BI360 – Release Notes

User Guide 4.7.1

Published: July 11, 2017

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Introduction

The following is a list of features, enhancements and bug fixes found in this version of the BI360 Suite. The release notes is divided into sections detailing the changes that have been made to each module of the BI360 Suite.

For any additional questions about a specific feature documented in this guide, please email support@solverusa.com who will be able to assist you further.

Who Should Read this Manual

All users of the BI360 Suite should read this manual to become acquainted with the new features that will be added to the application.

What is Included in this Manual

This manual provides detailed information on key new features found in this version of BI360. Additionally, it also provides a detailed list of all features that have been worked on in this version.

This service pack includes enhancements for the Planning and Data Warehouse applications. There are no enhancements made to the Reporting application.

Symbols and Conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
	The sunlight symbol indicates helpful tips, shortcuts, and suggestions.
	The warning symbol indicates situations we recommend to be aware of when completing tasks. Typically, this includes cautions about completing steps in their proper order or important reminders about how other information in BI360 may be affected.

System Requirements and Installation

Please review the System Requirements and Installation User Guides before installing this version of BI360. These two user guides are available on the Solver Support site.

Obtaining the Software

The Software can be found at https://support.solverusa.com. Once logged into the Solver Support site, select Downloads from the site header. A up to date maintenance contract is required in order to download this version of BI360.

Obtaining the Licenses Key

License keys are available on the Solver Support site. Once logged in, select **Licenses** from the site header. All licenses purchased by the company (based on company email) will be listed.

Upgrade Procedures

After downloading the Reporting and/or Planning & Warehouse installation files, the following is a high-level overview of how to complete the upgrade:

If the organization is upgrading from Data Warehouse Manager 3.x to the latest version, the organization must upgrade to Data Warehouse 4.0 before upgrading to the newest version.

Warning: Upgrading from BI360DW 3.x to 4.x includes a database structure change. All ETL/SSIS processes will require modifications. Please contact Solver or your Partner for assistance before upgrading.

A backup of your BI360 databases; this includes the BI360 Data Warehouse and/or the Repository database must be taken before upgrading. Additionally, it is strongly recommended to upgrade your database in a development environment and test before upgrading production.

This version of BI360 Data Warehouse requires new connector files. Please contact Solver Support for the latest connector.

1. **Reporting**:
   - Run the correct installation file and follow the steps listed.
   - Once the upgrade is complete. Open the Admin Tool and install the updated Integration Packages for the integration that is in use (if required). This can be found under the Integration Management menu option.

   Please see the full installation guide for more details, including upgrade deployment via login scripts.

2. **Planning/Data Warehouse Manager, Data Warehouse Database**: This installation file will work for all operating systems and all Excel versions listed in the System Requirements User Guide.
   - Run the correct installation file. The upgrade is performed by the installer. After the installer has finished, the application has been upgraded to this version.

   It is required that a user has sys_admin or db_owner rights in order to upgrade the database. Performing an upgrade as a sys_admin, creates a role on the msdb and master databases that is pre-configured with the necessary rights to grant users access to the *Data Warehouse Manager*'s Processes features. Full details may be found in the *Data Warehouse Manager User Guide.*

Planning

The following will detail enhancements found in Planning 4.7.1. Additionally, at the end of this section is a list of all Planning related fixes and enhancements.

Features and Enhancements

1. Ability to modify assignments after they have been re-opened.

Ability to Modify Assignments after they have been Re-Opened

Planning 4.7.1 introduces the ability for a user to modify an assignment after it has been reopened. In earlier versions of assignments, after an assignment was reopened, the user was able to save data back to the form, but the user was unable to do the following necessary actions.

1. Add/remove users.
2. Change the start and or end dates.
3. Create a duplicate of the assignment.
4. Delete an assignment

The above mention functionalities have been added to Planning 4.7.1

Additional Bug Fixes and Enhancements

ID	Description
SIM-724	Missing logo on some prompts
SIM-727	Add Ability to Edit assignment if the Status is Reopened.
SIM-732	Percent spreading uneven

Data Warehouse

The following will detail enhancements found in Data Warehouse 4.7.1. Additionally, at the end of this section is a list of all Data Warehouse related fixes and enhancements.

Features and Enhancements

1. Apply Bulk Load Process
2. Handle large attribute count

Apply Bulk load Process

Data Warehouse 4.7.1 introduces a new process to load data retrieved by the Connector. Prior versions insert data transaction by transaction, but in Data Warehouse 4.7.1, the application now uses a bulk load process for speed improvements. Users should expect their connectors to load data faster now.

Handle Large Attribute Count

We have seen an increase in the number of attributes created, especially for dimensions. Earlier versions of Data Warehouse could not load this data, but it has been resolved in Data Warehouse 4.7.1.

Set ApplicationName to BI360 in SQL

Data Warehouse and Planning now show as ApplicationName BI360 in SQL. This will help database administrators trace the BI360 application when needed.

Additional Bug Fixes and Enhancements

ID	Description
SODSUI-742	Adding a role and cancelling causes application to lose focus
SODSUI-767	Set ApplicationName to BI360 in SQL
SODSUI-770	Cannot run a rule if the number of parameters change
SODSUI-773	Data Explorer does not work if there a large number of Attributes
SODSUI-774	Dimension Page does not load if there are a large number of attributes
SODSUI-776	Entity character limit on currency
SODSUI-777	Importing large number of attributes unexpectedly triggers loading icon
SODSUI-780	Connection on DW login do not appear on CS repository
SODSUI-782	Apply Bulk Load Process
SODSUI-783	Integration screen crashes in Windows 8
SODSUI-784	Improve error message for period start date
SODSUI-785	Start date not reflecting fiscal configuration changes
SODSUI-786	Source Column Not Showing up on Import Wizard
SODSUI-787	Attribute name is cutoff in import wizard

Connectors

The following will detail enhancements made to Connectors. Additionally, at the end of this section will be a list of all Connector enhancements and fixes.

> ⚠️ **This version of BI360 Data Warehouse requires new connector files. Please contact Solver Support for the latest connector.**

Features and Enhancements

1. Utilize bulk load process and other performance improvements
2. Salesforce TLS 1.2 Support
3. Netsuite 2017.1 Support

Utilize bulk load and other Performance Improvements

Connectors in Data Warehouse 4.7.1 now use a bulk load process for speed improvements. This process will improve the loading of data into the Data Warehouse. This will require that the customer download and install a new version of the Connector, which is available by contacting Solver Support.

Where available, the connectors also use gzip to download data. Gzip is a compressed version of data that some cloud ERP providers provide. This will improve the downloading of data.

The above two features, when combined will improve the speed of loading data into the Data Warehouse.

Salesforce TLS 1.2 Support

On July 22, 2017, Salesforce will drop the Support of TLS 1.0. BI360's current connector used TLS 1.0 and we had to make application changes to work with Salesforce TLS 1.2. These changes are available in Data Warehouse 4.7.1 and a new connector file available by contacting Solver Support.

Netsuite 2017.1 Support

Earlier this year, Netsuite rolled out 2017.1. This version introduced an issue the resulted in the Data Warehouse connector to Netsuite not working. Changes were needed in the application and can be found in this version of BI360.

Additional Bug Fixes and Enhancements

ID	Description
WEBSERVICE-61	Select all not synced with options
WEBSERVICE-136	SalesForce - Migrate to bulk load
WEBSERVICE-137	Netsuite - Migrate to bulk load
WEBSERVICE-138	MYOB - Migrate to bulk load
WEBSERVICE-139	Acumatica - Migrate to bulk load
WEBSERVICE-141	Connector does not run if left 3 Month Label is not in US Regional Setting
WEBSERVICE-143	Improve Message when no data is found for Preview
WEBSERVICE-151	Support for Netsuite 2017.1
WEBSERVICE-152	Support for Salesforce 1.2
WEBSERVICE-154	Support for Netsuite "Parent" attributes

Additional Information

Solver Support Center

The Solver Support Center (support.solverusa.com) is the centralized location for users to learn more about the BI360 Suite. From opening and managing your support tickets to reading knowledgebase articles about the product, the Solver Support Center has everything a user will need.

Users may contact Solver Support if they have questions about the BI360 Suite. One of our technical support consultants will gladly assist you.

Users can access the Solver Knowledgebase for more information about the entire BI360 Suite. From user guides, white papers, training manuals and much more, the Solver Support Center has everything a user will need to get started with the application.

Solver Forum

The Solver Forum (solverusa.com/forum) is a great resource for users to ask questions about the software. Other users or one of the many Solver employees frequently check the boards and can quickly answer your questions.