

Release Notes

BizBroadcast
Build 2.1
11/1/13

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1. BizBroadcast - Feature

1.1. Minor Feature

1.1.1. Preserve Formulas in XLSX

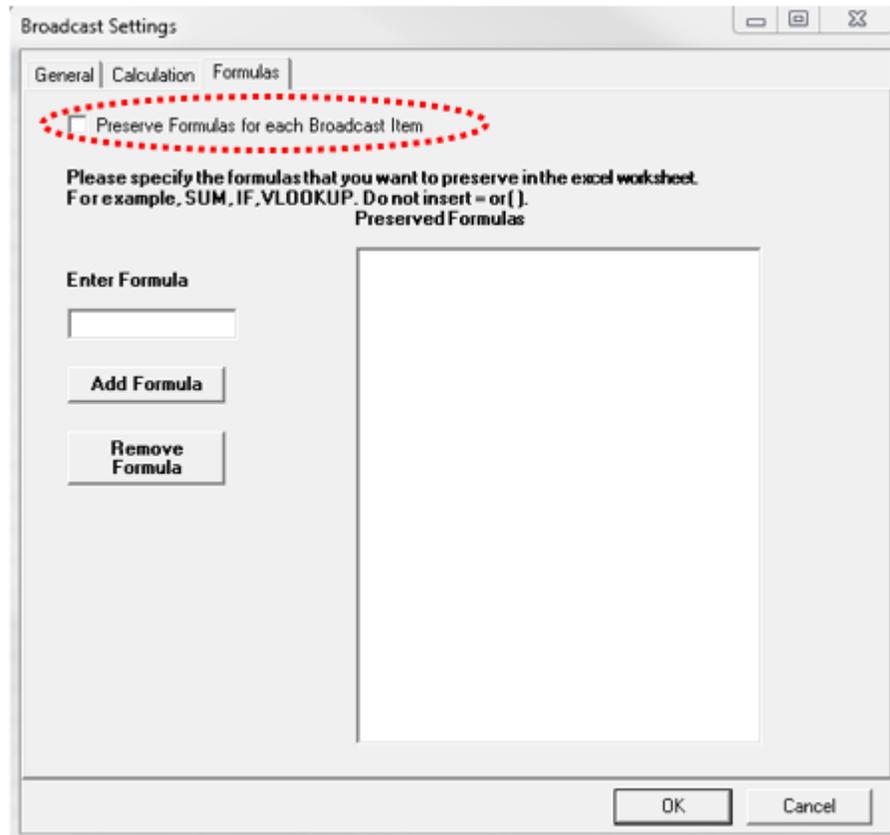
A new capability has been added that provides users a way to preserve non-BizInsight formulas when distributing workbooks rendered to the XLSX render format. Users must specify which formulas are to be preserved in a workbook being distributed. Users can apply this feature to the entire workbook or per worksheet. This feature allows workbooks to be distributed to non-BizInsight recipients while still preserving basic Excel formulas.

A. Workbook Setting:

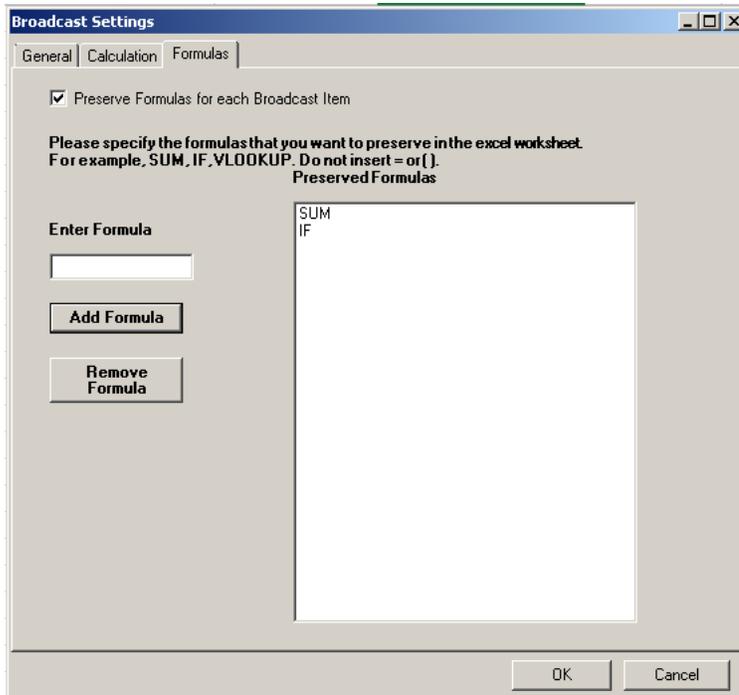
On the BizBroadcast ribbon, select the Application Settings button.



Click on the Formulas tab to access the **Preserve Formulas for each Broadcast item** checkbox.



The user must enter a list of functions to remain as a formula instead of a value during the distribution process. **Both Excel formulas and BizNet formulas can be entered.**



IMPORTANT: If any part of a cell in the worksheet contains this formula, the cell will be preserved including any of the formulas not listed.

EXAMPLE:

=IF (\$A\$1=1000, MTDNET (\$A\$1, \$A\$2, \$A\$3, \$A\$4, \$A\$5), 0)

In this example, the MTDNET formula will be preserved, although it is not specified in the preservation list.

A workaround to remove the MTDNET formula in this example is to reference a cell containing the BizInsight formula in the IF statement.

For example, \$B\$1 in the below example would contain the MTDNET function:

=IF (\$A\$1=1000, \$B\$1, 0)

Additional tips:

*List the most commonly used formulas in the report first for better distribution performance.

Most commonly used Excel functions

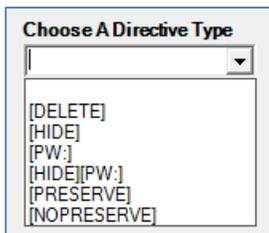
1. SUM
2. COUNT
3. TRIM
4. VLOOKUP
5. IF statements
6. SUMIF, COUNTIF, AVERAGEIF
7. CONCATENATE

B. Worksheet Setting:

With the render format set to XLSX, double-click a cell field in the Selection column to open the new interface.

EmailSubject	Selection	FileName

Select the desired directive:



[PRESERVE] – preserves only the user defined formulas.

[NOPRESERVE] – retains all formulas in the worksheet.

C. Preserve Formulas Matrix

Render Format: XLSX or XLSXVALUES

- Workbook – Application Setting (Preserve Formulas and formulas List).
- Worksheet – in the “Selection” column using the [CONTENT] directive.
- Merge Files – in the Optional Parameter section selecting “MergeFiles”.

BizNet has provided a matrix below to illustrate the various settings and combinations with preserving formulas.

Render Format: XLSX

[CONTENT]

XLSX Selection

	Preserve	No Preserve
Application Setting Preserve Formula Enabled	N/A	Worksheet contains all formulas.
Application Setting Preserve Formula Disabled	Only formulas listed by the user are preserved. All else values.	N/A

[CONTENT]

XLSX Selection

Merge File Parameter

	Preserve	No Preserve	
Application Setting Preserve Formula Enabled	N/A	Worksheet contains all formulas.	All merged workbooks contain all formulas
Application Setting Preserve Formula Disabled	Only formulas listed by the user are preserved. All else values.	N/A	All merged workbooks contain all formulas

Render Format: XLSXVALUES

[CONTENT]

XLSXVALUES Selection

	Preserve	No Preserve
Application Setting	Preserve Formula Enabled	Do Not Use
	Preserve Formula Disabled	Do Not Use

[CONTENT]

XLSXVALUES Selection

Merge File Parameter

	Preserve	No Preserve	
Application Setting	Preserve Formula Enabled	Do Not Use	All merged workbooks contain all values.
	Preserve Formula Disabled	Do Not Use	All merged workbooks contain all values.

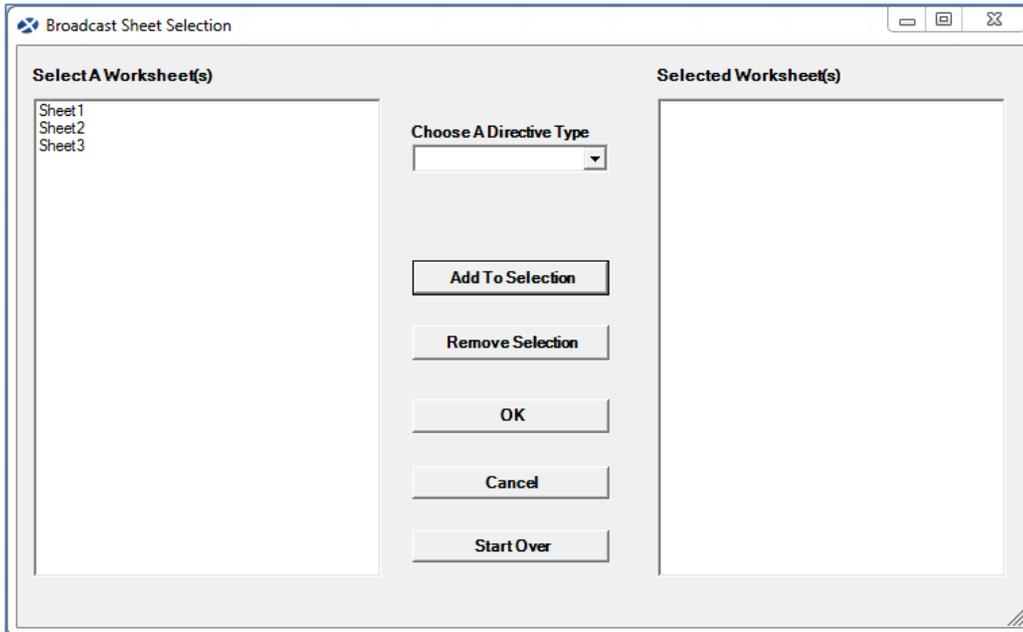
2. BizBroadcast - Enhancement

2.1. Major Enhancement

2.1.1. New Selection Interface

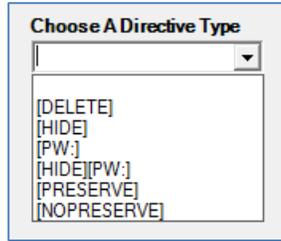
Users can double-click in the Selection column cell to open a dialog that allows easy selection of worksheets to the Selection field.

EmailSubject	Selection	FileName

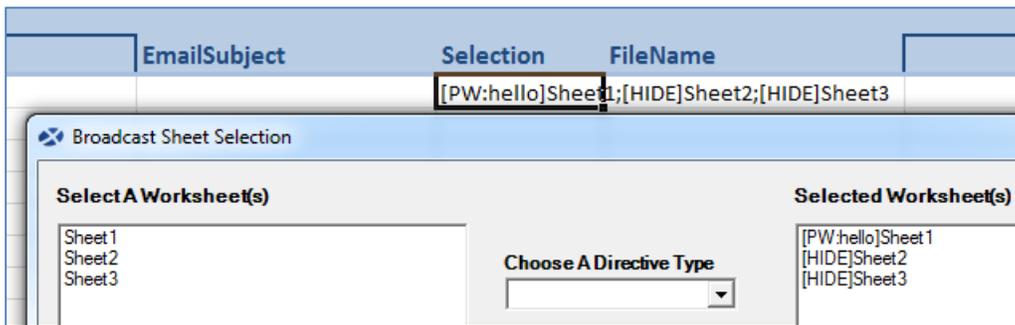


- A. Select a Worksheet(s) – Lists all worksheets contained in the current workbook. To select multiple worksheets:
 - Hold Shift + left-click or hold Shift, then press the down and up buttons to select all worksheets in-between.
 - Hold Ctrl + left-click to select individual worksheets.

- B. Choose a Directive Type – a list of directive statements that can be used in a worksheet. A “blank” selection is to take no action on the worksheet.



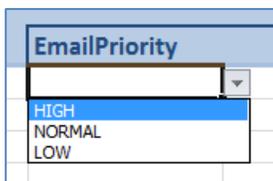
- C. **Add to Selection** – adds the selected worksheets to the Selected Worksheet(s) area.
- D. **Remove Selection** – removes the selected worksheets from the Select Worksheet(s) area.
- E. **OK** – commits the selection.
- F. **Cancel** – exit the Selection interface and does not commit changes.
- G. **Start Over** – resets the entire selection back to the original state.



The Selection interface has read-in capabilities. If you double-click on the Selection cell and there are already values entered, those previous values are preserved in the Selected Worksheet(s) area.

2.1.2. New Email Priority Interface

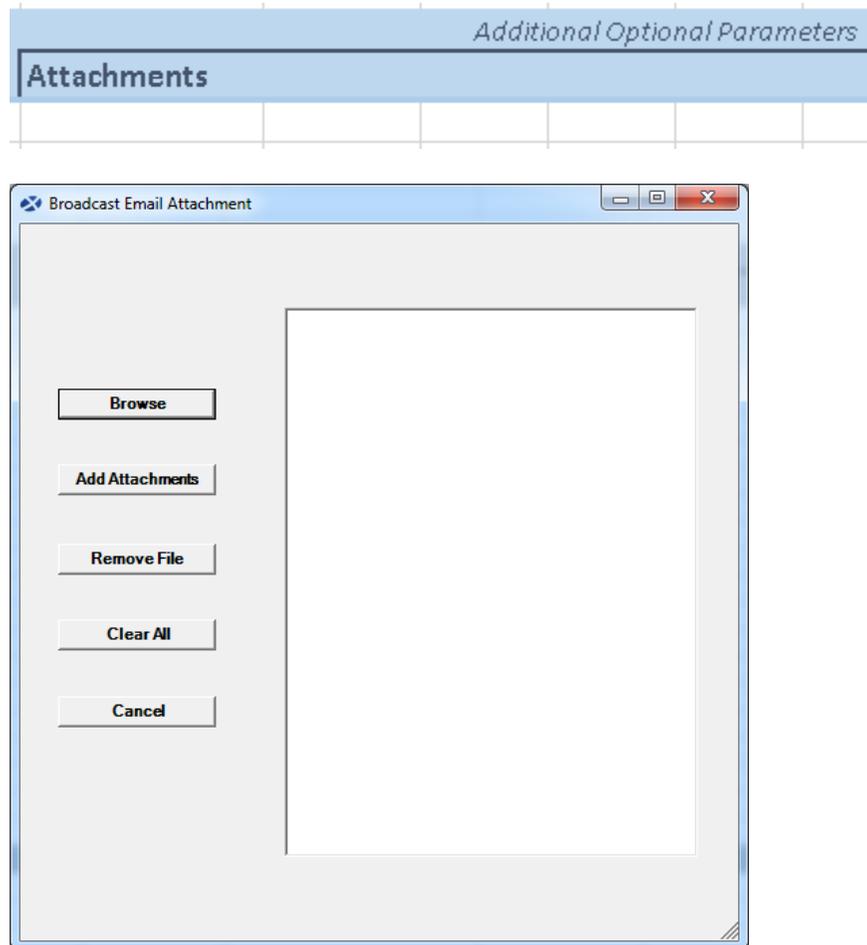
If EmailPriority is selected in the Additional Optional Parameters section, the user can double-click on the distribution row cell to get a drop-down list of email priorities. This option works on Microsoft Outlook and SMTP.



- A. High – high importance email status.
- B. Normal – regular email status.
- C. Low – low importance email status.

2.1.3. New Attachment Interface

If Attachment is selected In the Additional Optional Parameters section, the user can double-click on the distribution row cell to open a dialog to more easily select files to include as attachments.



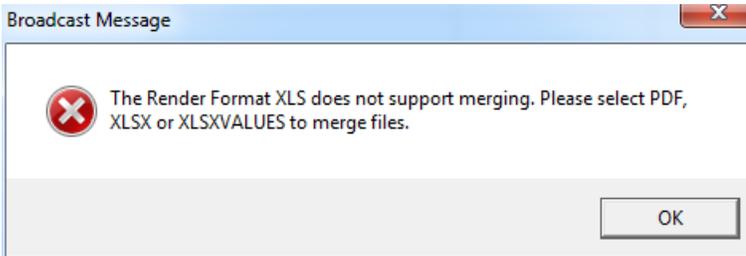
- A. **Browse** – opens a search form to locate files to attach.
- B. **Add Attachments** – commits the attachment(s) and closes the interface.
- C. **Remove File** – removes selected file from the list.
- D. **Clear All** – clears the list.
- E. **Cancel** – exits the Attachment interface and does not commit changes.

2.1.4. New Merge File Interface

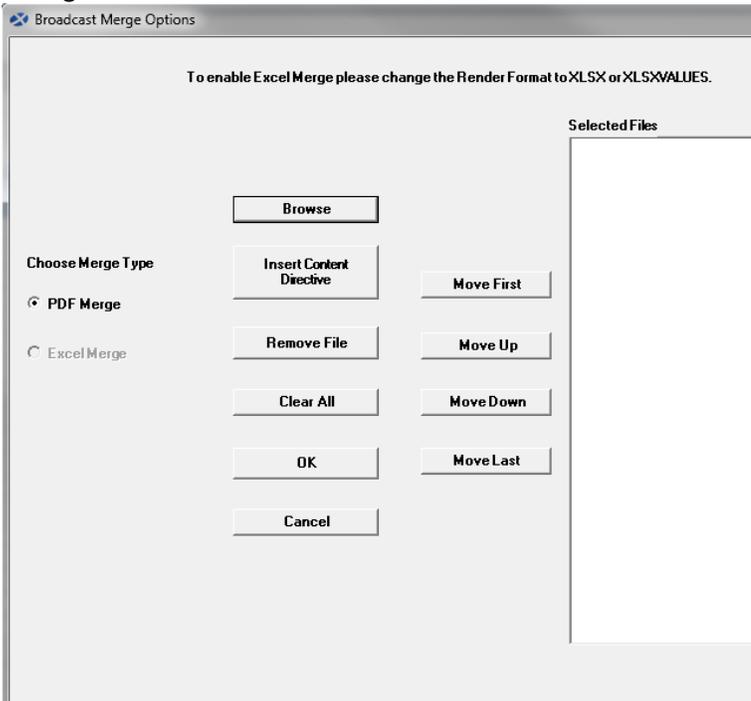
If MergeFile is selected in the Additional Optional Parameters section, a user can double-click on the distribution row cell to open a dialog that will allow them to more easily specify the files to merge and where in that list of merge files, the current content should go. This dialog will only be presented when the render format is PDF, XLSX, or XLSXVALUES. All files being merged must be in the same file format as the render format. The dialog displayed will vary depending on the RenderFormat selected.

Additional Optional Parameters					
MergeFiles					

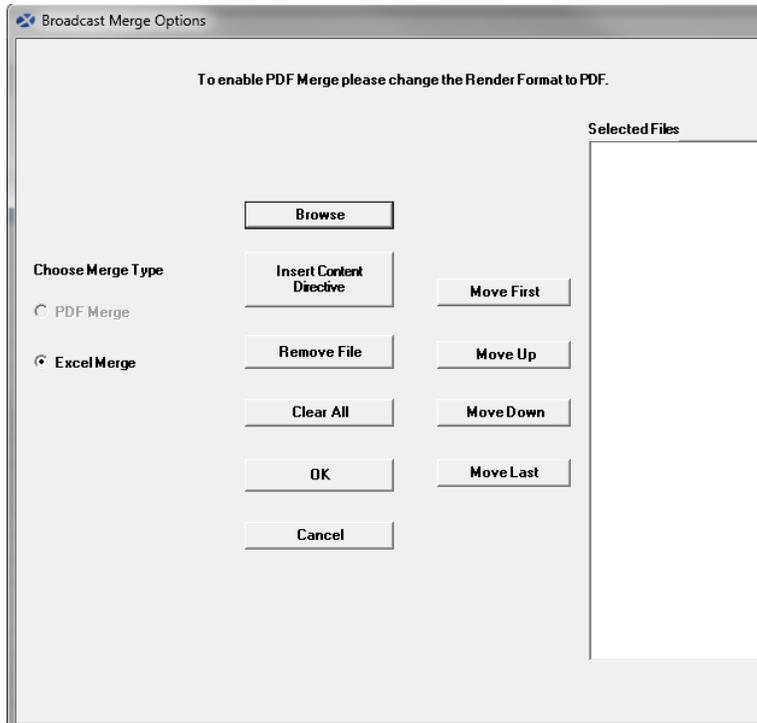
If the render format selected for the distribution row is not one of the supported types, the following message will be displayed to the user:



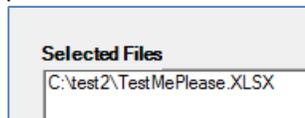
Dialog when the render format is PDF:



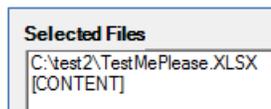
Dialog when the render format is XLSX or XLSXVALUES



- A. **Choose Merge Type** – this option is set by the selected RenderFormat on the distribution row.
- B. **Browse** – opens a search form to locate workbooks or pdf files. The selected file path is placed in the Selected Files section.



- C. **Insert Content Directive** – inserts the content directive that specifies where the value from the BizBroadcast Selection column will be placed in the resulting merge file.

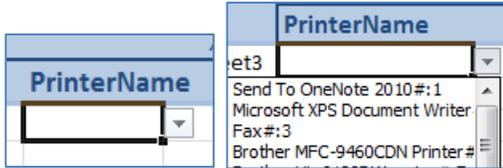


- D. **Remove File** – removes selection from the Selected Files area.
- E. **Clear All** – removes all selections from the Selected Files area.
- F. **OK** – commits the selection.
- G. **Cancel** – exit the Merge File interface and does not commit changes.
- H. **Move First, Up, Down, Last** – change the selected file order of the resulting merge file.

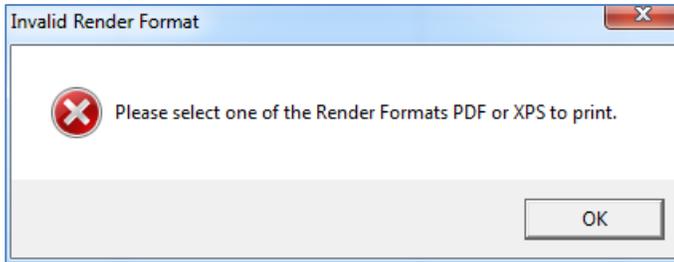
The Merge File interface has read-in capabilities. If the cell is already populated, when the user double-clicks on the cell to re-open the Merge File interface, the previous values are listed in the Selected Files area.

2.1.5. New Printer Name Detects Local Machine Printers

If the PrinterName option is selected in the Additional Optional Parameters section, the user can double-click on the distribution row cell to display a list of installed printers. This parameter will only work with PDF or XPS Render Formats.

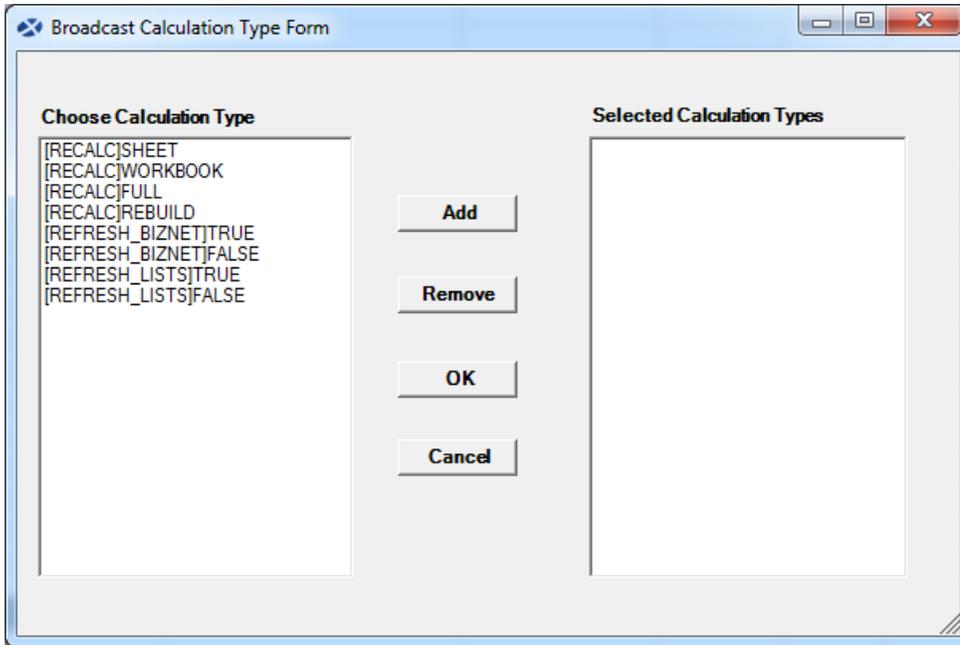


If the Render Format specified for the Distribution Row is not PDF or XPS, the user will receive the following error.



2.1.6. New Calculation Interface

If the Calculation option is selected in the Additional Optional Parameters, the user can double-click on the distribution row cell to open a dialog of the various calculation options that are available.

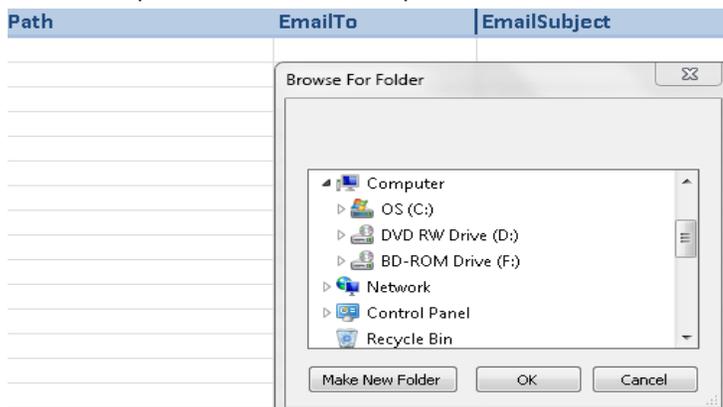


This parameter specifies the distribution item calculation instructions and supports the following directions and directive values:

- A. **[RECALC]** – Sheet, Workbook, Full or Rebuild to specify the level of calculation to perform.
Ex: [RECALC]Full
- B. **[REFRESH_BIZNET]** – True or False to specify whether to refresh BizNet lists within the workbook
Ex: [REFRESH_BIZNET]True
- C. **[REFRESH_LISTS]** – True or False to specify whether to refresh non-BizNet lists connected to external data
Ex: [REFRESH_LISTS]True

2.1.7. New Folder Path Selection

Double-click the cell field under Path to open a new Folder selection dialog. Browse for the folder and press **OK** to select the path or **Cancel** to exit the dialog.

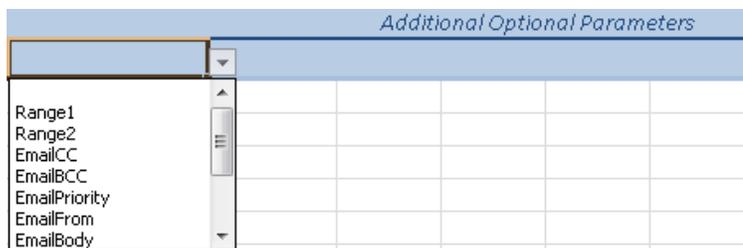


<i>Required</i>	<i>At least one required</i>	
RenderFormat	Path	EmailTo
	C:\BizBroadcast	

2.1.8. New Named Range in Additional Optional Parameters

Double-click any cell in the Additional Optional Parameters to get the Excel Named Ranges in the drop-down list along with the default list options. The following default named ranges are not shown in the drop-down list:

- a. AdditionalParameters
- b. BroadcastList
- c. BroadcastRenderFormatList



3. BizBroadcast - Bugs

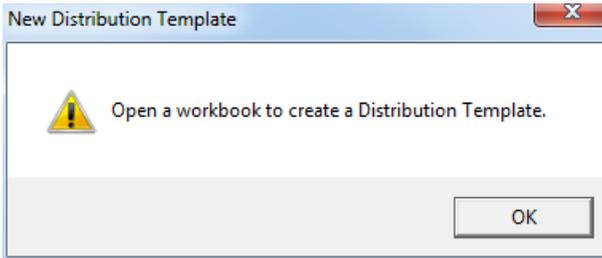
3.1. SMTP option required Microsoft Outlook

BizBroadcast over SMTP required the local machine to install Microsoft Outlook. This issue is now resolved. Microsoft Outlook is not required to be installed on the local machine.



3.2. Blank Workbook with Broadcast

Broadcast requires a workbook to be opened to create a template. If a workbook is not opened, Broadcast notifies the user instead of unhandled exception prompt.

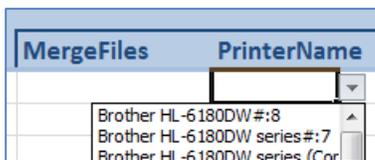


4. BizBroadcast – Known Issues

4.1. Changing Optional Additional Parameters

The distribution template does not sync with the cells in the worksheet if the parameter names are changed.

Before:



After:



Users should insert a new parameter column and recreate the parameter order or start a new distribution template.