



## **BI360 – Release Notes**

User Guide 4.6

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[support.solverusa.com](http://support.solverusa.com)

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## Introduction

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The following is a list of all new features, enhancements and bug fixes found in the BI360 Suite. The release notes are divided into two sections, one for Reporting and one for Planning and Data Warehouse Manager, but also contains information related to other modules of the BI360 Suite.

Please read the Release Notes to be introduced to many of the new features and enhancements found in this version of the software.

### Who Should Read this Manual



All users of the BI360 Suite should read over this manual to become acquainted with all of the new features in this version of the software.

### What Is Included in this Manual

This manual is designed to introduce many of the new features found in each component of the BI360 Suite. Further, the user guides for each component, found on the Solver Support site, go into greater detail about how to use the features discussed in this manual.

### 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 proceeding with installing or upgrading the software. These two user guides are available on the Solver Support site.

### Obtaining the Software

The software can be found at <http://support.solverusa.com/>. Once logged into the Solver Support site, select **Downloads** from the site header. Under Current Versions, click **Install Documentation** for the product being installed. Users will find a link to the BI360 Installation Guide.

## 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 to Data Warehouse Manager 3.x, they 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.**

### 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 4.5.



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*.



Minority interests and elimination scripts have not been finalized for the BI360 Data Warehouse version 4.0. Solver Support will make an announcement once these scripts have been finalized.

## 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.

## BI360 Reporting

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In BI360 Reporting Service Pack 1, there are no new features.

### Fixed issues and minor enhancements

The following reported issues have been fixed from previous BI360 versions. The table below describes the issue in short. If you need more information about one or more of these items, please contact Solver Support.

ID	Short Description
	Portal: Share link error
	Budget: Check storage properties update not sticking before going to Run mode.
	Bug: First time listing of Optional fields in RD Budget tab, does not show all items.
	Italian translation
	Bug: Budget: Forward references in the instance after expansion
	Data Manager: GridData datatypes. Handle everything as strings (and nulls)
	Data Manager: Link to TreeDimension
	Designer: Entity Tree NameValueLevelItem Error
	Budget: Fetch additional reference data from a (hidden) range
	Designer: Sheet per value fails on attributes of type text
	Budget: Reference Data - problems with ALL and filter on measure
	Budget: Support absolute references in cell (\$)
	DatePicker doesn't work using Safari browser on Mac
	Budget: range and ExcellItemBounds bug
	Portal: player mode modifications (direct navigation)
	Portal: minor navigation change
	Portal: support for URL params that lead directly to category
	Portal: LID and text input in cells
	Budget: GP Web Budget writeback with Force Stored limits
	Portal: Bring back Excel headers in Portal (ticket 3219).
	Portal: Storage allowed on nonexistent scenario
	Meta: Default Display Name is no longer used if Dictionary term is empty
	Admin: write to HKCU in Registry
	Installer: Make Admin Tool optional application to install
	Portal: Grey text on grey background in parameter combobox
	Portal: black screen and XML corruption, Safari on Mac OS X 10.10
	Solved indirectly by other card: Budget: Needs a way of defining conditional storage
	Budget: detect changed cells (or marked as 'StoreAlways')
	Budget - Bug: After 'unsaved value' dialog the wrong instance get refreshed
	NAV2013 - GetDimensionSetID
	Publisher does not work with Date Parameter

## BI360 Planning & Data Warehouse Manager

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The following section will detail the features and enhancements found BI360 Planning and Data Warehouse Manager. This section will be divided into three sections:

- Section 1 details Planning new features and enhancements.
- Section 2 details Data Warehouse Manager new features and enhancements.

Additionally, at the end each section is a list of all bug fixes per application.

### Upgrade Information

Please note that for this upgrade there have been major changes to the database structure. These changes will require the following to be done:



**If the organization is upgrading Data Warehouse Manager and are on version 3.x, they must upgrade to Data Warehouse 4.0 before upgrading to this 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.**



**Please ensure the BI360 database is backed up before upgrading the database.**



# BI360 Planning

The following will detail of some of the features and enhancements found in Planning 4.6. All features described in this section are detailed in the BI360 Planning 4.6 User Guide.

## Deprecated Features

1. Ability to store to GL\_Detail module from Planning

### No longer able to store to GL\_Detail

In version 4.6, we have removed the ability to store to the GL\_Detail module. It was determined that budgeting is not done at this level and the option to store to this module has been removed when created Planning Settings.

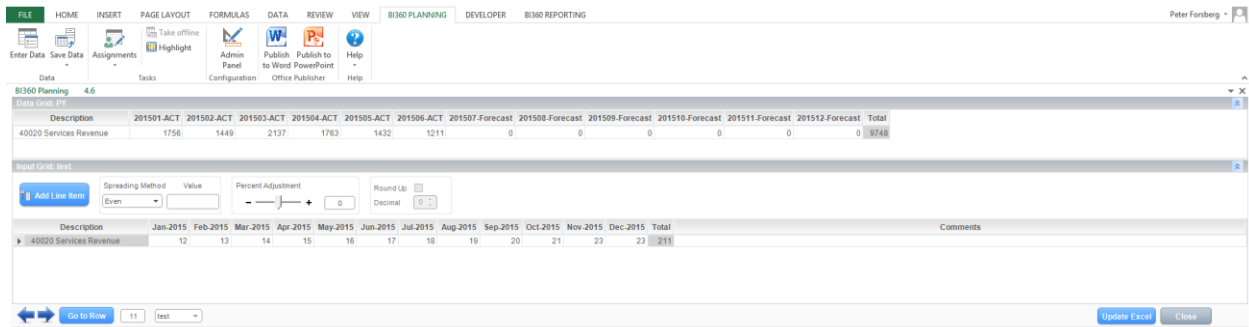
## Features and Enhancements

1. Ability to set Planning window font size.
2. Improved error messages throughout application for easier self-troubleshooting.

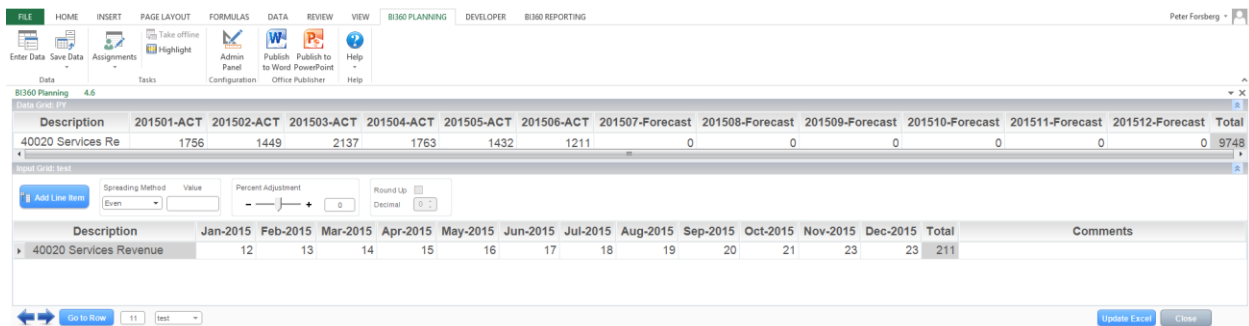
### Ability to set Planning window font size

In BI360 4.6, users can now set the Planning window font size, allowing them to increase the font size if the application's default font size is too small. The option to change the font size is located in the Help menu in the *Planning* Ribbon.

Default font size (12):



Font size increased to 18.



## Improved Error Messages throughout the Application

Planning 4.6 adds even more error handling to help our customers troubleshoot error messages on their own. Some errors we have removed from the application while others we have trapped for and display user friendly messages to help you troubleshoot without contacting support.

## Additional Bug Fixes and Enhancements

The following table provides a short description of all new features, bug fixes and enhancements found in this version of the software. For additional information on a particular features, please contact Solver Support ([support@solverusa.com](mailto:support@solverusa.com)).

ID	Short Description
SIM-634	Increasing size of Enter Data Window Text
SIM-645	LID Comment doesn't expand for really long comments
SIM-649	Remove the ability to store to GL_Detail
SIM-652	Planning Assignments Always closing a file
SIM-654	ignore syntax not working for #N/A excel formulas
SIM-659	Apostrophe in Folder Location Name causes Error
SIM-661	Assignment Wizard unable to open while file is open
SIM-663	Convert ASCII characters to standard text
SIM-664	Assignment Data restrictions
SIM-665	Planning storage hard coded to 255 characters
SIM-666	Cannot edit an existing assignment
SIM-662	Enter Data Window font size small based on screen resolution

## BI360 Data Warehouse Manager

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The following will detail some of the features found in this version of Data Warehouse Manager. All features described in this section are detailed in the BI360 Data Warehouse Manager User Guide.

### Features and Enhancements

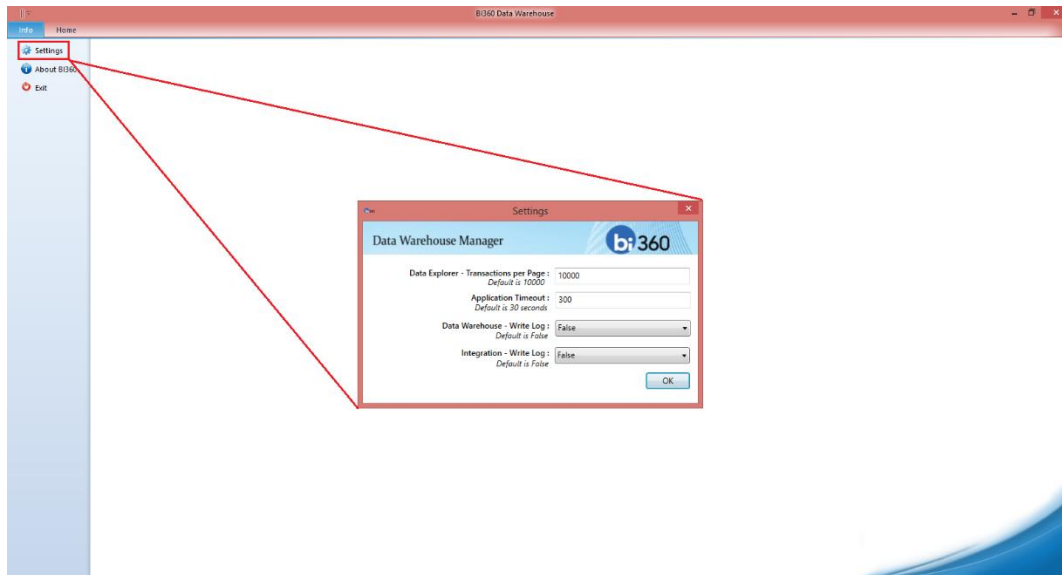
1. Front end interface for application settings.
2. Code refactoring during data export for speed improvement.

### Front End Interface for Application Settings

Data Warehouse Manager 4.6 has a front end interface allowing the user to control many settings of the application including:

1. Application Timeout
2. Number of transactions per page in data explorer
3. Enable/Disable logging.

This menu can be found in the Info menu in the upper left hand corner of Data Warehouse Manager.



### Code Refactoring During Export of Data in Data Explorer

We have improved the speed while exporting data in data explorer by processing the data handling on the SQL side rather than on the application side. Users should notice a significant improvement especially when filters have been applied to the data and on larger data export sets.

## Additional Bug Fixes and Enhancements

The following table provides a short description of all new features, bug fixes and enhancements found in this version of the software. For additional information on a particular ID, please contact Solver Support ([support@solverusa.com](mailto:support@solverusa.com)).

ID	Short Description
SODSUI-499	Add expand all feature to data explorer to easily find LIDs
SODSUI-617	Export Data Stored Proc error
SODSUI-633	Zero is stored as NULL
SODSUI-654	Data gets lost in Export
SODSUI-660	small numbers are getting convert to scientific notation
SODSUI-620	Disable the ability to add attributes to the elimination dimensions
SODSUI-623	Make front end interface for setting Transaction number
SODSUI-626	Ability to turn on and off integration logging
SODSUI-632	Improve speed while adding timeperiod for customers with a lot of currency setup
SODSUI-643	Sort Dimension by label, not field
SODSUI-644	increase transaction count for paging
SODSUI-648	UX Experience while adding codes
SODSUI-656	DWM Connection String Needs to pull in user connection security
SODSUI-631	Uploading import file with 20+ custom dimensions; speed improvement

# BI360 Portal

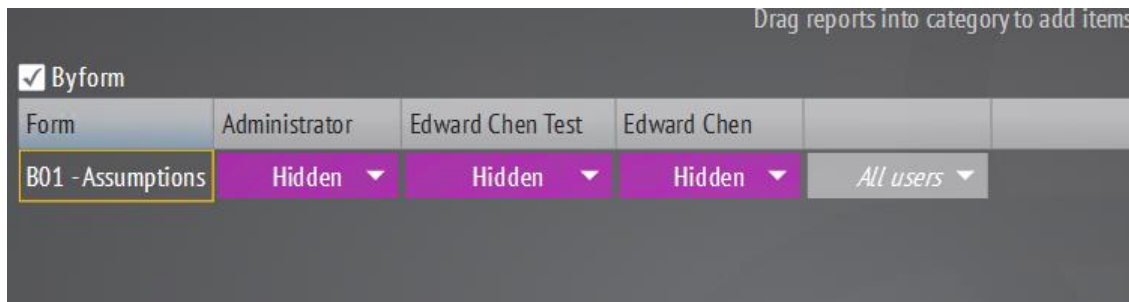
## Features and Enhancements

The BI360 Portal introduces the following new features and enhancements.

1. Workflow within the Portal.
2. Ability to search within the dimension lookup.

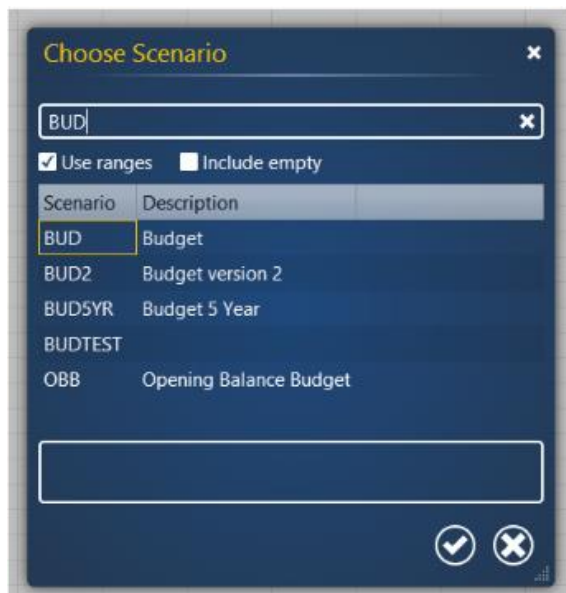
### Workflow with the Portal

Portal 4.6 introduces workflow within the web interface allowing the admin user to setup an assignment, defining the start and end dates, and allowing the end user to submit their assignment. The Admin user can then come in and close the assignment or reopen it. This is all controlled from the Library Administration menu.



### Ability to search the dimension lookup

Portal 4.6 introduces the ability to type in the dimension the users wishes to lookup instead of scrolling through the list. Upon clicking the lookup, users will see a text box where they can type in the code.



## Additional Bug Fixes and Enhancement

ID	Description
672	upload to original category
675	voucher viewer link error handling
676	interactive search and validation in parameter lookup
687	Voucher viewer printing enabled
694	drill to "document attachment" documents in GP
700	budgeting: period should be a mandatory field
701	Budgeting: writeback to BI360 LID table
704	Budgeting: Text/Comment should not be part of the key when storing
1044	Category information when uploading/updating report
1747	Storing error after report upload
1749	Direct links to Portal Categories
1750	Portal sidebar resizing
1751	Portal default view option
1752	Portal user search
1766	Portal navigating to category in Library Administration
2203	Dynamics SL Budgeting

## BI360 Installer

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### Features and Enhancements

1. Support for Windows 10 and Internet Information Services (IIS) 11.
2. Support for Excel 2016

### Additional Bug Fixes and Enhancements

ID	Short Description
BIINSTALL-141	Upgrade is not case sensitive
BIINSTALL-142	Update Tree_Structure tables to use Int
BIINSTALL-146	Support for Office 2016

## Additional Information

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### Solver Support Center

The Solver Support Center ([support.solverusa.com](http://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 have everything a user will need to get started with the application.

### Solver Forum

The Solver Forum ([solverusa.com/forum](http://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.

### Solver Feedback

Solver invites customers to participate in providing feature requests for future versions of BI360 on a site just for user feedback, [feedback.solverusa.com](http://feedback.solverusa.com). On the Solver Feedback site, users may suggest features for updates and upgrades to BI360 – and/or vote on existing feature submissions from fellow customers to really push for feature(s) that would make BI360 even more powerful, dynamic, and intuitive.