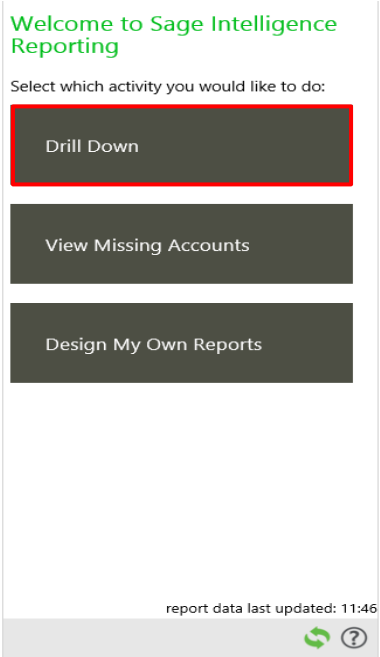
When using viewer mode, the user can use the out of the box reports and opt to use the auto refresh option. As and when periods for example are changed, the report will automatically refresh.

When using the design mode, by default the refresh option will be switched off. This will allow the user to design their report without constant refreshing of the data occurring with all changes made. When required, the user can opt to do a once off refresh by selecting "Refresh my report now".

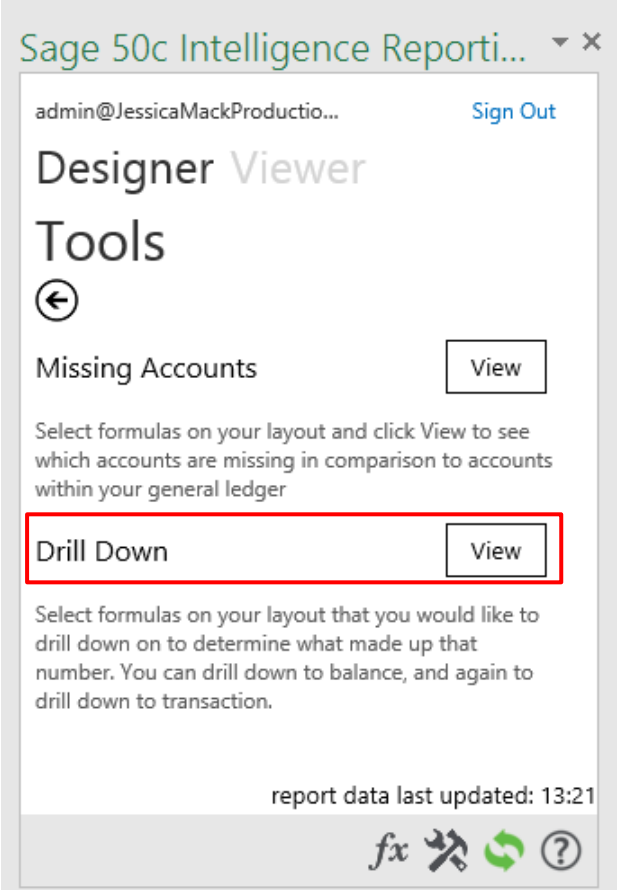
The timestamp at the bottom of the Task Pane will indicate the last time the report was refreshed.

6.1.4 Drill down to Balance

Aggregated balances can be drilled down to individual balances from the Excel report designer Task Pane. In order to use this feature, the user can select the aggregated balance they want to drill into and select the drill down menu option on the Task Pane.



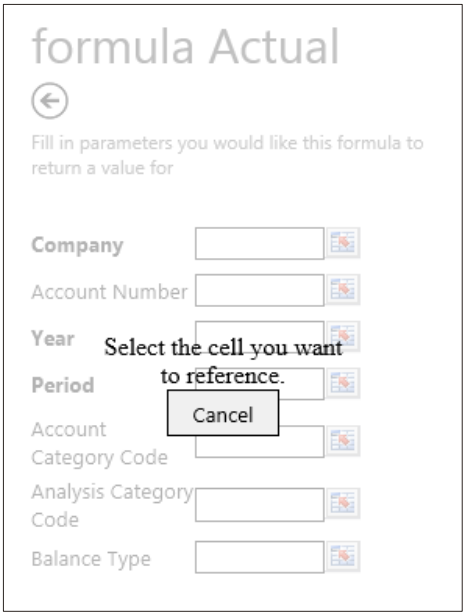
When in designer mode, select the tools icon at the bottom of the Task Pane. 



From here the user can select to view the Drill Down. The balances will be shown in a newly created sheet.

6.1.5 Formula Builder

The Formula Builder has been created to improve the ease of use. When selecting a formula from the Task Pane to insert into your selected cell, the pre-configured formula parameters are indicated. When selecting the field to update, e.g. Company, the user will be asked to select the cell the Company name appears in. Once updated select 'Save'.



To view which parameters have been provided for this formula or to edit any references provided, you can select the cell the formula is in and click on the fx button at the bottom of the Task Pane. This will display the selected formula's setup in the pre-configured formula fields. You can then make any changes you would like.

6.1.6 Menu Structure:

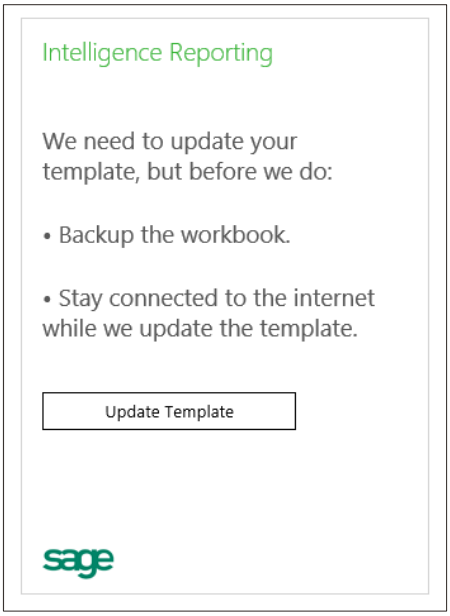
The toolbar is populated with four menu choices. Each is discussed in brief below:

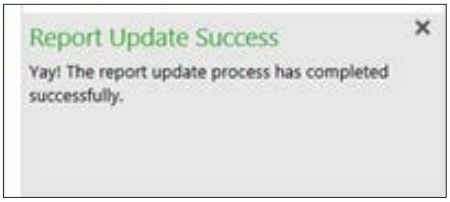
Icon	Description	Details
	Formula Builder	Indicates the pre-configured formula fields for the selected cell. An error message will be indicated should you select this menu option without first selecting a cell with a formula in. The fx icon will be green when the formula builder is on display.
	Tools	The tools button can be used should users wish to make use of the Missing Accounts and Drill Down features.
	Refresh	This allows users to switch the auto refresh option on or off. A once off refresh can also be done when the auto refresh option has been switched off. The icon will be green should the auto refresh function be switched on.
	Help	The help file can be accessed from this menu option.

6.2 Seamless template updates

Templates will be automatically updated when you open a Sage Intelligence Reporting Cloud workbook. These updates will give additional functionality to your workbook when new features are added to the software.

The following screens will be displayed guiding the user through the process of updating their template





7.0 Excel Report Designer Known Issues

7.1 Deleting financial tables

There is currently limited functionality with the deletion of financial tables. If you delete a financial table or delete a worksheet that contains a financial table, whilst you are signed out or whilst the Task Pane is closed, your template will become damaged.

7.2 Multiple financial tables on one sheet

Intelligence Reporting does not function correctly when more than one financial table is created on one worksheet.

This release is limited to reporting off one financial table on a worksheet. If you would like to see another financial table, open a new worksheet and insert your lists there.

7.3 Using the formula bar to reference cells

You will encounter limitations when changing cell references in the formula bar. These limitations will be visible if auto-refresh is turned on, the table will not refresh immediately when a parameter reference is changed. However, when you make your next legal change in the table, the refresh will be triggered.

Note: The same limitation is visible when dragging formulas across a table.

7.4 Referencing a formula in a Sage Intelligence Formula

Due to the nature of the choose formula. Referencing a formula within a formula will return an error. For example, A1 contains the formula for current year. A2 contains the formula current year -1 (with the intention of returning a prior year). A3 is a GLActual formula that references A2. Cell A3 will return an error as it is reliant on a referenced formula cell. You will need to manually type the prior year into a referenced cell if you would like to take this approach in your customised reporting.

7.5 Excel Online specific issues

In Excel Online users will find issues that are specific to the online environment, this issues will include:

7.5.1 Using F4 for absolute cell referencing in the browser

On the formula builder screen, when using F4 for absolute cell referencing in the browser, you will notice that each time you press F4 it loses focus from the parameter field. Therefore, you need to refocus the curser in the parameter field each time you press F4.