

# Release Notes

**BizInsight 5.0.35.1**

**Build 35.1**

**July 16, 2014**

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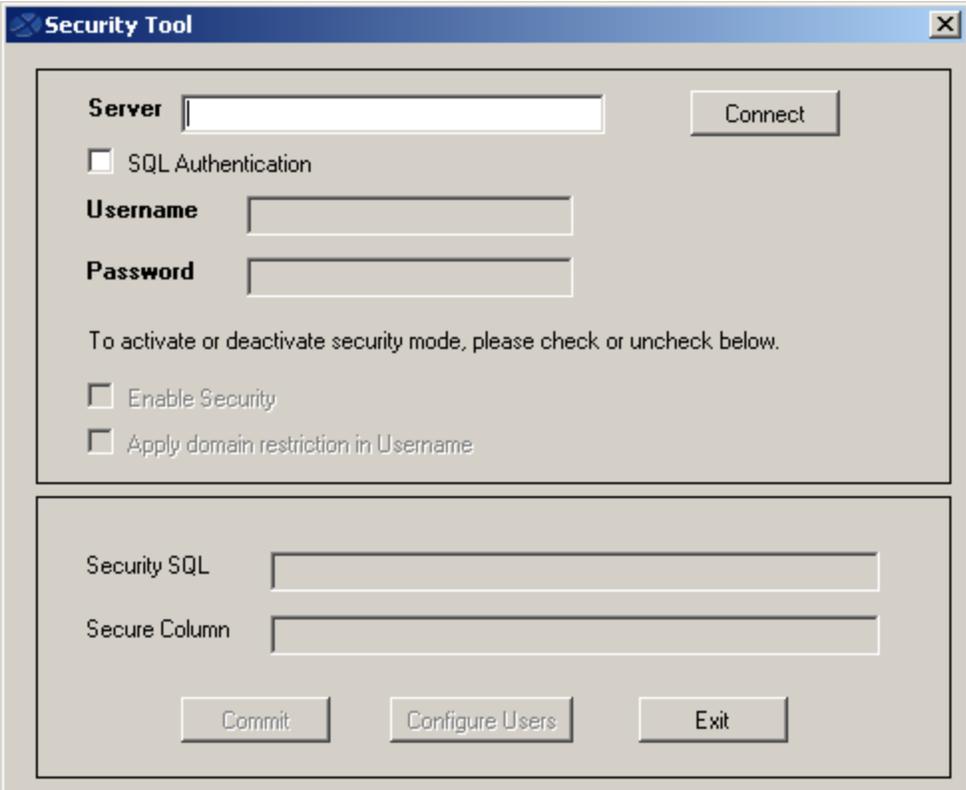
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# 1. New Features

## 1.1 BizInsight Column Security

A new Security tool is provided with BizInsight 5.0.35.1 that provides organizations with a new form of content security. This new feature allows an organization to implement a security policy that restricts users from accessing specific records in a database table based on the value of a column in that table. The column access restriction is based on individual user permissions. Column Security must be activated on the database system and access control applied to the database tables. See the Column Security appendix of the Installation Guide or User Guide for more information.



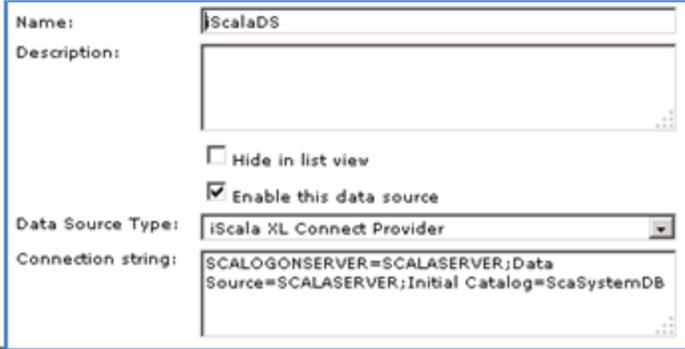
## 1.2 iScala XMLFast Native Support

BizInsight 9.05 SP5 supports XMLFast for SSRS SQL provider and the iScala Data Provider. XMLFast will only fail if the iScala client application is not installed on the client machine and the iScala Data Provider is selected on the Reporting Services data source.

SSRS Data Source Provider	Data Retrieval Method	
	XMLFast	XML
iScala Data Provider. No iScala client application is installed on the client workstation.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SQL Provider	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
iScala Data Provider with iScala client application installed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Requirements**

- iScala Client is installed on BizInsight client machine
- Report Server data source type is iScala XL Connect Provider



- XL Connect 9.05 SP5 or later version is installed

**IMPORTANT** When the Windows Server OS is 64-bit and the client workstation is using 32-bit Excel, the client workstation will require special additional installation steps to avoid the following error when XMLFast is enabled:

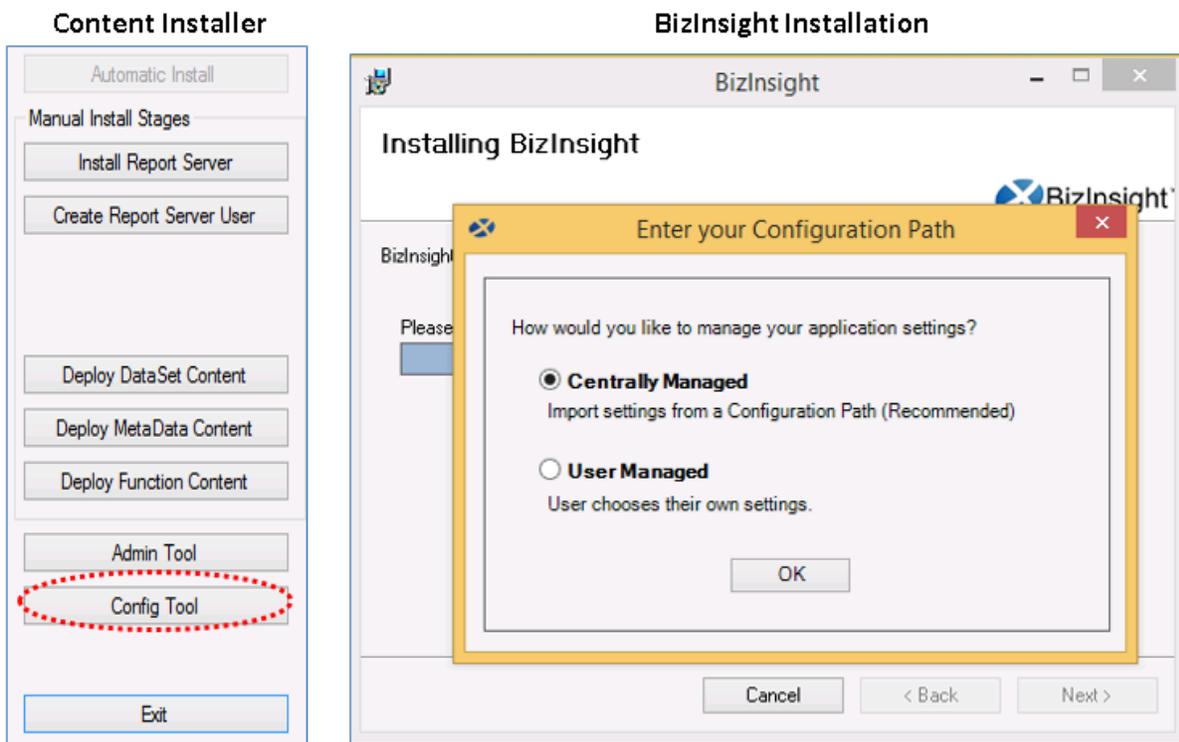
*"Could not load file or assembly 'file:///C:\Epicor XL Connect\bin5\x64\Microsoft.ReportingServices.Interfaces.dll' or one of its dependencies. An attempt was made to load a program with an incorrect format"*

Refer to Configure BizInsight section of the Installation Guide for instructions on the additional steps that need to be taken

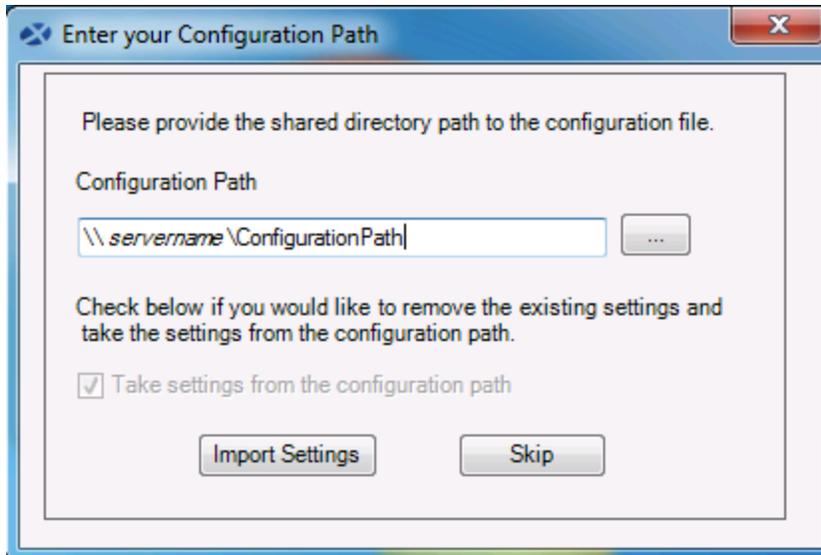
**1.3 Installation Support for Centralized Application Settings**

**NOTE** This feature works in conjunction with the new 1.4 Content Installer. Not all content packs have been packaged with the new Content Installer but will be by the end of this year.

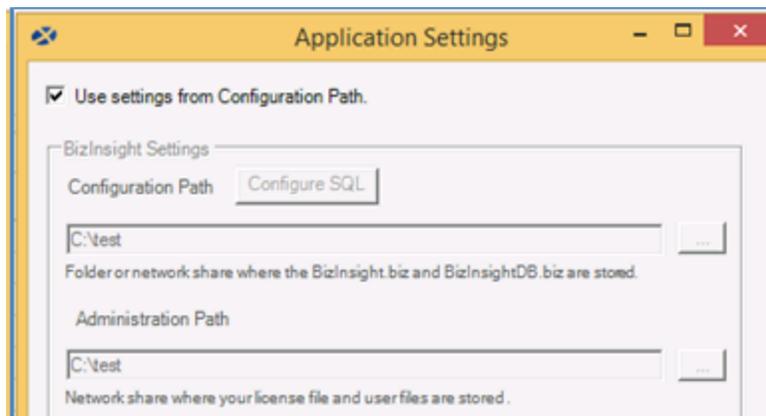
After completing a Content Installer installation and using the Configuration Tool component to generate an application configuration (app.config) file, IT administrators can import the app.config file during the BizInsight installation. This process allows IT administrators the ability to manage and configure BizInsight without going into the Application Settings dialog. By centrally managing the Application Settings, IT administrators can set generally accepted settings using the Content Installer's Configuration Tool, place the app.config file into the Configuration Path (Shared Directory folder), and every client machine can import the app.config file during installation. In addition, future changes to the app.config file can be consumed using the Scan for Content button on the BizInsight ribbon.



When the Central Managed option is used during BizInsight installation, you will be prompted to browse to the directory that contains the app.config file. This directory is the Configuration Path selected during the content installation on the server.



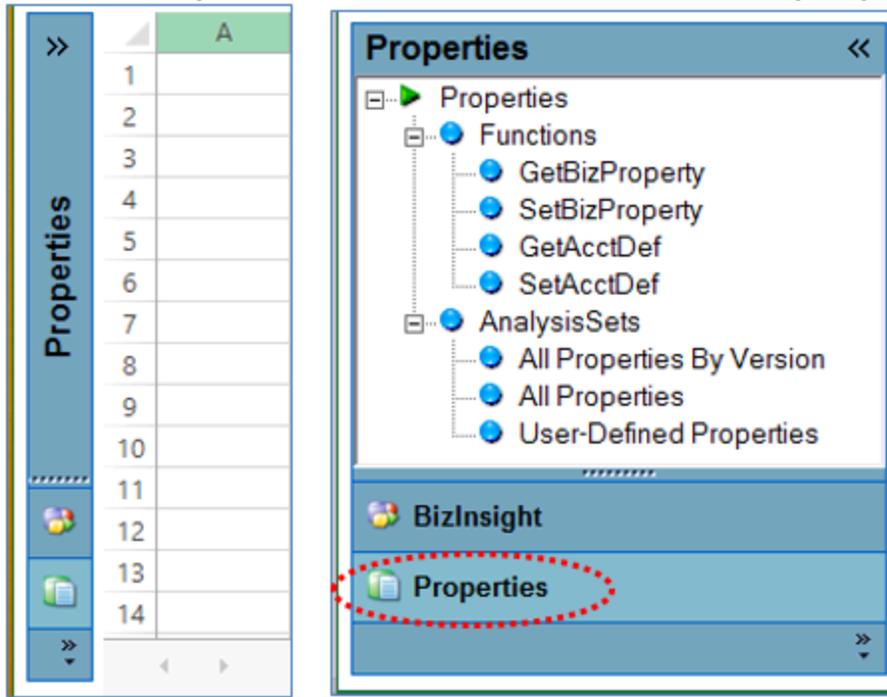
The Application Settings dialog has been updated with a new check box to instruct BizInsight to retrieve the settings from the app.config file located in the Configuration Path. When the Centrally Managed option is selected during BizInsight installation, this checkbox will be automatically checked for the user.



## 1.4 BizProperty and Account Definition Functions Embedded in the Navigation Pane

BizProperty and Account Definitions are a built-in set of functions, integrated within BizInsight, that provide an organization the ability to store and retrieve values. In previous BizInsight releases, the functions were not available in the Navigation Pane and users had to remember the names of their stored account definitions and manually add the functions to their BizInsight reports. The BizInsight 5.0.35.1 release provides access to these functions and definitions in the Properties menu and allows the user to drag-and-drop their stored definitions into a worksheet.

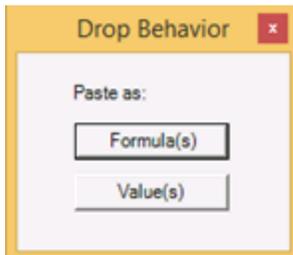
Users can create new properties on the fly or continue to define and maintain all Properties and User Defined Properties in an Excel workbook. Once defined, all properties are now clearly visible and accessible to all users via the Navigation Pane.



Navigation Pane  
Collapsed

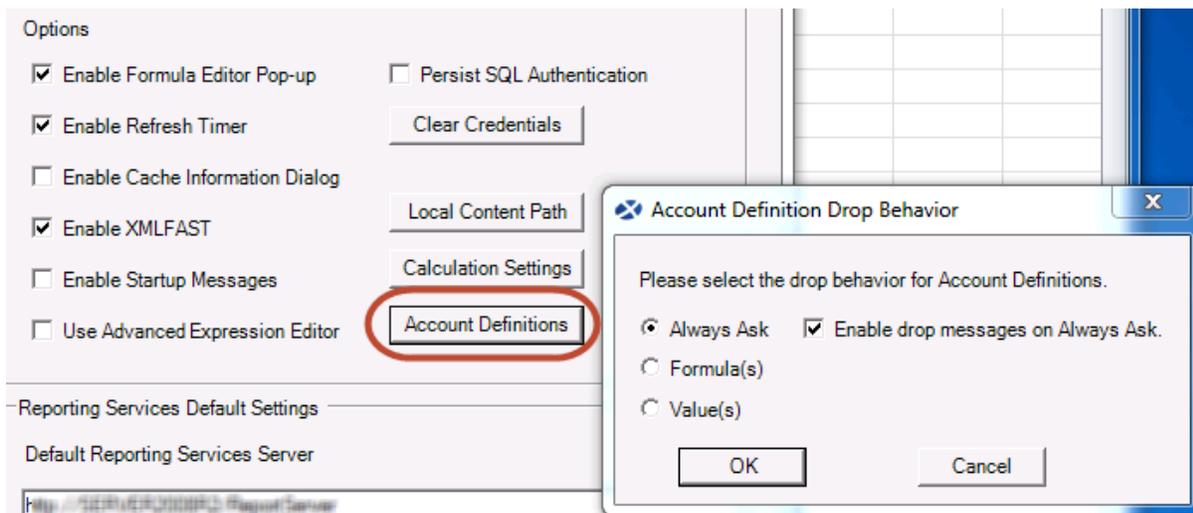
Navigation Pane  
Expanded

When dragging and dropping a property into an Excel worksheet, users will be prompted to choose whether they want the properties dropped with a live formula (ex. =GetAcctDef) or as values.



fx =GetAcctDef(\$B\$1)			fx [Segment1 = 1000]		
B	C	D	E	F	
Cash	[Segment1 = 1000]		Cash	[Segment1 = 1000]	
Formula(s) returned			Value(s) returned		

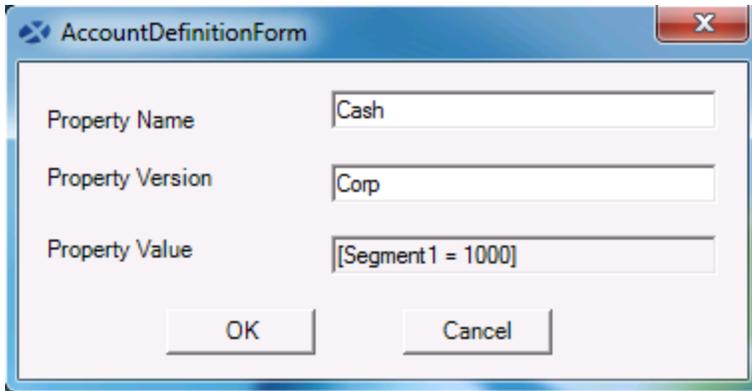
Users can change the default drag and drop behavior in the Application Settings dialog by clicking the Account Definitions button:



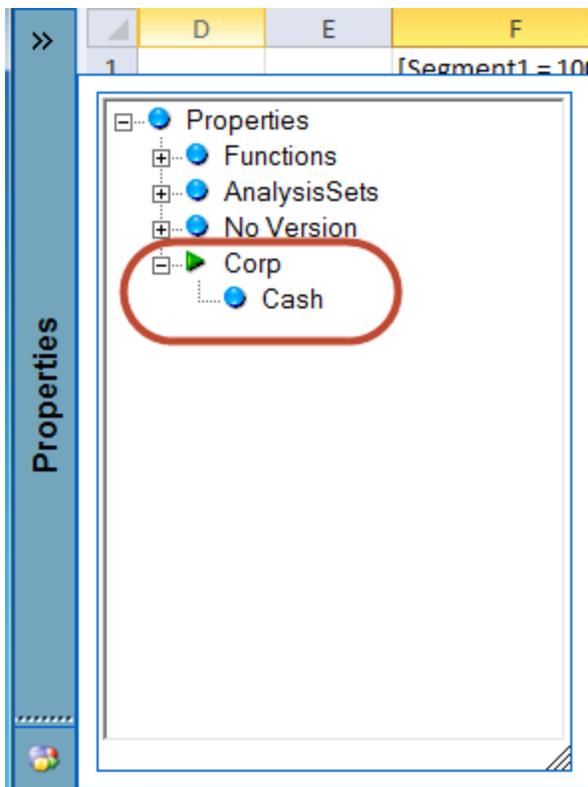
An additional option named "Save Property" has been added to the BizInsight right-click menu to allow users to create properties straight from an Excel workbook:



This option will open a dialog where the user can specify a Property Name and Property Version for the definition and commit that change.



Users can refresh the Properties menu to view the new definition.



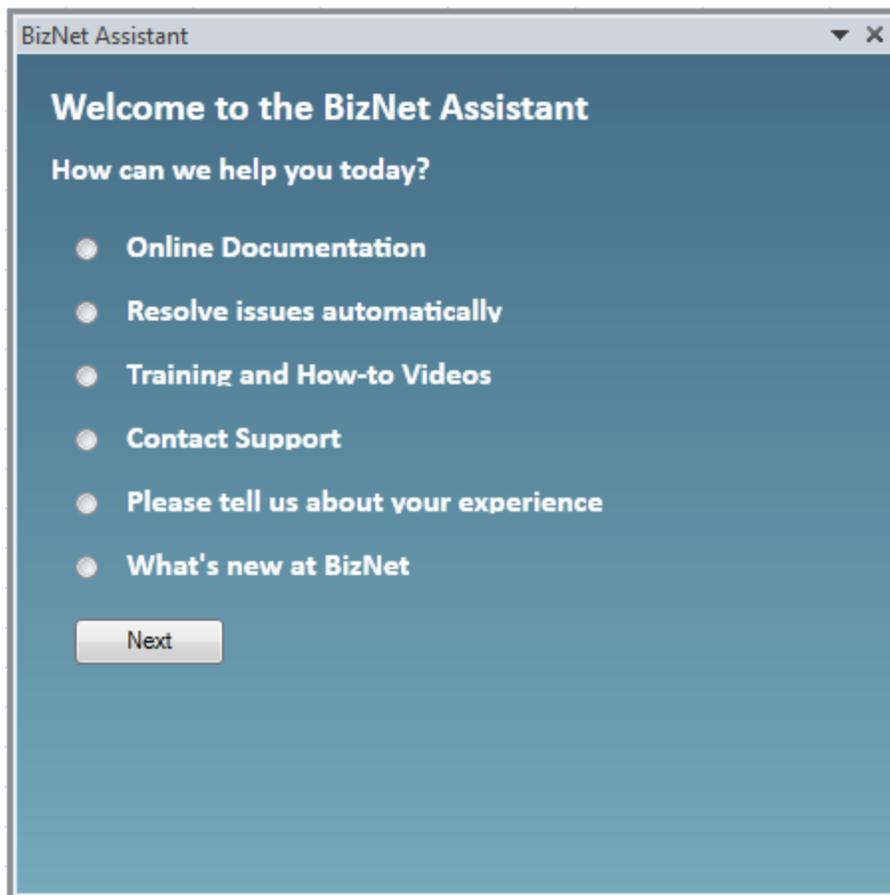
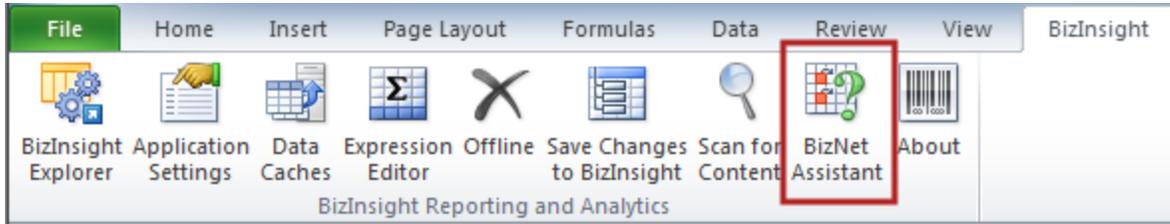
Users can continue to store Account Definitions in a single workbook for centralized maintenance.

## 1.5 BizNet Assistant

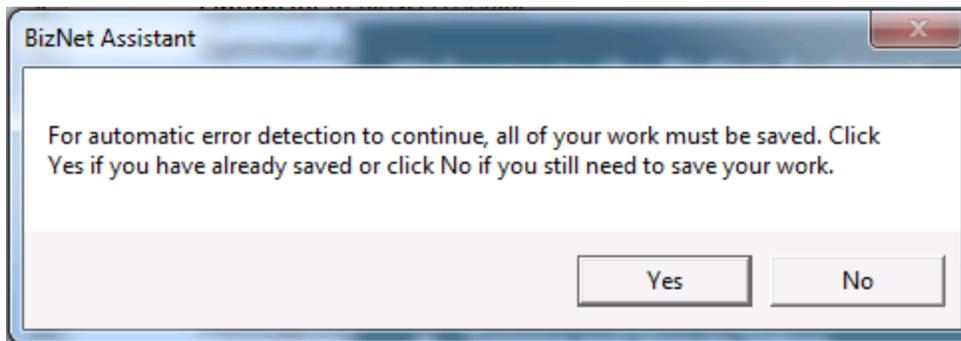
As a new feature in BizInsight 5.0.35.1, BizNet Assistant is developed from a business commitment to continually improve customer relationships and ensure the needs of our customers are fulfilled in a timely, friendly, and efficient manner. This automated self-service application provides customers access to support and education, and further discussions about the product.

Users have access to immediate answers, pertinent information, and error detection to automatically resolve most common issues.

The BizNet Assistant can be accessed from the BizInsight ribbon.



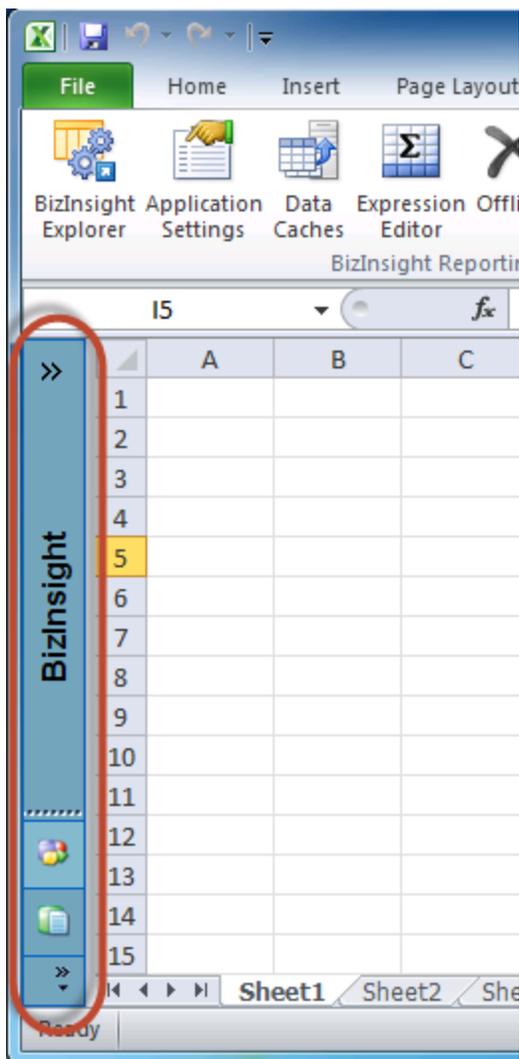
The Resolve Issues automatically radio button will trigger a process that will resolve most #NAME and #VALUE errors for a user. Choosing this option will require a restart of Excel. Users will be given the opportunity to cancel the process and save their work before the process is run:



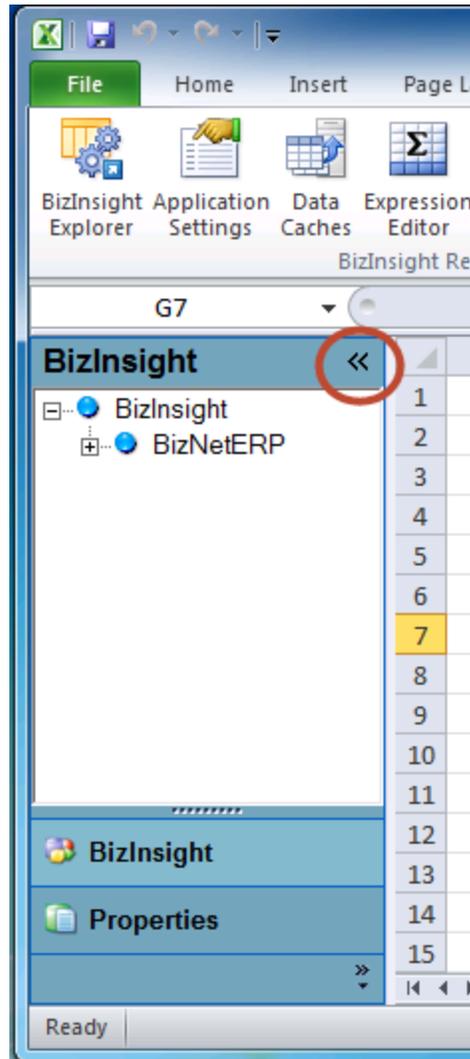
## 2. Product Enhancements

### 2.1 Collapsible BizInsight Navigation Pane

The new Navigation Pane replaces the five dots collapsible pane with one that is easier to collapse. Click on the double arrows to collapse the Navigation Pane and then left-click on the pane to view the menu of available objects.

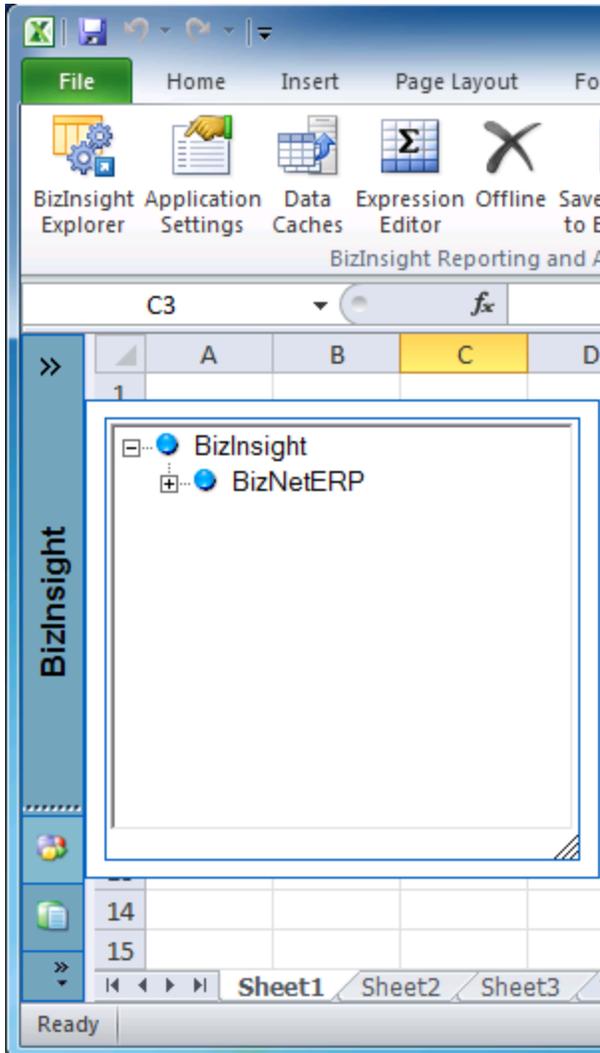


Collapsed (default)



Expanded

In addition to fully expanding the Navigation Pane using the double arrows, the items of the Navigation Pane can remain collapsed and users can temporarily display the nodes with a left click on the Navigation Pane. The temporary display of the nodes of the Navigation Pane will collapse when the user clicks away from the Navigation Pane.



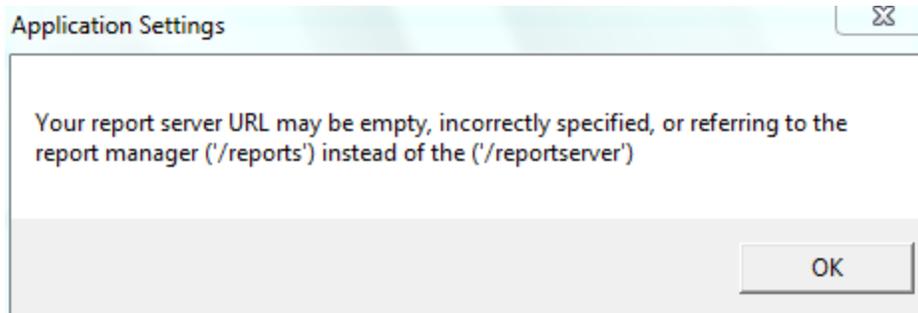
Left-click access

## 2.2 Application Settings with Automatic Scan for Content

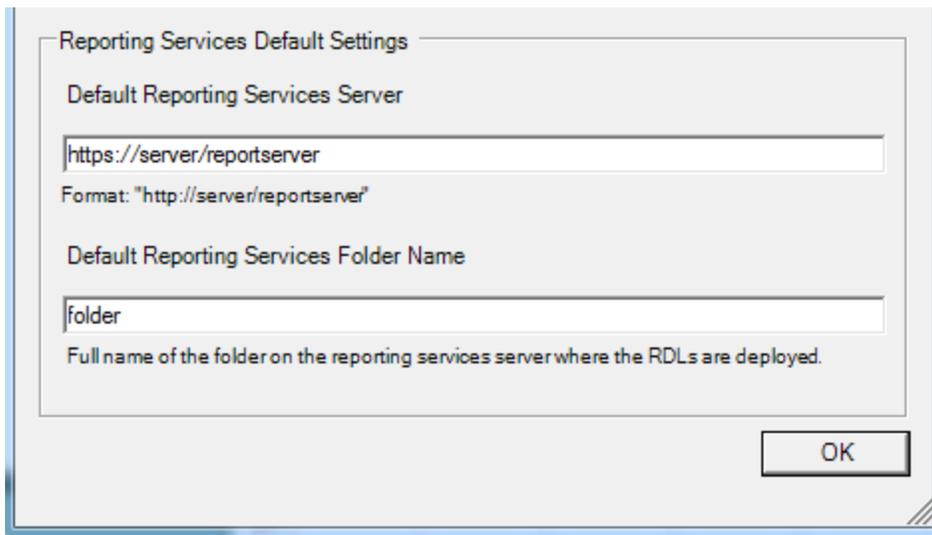
In the Application Settings, if the Use Settings from Configuration Path checkbox is checked, the user will receive a Scan for Content prompt. Scan for Content will import new settings and register content add-ins from the Configuration Path. During the process, all open workbooks will be requested to be closed.

## 2.3 Application Settings Dialog Support

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



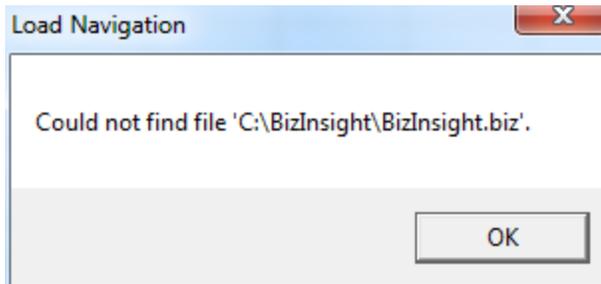
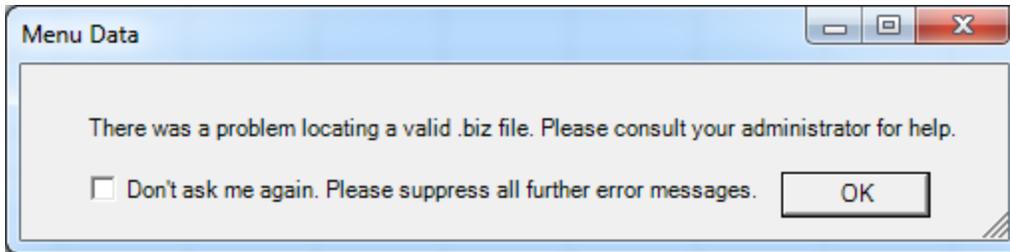
The Default Reporting Service Server field also now accepts HTTPS protocols.



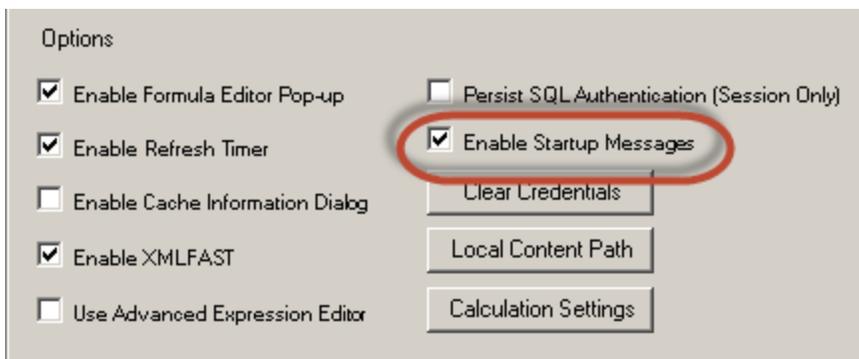
## 2.4 BizInsight Load at Startup Prompt Messaging

When BizInsight is activated, the application verifies the configuration path and presence of biz files in a valid folder path. If the configuration path or biz files are missing, BizInsight will prompt the user to select the new option to suppress all further warning messages. Check the "Don't ask me again" box to suppress further warning messages.

When the "Don't ask me again" check box is checked, the below two warning messages are suppressed in future loads.

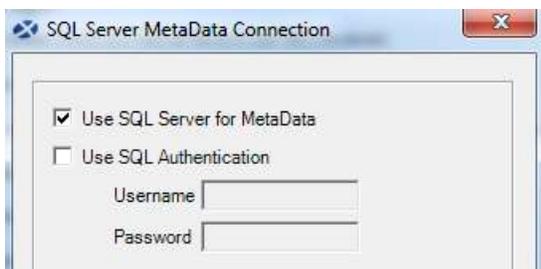


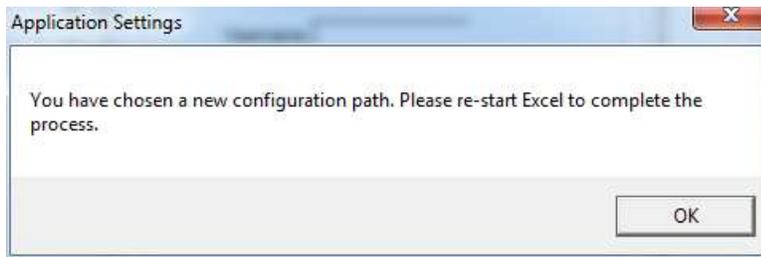
Users can re-enable the warning messages in the Application Settings and check the “Enable Startup Messages” check box.



## 2.5 Switching Metadata Connection Prompts Message Box to Close All Workbooks

Users switching from a Configuration Path folder to SQL Metadata connection in the Application Settings dialog are required to restart Excel to reload the BizInsight Navigation Pane. A new message prompts users to close Excel.





## 3. Issues Resolved

### 3.1 Unhandled exception thrown in Data Caches

When the Configuration Path folder has missing biz files (Configure SQL connection is disabled), an error will occur when the user clicks on the Data Caches ribbon button.

### 3.2 Expression Editor Launches in all Workbooks

When a user had multiple workbooks open and then launched the Expression Editor, the Expression Editor would open in all open workbooks. This issue has been resolved and users can open or close the Expression Editor in a workbook without affecting other open workbooks.

## 4. Known Issues

1. When using F2 to refresh a cell, the cell updates to #VALUE if an error occurs.

When using F2 to refresh a function, any errors that may occur will not be presented to the user and the cell will update with #VALUE. Go to **About > Support Tools > View Events** to see the cause of the #VALUE.

2. Only applies when using User Managed application settings:

The following is the best practice for initial BizInsight setup and use of the ScanForContent feature:

Install BizInsight > Open Excel > Click BizInsight Explorer ribbon button > Close Excel > Open Excel > Click Application Settings button and configure if needed > Click Scan for Content button > Close all Excel sessions > Open Excel.

3. BizInsight Workbooks requires users to enable Excel Protected View



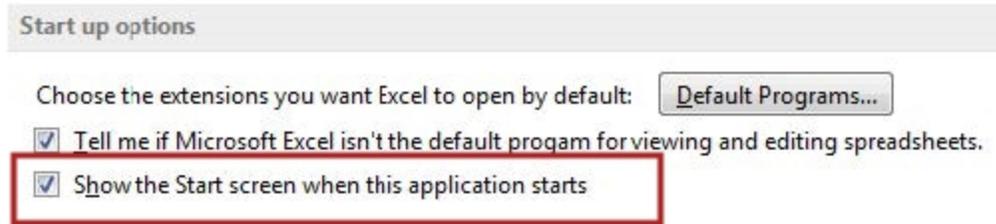
Protected View is a read-only mode where most editing functions are disabled. There are several reasons why a file opens in Protected View.

If you only need to read the workbook, and not edit it, you can remain in Protected View, but without BizInsight features enabled. If you know the workbook is from a trustworthy source, you can save the workbook locally on your computer. After you save it on your computer locally, it becomes a trusted document and BizInsight features will be enabled.

<http://office.microsoft.com/en-us/excel-help/what-is-protected-view-HA010355931.aspx>

4. Microsoft Office Excel 2013 Disable Start Screen Issue

In Excel 2013, a new feature allows users to disable the Excel Start screen.



This option causes a different behavior with BizInsight workbooks. If Excel is launched first, regardless of whether BizInsight is loaded on-demand or at start-up, the workbook functions return a #VALUE! BizNet recommends that users who disable their Excel Start Screen open the workbook file first rather than launching the Excel application.

**BizInsight Load On-Demand:** Open a BizInsight workbook > launch BizInsight > open other BizInsight workbooks

**BizInsight Load at Start-Up:** Open a BizInsight workbook > open other BizInsight workbooks

5. When a user opens any workbook with Set functions (SetAcctDef or SetBizProperty), the values will be automatically committed to the database. Users can place Excel in manual calculation mode or open the first workbook Offline to prevent the Set functions from executing.
6. Users should maintain separate a workbook for the Set functions (SetAcctDef and SetBizProperty). If a workbook contains both Set and Get (GetAcctDef or GetBizProperty) functions and a BizNet Refresh is performed, the following exception will occur and the Get functions will fail to update.

