Updating BizInsight 7

BizNet will occasionally release updates to the BizInsight 7 product. This will require a **migration (7.4 or lower)** or **update (7.5 or higher)** be applied to the BizInsight 7 product. This product is a generic run-time engine that is added into Excel. This means that updates will be made on each client workstation, or a Terminal Services/Citrix Server if implemented that way.

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Notice Screenshots in this document are provided as examples and may not exactly match what you see in your environment or the values displayed in the screenshots may not be appropriate for your implementation. Be sure to read all instructions completely for guidance on what values you may need to enter.

1.1 Migrating From BizInsight 7.4 to 7.5

🔥 IMPORTANT

Migrating requires you to be logged in as the user and the user account must be a local admin on the machine. Running as Administrator does not work.

All cached data will be removed when migrating from 7.4 to 7.5

1. Double-click the installer on the desktop and then click on the **Check for Updates** link:



BizInsight For BizNe	et San	nple Data 3.0.1.0 Connector Installer
		Check For Updates Relevant Informatio
Automatic Install		
Manual Install Stages	\checkmark	BizCloud Accelerator found
Install BizCloud Accelerator	\checkmark	BizNet Sample Data MetaData content found
Deploy MetaData Content	\checkmark	BizNet Sample Data Function content found
Deploy Function Content	\checkmark	BizInsight found
Install BizInsight	\checkmark	BizInsight settings have been configured
Config Tool	\checkmark	BizInsight has been activated
Activate Products	1	Settings have been configured by Config Tool
Exit		

If there isn't a content installer icon on the desktop,

- Start Excel
- Click the BizInsight 7 tab
- Click the Load BizInsight 7 button
- Click on the **Updates** button

FILE	HOME	INSERT P.	AGE LAYOUT	FORMU	JLAS	DAT	A REV	IEW	VIEW DE	EVELOPER	BizInsight 7
Load BizInsight7	P izNet Assistant	Select Query Data Data	Refresh Workbooks	Calculate E Formulas I B	X Design Mode IizInsigh	View Data t	Check for Errors	P (Activate	C Updates)	

2. Click Yes







3. Click OK



4. Click **EXIT** to exit the installer.

	Check For Updates Relevant Information
Automatic Install	Status ✓ Create\Verify Database is completed
Individual Steps	Merge Data is completed
Create\Verify Database	Deploy Functions is completed
Merge Data	Install BizInsight7 is completed
Deploy Functions	
Install BizInsight7	
Activate	
Exit	SLIM CD

1.2 Updating BizInsight 7.5

1. If BizInsight 7 is already installed on the workstation, double-click the installer on the desktop and click on the **Check for Updates** link:



Automatic Install Automatic Install Individual Steps Create\Verify Database Merge Data Deploy Functions Install BizInsight7 Activate	Vet Sample Data 3.0.2.0 Connector Installer Check For Updates Relevant Information Status Create\Verify Database is completed Merge Data is completed Deploy Functions is completed Install BizInsight7 is completed Activation is completed
Exit	SLIM C2

If there isn't a content installer icon on the desktop:

- Start Excel
- Click the **BizInsight 7** tab
- Click the Load then BizInsight 7 button
- Click on the **Updates** button



2. Click **Yes** to the next dialog.



3. You may be prompted to install a supporting application named "FreshBiz". Click Yes.



4. If there are new versions available, the following dialog will open. Click Update.

Connector Updates Available			
Program:	New Version	Update Information:	
Content Installer	3.2.8	No information is currently available.	
BizNet API	1.0.8	No information is currently available.	
BizInsight7	7.3.1	No information is currently available.	
BizNet ERP	2.3.1.0	No information is currently available.	
Update		[Don't Update

5. The updates will be downloaded and installed automatically. Click OK.



6. The Content Installer dialog will open. Click Exit.



1.3 Terminal Services Environment



- Check for Updates or Migration of BizInsight must be performed under each users profile.
- If BizInsight 7 is installed on a Windows Server, Group Policy for Windows Intaller must be Enabled and set to Never in order to migrate or update.
- If user profiles are being deleted when user logs off, BizInsight must re-installed under each users profile at which point they will need to check for updates.