Release Notes

BizInsight 5.0.34.2
Build 34.2
May 7, 2013

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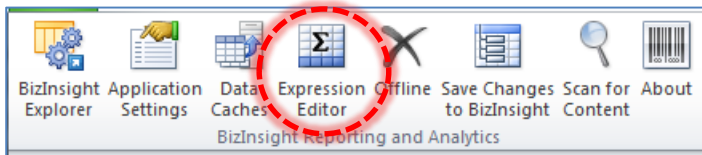BizInsight is a registered trademark of BizNet Software, Inc.
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1.   BizInsight - Feature

1.1.   Major Feature

1.1.1.   Expression Editor

The Expression Editor is a task pane input box in Excel that enables a user to write logical expressions based on fixed values, logical operations, and functions. The basic editor environment is recognized for ease of use expression building that auto complete expressions and error checks. The advanced editor environment provides the more experienced report builder all of the basic editor benefits with additional control over the operators and function types. The application requires BizInsight build 5.0.34.2 or later and supports Office 2003, 2007, 2010, and 2013.

Please refer to the _Guide to Using BizInsight 5.0_ for further details.
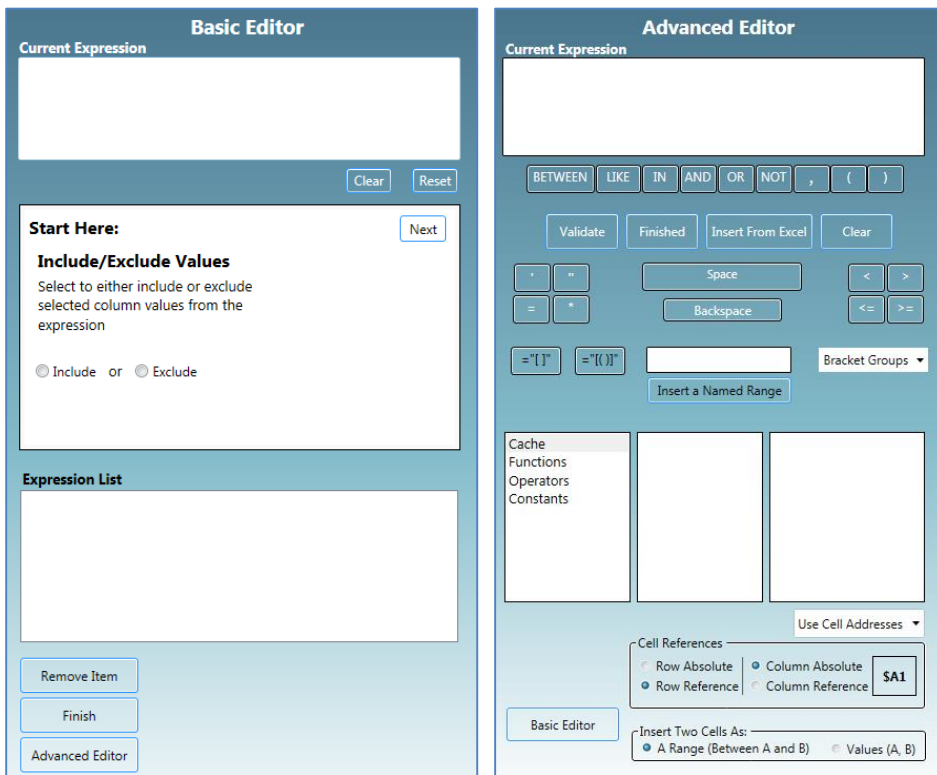
1.1.2. Access to SQL Server

Access to SQL is an internal conversion application for BizNet administrators to migrate BizNet biz files (BizInsight.biz and BizInsight.DB) into SQL Server databases. The application requires BizInsight build 5.0.34.2 or later and SQL Server 2005, 2008, 2008 R2, or 2012. The application resolves issue swith saving PivotLayouts, Account Definitions (BizProperty), and the Optimize Cache 255 character length limitation.

Please refer to the Access to SQL Conversion Tool Instructions included in the AccessToSQL download for further details.
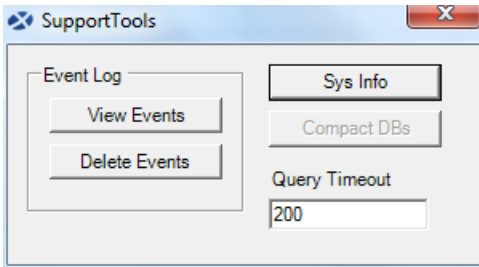
Access to SQL Application
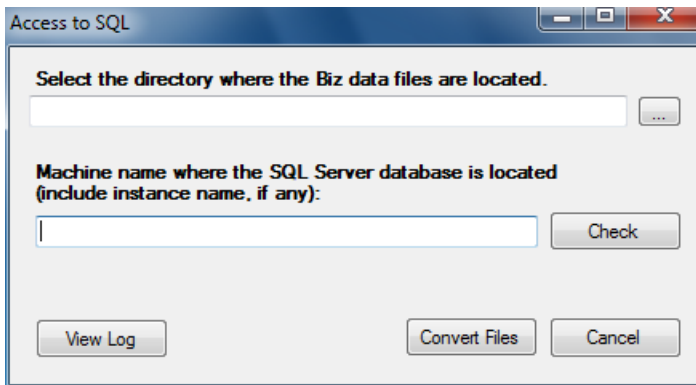
BizInsight Configure MetaData in SQL Server
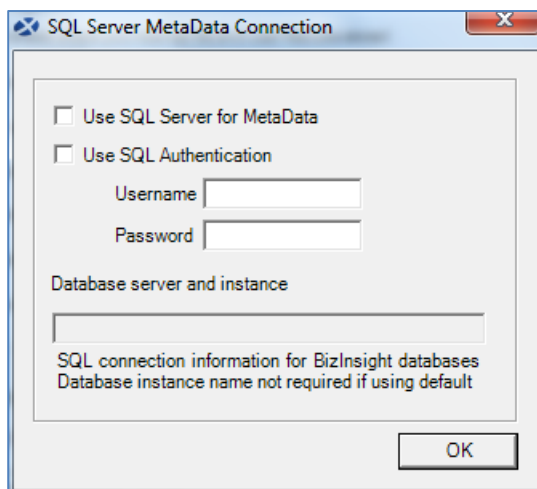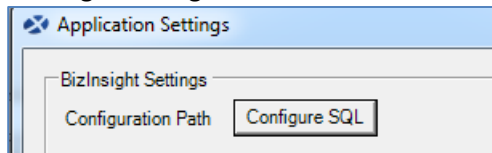
*IP address is saved in the connection string, but does not appear when launching Configure SQL button to review the current settings.

*Compact DBs option is disabled if SQL Metadata support is enabled.

1.1.3. Account Definition Functions

Account Definition is a built-in set of functions, located within BizInsightXL.Foundation, which provides an organization the ability to store a list of values and retrieve the stored value from BizInsight. The new functions are a robust and improved version of the BizProperty functions (SetBizProperty and GetBizProperty).

Set Account Definition
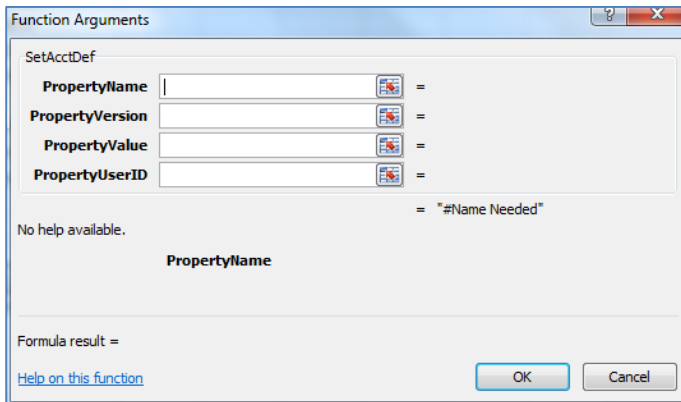
=SetAcctDef()

- PropertyName: provide a name for the value. Ex: Asset
- PropertyVersion: provide a version of the name. Ex: Version1
- PropertyValue: provide a value. Ex: [(Segment1 IN ('1000','1100','1150'))]
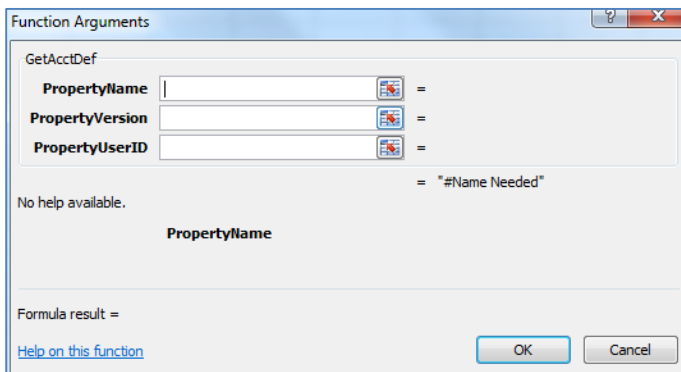- PropertyUserID: reserved for future functionality.

Get Account Definition

=GetAcctDef()

- PropertyName: provide a name for the value. Ex: Asset
- PropertyVersion: provide a version of the name. Ex: Version1
- PropertyUserID: reserved for future functionality.

Please refer to the Guide to Using BizInsight 5.0 for further details.

2. BizInsight – Enhancement

2.1. Major Enhancements

2.1.1. Windows 8, Office 2013 32bit/64bit, and SQL Server 2012 Support
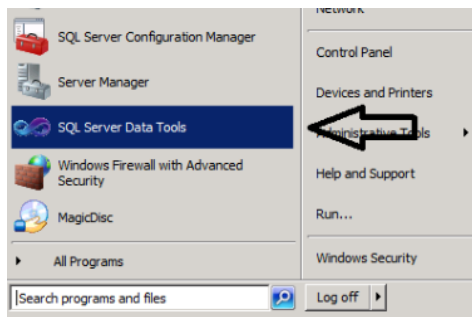
SQL Server Data Tools is embedded in Visual Studio (aka Microsoft BIDS Project)

2.1.2. Additional Support for Other Data Providers

Supports Oracle 10.5 and 11

Development attempted to use a generic OLEDB provider and syntax to replace a lot of parameter binding code with one set; however, additional components are needed for an Oracle connection. If the Oracle .NET Provider is utilized the connection works, but requires tighter constraint on the installation requirements.

In addition to the Oracle Client installation, the ODP.NET will also need to be installed.
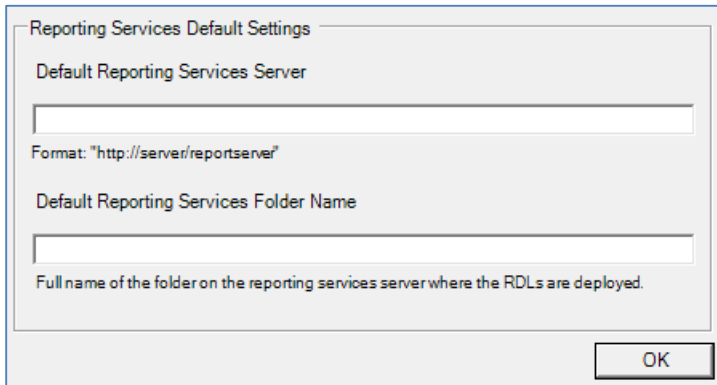
There are two installation methods:

1. Oracle Universal installer requires the correct bitness driver for Office installation, either 64-bit or 32-bit version. Download a separate installation of the Oracle Universal Installer.
2. Oracle Xcopy package (only the loose files) is faster, but harder to implement and great for system admins. ODP.NET installation is required.
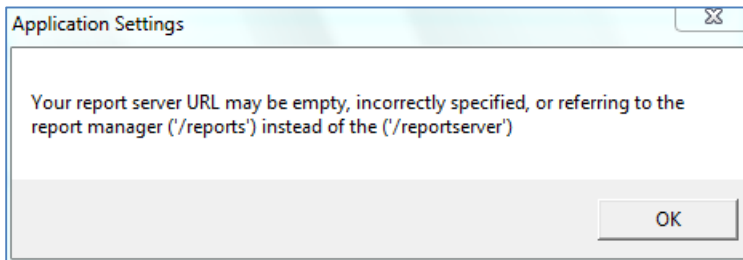
2.2. Minor Enhancements

2.2.1. Application Settings Dialog Support

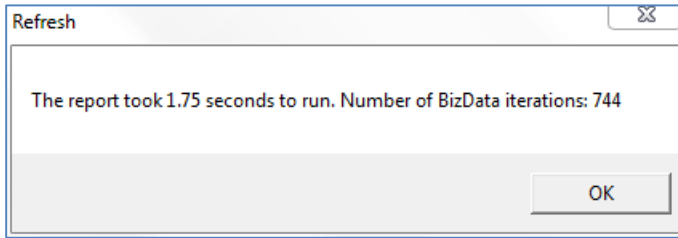Users are provided an error prompt if the Reporting Services path contains syntax issues.

2.2.2. Cancel BizNet Refresh Processing

Successful BizNet Refresh

Unsuccessful BizNet Refresh
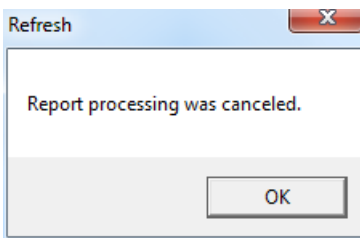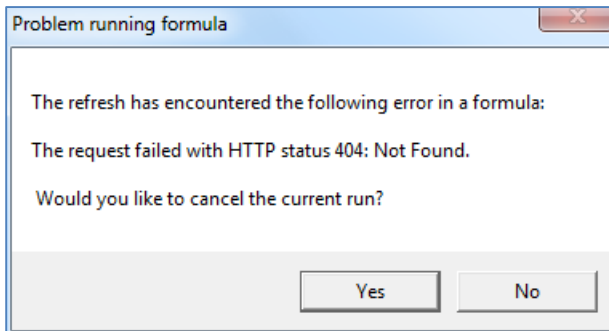
2.2.3. Errors and Events Captured in Event Logs
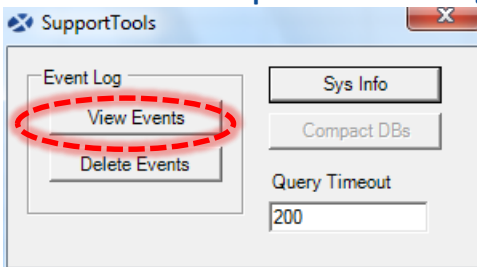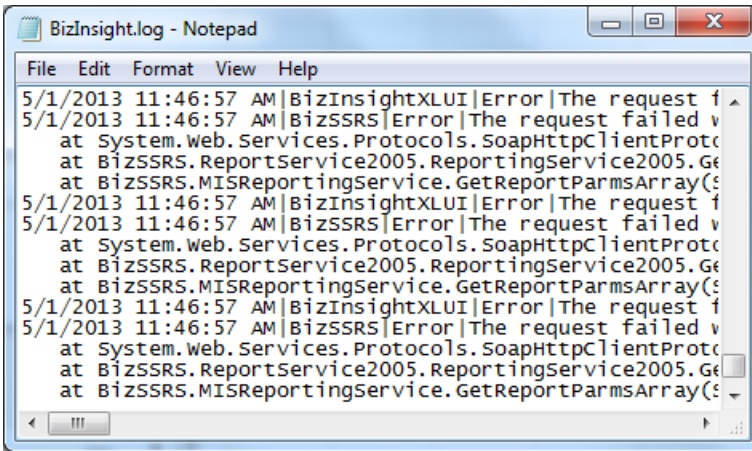
2.2.4. Query Timeout Setting for Support Troubleshooting

Query time-outs are typically a connection CommandTimeout. The CommandTimeout setting is now configurable in BizInsight under XMLFAST options. The default CommandTimeout for XMLFAST is 200 seconds. The default ConnectionTimeout for XMLFAST is 15 seconds.
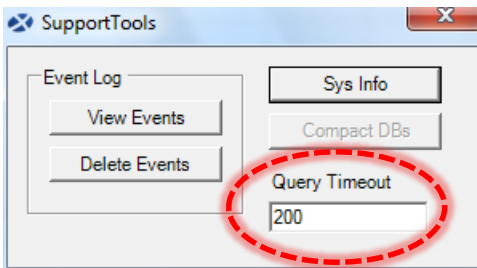
2.2.5. BizInsight Warning Prompt on Excel Close to Save Changes to the Navigation Pane
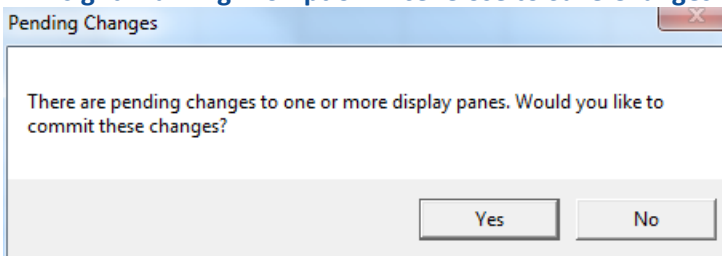
2.2.6. Launch Advanced Expression Editor on Startup
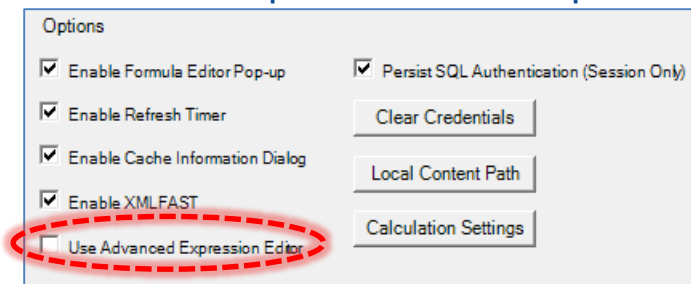
*Check the option and the next Expression Editor startup will be in Advanced Editor mode.

2.2.7. Added Office Bit Version information to SysInfo Support Tool
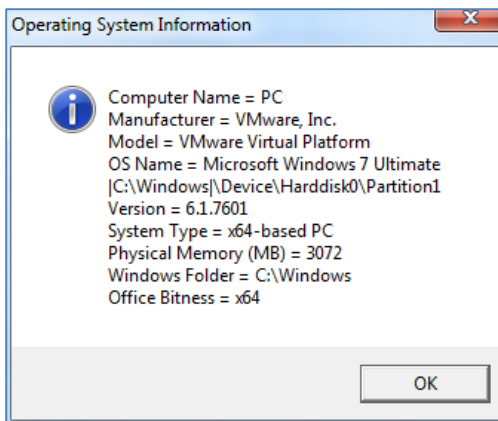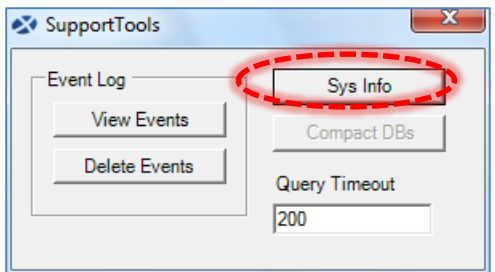
2.2.8. BizInsight Offline Mode is a Toggle Button
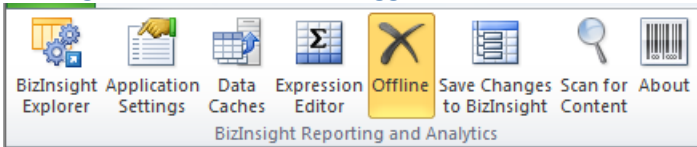
3. BizInsight – Bug

3.1.1. Trial Date and Trial Mode Displays Correctly
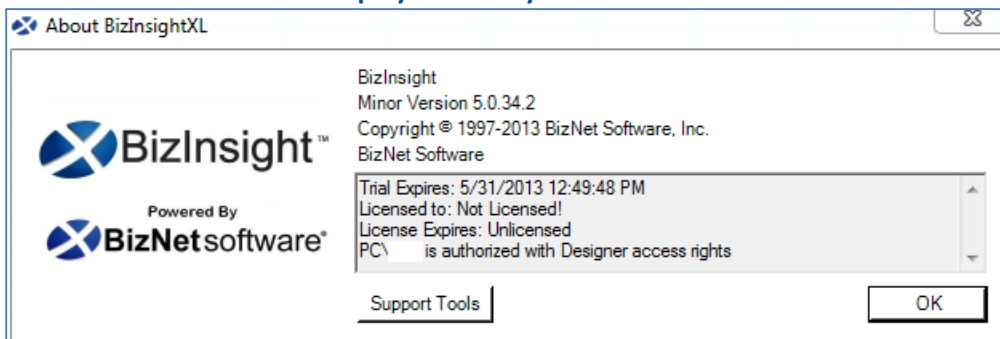
3.1.2. Multi-Monitor Dialog Support

BizInsight is able to detect whether Excel is on the main display or on an extended display. All prompts are displayed on the active Excel monitor. Exceptions to the active display monitor are caching and Scan for Content prompts. Users are able to disable caching prompts in the Application Settings.

Caching prompts
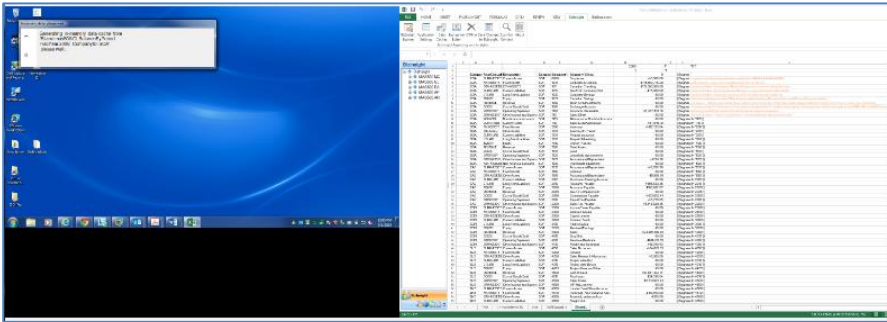
Scan for Content prompt
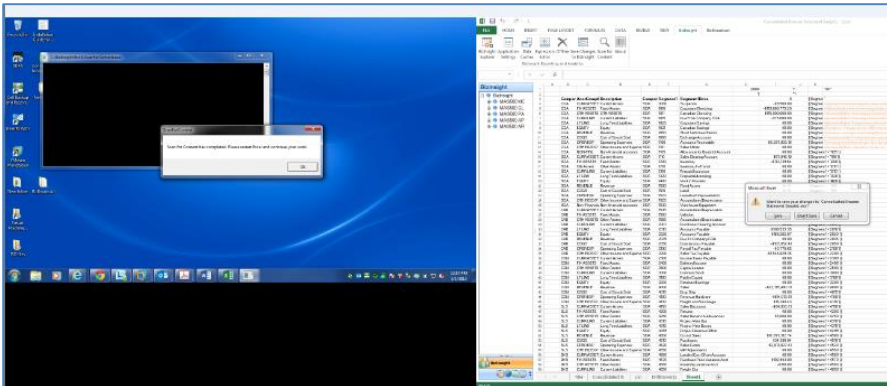
3.1.3. Invalid Licenses and Multiple licenses in the AdminPath Prompt

Multiple licenses prompt
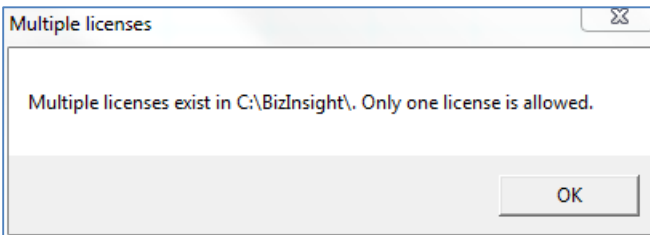
Invalid License prompt
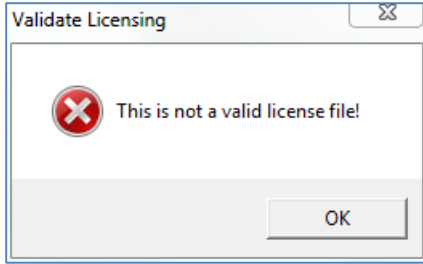
3.1.4. Resolved Exceptions When Refreshing Query Tables

Objects in the workbook silently fail when exception is thrown. Check the error log from the About button to review exceptions.

3.1.5. Scan for Content Improvements

ScanForContent detects Excel.exe for other users on terminal services environments.

The check to wait is removed and will commence running regardless of the state of Excel.exe.

Terminal Services Environment	
Before	After
Close all Excel sessions before running Scan for Content.	Run Scan for Content anytime.

3.1.6. SSRS 2008 R2 Requires XMLFAST to be Enabled in BizInsight.

Removed support for ATOM Feed on SSRS 2008 R2. Users will receive the error prompt, "This version of SQL Server does not support XML Export, please use XMLFAST under Application Settings" and will be given the option to cancel.

SSRS	XML Export	XMLFAST	ATOM Feed
SQL Server 2005	No express edition support	Supported	Unsupported
SQL Server 2008	No express edition support	Supported	Unsupported
SQL Server 2008 R2	No express edition support	Supported	**Unsupported (Build 34.2)**
SQL Server 2012	No express edition support	Supported	N/A

3.1.7. Pivot Layout Sort Order Fix

The order of the row fields are saved in the exact order which the user saved the pivot layout.
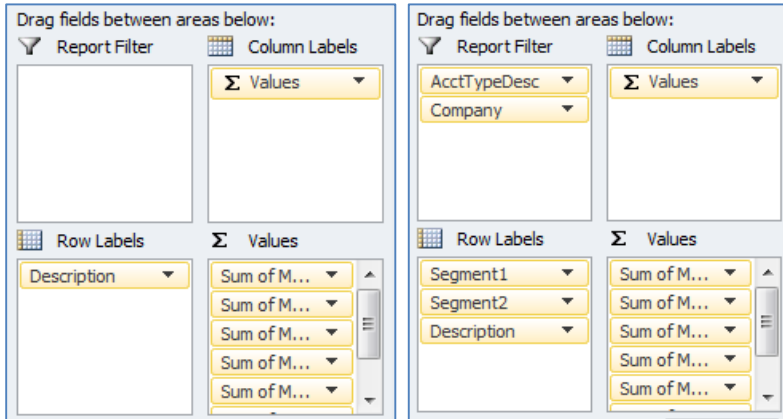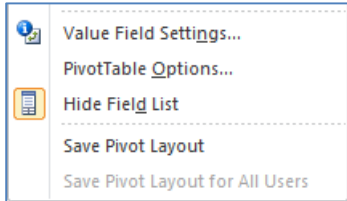
3.1.8. Power User Role Displays as "Viewer" in the About Button

Power is a legacy user role type and contains the same features as Viewer.
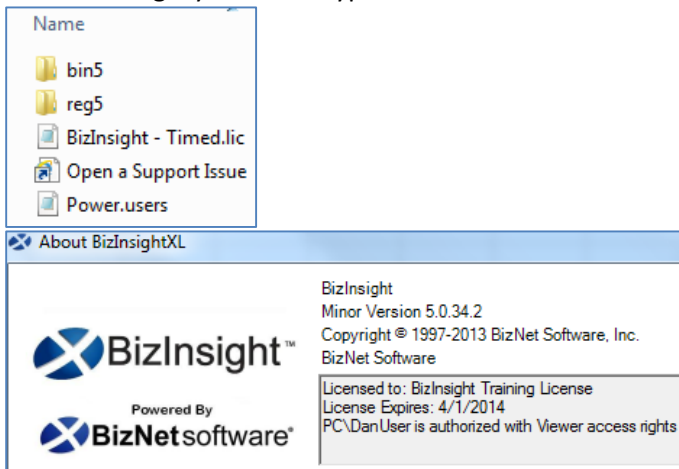
3.1.9. BizInsight Drill-down Fix

Right-clicking on certain parts of an Excel sheet may cause an exception "Error generating drilldown menus".

The addressed exception scenarios:

- Right-click on a function with no parameters

- Right-click on an empty cell
- Right-click on a cell that contains an Excel formula
- Right-click on a cell that contains numeric or string data
- Right-click on Analysis Set Pivot (PivotTable)
- Right-click on an Analysis Set List (QueryTable)
- Right-click when selecting more than one cell (a range of cells)
- Other scenarios may still exist

4. BizInsight - Known Issues

1. When using F2 to check a function, most errors will return #VALUE! Go to **About** > **Support Tools** > **View Events** to see the error.
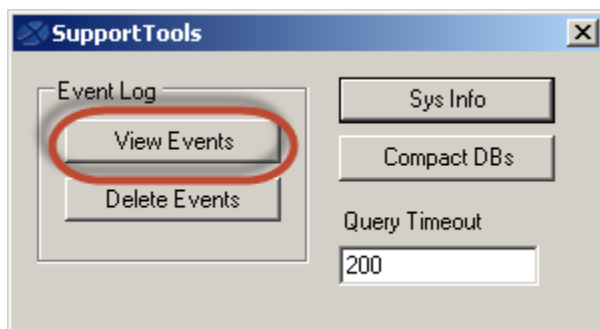
2. Analysis Set Refresh is not addressed.

3. In AccesstoSQL Configure settings, IP addresses are saved in the connection string, but do not appear when re-launching the Configure SQL dialog to review the current settings.

4. Scan for Content throws an exception on Office 64-bit versions when moving from one set of Content Packs to another.

   For example, if a user is currently using MAS500GL and wishes to switch to another configuration folder containing a different set of Content Packs, ex: MAS500AP and MAS500AR, ScanForContent throws an exception that it is not able to find the MAS500GL 64-bit files in the content path. The workaround is to manually register the new 64-bit Content.

5. BizInsightXLFoundation add-in unregisters during initial BizInsight startup steps.

   In some environments, it has been observed that the BizInsightXLFoundation add-in will become unregistered when starting up Excel after an initial installation and using Scan for Content. The steps to avoid this issue involve starting Excel twice after installation before scanning for content. The installation documentation has been updated to reflect this installation best practice.

6. Scan for Content Errors when Applicaton Settings paths are Mapped Drives

ScanForContent does not support mapped drives. A mapped drive cannot be used in the AdminPath or ConfigPath. The issue is not reproduced when using a full network drive name (\\servername\sharename) or a local drive (c:\).

5. Appendix
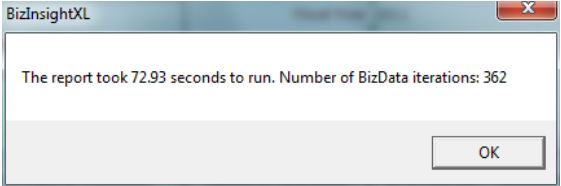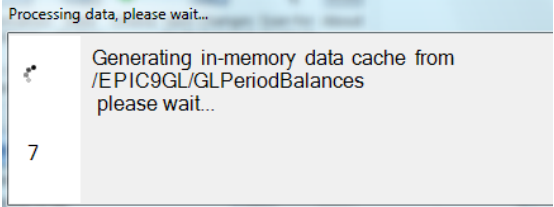
5.1. App.config and User.config Location Path

- App.config – (install directory)\BizInsight\bin5
- User.config – This path will vary by Excel version, installation path, and Workstation. An example location is %USERPROFILE%\AppData\Local\Microsoft_Corporation\ C__BizNet_Software_BizIns_Path_j5krx0ue5irs5to1ixyogavtiegg1nmn\12.0.xxxx.xxxx

5.2. App.config "User Settings" List

XML Element Name	Description	UI Equivalent	Script
PlugInPath	Future planned functionality.	N/A	<setting name="PlugInPath" serializeAs="String"> <value />
BizInsightMenuConnectionString	Connection string to connect to a database instead of the BizInsight.biz file	BizInsight Administration Button > MySettings - BizInsightMenuConnection String	<setting name="BizInsightMenuConnectionString" serializeAs="String"> <value />
BizInsightMenuReports1	Not in use	N/A	<setting name="BizInsightMenuReports1" serializeAs="String"> <value />
VerboseLogging	Allows all events to be logged in the event log. Recommended to be turned off unless troubleshooting. Default value to False.	BizInsight Administration Button > MySettings - VerboseLogging	<setting name="VerboseLogging" serializeAs="String"> <value>False</value>
BizInsightDataDBConnectionString	Connection string to connect to a database instead of the BizInsightDB.biz file.	BizInsight Administration Button > MySettings - BizInsightDataDBConnectionString	<setting name="BizInsightDataDBConnectionString" serializeAs="String"> <value />
BizInsightDataDBHistoryConnectionString	Not in use	N/A	<setting name="BizInsightDataDBHistoryConnectionString" serializeAs="String"> <value />

DefaultSSRSLocation	Location to the default reporting services server.	Ribbon Button: Application Settings > Reporting Services Default Settings - Default Reporting Services Server or BizInsight Administration Button > MyDataSettings - DefaultSSRSLocation	`<setting name="DefaultSSRSLocation" serializeAs="String"> <value>http://servername/reportserver</value>`
DefaultSSRSPath	Location to the default reporting services directory.	Ribbon Button: Application Settings > Reporting Services Default Settings - Default Reporting Services Folder Name or BizInsight Administration Button > MyDataSettings - DefaultSSRSPath	`<setting name="DefaultSSRSPath" serializeAs="String"> <value>Folder Name</value>`
Offline	Disables BizInsight from connecting to a database server. Excellent option to use during report creation or designing.	Ribbon Button	`<setting name="Offline" serializeAs="String"> <value>False</value>`
UpdateUserSettings	Programming trick to allow user.config settings to be updated when windows updates for Office are applied, specifically Excel.exe. Default value is True.	N/A	`<setting name="UpdateUserSettings" serializeAs="String"> <value>True</value>`
OptimizeCache	Option for performance testing. If set to False, reports could be perform slowly. Default value is True.	N/A	`<setting name="OptimizeCache" serializeAs="String"> <value>True</value>`
EAS5_5	Default value should be False for all content packs except Sungard EAS content. Value False disables EAS drill-downs and ribbon buttons.	N/A	`<setting name="EAS5_5" serializeAs="String"> <value>False</value>`

FormulaEditorPopUp	Optional setting to display function information during Excel calculations. When enabled, the Formula Editor will display on drag and drop of a function to allow configuration of parameters. Disabled by default on Windows XP because of compatibility issues. Works on Vista and Windows 7.	Ribbon Button: Application Settings - Enable Formula Editor Pop Up	`<setting name="FormulaEditorPopUp" serializeAs="String">` `<value>True</value>`
SQLAuthenticationPrompt	Persist SQL Credentials for duration of the session	Ribbon Button: Application Settings - Persist SQL Authentication (Session Only)	`<setting name="SQLAuthenticationPrompt" serializeAs="String">` `<value>False</value>`
RefreshTimer	Optional setting to enable or disable refresh timer pop-up on BizData call/iterations. BizInsightXL The report took 72.93 seconds to run. Number of BizData iterations: 362 OK	Ribbon Button: Application Settings - Enable Refresh Timer	`<setting name="RefreshTimer" serializeAs="String">` `<value>True</value>`
CachingWindow	Optional setting to enable or disable background worker thread pop-up. Processing data, please wait... Generating in-memory data cache from /EPIC9GL/GLPeriodBalances please wait... 7	Ribbon Button: Application Settings - Enable Cache Information Dialog	`<setting name="CachingWindow" serializeAs="String">` `<value>True</value>`
ContentPathOverride	Option provides the ability to change the local directory to which the BizInsight files are copied.	Ribbon Button: Application Settings > Local Content Path - Enable Override	`<setting name="ContentPathOverride" serializeAs="String">` `<value>False</value>`
ContentPath	Location of BizInsight Excel add-in files. Not used when Override option is set to False and uses default location users\My Documents directory.	Ribbon Button: Application Settings > Local Content Path - Enable Override then Local Content Path	`<setting name="ContentPath" serializeAs="String">` `<value />`

XMLFAST	Option for fast, low footprint rendering format that creates in-memory caches by using reporting services as a metadata store only and not an execution engine. Default value is True.	Ribbon Button: Application Settings - Enable XMLFAST	`<setting name="XMLFAST" serializeAs="String">` `<value>True</value>`
CacheExpiration	Client cache expiration after a specific date. BizNet Refresh removes the caches so adjusting this setting is unnecessary. Select the Offline ribbon button and use Excel Refresh option for an extended period of time. Default value set to 40,000 minutes.	N/A	`<setting name="CacheExpiration" serializeAs="String">` `<value>40000</value>`
TrialEnabled	Enable or disable all users from using a trial period of BizInsight. Highly suggested for Terminal Services implementation. Does not work on Sungard EAS products.	N/A	`<setting name="TrialEnabled" serializeAs="String">` `<value>True</value>`
CalcMode	Options that allow greater control over Excel's calculation behavior by refreshing all functions. The default option is Calculate Full unless the report is not refreshing all functions. Calculate Full Rebuild will cause Excel to rebuild the dependency tree before recalculating functions.	Ribbon Button: Application Settings > Calculation Settings	`<setting name="CalcMode" serializeAs="String">` `<value>CalcFull</value>`
ObjectRefresh	Option allows a user to control whether BizInsight analysis set lists contained in a report are refreshed when BizInsight performs a refresh. Valid options are AnalysisSetListsAndPivots, AnalysisSetLists, and AnalysisSetPivotsOnly. Default value is 'AnalysisSetListsOnly'.	Ribbon Button: Application Settings > Calculation Settings	`<setting name="ObjectRefresh" serializeAs="String">` `<value>AnalysisSetListsOnly</value>`
EventSources	Used during the installation stage of the product. Default setting is set to "True" and automatically set to "False" if event log cannot be written. The application log is updated when the value is set to "False".	N/A	`<setting name=" EventSources" serializeAs="String">` `<value>True</value>`

ShowLargeFilters	Display drill-down list when parameters more than 255 characters in length. Default set to "False". To enable, set value to "True".	N/A	`<setting name="ShowLargeFilters" serializeAs="String">` `<value>False</value>`
MetaDatabaseType	Internal conversion application for BizNet administrators to migrate BizNet biz files (BizInsight.biz and BizInsight.DB) into SQL Server databases. Set value from MSACCESS to SQL to enable SQL Database.	Ribbon Button: Application Settings > Configure SQL	`<setting name="MetaDatabaseType" serializeAs="String">` `<value>MSACCESS</value>`
RenderMode	WPF Setting to determine software or hardware graphics rendering.	N/A	`<setting name="RenderMode" serializeAs="String">` `<value>SoftwareOnly</value>`
StartUpPage	Expression Editor start-up mode set to basic or advanced editor. Set BasicEditor.xaml to ExpressionEditorWPF1.xaml for Advanced Editor.	Ribbon Button: Application Settings	`<setting name="StartUpPage" serializeAs="String"` `<value>BasicEditor.xaml</value>`
XMLFASTQueryTimeout	XMLFAST enabled and set the query timeout duration. Insert a time in seconds.	Ribbon Button: About > Support Tools	`<setting name="XMLFASTQueryTimeout" serializeAs="String">` `<value>200</value>`
MetaDatabaseTypeAuth	Select the authentication type in the Configure SQL setting. Use SQL or Windows Authentication to connect to the SQL Server databases. Valid values are SQL or WINDOWS.	Ribbon Button: Application Settings > Configure SQL	`<setting name="MetaDatabaseTypeAuth" serializeAs="String">` `<value>WINDOWS</value>`
BizInsightMenuDB	Location to the BizInsight.biz file.	Ribbon Button: Application Settings - Configuration Path or BizInsight Administration Button > MySettings -	`<setting name="BizInsightMenuDB" serializeAs="String">` `<value>C:\folder name\BizInsight.biz</value>`

		BizInsightMenuDB	
BizInsightDataDB	Location to the BizInsightDB.biz file.	Application Settings Button: Configuration Path or BizInsight Administration Button > MySettings - BizInsightDataDB	`<setting name="BizInsightDataDB" serializeAs="String"> <value>C:\folder name\BizInsightDB.biz</value>`
BizInsightDataDBHistory	Not in use	N/A	`<setting name="BizInsightDataDBHistory" serializeAs="String"> <value>C:\folder name\BizInsightDB.biz</value>`
ConfigPathV4	Location of the BizFunctions.xml for V4 Compatibility and set by the Configuration Path in the UI.	Ribbon Button: Application Settings Button - Configuration Path	`<setting name="ConfigPathV4" serializeAs="String"> <value>C:\foldername\</value>`
AdminPath	Location of BizInsight license and .users files.	Ribbon Button: Application Settings - Administration Path or BizInsight Administration Button > MySettings - AdministrationPath	`<setting name="AdminPath" serializeAs="String"> <value>C:\foldername\</value>`
ERP	Valid values are BizNet or Epicor. One-time update only. Must re-register the add-in to get the branding to rebuild.	N/A	`<setting name="ERP" serializeAs="String"> <value>Epicor</value>`