



# **Sage Live Intelligence South Africa**

## **User Guide**

October 2017

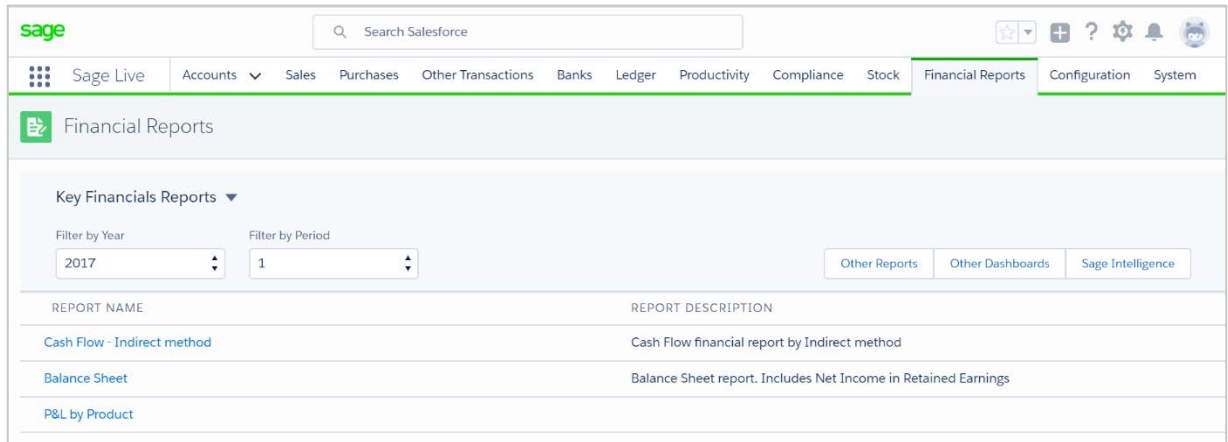
# Table of Contents

<b>1.0</b>	<b>Features</b>	<b>3</b>
1.1	Reporting Landing Page	3
1.1.1	My Reports	3
1.2	Personalized folder structures	5
1.3	Create Financial Report	6
1.3.1	Inserting columns into your report	8
1.3.2	Inserting rows into your report	17
1.3.3	Reporting Action Panel	23
1.3.4	Online Report	23
1.4	Drill Down to Balances	24
1.5	Data Load	25
1.6	Multi Company reporting	26
<b>2.0</b>	<b>Sage Live Learning Resources</b>	<b>27</b>
2.1	Learn More	27
2.2	In-product Help Files	28
2.3	Sage Live Learning Portal	28

# 1.0 Features

## 1.1 Reporting Landing Page

Once you have successfully signed in to your Salesforce account, navigate to Sage Intelligence.



The page will offer the following options:

Button label	Description	Current Availability
<b>My Reports</b>	This folder contains all your copied / customized report layouts. Only you have access to these reports, and other users are not able to see any of your customized reports.	Available
<b>Create Financial Reports</b>	Once you click on this tab, name your new report. Once named, the creation deck will open for you to start designing.	Available
<b>Show Me How</b>	Contains help videos to assist you in using the software.	Available

### 1.1.1 My Reports

This folder contains all your copied / customized reports. Only financial reports are included in this release.

## Financial

When you open the financials, you will notice that there are already reports available. These reports are termed “standard reports” – these reports are created by Sage Intelligence, to get you started.

To ensure these standard reports remain unchanged, they are locked for editing. If you would like to customize them, copy the report of your choice, give it a unique name and make your changes.

For this release, we have added 8 new Financial reports for **South African legislation**.

- SA – Balance Sheet - Actual vs Prior 1 to 12
- SA – Income Statement - Actual vs Prior 1 to 12
- SA – Trial Balance
- SA – Balance Sheet - Actual 1 to 12
- SA – Income Statement - Actual 1 to 12 & YTD
- SA – Income Statement - Current Period & YTD
- SA – Income Statement - Quarter 1 to Quarter 4 & YTD
- SA – Income Statement - Actual vs Budget 1-12 & YTD

Button Label	Description
<b>Run</b>	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.
<b>Edit</b>	Not available for standard reports. This option will allow you the ability to make changes to an existing report that is unlocked.
<b>Copy</b>	Make a copy of the report so that you can make changes without changing the existing report. When you click this option, you are prompted to name your new report – it may not be given the same name as an existing report.
<b>Delete</b>	Not available for standard reports. Allows you to delete a report. Once a report is deleted, it cannot be recovered.
<b>Export</b>	Allows you to export the report definition. This can then be shared with other users who can import this and use your layout to run on their data.

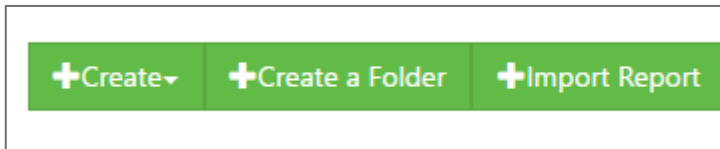
## Shortcuts available from this page

<b>Create a Report</b>	Allows you to create a new report from scratch.
<b>Quick Create a Report</b>	Quickly create a new report using predefined rows and columns.
<b>Create Folder</b>	Creates a Folder.
<b>Import Report</b>	Allows you to import a report definition received from other users, into your report screen.

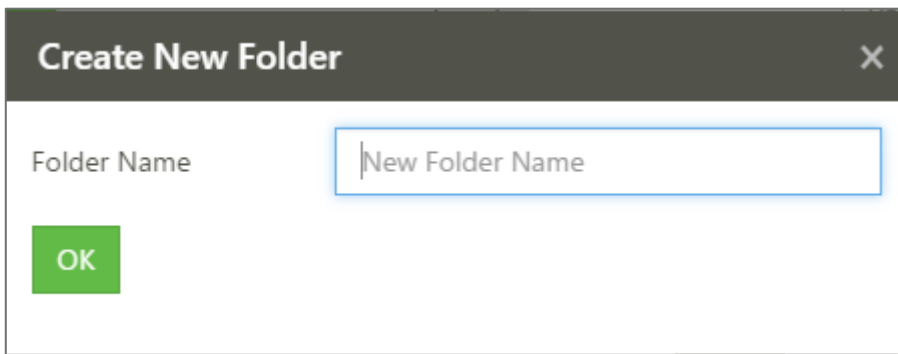
### 1.2 Personalized folder structures

Sage Intelligence has added the ability for you to add folders. There are many benefits of organizing reports into folder structures. One of the main advantages of folders is that they make it easier to locate and access your favorite reports. Having folders, you can now find reports faster. You can now order your reports logically into a folder structure that is neat and easy to navigate around.

1. Select **Create a Folder**.



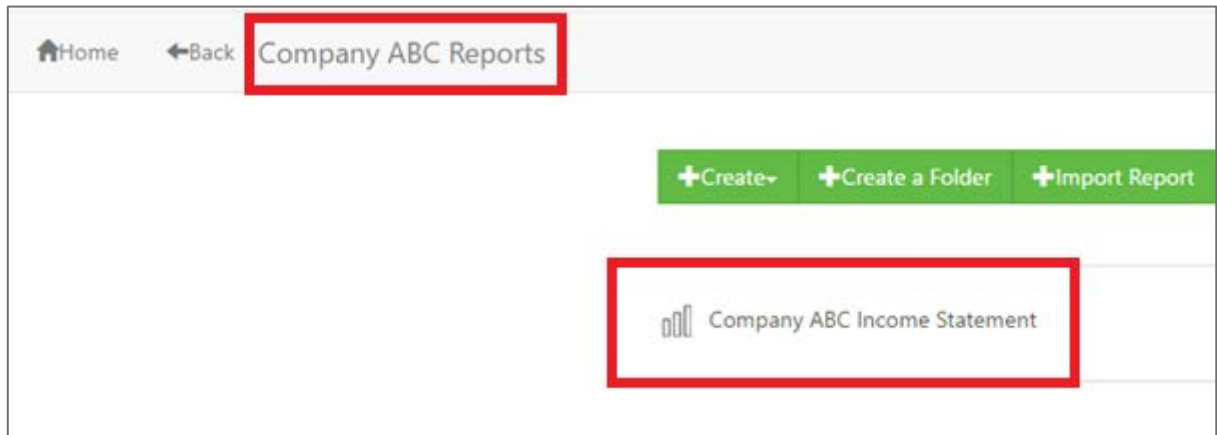
2. Give the new folder a name. I.e. Company ABC Reports.



3. The folder will appear; you can then open or delete this folder.

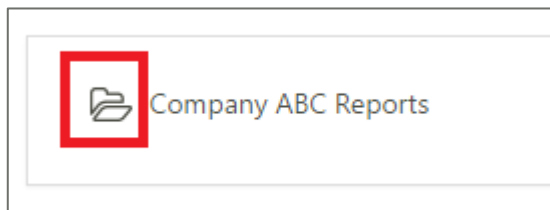


4. You can import reports into, or create new reports within this folder.



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

Folders can be identified by the Folder icon, on the left of the folder name.

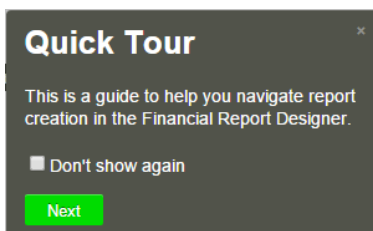


### 1.3 Create Financial Report

This menu item takes you through to the design screen. This screen houses all the tools you need to create your financial reports.

When this item is first clicked, you will be prompted to give your new report a name. This is the name that will appear in the “My Reports” folder.

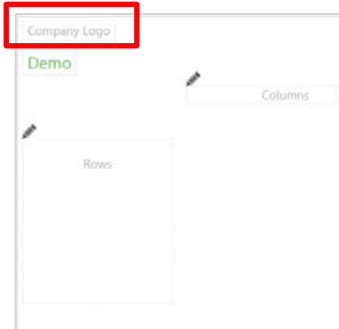
The first interaction with the report designer will be a quick tour of the product and where you can access all the features you need. You can travel through the tour by clicking “Next”.



Once you have come to grips with everything, and no longer need to see the tour, you can click on “Don’t show again”.

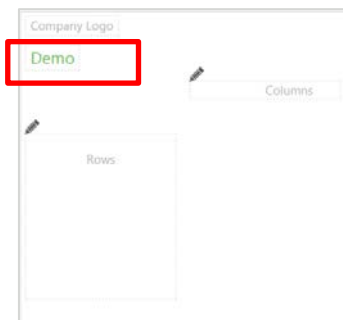
### Adding a logo to your report

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



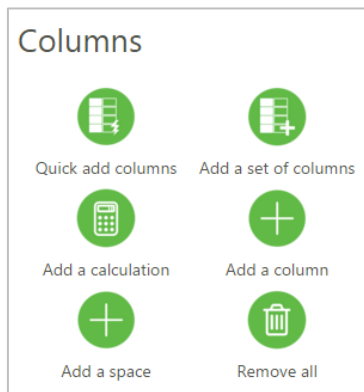
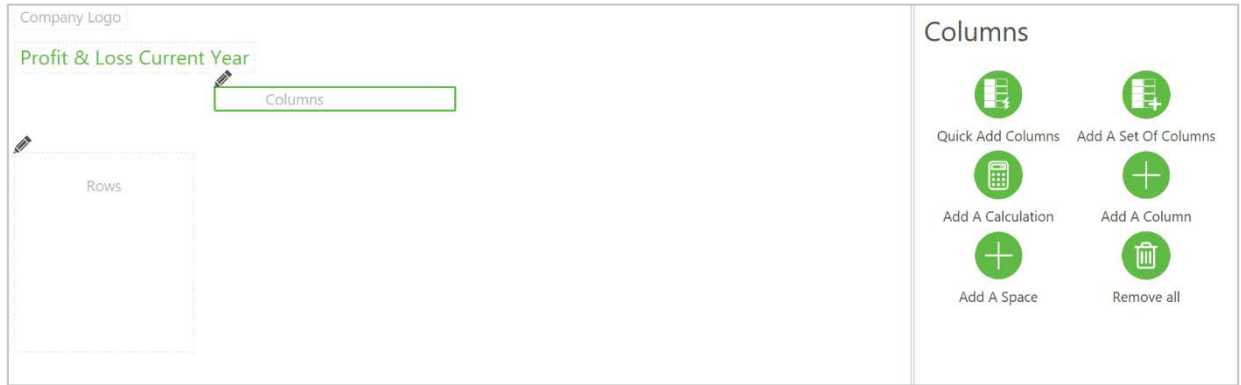
### Changing the title of the report

If at any time you 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.

### 1.3.1 Inserting columns into your report

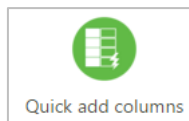


Select the pencil icon above the columns section to get access to these options. You have a selection of options that will give you the ability to add columns to your report. The different options give you the flexibility that best suits you.



Columns are the line items that run vertically in your report, for example Actual or Actual YTD values.

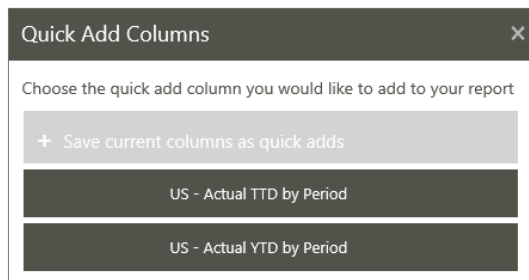
#### Quick add columns



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

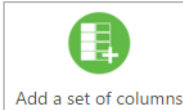
Best practice would be to use this option, when you already have a collection of columns in mind for the report you would like to create.

If you would like to save your own collection of columns you have just created, you can click "Save current columns as pre-defined columns", once you have given the collection a name, the option will be added to the list for re-use again and again.



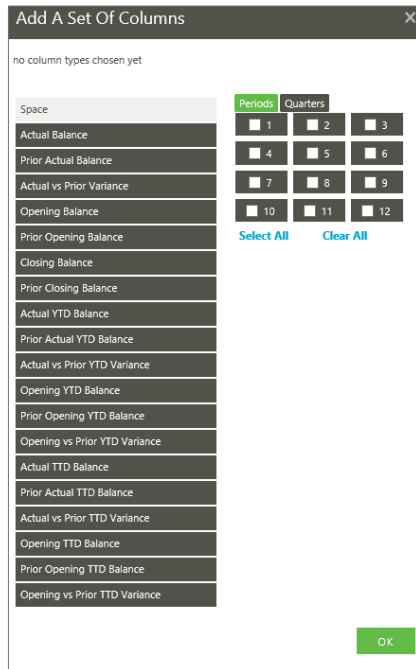


## Add a set of columns



This option allows you to choose from a set of available columns. To select a column, simply click on it and you will see it add to the preview pane at the top.

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

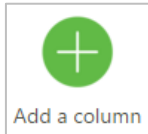


Once you are happy with your column selection, choose a time scale for the report – you can filter your options by periods and quarters.

To allow you an easy to read report, you can insert spaces.

**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.

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

**Column Properties**

Column Heading:

Column Type:

Amount Type:

Dimension Tag:

Layer:

Year:

Period:

1	2	3	4
5	6	7	8
9	10	11	12
Quarter 1	Quarter 2	Quarter 3	Quarter 4
Current Period	Prior Period		

Hide Column

Column Property	Description
<b>Column Heading</b>	This is the name will be displayed on the report.
<b>Column Type</b>	Is the column used to display a specific amount, or show a calculation?
<b>Amount Type</b>	If “amount” is selected in column type, this option will let you determine the type i.e. actual, budget etc.
<b>Dimension Tag</b>	Enables you to specify which dimension tag filters should be applied for this column. You can select multiple dimension tag combinations
<b>Layer</b>	This parameter allows you to view the specific column by a layer. (Budget, Actual, Adjustments)
<b>Year</b>	Enables you to choose what year would you like the column to represent? <ul style="list-style-type: none"><li>• The year selected for the report filters</li><li>• The year prior to the year filter</li><li>• A specific year</li></ul>

<b>Period</b>	What period would you like the column to represent?
<b>Hide Column</b>	This is a tick box. When this is ticked, this column item is available to use in a calculated column but will not show when the report is run out.

Dimension and Tag Report Filtering on Column Level

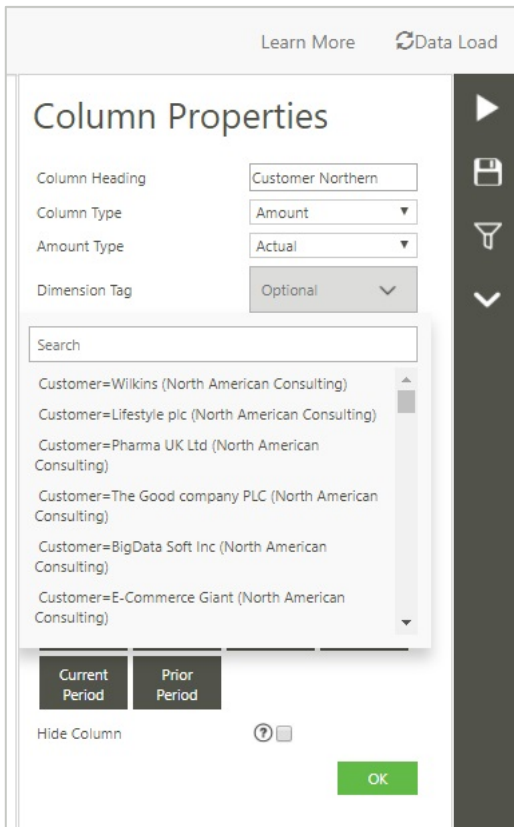
Should you want to filter your report with Dimensions and Tags, you could type directly into the applicable column property or select from the drop down. Updating this column property, will filter all balance results with this selection.

The dropdown list shows the Dimension, Tag and the Company that the Dimension tag is associated with. If the Dimension Tag is Global, there will be no company name appended to the Dimension Tag. Previously you could only select a single dimension tag per column. In this release, you are now able to do a multi-select of dimension tag combinations on the Actual and Actual YTD Amount Type.

The Dimension Tag column property is optional, and can be left blank if you do not want to create a report based on dimensions.

Actual & Actual YTD – Multi-Dimension selection

**Dimension Tag Column Property (no selection)**



## Dimension Tag Column Property (Multiple Dimension Tags selected)

Multi-Dimension selection is currently only available when using the Actual or Actual YTD Amount type. When you select multiple dimension tags a tick will appear alongside the Dimension Tag name. To unselect a single dimension simply reselect the same dimension. Selecting Multiple dimension tags allows you to view specific dimension tag combinations in the column, and only returns the balances specific to the dimension tags selected.

The screenshot shows the 'Column Properties' dialog box. At the top, there are links for 'Learn More' and 'Data Load'. The dialog is titled 'Column Properties' and contains the following fields:

- Column Heading: Customer Northern
- Column Type: Amount
- Amount Type: Actual
- Dimension Tag: Customer=Wilki

Below these fields is a search bar and a list of dimension tags with checkboxes:

- Customer=Wilkins (North American Consulting)
- Customer=Lifestyle plc (North American Consulting)
- Customer=Pharma UK Ltd (North American Consulting)
- Customer=The Good company PLC (North American Consulting)
- Customer=BigData Soft Inc (North American Consulting)
- Customer=E-Commerce Giant (North American Consulting)

At the bottom of the dialog, there are buttons for 'Current Period' and 'Prior Period', a 'Hide Column' option with a help icon, and an 'OK' button.

This example above would return on the balances associated with Customers:

- Wilkins,
- Pharma UK Ltd
- Big Data Soft Inc.

## Dimension Tag (Clear All Selections)

To clear all dimension tag combinations that have been previously selected on a column property, simply select on the X alongside the Dimension Tag. This will automatically clear all selections previously assigned to this column.

Learn More ↻ Data Load

### Column Properties

Column Heading: Customer Northern

Column Type: Amount

Amount Type: Actual

Dimension Tag: ⊗ Customer=Wilki

Layer:

Year: Year

Period:

1	2	3	4
5	6	7	8
9	10	11	12
Quarter 1	Quarter 2	Quarter 3	Quarter 4
Current Period	Prior Period		

Hide Column ?

OK

## Adding a Budget Layer

A new mandatory budget layer parameter has been added to the Column properties in the Design Pane. This parameter allows you to view the specific column by a selected layer. You can select either the Actual, Adjustments or Budgets. The budget layer will only show if you have added budgets, actuals or adjustments into Sage Live.

### Column Properties

Column Heading:

Column Type:

Amount Type:

Dimension Tag:

Layer:

Year:

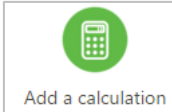
Period:

1 2 3 4

Example Profit & Loss Actual vs Budget & Variance 1-12 & YTD

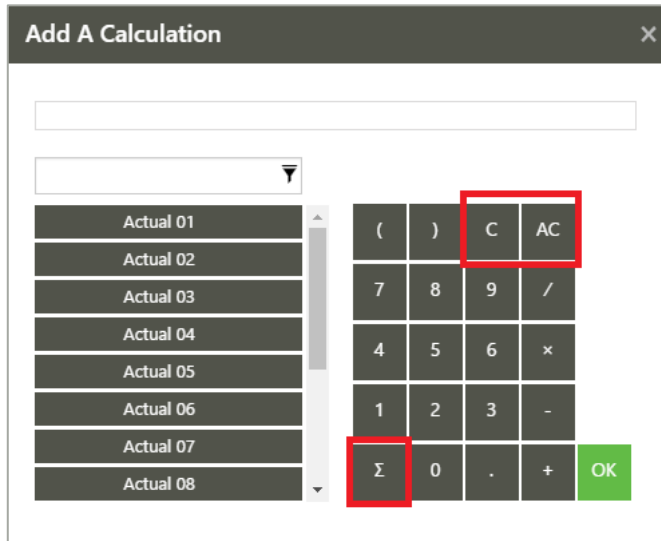
<b>Company</b>	Australian Consulting		
<b>Year</b>	2017		
<b>Current Period</b>	12		
	Actual 01	Budget 01	Variance 01
<b>Income</b>			
Sales		450 000	(450 000)
<b>Total Sales</b>		<b>450 000</b>	<b>(450 000)</b>
<b>Cost of Sales</b>			
Purchases	3 523	10 000	6 477
Direct Expenses			
<b>Total Cost of Sales</b>	<b>3 523</b>	<b>10 000</b>	<b>6 477</b>
<b>Gross Profit/(Loss)</b>	<b>(3 523)</b>	<b>440 000</b>	<b>(443 523)</b>
<b>Expenses</b>			
Expenses			
<b>Total Expenses</b>			
<b>Net Income Before Taxation</b>	<b>(3 523)</b>	<b>440 000</b>	<b>(443 523)</b>
<b>Taxation</b>			
Taxation			

## Add a calculation



This option is used when a calculated column is required, for example adding periods together.

When this option is clicked, you will see all the columns in your report that can form part of a calculation. If the column you need in your report does not appear in this list, you can manually add the column to the report via the “Add Column” option.



### AC – All Clear

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

### C- Clear

Clears individual selected columns or rows from the calculation.

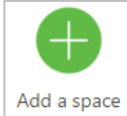
### Σ- SUM All

Selecting SUM All without selecting any columns or rows will automatically sum all the columns or rows available. Using Ctrl+ or Shift+ and selecting rows or columns followed by SUM All will sum the selected columns or rows.

### Ability to Edit within a Calculation

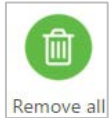
Previously to edit a column or row in a calculation you would have to delete the entire calculation, now you can select within the calculation and add or remove the columns or rows at that point using the cancel button on the calculator.

## Add a space



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

## Remove all

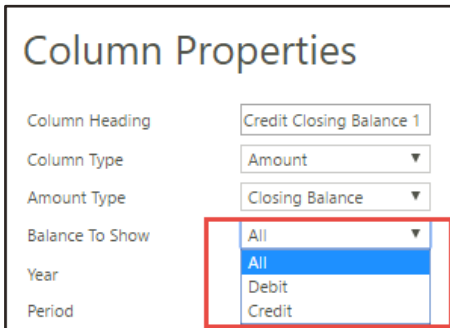


Remove all the columns currently in the report.

## **Debit and Credit Column Options**

The Column Property screen has been enhanced for the formulas Opening Balance and Closing Balance. This allows for debit and credit balance reporting required in Trial Balance reports.

Should a report be setup to use the Opening Balance or Closing Balance column formulas, you now have the option to indicate in the “Balance to Show” field, found under the Column Property screen, whether the balance should always show, show only when the balance is a debit (balance of 0 or higher), or show only if the balance is a credit (balance of less than 0).



**Column Properties**

Column Heading	Credit Closing Balance 1
Column Type	Amount
Amount Type	Closing Balance
Balance To Show	All
Year	
Period	

To use this feature in a Trial Balance for example, two Closing Balance columns for period 1 needs to be created.

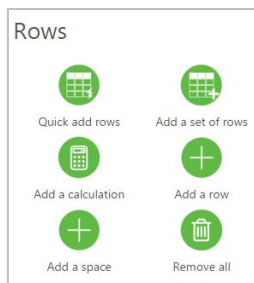
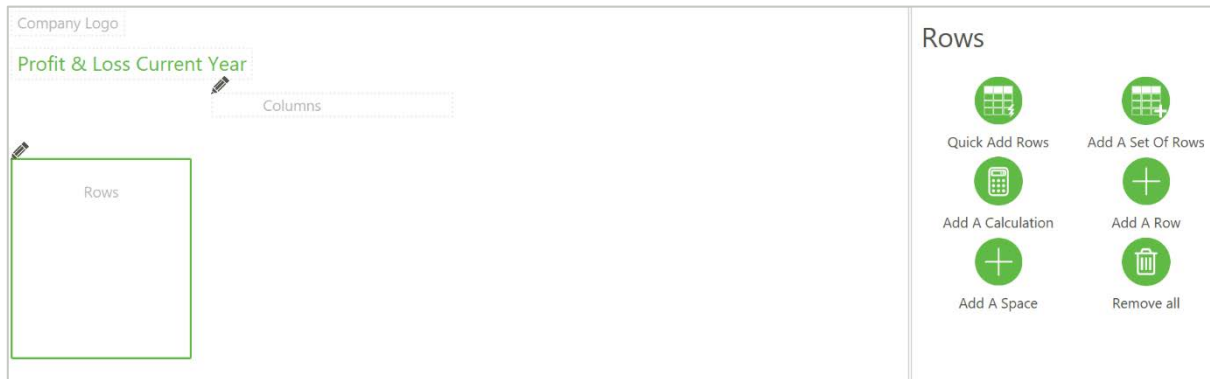
Select the first one and in the Column Property screen, rename this to Debit Closing Balance. Update the Balance to Show dropdown to only show debit balances.

Select the second column and in the Column Property screen, rename this to Credit Closing Balance. Update the Balance to Show dropdown to only show credit balances.

**Note:** All balances found under a column setup to only show credit balances will automatically be toggle switched for all balances to be displayed positive values. Row toggle switch settings will override in this setup if also selected.



### 1.3.2 Inserting rows into your report

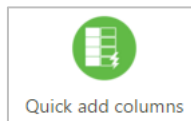


Use the rows menu to select a method of inserting rows into your report. Select the pencil icon above rows to get access to these options.



Rows are the line items that run horizontally in your report, for example Revenue or Cost of Sale.

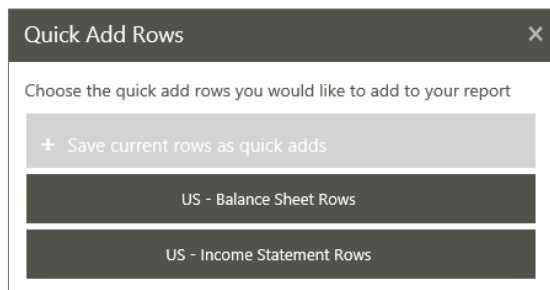
#### Quick add rows



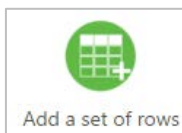
This option gives you the quick and easy option to add a collection of rows that have already been pre-defined for you - both by Sage Intelligence and by yourself.

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

The software will arrive with options that have been created for you by Sage Intelligence. If you would like to save your current collection of rows to the "Quick Add rows list", you can click "Save current rows as quick add rows". Once you have given the collection a name, the option will be added to the list for re-use again and again.

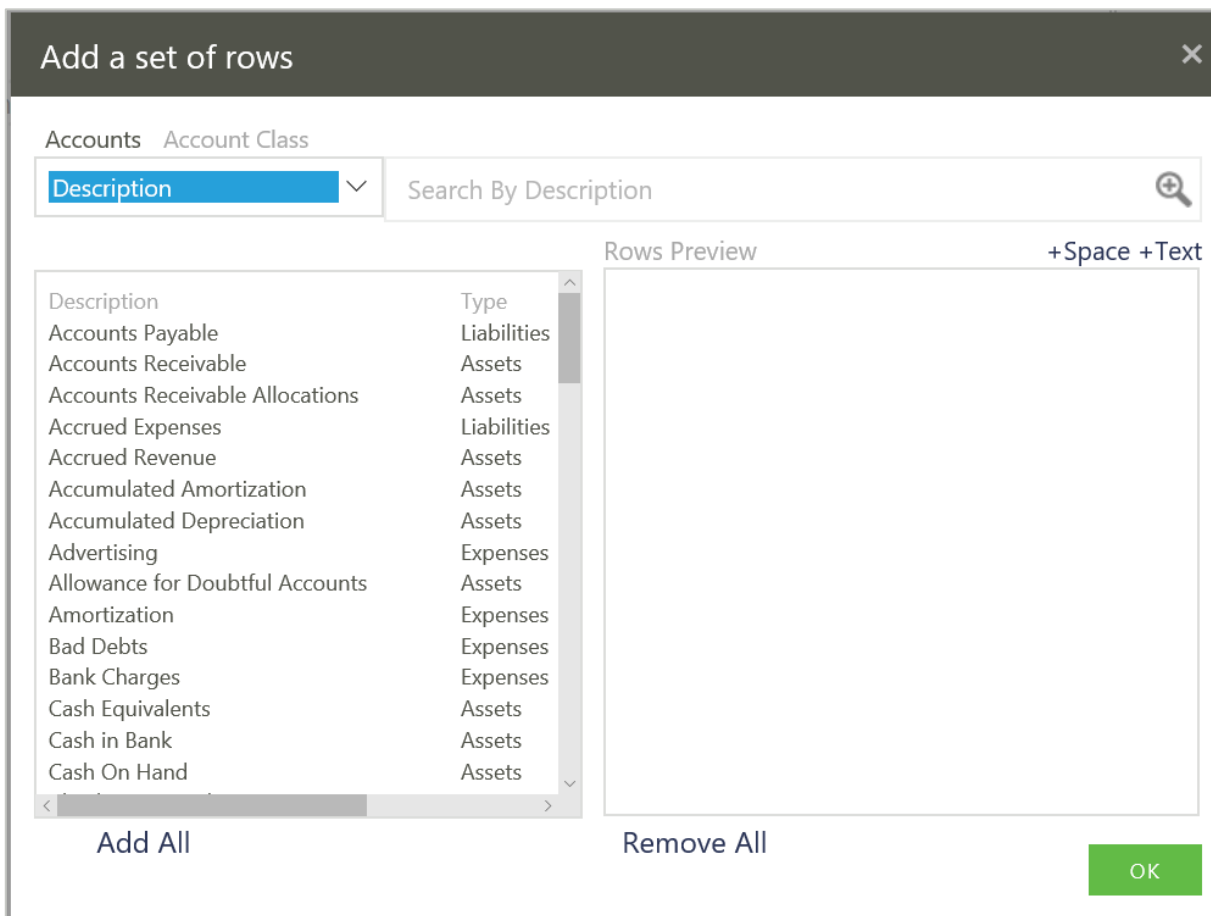


## Add a set of rows



This option will allow you the ability to search and add any general ledger for accounts / account categories to the report.

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



**Add a set of rows** [Close]

Accounts Account Class

Description [v] Search By Description [Magnifying Glass]

Description	Type
Accounts Payable	Liabilities
Accounts Receivable	Assets
Accounts Receivable Allocations	Assets
Accrued Expenses	Liabilities
Accrued Revenue	Assets
Accumulated Amortization	Assets
Accumulated Depreciation	Assets
Advertising	Expenses
Allowance for Doubtful Accounts	Assets
Amortization	Expenses
Bad Debts	Expenses
Bank Charges	Expenses
Cash Equivalents	Assets
Cash in Bank	Assets
Cash On Hand	Assets

Rows Preview +Space +Text

Add All Remove All [OK]

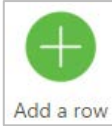
To make it easier to find the specific account you are looking for, you can use the search options. This allows you to search by company, account number or description. When you search, you will notice that the options in the boxes below decrease to match your search.

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

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

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

## Add a row



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

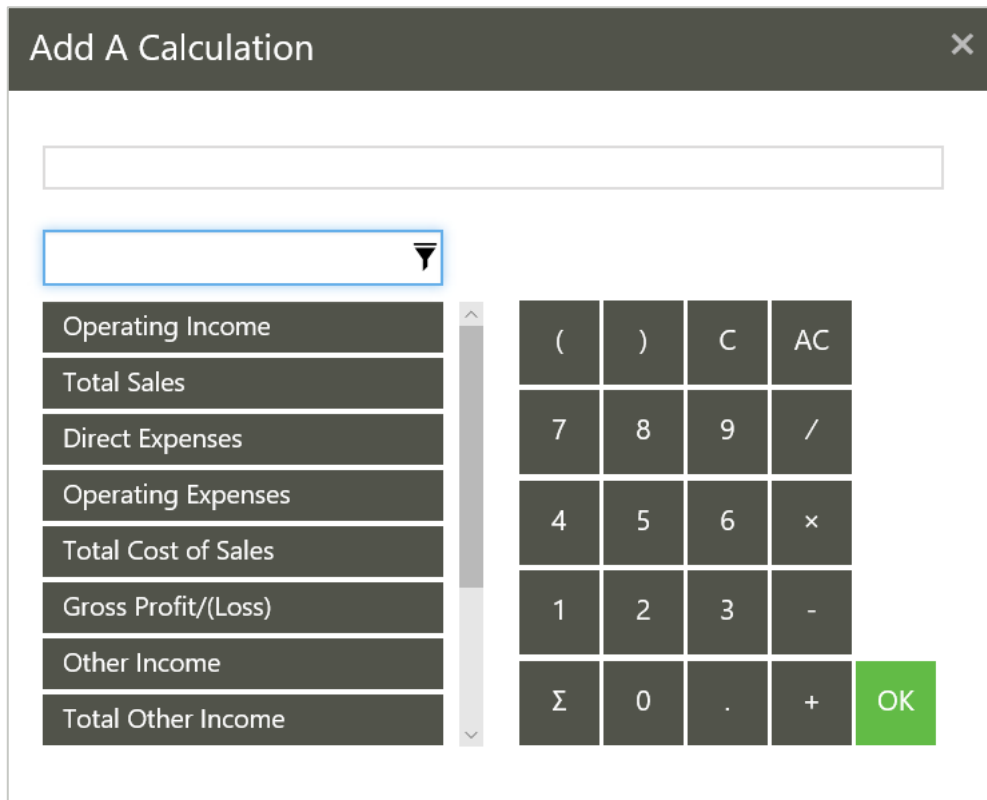
This is recommended if you know the exact row you need to see and want full control and customizing ability.

### Row Properties

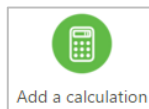
Row Heading	<input type="text" value="NewRow"/>
Row Type	<input type="text" value="Amount"/>
Row Identification	<input type="text" value="Account"/>
Account	<input type="text"/>
Reverse Sign	<input type="checkbox"/>
Hide Row	<input type="checkbox"/>

Row Properties Menu	Description
<b>Row Heading</b>	This is the name that will be seen in the report
<b>Row Type</b>	Which of the following would you like this row to display? <ul style="list-style-type: none"><li>• <b>Amount:</b> Either a specific account or an account category.</li><li>• <b>Calculation:</b> This row is a calculated value, made up of one or more other rows used in a calculation.</li><li>• <b>Text:</b> Used for heading rows</li></ul>
<b>Row identification</b>	Is displayed when the amount row type is selected. To allow you to select either account or account category
<b>Account category</b>	You will need to choose account or account class to represent the row
<b>Reverse sign</b>	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 to make it a positive value.
<b>Hide Row</b>	This is a tick box. When this is ticked, this row item is available to use in a calculated row but will not show when the report is run out.

With the Account Selector calculator, found in row properties when creating account rows, you can select which accounts should be considered. You can sum and subtract accounts from each other using this calculator if required.



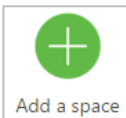
### Add a calculation



This option is used when a calculated row is required.

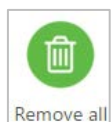
When the option is clicked you will see all the rows in your report that can form part of a calculation. If the row you need in your report does not appear in this list, you can manually add it through the “Add Row” option and then add it to the report.

### Add a space



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

### Remove all

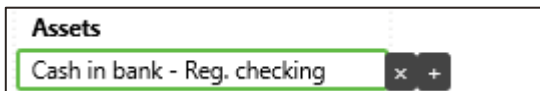


Remove all the rows in the report.

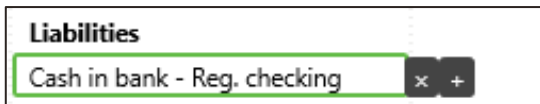
## Flip Account Settings

You can show/hide rows based on whether the account has a debit or credit balance, as at a given period, in the Online Report Designer. This allows for accurate Balance Sheet creation where a Current Asset account can either be found under the Current Liabilities section and vice versa, based on the setup done by the user and the balance value (debit or credit).

To use this feature in a Balance Sheet for example, the same account row needs to be created under both the Asset and Liabilities sections.

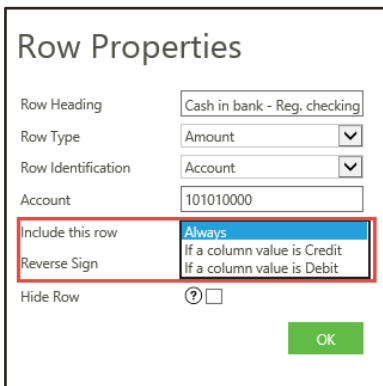


**Assets**  
Cash in bank - Reg. checking



**Liabilities**  
Cash in bank - Reg. checking

A new dropdown menu item, “Include this row”, has been added to the Row Properties screen. The default value of “Always” indicate that the balance will always be shown for this account. “If a column value is Credit” indicates that this row will only be visible in the run out report should the balance be less than zero. “If a column value is Debit” indicates this will only be visible in the run out report if the balance is bigger than or equal to zero.



**Row Properties**

Row Heading: Cash in bank - Reg. checking

Row Type: Amount

Row Identification: Account

Account: 101010000

Include this row: Always  
If a column value is Credit  
If a column value is Debit

Reverse Sign:

Hide Row:

OK

**Note:** This feature is only available for account rows. The new menu items will not be available for other row options.

Once the debit or credit display option has been setup, an additional menu item “Column to check” will be indicated. Here you must specify which of the existing column balances you want to use, to determine whether the balance is a debit or credit value.






Row Properties	
Row Heading	Cash in bank - Reg. checking
Row Type	Amount
Row Identification	Account
Account	101010000
Include this row	If a column value is Credi
Column to check	Current
Reverse sign	Actual 1

**Note:** Columns used in this setup cannot be deleted while referenced by a row property. Predefined rows and columns can also not be created with this setup present.

### 1.3.3 Reporting Action Panel

The Action panel provides quick access to general reporting functions.

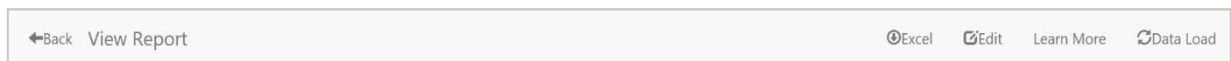
Functions available from the action panel are:

Button	Action
 <b>Run</b>	Use this button to run out your report into the online report
 <b>Save</b>	Use this button to save your report
 <b>Filter</b>	Filters are required to determine the information you want to see in the run out report
 <b>Help</b>	Use this button to launch the help file
 <b>Expand / Collapse</b>	Use this button to increase/decrease the number of action panel buttons you can see.

### 1.3.4 Online Report

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

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



Button	Action
<b>Back</b>	This takes you back to the Online Report Designer editor.
<b>Excel</b>	Download this report into Excel with static values.
<b>Edit</b>	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.
<b>Learn More</b>	The Learn More is a quick way to be able to access help from within the product.

### Profit & Loss Current Year

Company North American Consulting  
Year 2017  
Current Period 4

	Actual 01	Actual 02	Actual 03	Actual 04	Actual 05	Actual 06	Actual 07	Actual 08
<b>Sales</b>								
Operating Income	91 119	45 377	231 389	52 804	238 416	312 300	310 250	37 550
<b>Total Sales</b>	<b>91 119</b>	<b>45 377</b>	<b>231 389</b>	<b>52 804</b>	<b>238 416</b>	<b>312 300</b>	<b>310 250</b>	<b>37 550</b>
<b>Cost of Sales</b>								
Direct Expenses	46 723	46 523	56 598	13 203	22 563	22 920	16 935	9 800
Operating Expenses	732	732	732					
<b>Total Cost of Sales</b>	<b>47 455</b>	<b>47 255</b>	<b>57 330</b>	<b>13 203</b>	<b>22 563</b>	<b>22 920</b>	<b>16 935</b>	<b>9 800</b>
<b>Gross Profit/(Loss)</b>	<b>43 664</b>	<b>(1 878)</b>	<b>174 059</b>	<b>39 601</b>	<b>215 853</b>	<b>289 380</b>	<b>293 315</b>	<b>27 750</b>

**Note:** Account balance values of 0 will show as blank in the run out report.

#### 1.4 Drill Down to Balances

You can now drill down to balances from the values in your reports.

Report:

### Expense Detail Current Month

Company RKL\_DBN  
Year 2016

	Actual
Returns & allowances	110
Returns & allowances - East	5 102
Returns & allowances - West	1 754
Purchases	219 837
Freight	750
Freight - East	4 546
Freight - West	2 031
Warehouseman payroll - East	51 765
Warehouseman payroll - West	12 181
Warehouse supplies	1 400
Driver payroll - East	42 385
Driver payroll - West	16 138



Drill Down:

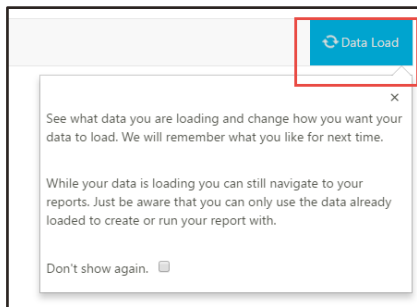
Drilldown								
<b>Amount:</b> 219 836.99								
Company Code	Account Number	Account Description	Account Category Code	Account Category Description	Year	Period	Invoice Number	Amount
RKL_DBN	450010000	Purchases	C	Cost of Sales	2016	10	INV816	18 614.00
RKL_DBN	450010000	Purchases	C	Cost of Sales	2016	10	INV520	3 155.00
RKL_DBN	450010000	Purchases	C	Cost of Sales	2016	10	INV658	18 262.00
RKL_DBN	450010000	Purchases	C	Cost of Sales	2016	10	INV133	15 423.00
RKL_DBN	450010000	Purchases	C	Cost of Sales	2016	10	INV646	8 548.00
RKL_DBN	450010000	Purchases	C	Cost of Sales	2016	10	INV715	62 208.00
RKL_DBN	450010000	Purchases	C	Cost of Sales	2016	10	INV592	93 626.99

### 1.5 Data Load

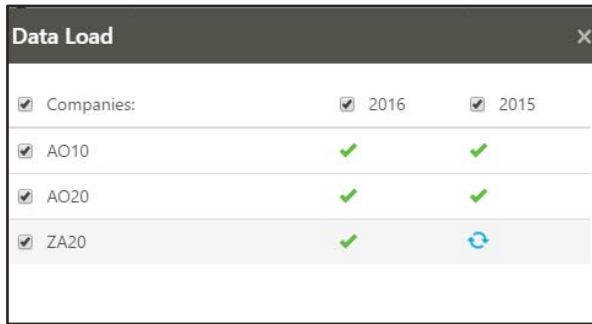
The data load functionality allows you to select which companies and years you would like data to be loaded for. While a data load is running, you can navigate through the system.

**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. It will appear blue while a data load is in progress and grey when this is complete.



Drag-and-drop functionality is available. This allows you to also reorder the company list in priority of load.



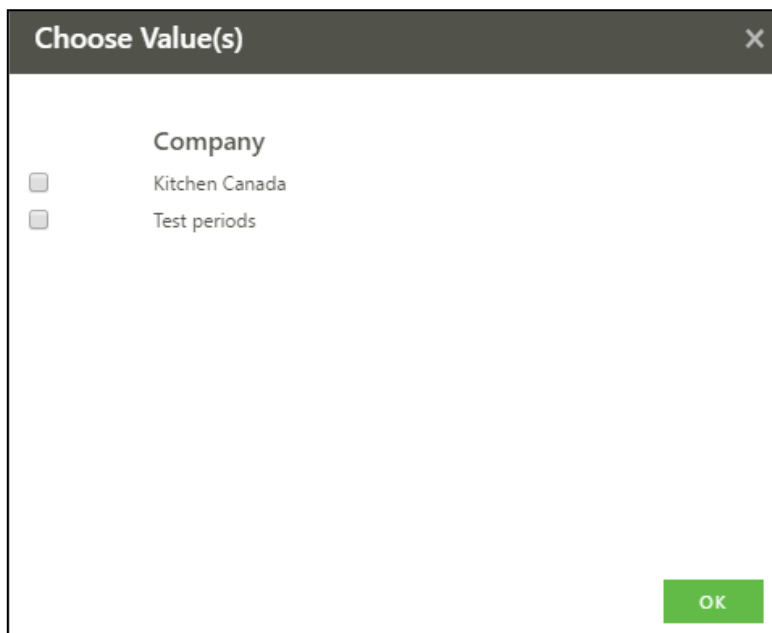
<input checked="" type="checkbox"/> Companies:	<input checked="" type="checkbox"/> 2016	<input checked="" type="checkbox"/> 2015
<input checked="" type="checkbox"/> AO10	✓	✓
<input checked="" type="checkbox"/> AO20	✓	✓
<input checked="" type="checkbox"/> ZA20	✓	↻

Should additional company data be required but was not part of the initial data load, you are 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 it is already loaded, and another load is initiated. Only new company and year data will be loaded.

## 1.6 Multi Company reporting

The ability to select Multi-companies at report run time has been added. Previously only 1 company could be reported off at a time. You can now use a check box to select the company/s data you would like to view in the online report. The data will be aggregated in the report display.



**Choose Value(s)**

**Company**

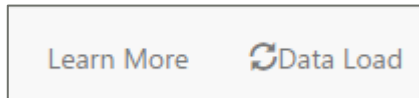
- Kitchen Canada
- Test periods

OK

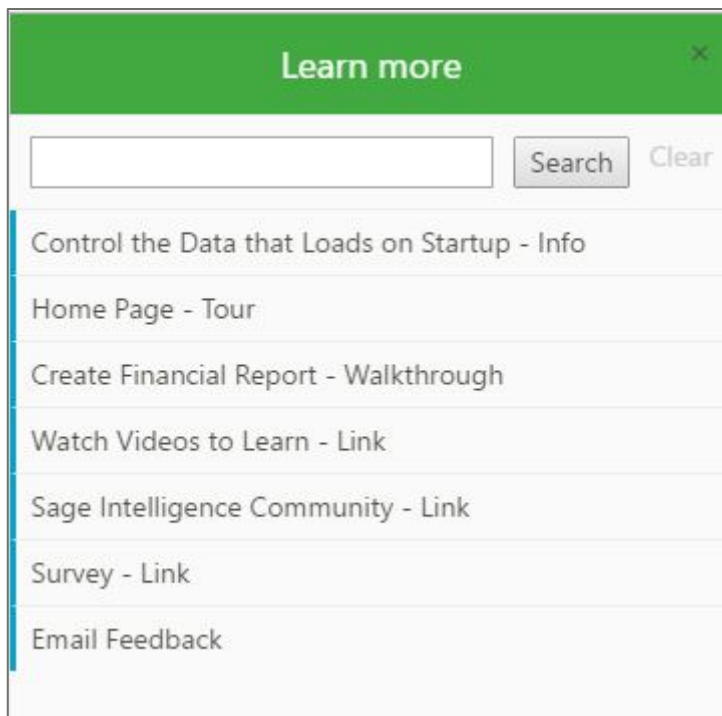
## 2.0 Sage Live Learning Resources

### 2.1 Learn More

The Learn More is a quick way to be able to access help from with-in the product. You can access the Learn More button from the menu bar.



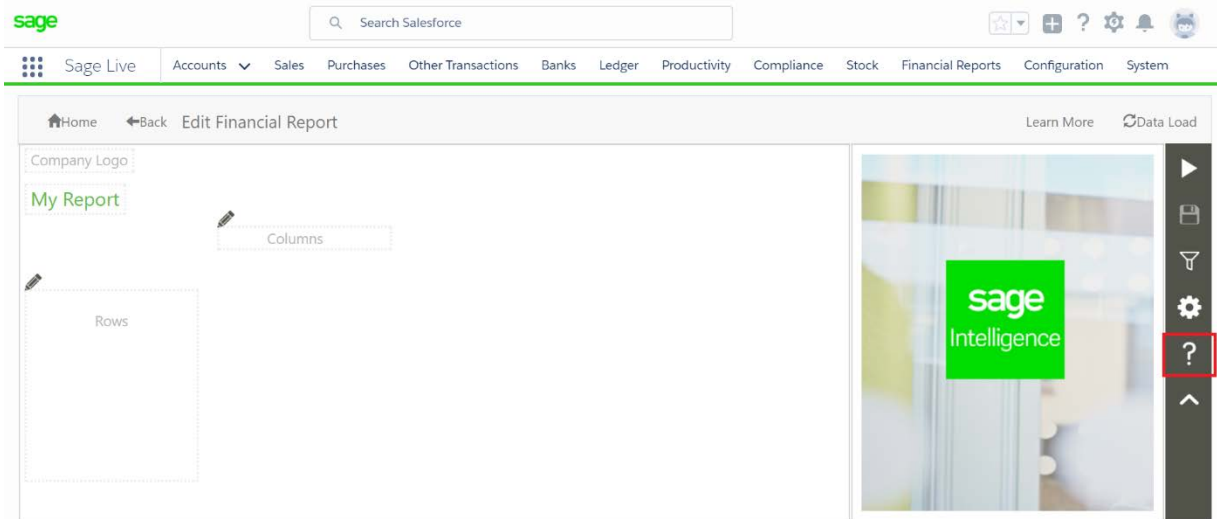
When you select 'Learn More' the in-product tour menu displays. You can select your specific learning requirements.



You will then be taken through a step-by-step tour based on your selection.

## 2.2 In-product Help Files

In-product help files are found on the reporting action panel. Selecting on the Help icon (?) will open the in-product help files.



The following link will take you to the Sage Live in-product help files.

<http://help.sageintelligence.com/sagelive/>

## 2.3 Sage Live Learning Portal

Check out our brand-new Sage Intelligence Learning Portal! Your personal library of learning resources that suit your knowledge level, and then guide you towards mastering your solution.

### Beginner

<http://learning.sageintelligence.com/sage-live-beginner/>

### Intermediate

<http://learning.sageintelligence.com/sage-live-intermediate/>