


## What's New in Sage Enterprise Intelligence (SEI) Version 9?

The user interface (web client) for desktop and mobile has been redesigned for version 9. The current version released by Sage is 9.2.6791. Below are some tips and tricks with the new features, Hyperlinks and images.


Enterprise Intelligence

### V9 New Features

Public Cloud

- Public cloud, compatible with any Sage Solution
- Single-tenant and multi-tenant
- Synchronization and consolidation of any databases (new ETL module)

UDM Finance

- New reporting structure and module
- Currency conversion and consolidation module
- Simplified importing of existing account groups

DataSync - ETL

- Cloud Synchronization
- On Premise Replication
- Consolidation
- Transformation
- Migration

UDM CRM

- Salesforce, Sage CRM, Sage X3, Acumatica
- 30+ KPIs
- Pre-built Dashboards
- Campaigns, Leads, Opportunities...

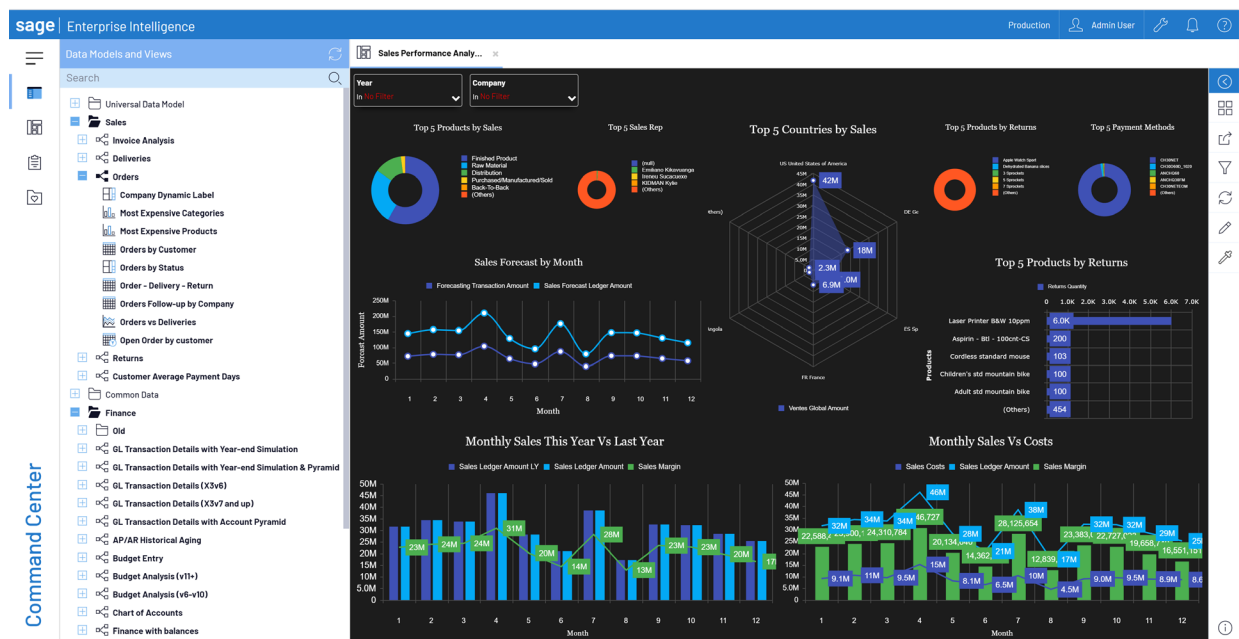
Web Application

- New Look & Feel
- New Online Help
- OLAP Manager Incremental by Date
- Reporting Pack
- Hyperlinks and images

UDM Sales

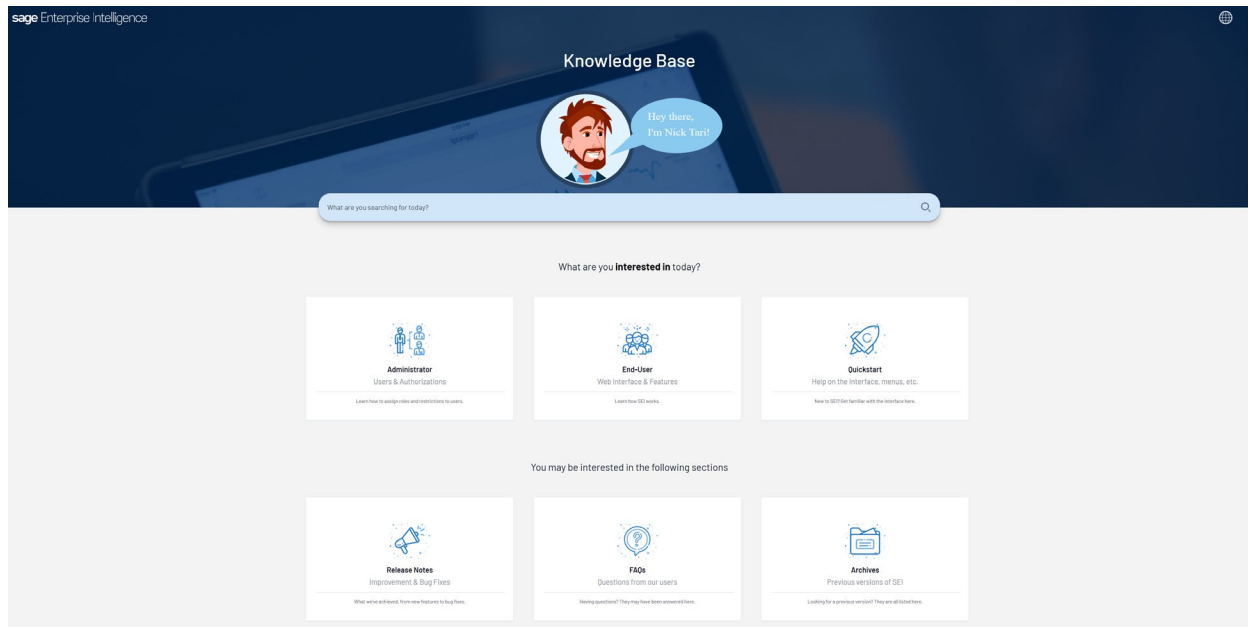
- Sage X3, 100, 200, 300, 500, 1000, Acumatica, etc..
- 185+ KPIs
- Forecasting & Budget Data Entry
- Pre-built Dashboards

The layout has changed, a new look & feel and some terminology changed like processes are now called data models.



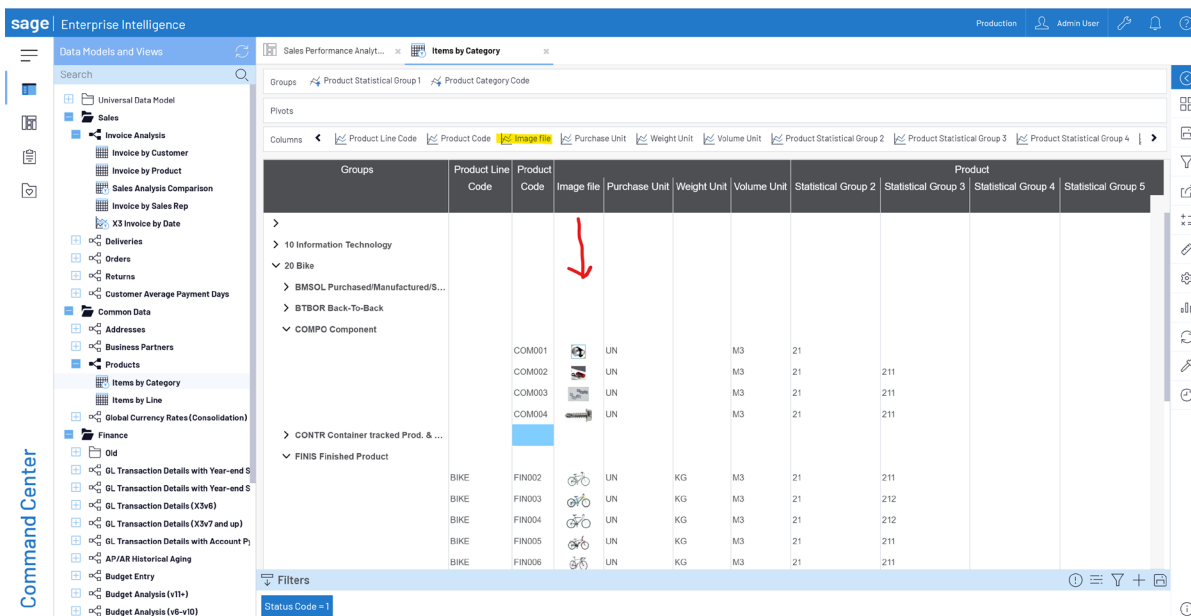
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Online help and SEI documentation is now accessible online with search capabilities.



Let's dive a little deeper into one of the new features, Hyperlinks and Images.

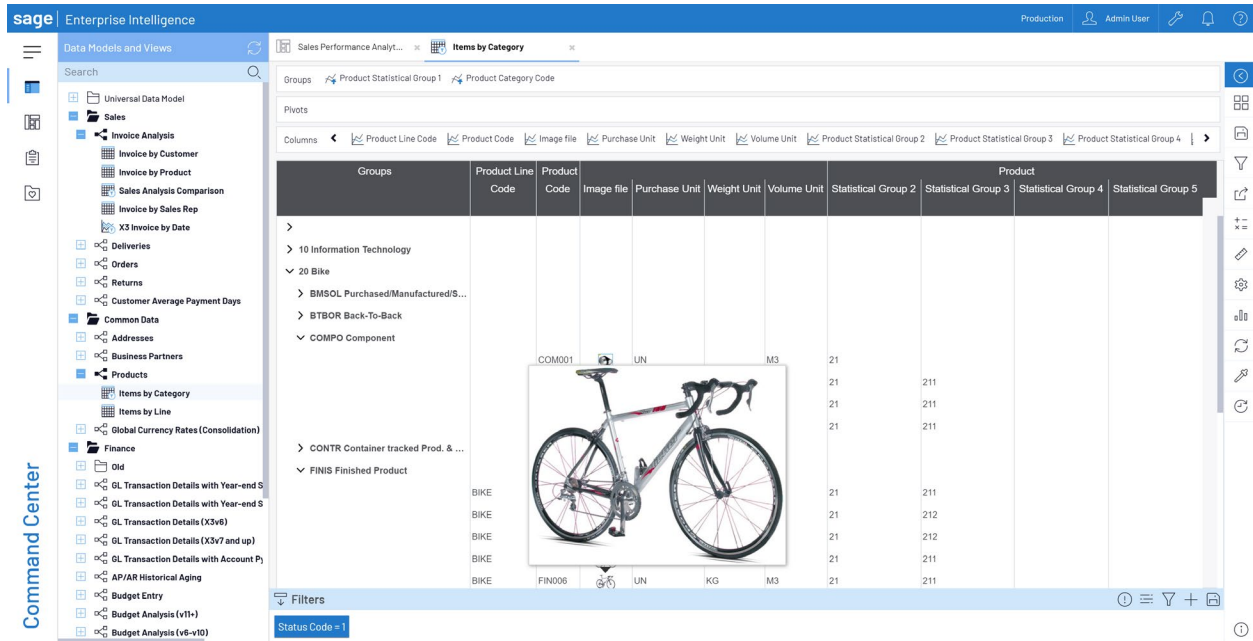
You can now add columns to your data model that are images. Maybe you want to give your warehouse employees an inventory listing showing a visual image of each product or you might want to create a product price list showing products, their descriptions and an image of the product. In the example below, I added the image related to the Product from Sage X3 as a column to show on my Items by Category worksheet view. The images can be referenced from stored Blob (Binary Large Object) or URL link data.



| Groups                              | Product Line Code | Product Code | Image file | Purchase Unit | Weight Unit | Volume Unit | Statistical Group 2 | Statistical Group 3 | Statistical Group 4 | Statistical Group 5 |
|-------------------------------------|-------------------|--------------|------------|---------------|-------------|-------------|---------------------|---------------------|---------------------|---------------------|
| 10 Information Technology           |                   |              |            |               |             |             |                     |                     |                     |                     |
| 20 Bike                             |                   |              |            |               |             |             |                     |                     |                     |                     |
| BMSOL Purchased/Manufactured/S...   |                   |              |            |               |             |             |                     |                     |                     |                     |
| BTBOR Back-To-Back                  |                   |              |            |               |             |             |                     |                     |                     |                     |
| COMPO Component                     |                   |              |            |               |             |             |                     |                     |                     |                     |
|                                     |                   | COM001       |            | UN            |             | M3          | 21                  |                     |                     |                     |
|                                     |                   | COM002       |            | UN            |             | M3          | 21                  | 211                 |                     |                     |
|                                     |                   | COM003       |            | UN            |             | M3          | 21                  | 211                 |                     |                     |
|                                     |                   | COM004       |            | UN            |             | M3          | 21                  | 211                 |                     |                     |
| CONTR Container tracked Prod. & ... |                   |              |            |               |             |             |                     |                     |                     |                     |
| FINIS Finished Product              |                   |              |            |               |             |             |                     |                     |                     |                     |
|                                     | BIKE              | FIN002       |            | UN            | KG          | M3          | 21                  | 211                 |                     |                     |
|                                     | BIKE              | FIN003       |            | UN            | KG          | M3          | 21                  | 212                 |                     |                     |
|                                     | BIKE              | FIN004       |            | UN            | KG          | M3          | 21                  | 212                 |                     |                     |
|                                     | BIKE              | FIN005       |            | UN            | KG          | M3          | 21                  | 211                 |                     |                     |
|                                     | BIKE              | FIN006       |            | UN            | KG          | M3          | 21                  | 211                 |                     |                     |

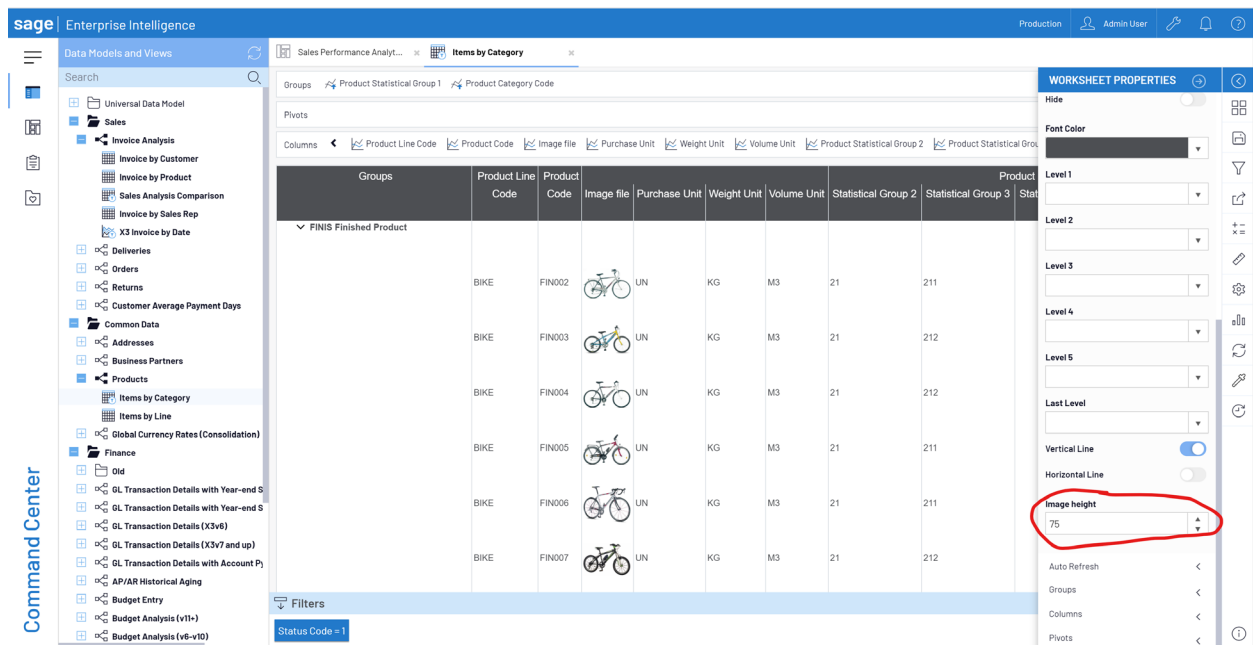
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Hovering over the image, you can see a larger popup of that image.



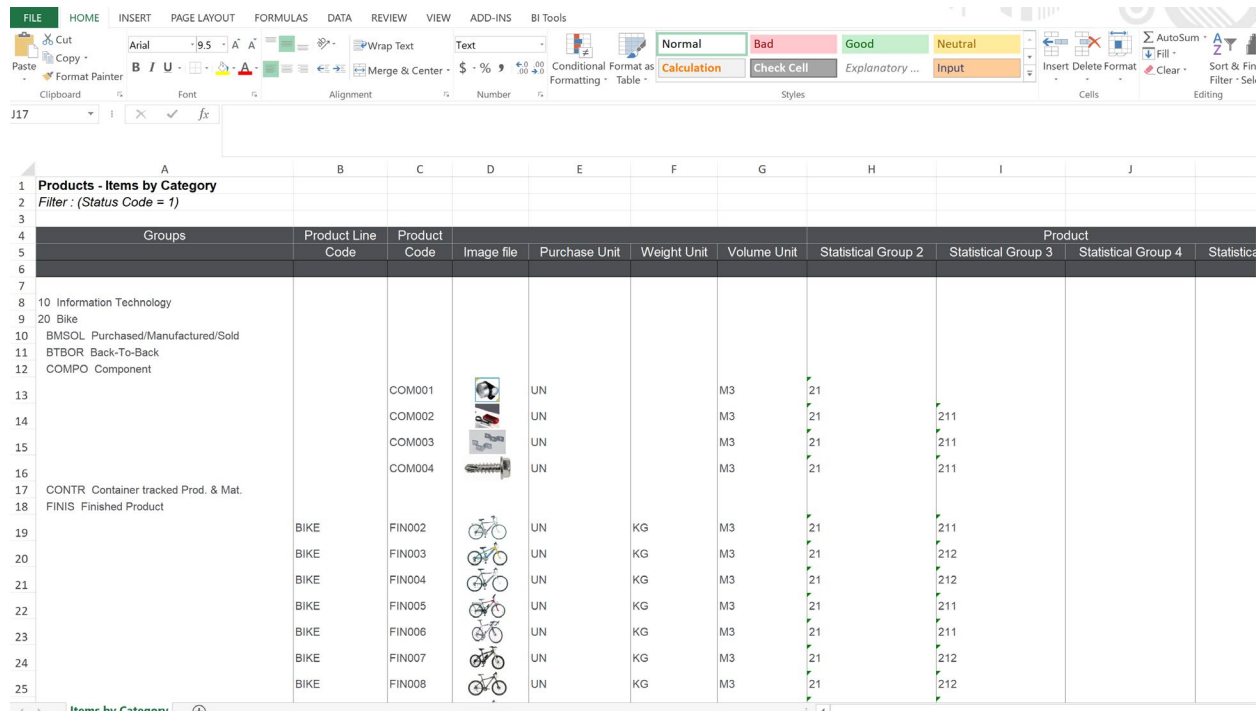
The screenshot shows the Sage Enterprise Intelligence interface. On the left is the 'Command Center' with a search bar and a list of data models and views. The main area displays a pivot table titled 'Items by Category'. The table has columns for Groups, Product Line Code, Product Code, Image file, Purchase Unit, Weight Unit, Volume Unit, and five Statistical Groups. A large image of a bicycle is shown in the 'Image file' column, with a larger popup image appearing over it. The bottom of the interface shows filters and a status code of 1.

Using the worksheet properties, grid content, you can adjust the size to increase or decrease each row.



The screenshot shows the Sage Enterprise Intelligence interface with the 'Worksheet Properties' panel open on the right. The panel includes settings for 'Hide', 'Font Color', 'Level 1' through 'Level 5', 'Last Level', 'Vertical Line', 'Horizontal Line', 'Image height' (highlighted with a red circle and set to 75), 'Auto Refresh', 'Groups', 'Columns', and 'Pivots'. The main area displays a pivot table with a list of bicycles and their details. The 'Image height' property is highlighted with a red circle.

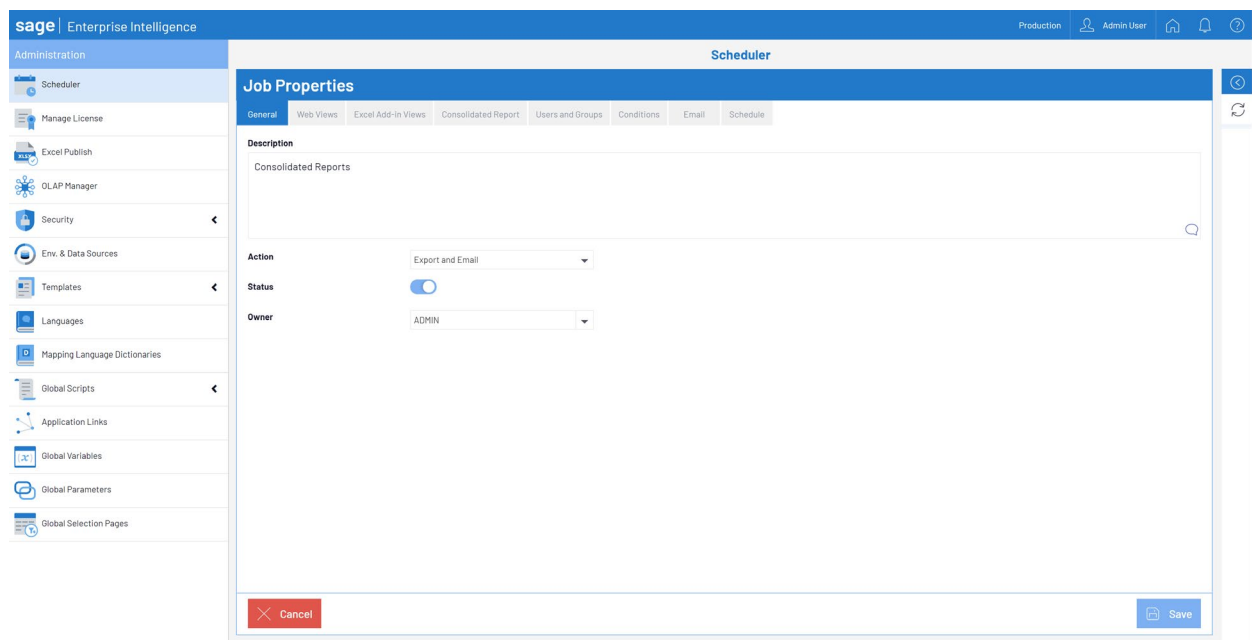
The images even get exported when sharing the worksheet view. Below is an example exported to Excel.



| Groups                               | Product Line Code | Product Code | Image file | Purchase Unit | Weight Unit | Volume Unit | Statistical Group 2 | Statistical Group 3 | Statistical Group 4 | Statistical Group 5 |
|--------------------------------------|-------------------|--------------|------------|---------------|-------------|-------------|---------------------|---------------------|---------------------|---------------------|
| Information Technology               |                   |              |            |               |             |             |                     |                     |                     |                     |
| Bike                                 |                   |              |            |               |             |             |                     |                     |                     |                     |
| BMSOL Purchased/Manufactured/Sold    |                   |              |            |               |             |             |                     |                     |                     |                     |
| BTBOR Back-To-Back                   |                   |              |            |               |             |             |                     |                     |                     |                     |
| COMPO Component                      |                   |              |            |               |             |             |                     |                     |                     |                     |
|                                      |                   | COM001       |            | UN            |             | M3          | 21                  |                     |                     |                     |
|                                      |                   | COM002       |            | UN            |             | M3          | 21                  | 211                 |                     |                     |
|                                      |                   | COM003       |            | UN            |             | M3          | 21                  | 211                 |                     |                     |
|                                      |                   | COM004       |            | UN            |             | M3          | 21                  | 211                 |                     |                     |
| CONTR Container tracked Prod. & Mat. |                   |              |            |               |             |             |                     |                     |                     |                     |
| FINIS Finished Product               |                   |              |            |               |             |             |                     |                     |                     |                     |
|                                      | BIKE              | FIN002       |            | UN            | KG          | M3          | 21                  | 211                 |                     |                     |
|                                      | BIKE              | FIN003       |            | UN            | KG          | M3          | 21                  | 212                 |                     |                     |
|                                      | BIKE              | FIN004       |            | UN            | KG          | M3          | 21                  | 212                 |                     |                     |
|                                      | BIKE              | FIN005       |            | UN            | KG          | M3          | 21                  | 211                 |                     |                     |
|                                      | BIKE              | FIN006       |            | UN            | KG          | M3          | 21                  | 211                 |                     |                     |
|                                      | BIKE              | FIN007       |            | UN            | KG          | M3          | 21                  | 212                 |                     |                     |
|                                      | BIKE              | FIN008       |            | UN            | KG          | M3          | 21                  | 212                 |                     |                     |

Another new feature is the Reporting Pack. This new feature works with the Distribution Scheduler to create a PDF consolidated reporting package by allowing you to merge several web views and Excel add-in views into one PDF report. Let's take a look.

We will create a new job in the Scheduler and add several web views.



**Sage Enterprise Intelligence**

**Scheduler**

**Job Properties**

General | Web Views | Excel Add-in Views | Consolidated Report | Users and Groups | Conditions | Email | Schedule

**Description**

Consolidated Reports

**Action**: Export and Email

**Status**: ☒ On

**Owner**: ADMIN

The views selected need to have their output set to PDF.

Production Admin User

**Scheduler**

**Job Properties**

General **Web Views** Excel Add-in Views Consolidated Report Users and Groups Conditions Email Schedule History

| Data Model Name                                | View Name                                   | View Type             |
|--|---|-----------------------|
| Month/Quarter Forecast                         | Estimated Total Sales                       | Chart With Filter     |
| Historical Stock Movement                      | Work Order Products Stock Movement          | Worksheet             |
| Account Payables                               | Overdue vs Current Amount by Month          | Chart                 |
| AP/AR Historical Aging                         | AR Historical Aging Ledger Currency         | Worksheet With Filter |
| GL Financial (Cube)                            | Balance Sheet Layout for Report             | Worksheet             |
| Project Profit&Loss                            | Profit&Loss Global Currency                 | Worksheet             |
| GL Transaction Details (X3v7 and up)           | Posting by site                             | Chart                 |
| Inventory vs Sales vs Purchases (X3v11 and up) | Data Validation - Inventory vs Safety Stock | Worksheet             |
| Inventory vs Sales vs Purchases (X3v11 and up) | Sales vs. Inventory vs. PO Quantities       | Chart                 |
| Project Cost                                   | Financial Overview - Cost Structure View    | Worksheet             |
| GL Transaction Details (X3v6)                  | GL Transaction Details                      | Worksheet             |
| <b>Account Payables</b>                        | <b>Total Amount by Supplier</b>             | <b>Worksheet</b>      |
| Purchase Invoices                              | Purchase Invoices                           | Worksheet             |
| Sales (Cube)                                   | Sales by Customer and Product               | Worksheet             |
| Sales (Cube)                                   | Product Sales by Sales Rep                  | Tree Map              |
| Sales (Cube)                                   | US Bill to Customers                        | Map                   |

| Data Model Name        | View Name                           | View Type             | Format | Environment |
|------------------------|-------------------------------------|-----------------------|--------|-------------|
| Invoice Analysis       | Invoice by Customer                 | Worksheet             | Pdf    | Production  |
| AP/AR Historical Aging | AR Historical Aging Ledger Currency | Worksheet With Filter | Pdf    | Production  |
| Account Payables       | Total Amount by Supplier            | Worksheet             | Pdf    | Production  |

Cancel Save

On the Consolidated Report tab, give the report a name. You can choose to add a cover page, table of contents and select the views in the list to be consolidated into one report. First, you can click on a view and move it to rearrange the order you would like them to appear in the final PDF.

Production Admin User

**Scheduler**

**Job Properties**

General Web Views Excel Add-in Views **Consolidated Report** Users and Groups Conditions Email Schedule History

**Name**  
Monthly

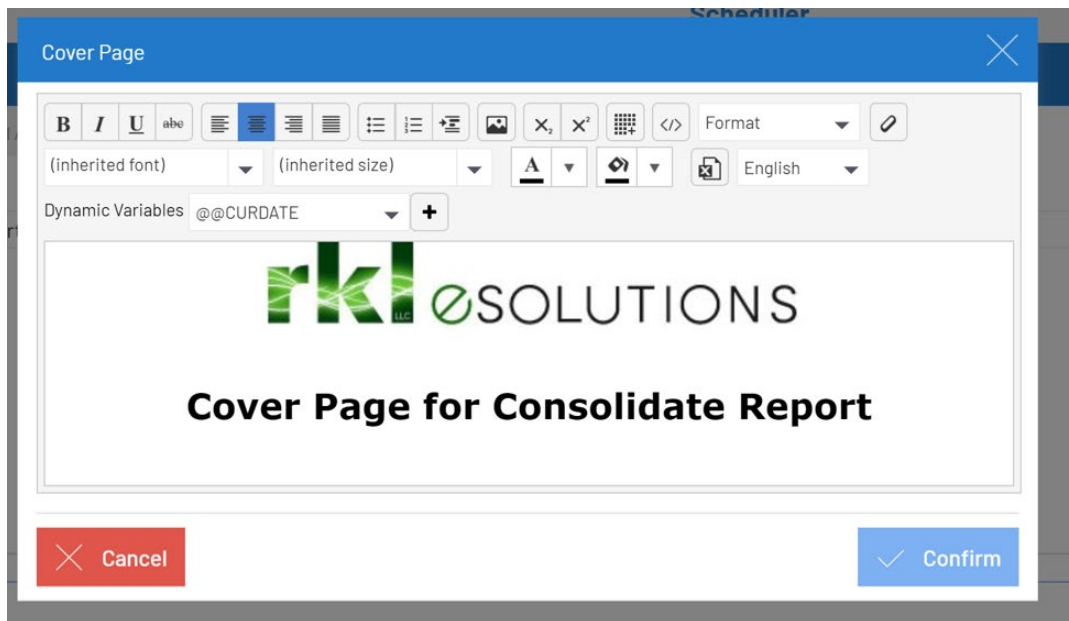
**Cover Page** ☒

**Table Of Contents** ☒

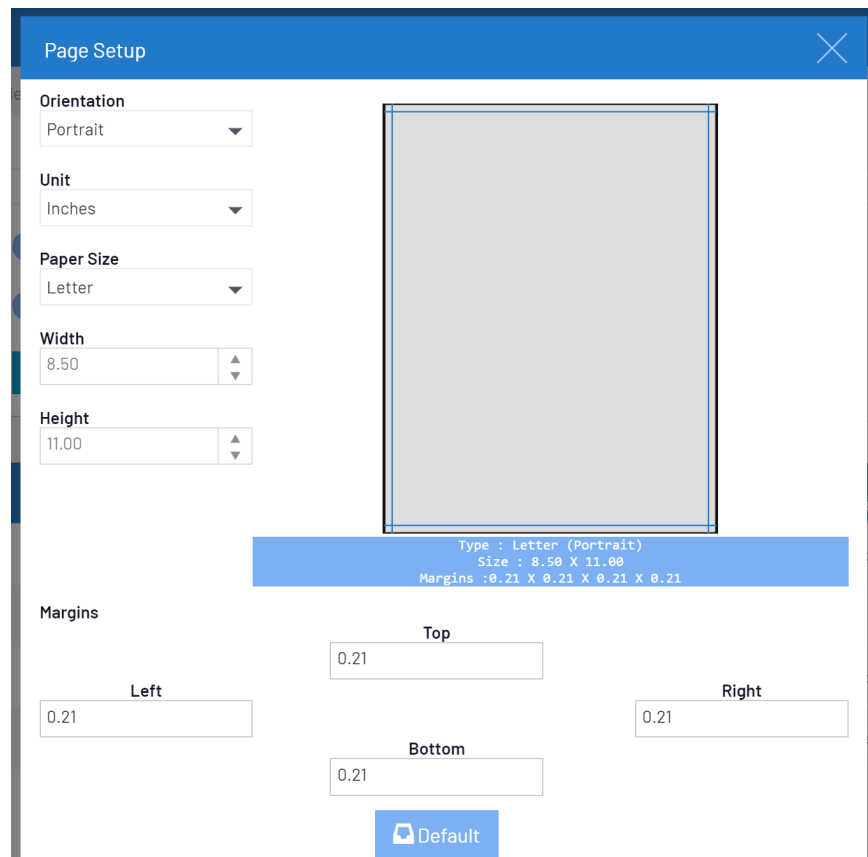
**Page Setup** ☒

| <input checked="" type="checkbox"/> | Type | View Name                           | Data Model Name        | View Type             | Environment |
|-------------------------------------|------|-------------------------------------|------------------------|-----------------------|-------------|
| <input checked="" type="checkbox"/> | View | Invoice by Customer                 | Invoice Analysis       | Worksheet             | Production  |
| <input checked="" type="checkbox"/> | View | AR Historical Aging Ledger Currency | AP/AR Historical Aging | Worksheet With Filter | Production  |
| <input checked="" type="checkbox"/> | View | Total Amount by Supplier            | Account Payables       | Worksheet             | Production  |

For the cover page, you can insert text and images.



Next, adjust the page settings.





Now you can finish adding users and email addresses of who will be receiving the report, setup your email and schedule the job.



Generated email and snippets of consolidated PDF attachment.

Monthly\_2020-03-30 120027\_4e2b9306.pdf - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools Test Consolidated\_... Test Consolidated\_... Monthly\_2020-03-... x

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- Invoice Analysis - Invoice by Customer ..... 3
- API/AR Historical Aging - AR Historical Aging Ledger Currency ..... 5
- Account Payables - Total Amount by Supplier ..... 9

API/AR Historical Aging - AR Historical Aging Ledger Currency

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| Groups                                | Document Number | Due Amount    | Ledger Currency Current Amount |
|---------------------------------------|-----------------|---------------|--------------------------------|
|                                       |                 | 62,801,555.97 | .00                            |
| AOA                                   |                 | 22,836,693.00 | .00                            |
| AO10 Sociedade Distribuidora Angola   |                 | 22,836,693.00 | .00                            |
| 31121 Nacionais                       |                 | 22,836,693.00 | .00                            |
| AUD                                   |                 | 33,479.19     | .00                            |
| AU10 AU Discrete                      |                 | 33,479.19     | .00                            |
| 220000 SALES LEDGER - Current         |                 | 33,479.19     | .00                            |
| EUR                                   |                 | 37,269,216.55 | .00                            |
| BE20 BE process                       |                 | 14,557.89     | .00                            |
| 400000 Clientes                       |                 | 16,067.89     | .00                            |
| 460000 Acomptes reçus sur commandes   |                 | -1,510.00     | .00                            |
| DE10 DE Discrete Fertigung            |                 | 18,693,010.97 | .00                            |
| 1400 Forderungen                      |                 | 18,693,010.97 | .00                            |
| DE20 DE Prozessfertigung              |                 | 1,307,160.65  | .00                            |
| 1400 Forderungen                      |                 | 1,307,160.65  | .00                            |
| ES10 ES Discrete                      |                 | 8,951,275.58  | .00                            |
| 43000 Clientes (euros)                |                 | 8,796,152.48  | .00                            |
| 43100 Efectos comerciales en cartera  |                 | 150,291.68    | .00                            |
| 43300 Clientes emp grupo (euros)      |                 | 2,831.40      | .00                            |
| ES20 ES Proceso                       |                 | 104,851.20    | .00                            |
| 43000 Clientes (euros)                |                 | 102,634.54    | .00                            |
| 43030 Clientes Factoring(No recours3) |                 | 2,016.68      | .00                            |
| 43600 Clientes de dudoso cobro        |                 | 200.00        | .00                            |
| FR10 Diadra                           |                 | 3,560,023.08  | .00                            |
| 411000 Clientes                       |                 | 3,568,964.28  | .00                            |
| 411610 Clientes affectuage            |                 | -36,000.00    | .00                            |
| 413000 Clientes - Effets à recevoir   |                 | 9,200.00      | .00                            |
| 416000 Clientes douteux               |                 | 17,500.00     | .00                            |
| 462000 Créances sur cessions d'immo.  |                 | 358.90        | .00                            |
| FR20 Proctra                          |                 | 4,601,012.81  | .00                            |
| 411000 Clientes                       |                 | 4,601,012.81  | .00                            |
| PT10 Modelo mono-referencial          |                 | 20,007.28     | .00                            |
| 2111 Clientes C/C Gerais              |                 | 20,007.28     | .00                            |
| PT20 Sociedade AgroQuil'ar            |                 | 252,880.79    | .00                            |
| 2111 Clientes C/C Gerais              |                 | 252,880.79    | .00                            |
| PT30 Sociedade Distribuidora          |                 | -235,563.88   | .00                            |

API/AR Historical Aging - AR Historical Aging Ledger Currency

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| 2111 Clientes C/C Gerais              |  | -235,563.88  | .00 |
|---------------------------------------|--|--------------|-----|
| GBP                                   |  | 490,339.50   | .00 |
| GB10 GB Discrete                      |  | 490,339.50   | .00 |
| 220000 SALES LEDGER - Current         |  | 490,339.50   | .00 |
| GB20 GB Process                       |  | .00          | .00 |
| 220000 SALES LEDGER - Current         |  | .00          | .00 |
| PLN                                   |  | -17,512.97   | .00 |
| PL10 PL Dyskretina                    |  | -17,512.97   | .00 |
| 20211100 AR - trade dom., natl. short |  | -17,512.97   | .00 |
| USD                                   |  | 2,067,264.65 | .00 |
| NA10 NA Discrete                      |  | 933,169.83   | .00 |
| 12100 Accounts Receivable             |  | 933,169.83   | .00 |
| NA20 NA Process                       |  | 1,124,094.82 | .00 |
| 12100 Accounts Receivable             |  | 1,124,094.82 | .00 |
| ZAR                                   |  | 132,076.05   | .00 |
| ZA10 ZA Discrete                      |  | 132,076.05   | .00 |
| 220000 Sales Ledger - Current         |  | 132,076.05   | .00 |

In summary, we have touched on a few of the new features in version 9 of SEI like the improved look and feel of the web client. The ability to visualize products and product information on SEI worksheet views using image URLs and hyperlinks. Lastly the ability to create reporting packs for distribution with cover pages, table of contents into one PDF file for bank or board reporting for example.

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