



Solver Private Host – Release Notes v5.2.30708

A Solver User Guide

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Overview

This user guide will detail new features, enhancements and bug fixes found in this version of Solver Private Host, v 5.2.30708. This user guide documents all changes to the application since the previous version of Private Host (5.2.30319) 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. Should you have further questions on a feature documented, please contact Solver Support (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 of 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) from assistance.

System Requirements, Installations and Upgrades

Please reference the Solver Private Host Installation Guide before installing or upgrading to this version of Private Host. The upgrade involves database changes to the below list of Solver Databases and backups of these databases (names may be different for your implementation) must be taken prior to performing the upgrade.

- Solver_Repository
- SolverDW

Solver Support and/or your partner can assist in these installation tasks. Please reach out to Solver (support.solverglobal.com) or your partner for more information.

Upgrade Considerations

Upon upgrade, the following will happen.

1. Deprecation of the .csv connector:

With this version of Private Host, the new File Import connector is available for use.



This connector supports both Excel and csv files. The file import connector is Solver's new connector for importing data from a file and all future development will be done to this connector.

While already configured csv files will continue to work with this connector, it is **strongly recommended** to build all future file import integrations using the File Import connector; enhancements and bug fixes will only be applied to this connector.

2. Implementation of Data Warehouse Permissions

All Data Warehouse users will be **unable** to do the following actions until they have been granted Permissions to do so.

- a. Update Dimensions and modules,
- b. Run integrations and jobs and
- c. Create Modules and dimension

This can be done via the Settings >> Administration screen or Solver has provided a script (found in the Private Host download) that will allow you to make these changes, effectively giving users and/or roles the same permissions they had prior to upgrade.

Should you choose to run the script, you must provide where the permissions should be *enableFor*:

- a. Users only: this will give the necessary DW permissions at the user level for all users or each tenant. This will not give DW permissions to roles.
- b. Roles only: this will give the necessary DW permissions to all roles for each tenant. This will not give DW permissions to users who are not assigned to a role.
- c. Both: this will give DW permission to all users and roles, roles taking precedence. This means that if a user has security applied at the User and the role level, the DW permissions will be applied to the user's role permissions and not at their User level permission.

```
Set XACT_ABORT ON
BEGIN TRANSACTION

DECLARE @enableFor varchar(1000)
SET @enableFor =
--'Users Only'
--'Roles Only'
'Both'

if @enableFor = 'Users Only'
Begin
Merge [dbo].[Permissions] t
```

3. This version of Private Host is a compilation of many features found in the Solver Cloud application. The following features are found in Solver Cloud currently but are not available in this version of Private Host:
 - a. Hyperlink support

Should you have any questions on a feature mentioned, please contact Solver Support (support.solverglobal.com).

This section has been left blank intentionally

Portal Settings and A

Administration

New Features

1. Data Warehouse Permissions

Please see the [Data Warehouse](#) section for more information on this feature

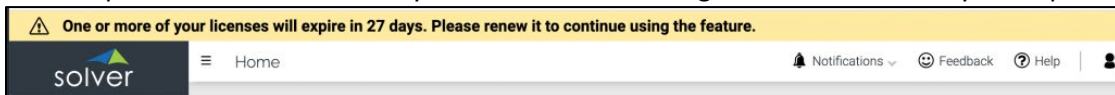
2. Authentication Policies for User Logins

This version of Private Host introduces authentication policies for users logging in using Portal Authentication. While existing passwords will work, new user registration in the portal and password resets will adhere to the following:

- If you are using the internal user authentication, users will now be temporarily locked out after five failed login attempts. The lockout will be removed after a 30 minute waiting period. However, requesting a password reset from the login page can restore access without waiting.
- Password requirements have been updated. Solver follows the [National Institute of Standards and Technology \(NIST\)](#) guidelines. And specifically, the guidelines outlined in [NIST Special Publication 800-63B](#).
- The minimum password length is 8 characters and may not be similar to a database of common passwords.

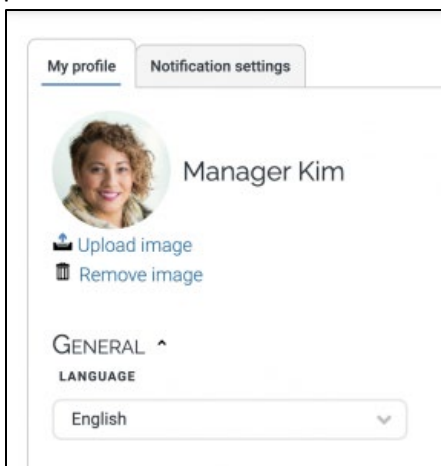
3. Notification of License expiration

Customer and Tenant administrators will now see a new warning banner when your license is set to expire within the next 60 days. The banner will change to red within 14 days of expiration.



4. User Profile Pictures

In this version of Private Host, users can upload a user profile picture from their user control panel.



5. Expanded Help menu product information.

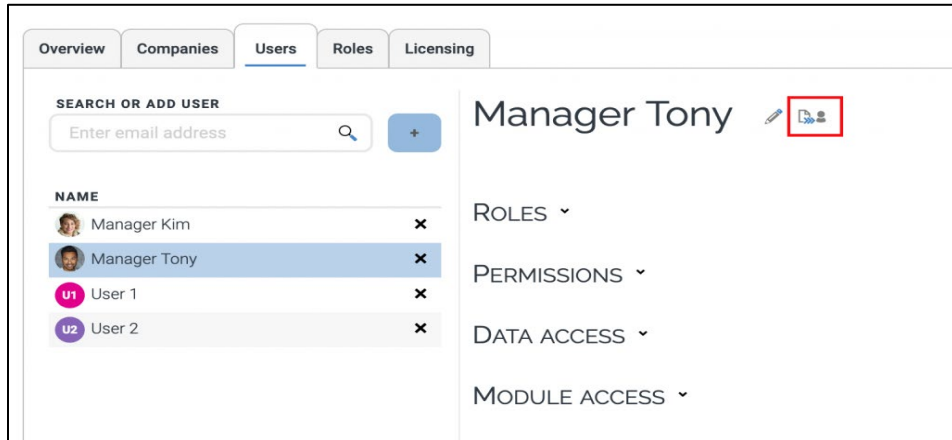
We have worked to expand and update the product information from the Help button located in the upper right-hand corner

6. Change Ownership:

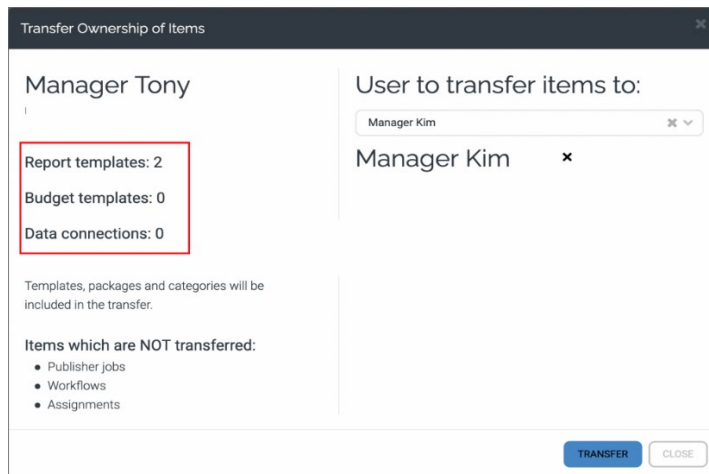
This version of Private Host introduces the ability to change the owner of reports, budget templates, report packages and categories within your Private Host install. This feature is available to anyone who has “can manage users and licensing” permissions.

To change the ownership of reports

- a. From the Settings >> Administration screen, select the user who currently owns reports.
- b. By the user’s name there will be the option to change owner.



- c. Upon clicking this option, a detailed list of the reports, budget templates and categories that this user created appears. Select the user that you wish to reassign these items to and click **Transfer**.



7. New license assignment model

This version of Private Host introduces the following license changes

- **Budgeting menu:** Live Reporting users can now have direct access to the Budgeting menu via the license configuration page. The Budgeting menu was previously reserved for Designer users and Assignments were used for user data entry. With this new option, an organization can decide whether users should enter budgets, forecasts, and other data from the Assignments menu and/or if users should directly access the templates from the Budgeting menu. The license count has been removed for the

Budgeting license. Please note that you must enable a Live Reporting license to enable the Budgeting license.

- **Publisher recipients:** Solver now offers an unlimited number of Publisher recipients. Recipients must be configured as a user and applicable data access privileges can be configured. Every user within Solver can receive a Publisher email containing reports configured for that Publisher job.
- **Workflow:** Similar to the Budgeting menu, when a Live Reporting user has Budgeting enabled on the license screen, the user will now also have access to configure the Workflows from the Workflow menu.
- The *Assignments* and *Publisher Recipients* license are no longer found on the license page. All Live Reporting users continue to have access to Assignments when the Budgeting feature is purchased. All users are automatically included as Publisher Recipients.

Below is a matrix of the new license model.

	Power User	End User -Live Reporting / Budgeting	End User - Archive
Report Designer	X		
Live Reporting	X	X	
Archive	X	X	X
Publisher	X		
Budgeting Module			
Budgeting	X	X	
Assignments	X	X	
Workflow			
Workflow	X	X	

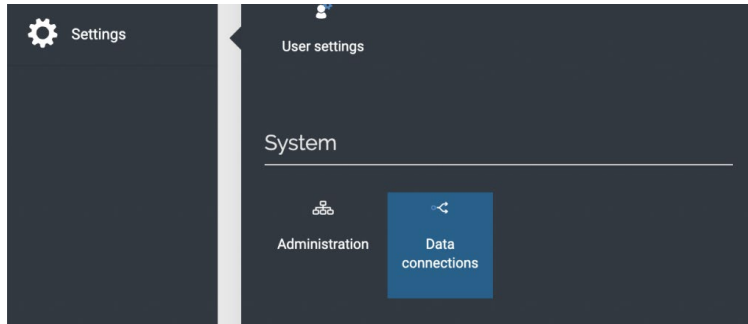
Below is a screenshot of the new license assignment screen.

ARCHIVE (0 / 0)	BUDGETING	DATA WAREHOUSE (2 / 20)	LIVE REPORTING (1 / 10)	REPORT DESIGNER (1 / 10)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enhancements

1. **Move Get Data to Settings menu**

As an improved user experience and to reduce potential confusion, since setting up data connections is considered a “Setting”, the Get Data menu option has been moved and renamed to “Data Connections”, found in the Settings menu.



2. **Add support for German throughout the application.**

From within your User Profile, users are now able to select German as an option.

Bug Fixes

There are no bug fixes related to Administration found in this version of Private Host

Data Warehouse and Connectors

New Features

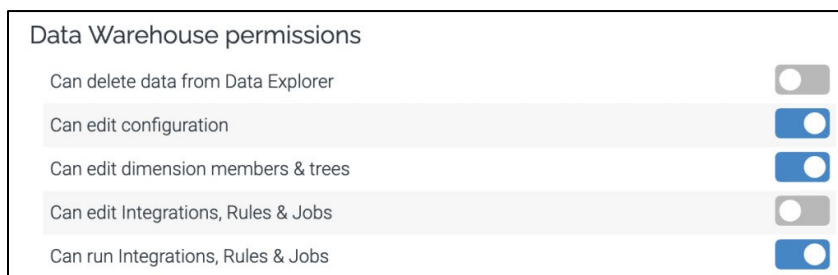
1. Data Warehouse Permissions

This version of Private Host introduces Data Warehouse permissions to control user actions within the Data Warehouse application

Note: data access security is not inherited in the Data Warehouse.

The following permissions are available for the Administrator to assign.

- **Can delete transactions:** Enable this permission to give users the ability to delete transactions from Data Explorer.
- **Can edit configuration:** Enable this permission to give users the ability to add/modify/delete modules, dimensions, and attributes as well as modify module schema.
- **Can edit dimension members & trees:** Enable this permission to give users the ability to edit (add/modify/delete) dimension members and related trees. This includes the Currency dimension and related currency menu.
- **Can edit integrations, rules & jobs:** Enable this permission to give users the ability to edit (add/modify/delete) data integrations, rules, and jobs.
- **Can run integrations, rules & jobs:** Enable this permission to give users the ability to execute (run) data integrations, rules, and jobs manually.



2. File Import (excel) connector

We have added support for Excel (xls,xlsx) and Macro enabled files (XLSM)



The new file connector is also available through the Gateway client. To access the new connector, you will need to download and install the latest version of Gateway from the marketplace.

3. New Period Wizard

This version of Private Host introduces a new period wizard designed to be simpler to use, yet more flexible to accommodate the complexities that can occur with fiscal calendars. The new wizard still supports both fiscal and standard calendars, but also adds in expanded support for “one off” fiscal years that were more difficult to configure in the previous menu.

Period	Fiscal Period	Fiscal Label	Calendar Start Date	Calendar End Date
1	202001	January	01/01/2020	01/31/2020
2	202002	February	02/01/2020	02/29/2020
3	202003	March	03/01/2020	03/31/2020
4	202004	April	04/01/2020	04/30/2020
5	202005	May	05/01/2020	05/31/2020
6	202006	June	06/01/2020	06/30/2020
7	202007	July	07/01/2020	07/31/2020
8	202008	August	08/01/2020	08/31/2020
9	202009	September	09/01/2020	09/30/2020
10	202010	October	10/01/2020	10/31/2020
11	202011	November	11/01/2020	11/30/2020
12	202012	December	12/01/2020	12/31/2020

Further details of this feature can be found on the support site.

Enhancements

1. Ensure Upsert operates properly for dimension tasks

The *Upserts* option for Integration >> dimension task was not operating properly and could lead to longer than expected dimension loads. The underlying operation has now been updated to do the following to dimensions codes being provided by the source data set.

- Update existing
- Insert new

2. Improve error messages on integration failure

This version of Private Host introduces improved error messages for some of the most common integration issues to help users self-troubleshoot.

3. Support copy+paste work on dimension list view

In this version of private host, users can copy + paste a change from an above cell in the dimension list view to other dimension codes. This is useful when performing such actions as bulk account category updates.

Bug Fixes

The following issues have been addressed in this version of Private Host.

- Period dimension list does not pick up user’s regional setting.
- Period generation calculates FYQuarter and Quarter label wrong.
- Dimension lookups in Data Explorer are not sorted by Code.
- PowerBI External API can reach max threshold with certain data sets.
- Integration and Job status indicator stops showing when leaving page and returning.

- Reordering Integration tasks does not work.
- Data Explorer "< >" does not operate properly.
- Emails entered with a carriage returns (new line) in Job Scheduler result in user not getting job notification.
- Improve loading speeds when user has a large number of dimension codes.
- Edits to filtered dimension lists do not work.
- Exports from Data Explorer should inherit and filters applied.
- Exports of large data sets from data explorer could result in error.
- Ensure CSV imports support all special characters.
- Jobs do not display the correct next run date/time.
- Total in data explorer can be shifted.

Live Reporting, Budgeting and Report Designer

New Features

1. **Integration Customization Tool**

Available within the Private Host download, users can download and install the Integration Customization tool

Enhancements

1. Make Report Rendering service utilized 64bit processing when available.

Bug Fixes

- Storage can fail when LIDs and Force Store are used.
 - o In addition to an application update, this requires an integration update from Settings >> Administration
- Merge cells across columns do not display correctly.
- Replace cut values with ###: Values longer than column width cut off the number. This fix sets the entire value to #### to match how it appears in Excel.
- Percentages appear differently between Excel and Portal. This fix will ensure the percentage format matches between Excel and Portal.
- The number format in Excel appears different in the Portal.
- The calculation may differ from Excel to the portal if the value contains a decimal separator.
- Traffic lights too big when having cells with a smaller font.
- Accounting format issue in Portal where trailing zeroes after the decimal pointer is removed.
- The Portal is stripping 0's from input cells.

Known Issues

- Center across columns is not supported in the web at this time.

Report Publisher

New Features

There are no new Publisher features found in this version of Private Host.

Enhancements

1. Ensure Publisher service utilize 64bit processing when available.

Bug Fixes

There are no bug fixes for publisher addressed in this version

Additional Information

Solver Support Center

The Solver Support Center (support.solverglobal.com) is the centralized 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.