BI360 Private Host
Release Notes 5.2

Contents

Overview

This document details new features, enhancements and bug fixes that can be found in this version of BI360 Private Host, referred to as BI360 Private Host 5.2. Included is a high-level introduction to new features that have been added, brief details on enhancements on currently available features and a detailed list of all bugs that have been addressed in this version.

For questions about a specific item in this document, please contact support@solverglobal.com.

Intended Audience

This documented is intended to be read by all BI360 users looking to upgrade from a currently installed version of BI360 Private Host. It is especially important that users who are leads of the BI360 project at the organization, familiarize themselves with the information found in this document.

Upgrade Notes

For organizations that wish to upgrade on their own, please read the installation guide prior to doing the upgrade. Additionally, please see the Required Changes section for details on specific steps that must be performed during or after the installation is complete.

Solver Support offers assisted upgrade assistance at a billable rate.

Obtain the Software

The download of BI360 Private Host may be found on the support site, support.solverglobal.com. To access the download, a valid registration must be completed and the organization must be current on maintenance. The installer is available, once logged in, by clicking **Downloads** option in the site header.

If the download is unavailable, please contact support@solverglobal.com.

Obtain License Keys

An organization's license key is available on the support site, support.solverglobal.com. To access the organization's license key, a valid login is required. Once logged in, click on **License** on the site header to retrieve the license key.

Required Changes

Integration Package Update Required

Upgrading to this version of BI360 requires an update of the integration package. To do this, after upgrading the application, as an administrator navigate to:

1. Settings -> Administration
2. At the tenant level, click Overview.
3. Click the update option for all integrations
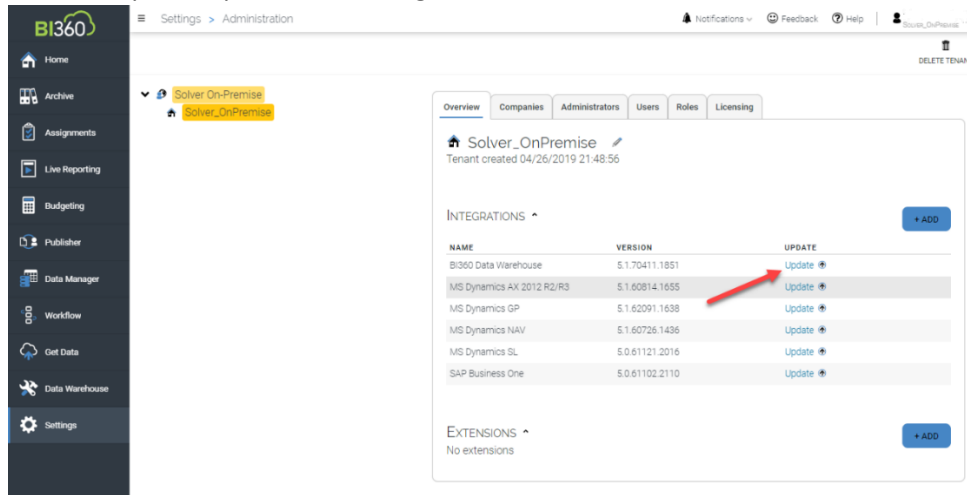
This is required and reports may not run if this is not performed after upgrade.

Service Fabric

Customers must reinstall Service Fabric, pointing Service Fabric to a new database called BI360_Scheduler.

Integrations and jobs will not run if this is not done.

Please reference the installation guide for details on installing BI360 Private Host.

Database Schema Changes

The following database changes are part of this is upgrade. While these changes should not affect external, data load processes please review any data load processes that have been incorporated into the BI360 database, ensuring that they are not dependent on these tables. Integrations built using BI360's Integration feature are not affected by this change.

1. Addition of Depth column, datatype integer, to the Tree_Structure_<dim> tables.

    Sample query:

    ```sql
    IF NOT EXISTS(SELECT COLUMN_NAME FROM INFORMATION_SCHEMA.COLUMNS WHERE TABLE_NAME
    = 'Tree_Structure_Account' and COLUMN_NAME = 'Depth')
    BEGIN
    ALTER TABLE Tree_Structure_Account
    ADD Depth int
    END
    GO
    ```

2. Migrating tables related to BI360 Private Host integration jobs from the BI360DW database to a new database called BI360_Scheduler. The following are tables found in the BI360DW that will be moved to a new database as part of this upgrade.
    a. Job
    b. QRTZ_BLOB_TRIGGERS
    c. QRTZ_CALENDARS
    d. QRTZ_CRON_TRIGGERS
    e. QRTZ_FIRED_TRIGGERS
    f. QRTZ_JOB_DETAILS
    g. QRTZ_LOCKS
    h. QRTZ_PAUSED_TRIGGER_GRPS
    i. QRTZ_SCHEDULER_STATE
    j. QRTZ_SIMPLE_TRIGGERS
    k. QRTZ_SIMPROP_TRIGGERS
    l. QRTZ_TRIGGERS
    m. ScheduleData

These tables are then deleted from the BI360DW database.

Portal

Highlighted in this section are new features, enhancements and bug fixes that are found in the versions. Additionally, at the end of each section is a list of all new features, enhancements and bugs.

New Features and Enhancements

The following are new features and enhancements that can be found in this version.

1. Language support for various countries
2. Expanded notification features
3. Ability to download reports and packages to PDF.
4. Ability to import Extension Files

Language Support for Various Countries

Users will find that in this upgrade, many screens can now be translated to a local language as shown below.
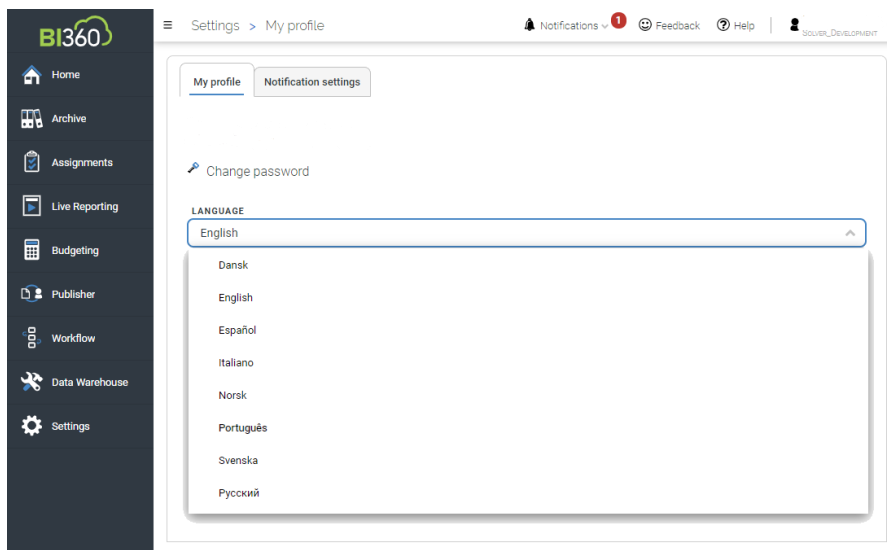
Currently, the supported languages are

- English
- German
- Spanish
- Italian

- Norwegian
- Portuguese
- Swedish
- Russian

We are working to provide more language options in future versions.

Expanded Notification Options

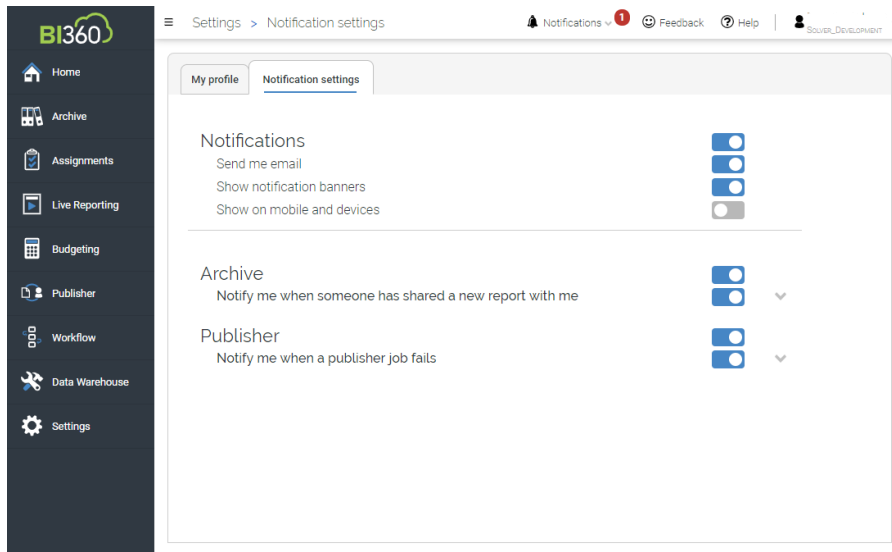Users will find expanded notification options, allowing for better control of what notifications they would like to receive.

Ability to Download Reports and Report Packages to PDF

We have added the ability to download Reports and Report Packages to PDF. To do so, in a report or report package, under the Export to Excel option is a dropdown box, allowing users to export to Excel.
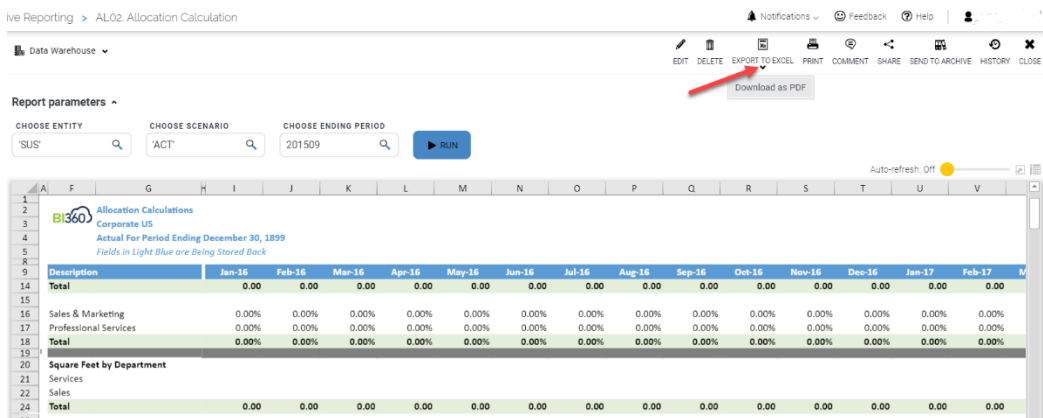
Ability to Import Extension Files

For customers using Extensions in BI360 4x and migrating to BI360 Private Host, they may now export their Extensions from 4x and import them into BI360 Private Host. Once exported from BI360 4x, for users with Administrator permissions, navigate to

1. Settings -> Administrations
2. At the tenant level, click Overview level there is an Extensions option, which allows the user to import the extension.
   a. Only one extension is supported.
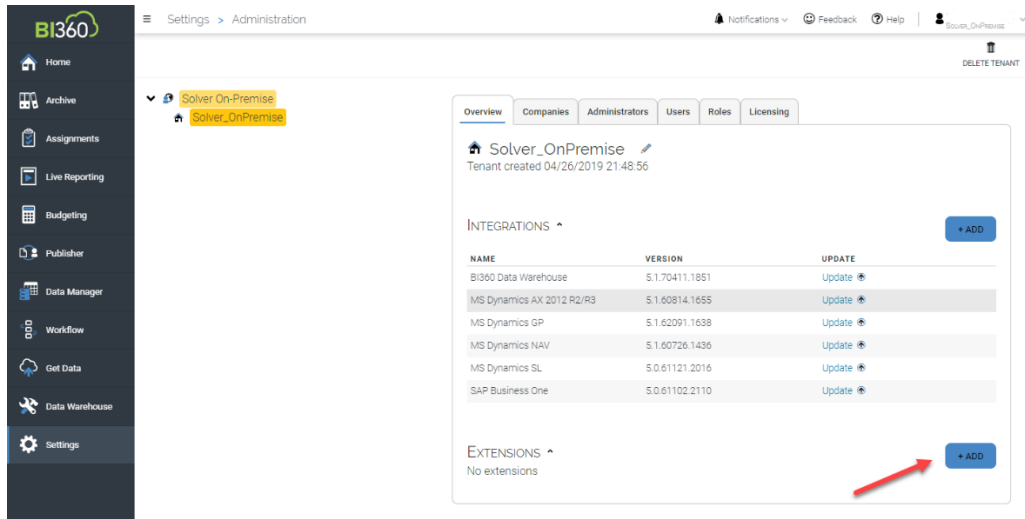
Additional Bug Fixes and Enhancements

The following is a list of all bug fixes and enhancements found in this version. Technical enhancements have been omitted.

1. Performance issues in Firefox
2. Flickering form in Portal when collapsing panels
3. Dimension name not displaying correctly in Access filter dialog
4. Live Reporting license should give access to Assignment if budget license exists
5. In licensing tab the tenant and customer columns should be grouped to the right and a tenant row should not be able to alter the number in tenant column
6. Performance problems with the INDEX Excel formula in Portal
7. Warn customer administrator if he is about to remove himself
8. Support model extensions in on-premise
9. Report Service can crash with stack overflow on period function filters
10. License check when adding companies on-premise is incorrect
11. Create new connection dialog should not be pre-filled with login information
12. String concatenation with cell references issue
13. Settings/Administration: exception when clicking on breadcrumb
14. Download reports and packages as PDF

Reporting

New Features and Enhancements

The following are new features and enhancements found in this version:

1. Report rendering maximum cell count
2. Remove limitation on report filter requirements

Report Rendering Maximum Cell Count

Users can enable report rendering maximum cell count to prevent "rogue" reports from bogging down the Report Rendering Service. It was found that in cases were a user creates a large report, it could use the entire Report Rendering Service and prevent other reports from running. This feature helps organizations ensure that BI360 is always available.

This is a custom setting, please contact Solver Support for assistance

Remove Limitation on Report Filter Requirements

In Private Host 5.0, there was a limitation on the number of filters that could be added to a report. This limitation has been removed.

Additional Bug Fixes and Enhancements

The following is a list of all bug fixes and enhancements found in this version. Technical enhancements have been omitted.

1. Tree Structure fields does not display friendly name in access management.
2. Text in Period lookup causes error
3. Trees should be sorted alphabetically, not by entry date
4. Error when dimension is not associated with a module.
5. Remove the content of a range of cells in a budget template
6. When creating a new report from the portal, after creating it, the focus should be set on it
7. Playlist column width adjustment
8. Allow optional attributes in budgeting mapping
9. Allow dismissing the large green tooltip for when there are new templates
10. Feature request: have an option to minimize the menu on top of input forms
11. AX Virtual Companies
12. Fix LID paste bug
13. Auto-refresh of reports in Live Reporting Player
14. Improve message when password is incorrect
15. Support workbooks with macros in Excel
16. expand ignore syntax feature to support budgeting to unbudgeted accounts
17. Border at the bottom of notification settings is going ABOVE the last row
18. Current user field in meta seems to be pulling in the wrong user
19. Error clicking in Period lookup in Designer

20. GP: segment lookup when storing GLBudgetTransactions
21. If clicking fast on delete-icon in roleUsers in administration, the user is added twice to the autocomplete search source
22. After uploading a report in Live Reporting, user cannot download another report
23. Comments are lost if navigating away without saving
24. Make publishing jobs table expand horizontally
25. UI error on unchecking and checking 'Inherit this parameter' in Workflow AssignmentDefinition dialog
26. Script error when editing a workflow user when there are no parameters
27. Instances in budgetAssignments are added to sidebar before run has returned success
28. Inherited From/To date is not showing in assignmentDefinition
29. Remove digest errors caused by scope apply
30. Drilldown crashes in Report Designer
31. Check that file has correct file type when uploading a file in budget and Live Reporting
32. Multiple row groups fail with 'Index was outside the bounds of the array'
33. Parameter lookup shows wrong values
34. Ignore store always
35. To many rows were read from database when unreleated dimension were used
36. The reset password link is always valid
37. Comparable data range needs measure field
38. Expanding filter menu while running budget breaks lid resize
39. Problem with resize of LID when minimizing report parameters
40. Add information message about objects being deleted when unmarking companies in system connection
41. AddFilter fails in ReportDesigner
42. Publisher – Scheduling to day 7 missing
43. Suppress Open in Excel for packages
44. Double-quotes in Excel formula
45. Dimension trees should be sorted alphabetically

Web Budgeting

New Features and Enhancemets

There are no new features or enhancements to Web Budgeting found in this version. Below is a list of bug fixes.

Additional Bug Fixes and Enhancements

The following is a list of all bug fixes and enhancements found in this version. Technical enhancements have been omitted.

1. Resolve problem with BI360 budget and null values
2. "Based on Excel range" in Budget comparable data does not work
3. Resize bug on budget assignment
4. No scrollbar in budget flow form
5. Creating budget assignment does not refresh parameter values on changing company
6. If StoreAlways is set on a cell without a mapping
7. Copy of cells in Budget does not work in IE
8. Budgeting - Spreading lists weird distribution rules
9. Distribution rules don't appear in spread dialog

Data Warehouse

New Features and Enhancements

The following are new features and enhancements found in this version

1. Support multi-tenant data warehouse configuration.
2. Improve user experience of Currency, Data Explorer, Period Configuration menu
3. Improve user experience of Data Explorer
4. Improve user experience of Period Configuration
5. Cannot modify monthly rates
6. Support all parameter types for rules

Support Multiple Tenants with One Service Fabric Installation

In Private Host 5.0, Service Fabric (SF) could only point to one database per installation. We have made changes to support multiple database <u>per single</u> Private Host installation.

It is required to reinstall Service Fabric as part of the BI360 Private Host 5.2.

Improve User Experience

In order to drive users in the right direction in terms of entering or viewing data properly, users can expected significant, improved functionality of the Currency, Data Explorer and Period Configuration pages to improve the ease of use.

Support All Parameter Types for Rules

We have expanded our parameter support for business rules, allowing for existing rules to work properly in BI360 Private Host along with new rules being created. For full information on creating a business rule, please see the private host user guide.

Additional Bug Fixes and Enhancements

The following is a list of all bug fixes and enhancements found in this version. Technical enhancements have been omitted.

1. Enable Tooltip hover over for Module and Dimension table names.
2. Deleting more than one dimension may cause inconsistent behavior.
3. Sorting the dimension codes caused an error when adding a new dimension code.
4. Alphanumeric sort order on module schema page
5. Ability to create a job without a schedule.
6. Fixed missing parameter description on jobs page
7. Fixed alphanumeric sort order in job tasks dropdown.
8. Parameter lookup on the jobs page now sort alphanumerically.
9. Fixed when creating multiple integrations, field information was cached and used in subsequent integrations.
10. Event type filter does not filter correctly.
11. Default sort has been changed to last run
12. Improved parameter filtering capabilities.
13. Rules should not require a parameter
14. Fixed sum lined did not align correctly.
15. Added pagination to control data flow of large data sets
16. Localization of formats within the DW screens
17. Integrations: Freeze header bar frontend fix
18. Improved error messages when deleting dimensions
19. Minor interface improvements and smaller bug fix
20. Jobs using the wrong format, switched to UTC
21. Quarter labels are not showing the correct quarter
22. Jobs are not using the parameter to limit the query
23. Improved experience entering and deleting rates from the monthly rates table
24. Increase transaction limit for CSV file imports. Tested to 1,000,000 records
25. Add default selection to Task Type
26. Jobs fail when changing schedule from daily to monthly
27. Event Log displays UTC time instead of users local time
28. Event Log displays a default end time before the job has ended
29. Updating a job should not automatically start running the job.
30. Importing monthly currency rates fails to load data
31. Business Rules parameter and filter mismatch causes error running rule
32. Data Explorer amount field should be right aligned
33. Import batching large CSV files for improved performance and stability
34. Period configuration is going back one day for international time-zones
35. Scheduled integration job still runs after deleting the schedule
36. Business rules are not working when multiple selections are made within one parameter

Additional Information

Solver Support Center

The Solver Support Center (support.solverglobal.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.