



## Solver Private Host – Release Notes

A Solver User Guide  
Private Host version 5.2.30319  
Publisher March 2020

# Contents

- Who Should Read This User Guide ..... 3
- Software Download ..... 3
- License Keys ..... 3
- Private Host Application ..... 4
  - New Features and Enhancements ..... 4
    - Solver Rebranding ..... 4
    - New Login Process and support for Azure AD ..... 4
    - Notify users when they are added to additional tenants ..... 4
    - Additional Globalization settings ..... 4
    - List AD Groups in Settings >> Active Directory ..... 4
  - Additional Bug Fixes and Enhancements ..... 6
- Reporting ..... 7
  - New Features and Enhancements ..... 7
    - Address Auto Execution of Reports ..... 7
    - Static Execution Mode for Reports ..... 7
    - Improve Report Player Loading Time ..... 7
    - Click and Drag selection for Report Parameters ..... 7
  - Additional Bug Fixes and Enhancements ..... 8
- Budgeting ..... 9
  - New Features and Enhancements ..... 9
    - Line Items Detail Columns Should Expanded ..... 9
    - Download or Reports from the Assignment Menu ..... 9
  - Additional Bug Fixes and Enhancements ..... 9
- Data Warehouse ..... 10
  - New Features and Enhancements ..... 10
    - Restrict Label changes ..... 10
    - Introduce Dynamic Periods for Jobs ..... 10
    - External API for PowerBI Does not Work ..... 10
    - Lookups Appear Blank ..... 10
  - Additional Bug Fixes ..... 11
- Publisher ..... 12
  - New Features and Enhancements ..... 12

Expanded Publisher Notifications.....	12
Ability to Overwrite existing publisher report in Archive .....	12
Additional Bug Fixes and Enhancements.....	12
Additional Resources .....	13
Solver Support.....	13
Solver Academy.....	13

## Overview

This user guide will detail new features, enhancements and bug fixes found in this version of Solver Private Host, v 5.2.30217. This user guide documents all changes to the application since the previous version of Private Host (5.2.20902) and is not a comprehensive list of all changes made since the first version of Private Host. For changes from an earlier version of Private Host to this version, please also reference the corresponding release notes for that version.

Each section of this guide documents all new features, enhancements and bug fixes for this version. Some description may be short or seem incomplete. Should you have further questions on a feature documented, please contact Solver Support ([support@solverglobal.com](mailto:support@solverglobal.com)).

## Who Should Read This User Guide

This user guide may contain both technical and product feature information. It is recommended that all users involved in the Solver implementation review this user guide.

## Software Download

This version is available on the Solver Support site. Once logged in, click Downloads from the site header to download this version of Private Host.

Access to this downloads page requires a valid, registered organization with Solver and an up to date maintenance contact. If you are unable to download the software, it may be a result of one of the previously mentioned causes, please contact Solver Support ([support@solverglobal.com](mailto:support@solverglobal.com)) from assistance.

This version of the product introduces a new version of Report Designer available for download from within the application. While not required to upgrade to this version, it is strongly recommended to upgrade the version of Report Designer you have installed.

## License Keys

License keys can be found on the Solver Support site. Once logged in, click Licenses from the site header to find your Private Host license key. If you do not see your key, please contact Solver Support ([support@solverglobal.com](mailto:support@solverglobal.com)).

# Private Host Application

## New Features and Enhancements

The following are key feature enhancements found in this version of Private Host.

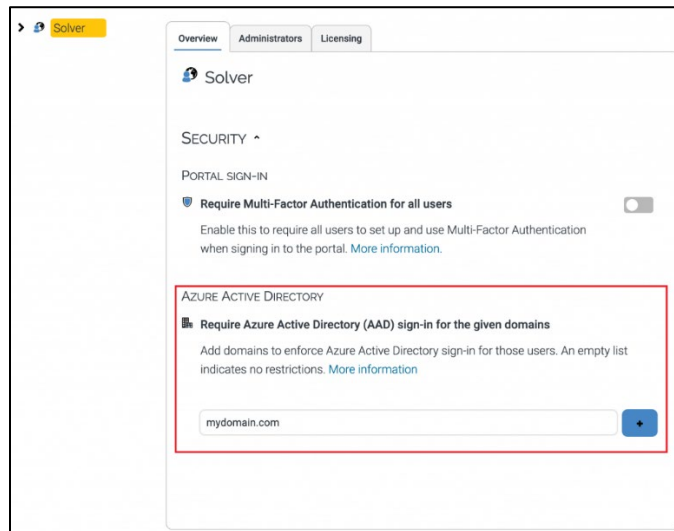
- Solver Rebranding
- New Login Process and support for Azure AD
- Notify users when they are added to additional tenants
- Additional Globalization settings
- List AD Groups in Settings >> Active Directory

Details on the above features can be found below.

1. This version introduces a rebranded interface referencing Solver’s new product name, Solver. More information on the rebranding of the Solver product can be found [here](#).
2. New login process and support Azure Active Directory  
Prior versions of Private Host displayed a login screen that included both the Username (users email) and password. We have changed the login process, requiring the user to first type in their username, and on a proceeding screen, provide this password.

This new experience is a result of support Azure Active Directory. Available in this version of Private Host is Azure Active directory support. Prior versions of Private Host only support local Active Directory, this version also supports Azure Active Directory. To enable Azure Active Directory login:

- a. As a company admin, log into Private Host and navigate to Settings >> System Settings
- b. From the Overview table, select Azure Active Directory
- c. Add your Azure domain to the text box.



Once added, only Active Directory login will work for the installation except for those who are assigned as a company admin.

The login process for Azure Active Directory requires only the username and not an email.

3. Notify user when they are added to additional tenants

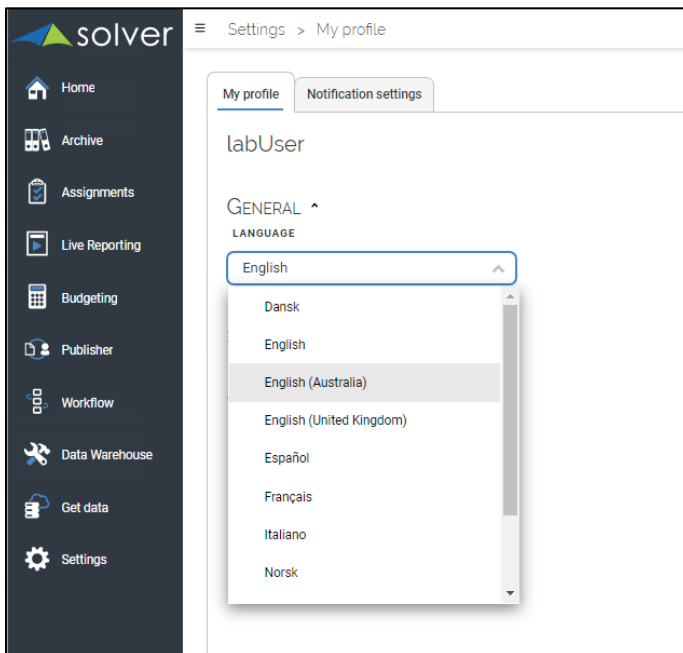
In prior versions of Private Host, if an already added users was added to another tenant, there was no notification of this new access for the end user. As an example, if your organization has two tenants (Dev and Prod), if a users was added to dev, they would receive a notification acknowledging that they had been added to the Dev tenant. However, upon being added to the Production tenant, the user would not receive an email notification.

4. Additional Globalization Settings

In this version of Private Host, we have added the following formats

- English (Australia)
- Englisher (UK)

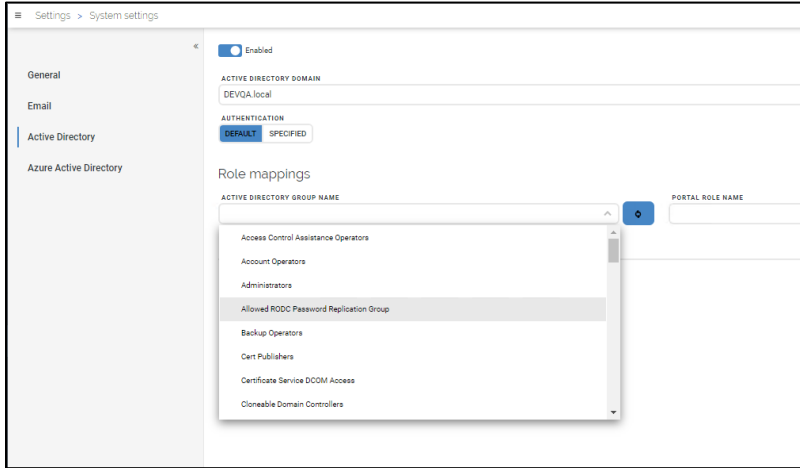
Users can now select these options to see the correct numeric and date formats for the respective globalization setting selected.



*This section has been left blank intentionally*

5. List Active Directory Groups in Settings > Active Directory

This version of Private Host introduces the addition of listing AD groups in the Active Directory dropdown. This will help organizations find the correct AD group and also acts as a verification, that the application has successfully connected to the organization's AD.



### Additional Bug Fixes and Enhancements

The following lists all bug fixes found in this version of Private Host.

ID	Short Description
	Sort Playlists in Archive by date; previously sorted by unread at the top
	Make Download to Excel from the archive a permission
	Make Data Manager access a permission
	When opening multiple archive items, some items render blank
	Fix issues with KPIs and Expressions
	Ensure stuck report jobs are cancelled
	Sheet per value filters should take precedence
	KPIs based off multiple factsets do not work
	KPIs based off multiple expressions do not work
	AccountString (GP and SL) concept does not work in reporting
	Long Customer names do not render in Settings >> Administration

# Reporting

## New Features and Enhancements

The following are key feature enhancements found in this version of Private Host.

- Address Auto Execution of Reports
- Static Execution Mode for Reports
- Improve Report Player Loading Time
- Click and Drag selection for Report Parameters

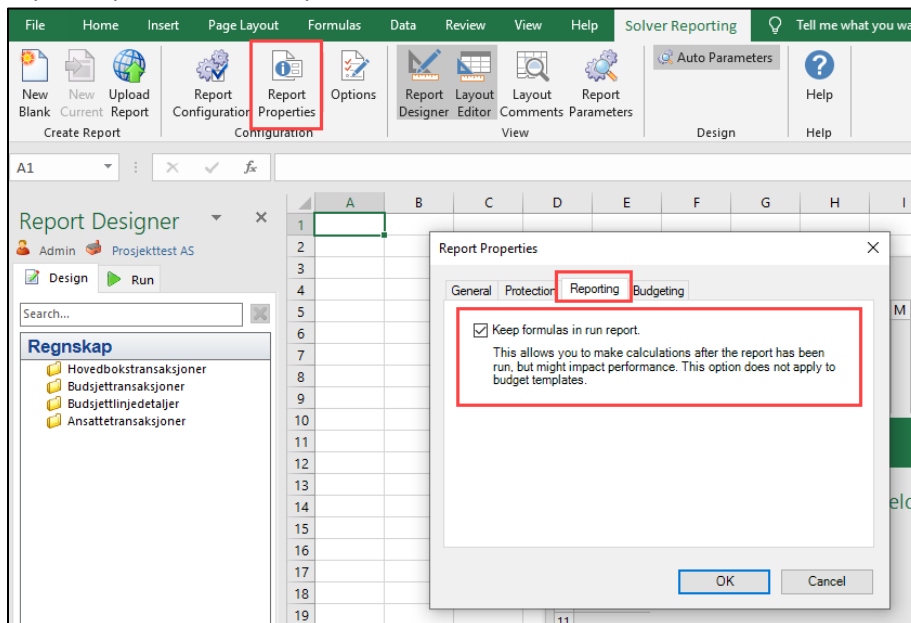
Details on the above features can be found below.

### 1. Auto Execution of Reports

This version address an issue that some Private Host customers have faced where reports auto execute in Designer and/or in their web browser.

### 2. Static Execution mode for reports.

This version of Private Host, requires installation of the new Report Designer, introduces a concept of static reports for performance improvements within the web application. If this option is disabled, reports will not maintain their formulas in the web and the value rendered will be the result of the formula. By removing this calculation, on larger reports, users can expect a performance improvement.



Found within the Report Designer excel addin > Report Properties > Reporting tab, check this option to keep the formulas in the web. Some key notes about this features.

- For upgrading customers, this setting will be enabled.
  - For new reports after upgrade, this setting will be disabled.
  - This is a Live Reporting feature only and does not impact budget template.
- ### 3. Improved Report Player loading time
- This version introduces code refactoring which improves loading of reports into Report Player.



4. Allow click and drag for parameter value selection in Live Reporting  
Users can now click and drag to select parameters in the web. Previously this was unavailable.

### Additional Bug Fixes and Enhancements

The following lists all bug fixes found in this version of Private Host.

ID	Short Description
	Old report name appears in application toast messages
	Certain report designs can lead to extra query results, optimize where needed.
	Sort playlists in Archive by date

This section has been left blank intentionally

# Budgeting

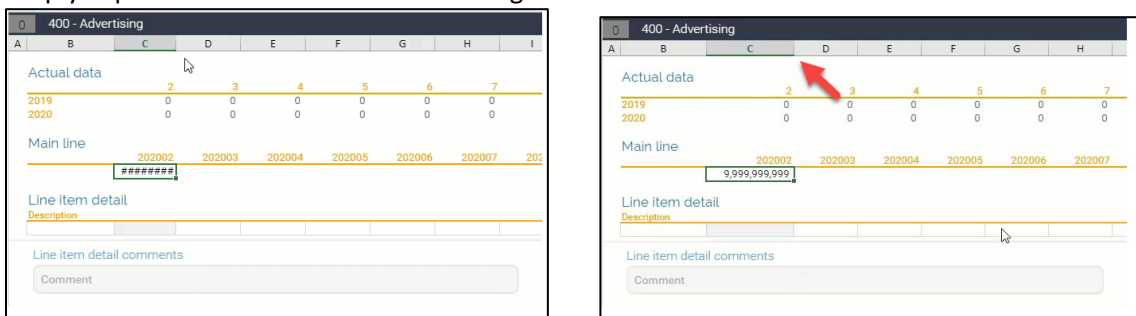
## New Features and Enhancements

The following are key feature enhancements found in this version of Private Host.

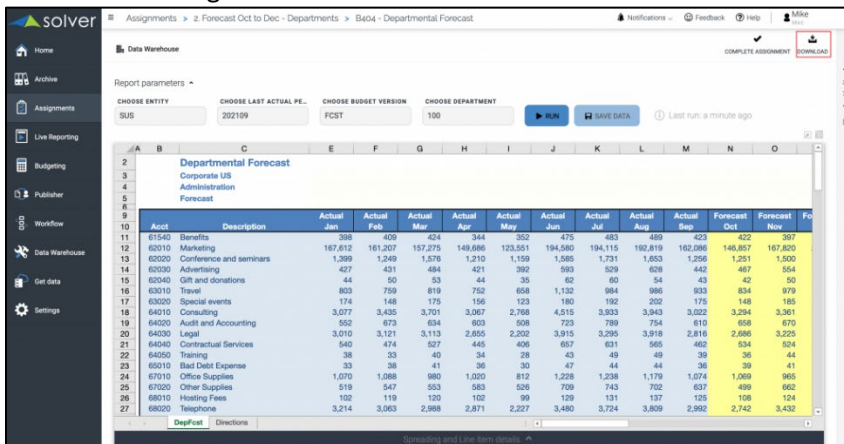
- Line Items Detail Columns Should Expanded
- Download or Reports from the Assignment Menu

Details on the above features can be found below.

- Line items detail (LID) columns can now be expanded, allowing users to view large LID values. Using a similar experience to Excel, if the inputted line item detail numbers are getting cut off, simply expand the column to view the budget number.



- Enable downloading of reports from the Assignment menu  
Users are now able to download static copies of their budget template that has been assigned to them via the Assignments menu.



## Additional Bug Fixes and Enhancements

The following lists all bug fixes found in this version of Private Host.

ID	Short Description
	Resolve LID storage issue – Cannot store “LID_001” error
	Sort assignment alphabetically
	Error when navigating to budget template if previous execution no longer exists
	Budget Storage fails in Sheet Per Value report if non-Code attribute is used for sheet name

# Data Warehouse

## New Features and Enhancements

The following are key feature enhancements found in this version of Private Host.

- Restrict Label changes
- Introduce Dynamic Periods for Jobs
- External API for PowerBI Does not Work
- Lookups Appear Blank

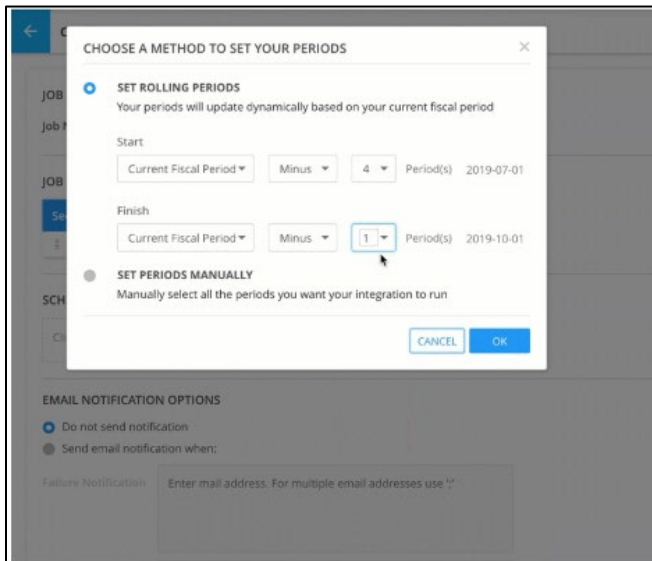
Details on the above mentioned features are found below.

1. Allow Module, Dimension and their associated attribute label changes from the Configuration menu only.

In prior version of Private Host, users were able to change the label on a dimension, module and their associated attributes from the configuration page and from the integration menu. We have removed the ability to change label names from the integration menu to better track label updates.

2. Dynamic Periods for jobs

For organizations using Jobs, this version of private host introduces dynamic periods, allowing a user to select the number of periods back to a set period to run an integration for.



This is very useful for organizations looking to load the last 3 months of data, as an example. In prior versions of Private Host, users were required to hard code the periods for a job, but with dynamic periods, users can state to run an integration for a predefined number of periods back.

3. External API does not work in certain use cases

In some cases, Private Host clients using the external API to PowerBI were unable to get Private Host to connect to PowerBI. We have handled this use case in code and have corrected it. No changes are required by the customer to get this to work once they have upgraded to this version.

4. Lookup textboxes do not render some and/or all codes  
Depending on the Windows updates applied to the Private Host infrastructure, lookups within the Data Warehouse menu rendered an incomplete list and/or an empty list. The temporary workaround at the time was to search for the code to be used. We have corrected this issue so that the lookups display a complete list of results.

### Additional Bug Fixes

The following lists all bug fixes found in this version of Private Host.

ID	Short Description
PDWM-1745	Scheduled Job time corrected to local time
PDWM-1995	Event log corrected to local time
PDWM-1784	Job scheduled run less than UTC offset won't run
PDWM-2273	Preview source table shows blank
PDWM-2158	Jobs parameter selection shows blank
PDWM-2075	Added tenant name to job email notification
PDWM-2346	Limit FK index to 30 dimensions to ensure it is always created
PDWM-2341	FK index not recreated upon module schema change
PDWM-2272	Data Explorer lookups renders blank
PDWM-2273	Source Table lookup renders blank
PDWM-2250	Email templates show UTC time instead of users local time
PDWM-2234	Introduce Dynamic Periods for Jobs
PDWM-2235	Allow label changes from the Configuration menu only

# Publisher

## New Features and Enhancements

The following are key feature enhancements found in this version of Private Host.

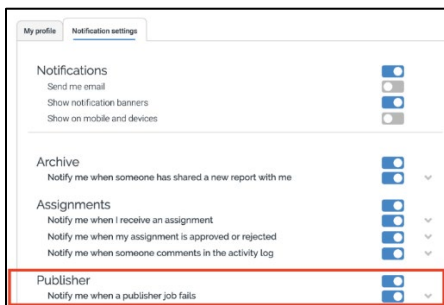
Expanded Publisher Notifications

Ability to Overwrite existing publisher report in Archive

Details on the above mentioned features are found below.

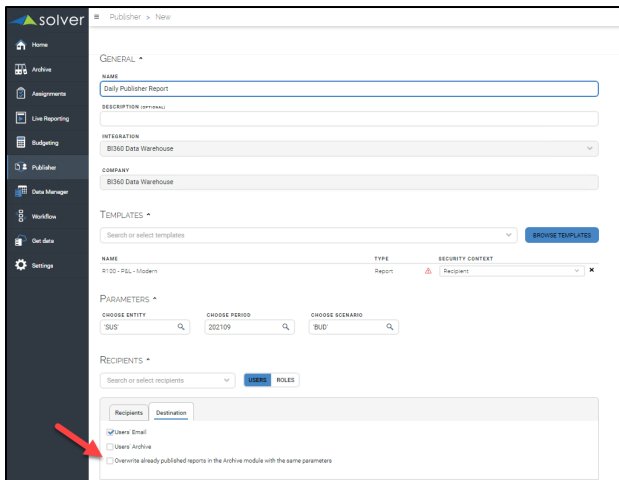
### 1. Expanded Publisher Notifications

Found within the users profile menu, users can select to be notified if a Publisher job fails. Users will receive this as a notification in the app should a publisher job fail.



### 2. Ability to overwrite existing Publisher reports

This version of the Portal introduces the ability to overwrite an existing Publisher subscription in the archive based off the identical parameters for an existing subscription to the subscription just ran. This can reduce the number of items in your archive preventing important reports from getting lost amongst other reports being distributed to your archive. When enabling this feature, only the last execution of the report will be overwritten. All prior Publisher subscriptions will remain in the archive history.



To enable this feature, simply click the checkbox as part of your Publisher subscription.

## Additional Bug Fixes and Enhancements

There are no other enhancements or bug fixes found for Publisher in this version of Private Host.

## Additional Resources

### Solver Support

The Solver Support Center ([support.solverglobal.com](https://support.solverglobal.com)) is the central location for users to learn more about the Solver 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 Solver Suite. One of our technical support consultants will gladly assist you.

Users can access the Solver Knowledgebase for more information about the entire Solver 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 Academy

The Solver Academy is an eLearning subscription based learning platform for Solver users to access. Users can find detailed video material on many Solver Suite features along with training material and certifications. To begin, visit [academy.solvertraining.com](https://academy.solvertraining.com).