BIZBROADCAST 2.4

User Guide

BizBroadcast is a powerful Microsoft Excel™ Add-In that lets you distribute data driven reports to end users. After you build content in reports that you want to send out from Excel, use BizBroadcast to define distribution parameters and run the distribution.

BizBroadcast lets you immediately distribute reports or use the BizBroadcast Scheduler to schedule a report distribution.

This Guide describes the BizBroadcast elements that display in Excel and explains how to use BizBroadcast commands to set up and distribute your content. Many of the examples shown in this guide have example workbooks for hands-on testing and experimentation. These companion workbooks are contained within the BizBroadcast download .zip file. If a companion workbook is available, you will see the following icon followed by the file name of the example workbook.

Example.xlsx

Note

Most BizBroadcast example workbooks use static data and VLookups to simulate dynamic data updates. Use the example files to focus on the functionality of BizBroadcast and not the way the data is being retrieved.

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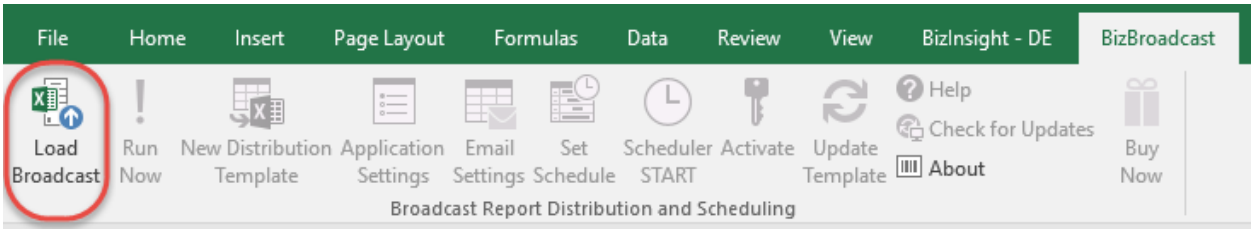
1. Starting BizBroadcast

To use BizBroadcast you must first click the Load BizBroadcast button. This design eliminates conflicts that can occur with other add-ins that may export to Excel.

When BizBroadcast is in On Demand mode, click on the **Load Broadcast** button of the BizBroadcast ribbon or toolbar to start BizBroadcast.



Once loaded, the **Load Broadcast** button disappears and the remaining buttons on the BizBroadcast ribbon will be enabled.

If you prefer to have BizBroadcast load automatically every time Excel is started, browse to the BizBroadcast installation directory, **C:\Users\username\AppData\Local\BizBroadcast\Bin\Reg** and double-click the "Register BizBroadcast for Excel xxxx OnStartup.bat" that corresponds with your Excel version. This file will change BizBroadcast to load automatically when Excel starts.

WARNING

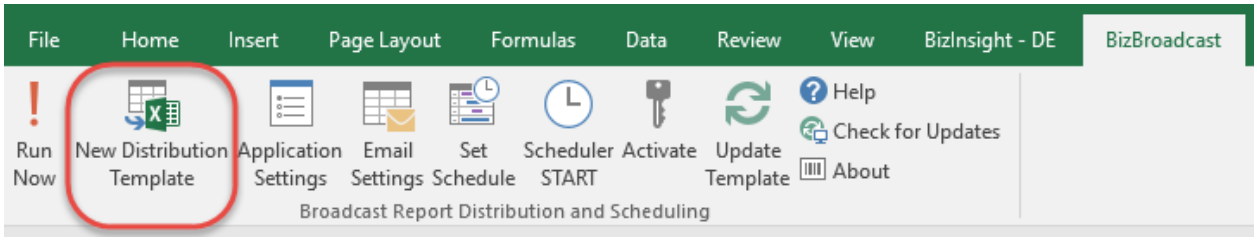
You may have to go back to Load BizBroadcast manually if you experience issues with other applications that export to Excel. To change back to the default behavior, repair the BizBroadcast installation from **Control Panel** > **Programs and Features**.

2. Create a Simple BizBroadcast Distribution

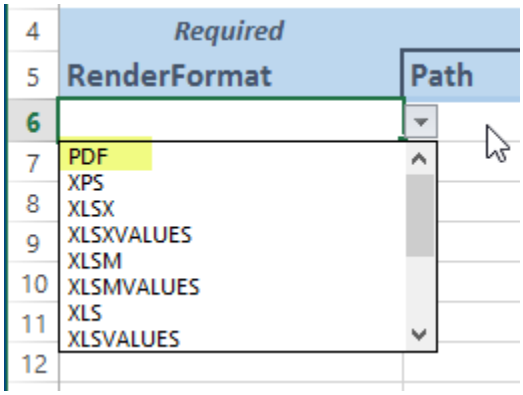
BizBroadcast is a very feature-rich product. This guide will be presenting all its capabilities, some of which you may never need to use. Before getting into all the details, try the following steps to create and run a basic distribution.

1. Open a simple (one worksheet) existing report or create a new very simple report.

2. Click on the **New Distribution Template** button on the BizBroadcast ribbon.



3. Choose **PDF** from the RenderFormat drop-down list.



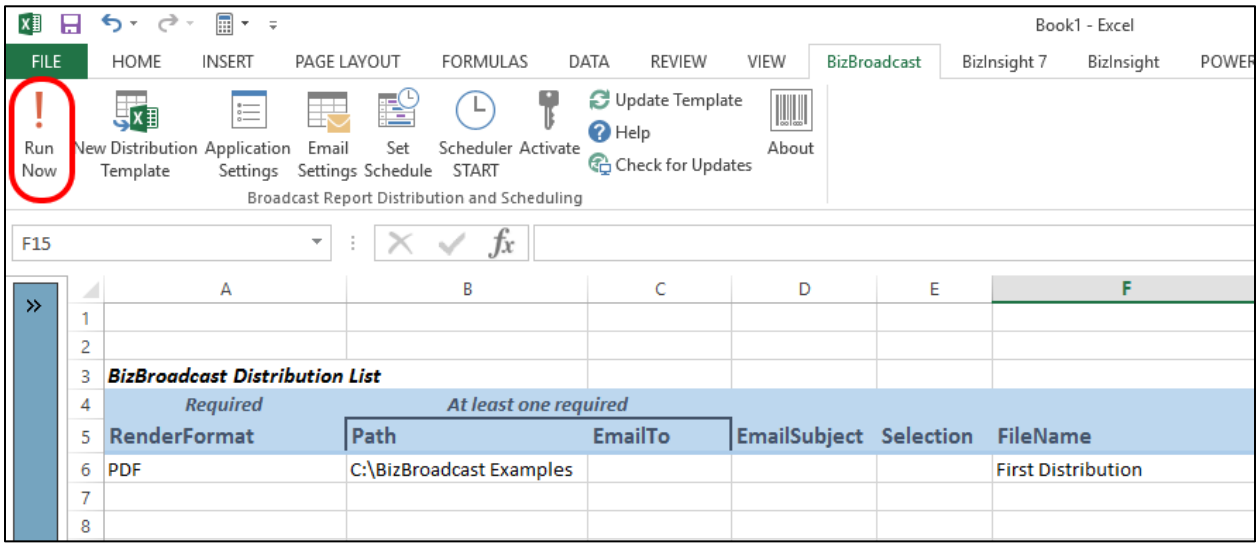
4. Type C:\BizBroadcast Examples in the Path field.

	A	B	C
1			
2			
3	***BizBroadcast Distribution List***		
4	*Required*	*At least one required*	
5	**RenderFormat**	**Path**	**EmailTo**
6	PDF	C:\BizBroadcast Examples	
7			
8			

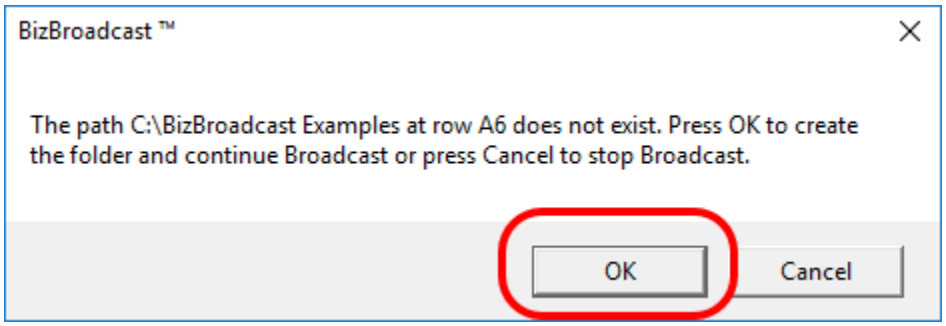
5. Type a name in the **FileName** field so the resulting output file will have a different filename than the file currently open.

FileName
First Distribution

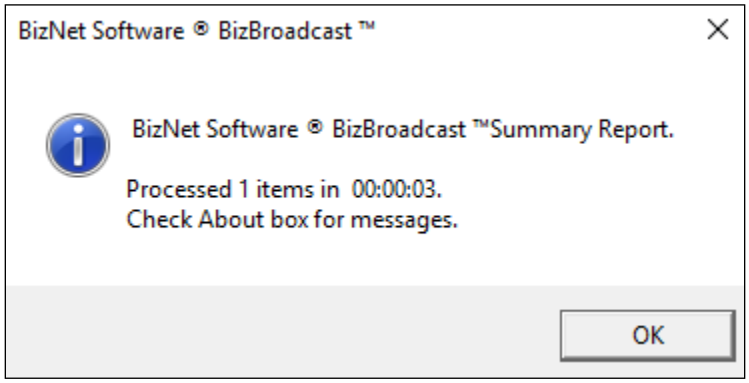
6. Save your changes and click the **Run Now** button.



7. Click **OK** to the message asking whether to create the directory. This will only happen if the directory does not already exist.



8. A pop-up dialog will open indicating that the distribution is complete.

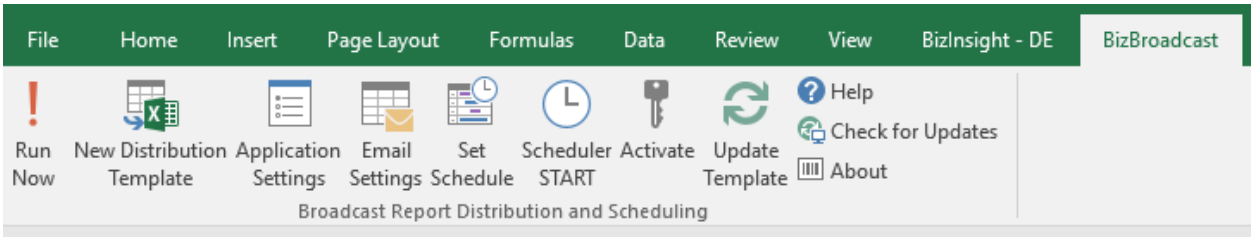


9. Check the directory or email for the distribution and confirm that the report was produced.

Simple Distribution Example.xlsx

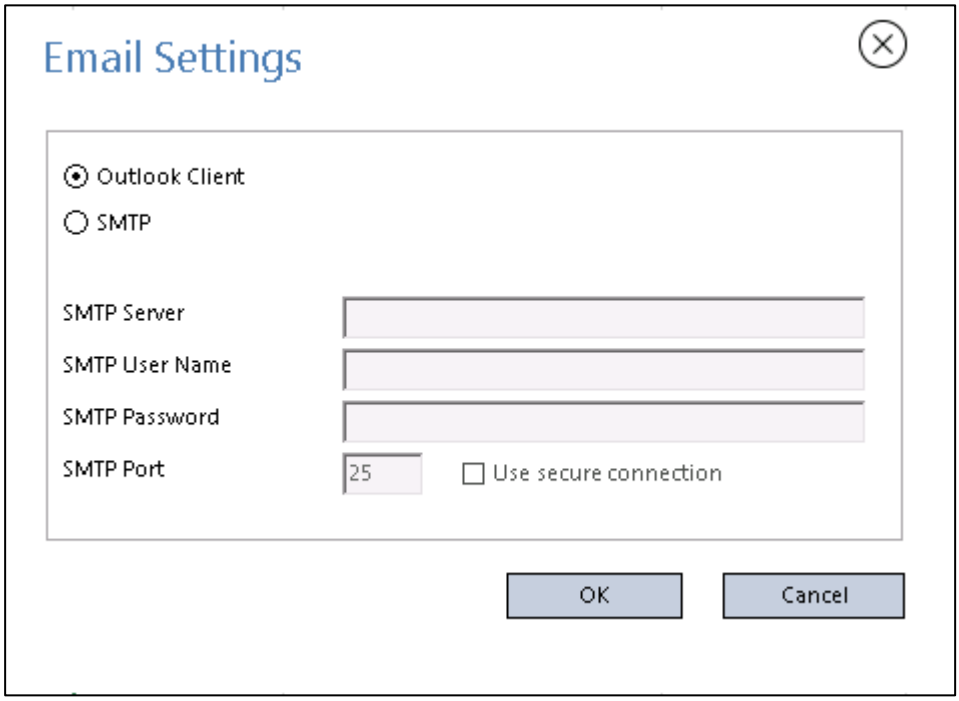
3. BizBroadcast Ribbon Options

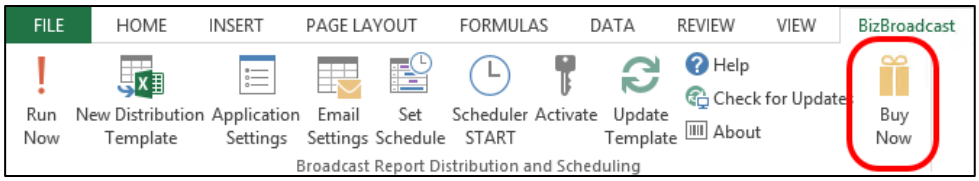
The BizBroadcast ribbon includes commands for setting up and running a BizBroadcast distribution. Before you use BizBroadcast, review the description of each command to make sure you understand how reports can be scheduled and distributed.



BizBroadcast commands work as described in the following table:

Command/Button	Description
Run Now!	Immediately executes a BizBroadcast distribution using parameters you have specified. **IMPORTANT** When running a distribution, Excel should be left as the foreground application to avoid inconsistent calculation. Do not switch to work in another application while running a distribution. If necessary, install BizBroadcast on a separate workstation and work on another computer while broadcasting.
New Distribution Template	This button inserts a Distribution Template into the current workbook. The Distribution Template is where the user can define how they want the report distributed. Fields required for the distribution are labeled as such; other fields are optional. Select a column heading to view a description of the field. Click the drop-down fields or type text to specify distribution choices.
Application Settings	This button opens the **Application Settings** dialog. This is the primary area for adjusting BizBroadcast settings. See Application Settings for more detailed information about the settings in this dialog.

Command/Button	Description
EMail Settings	This button opens a dialog where BizBroadcast can be changed to use an SMTP server for email distributions. By default, BizBroadcast is configured to use Microsoft Outlook for email distributions.  **IMPORTANT** BizBroadcast supports both SSL and TLS protocols. When using the TLS protocol, the optional EmailFrom distribution parameter must be used and be set to a valid email address in order for an email distribution to succeed.
Set Schedule	Opens the **Scheduler** dialog for specifying the **Frequency**, **Schedule Details**, and **Application Settings** for a workbook scheduled for BizBroadcast distribution. For more information about the Scheduler, see Scheduler.
Scheduler **(START/STOP)**	Toggles between starting and stopping a scheduled distribution. After you click **START**, the button label changes to **STOP**. For more information about the Scheduler, see Scheduler.

Command/Button	Description
Activate	Opens a dialog from which a license can be activated or deactivated. For more information, see Licensing.
Update Template	Use this button to fix issues with existing Distribution Templates. This button recreates all Excel ranges used by BizBroadcast and can resolve most issues that occur with Distribution Templates created by older BizBroadcast versions.
Help	Opens BizNet Software's Online Documentation website where product documentation can be found as a well as a link to BizNet's knowledge base.
Check for Updates	Checks BizNet Software's site for any BizBroadcast software updates that might be available.
Buy Now	Browses to BizNet Software's website where the product can be purchased. The **Buy Now** button only displays when BizBroadcast is not activated 
About	Displays the software version, license details, and any system messages. Monitor Scheduler activity by clicking **About** on the **BizBroadcast** ribbon. Scheduler messages are displayed in the **System Messages** text box and can be cleared using the **Clear Messages** button.

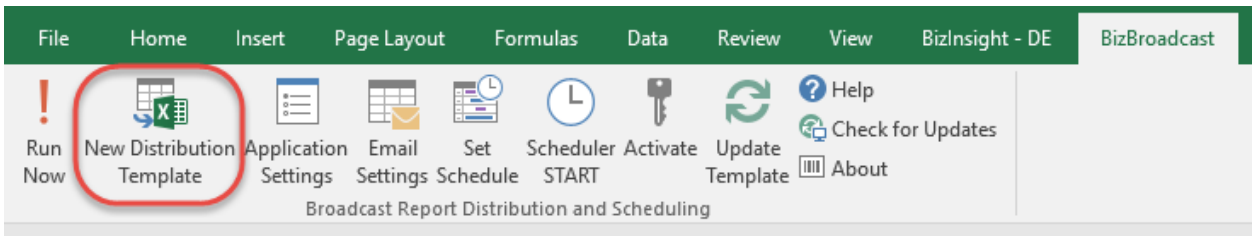
4. Creating Distribution Lists

The first step when using BizBroadcast is to create a Distribution List that will be used to define what BizBroadcast should do. A Distribution List is simply a table in Excel that is comprised of the parameter names as headers and the values for those parameters provided in the rows underneath. Once you have created your table of parameter values, you assign an Excel name to that table and provide that range name to BizBroadcast as a Distribution List.

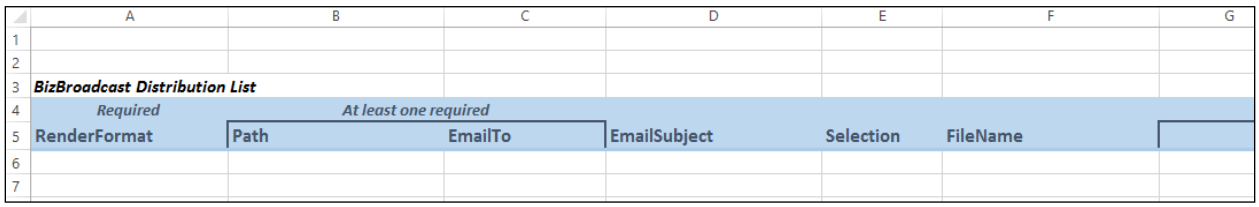
4.1 Create a Distribution List Automatically

Use the **New Distribution Template** button to create a Distribution List automatically. This template can only be inserted once into a workbook. If you need additional Distribution Lists in your workbook, they can be created manually as described in Create a Distribution List Manually.

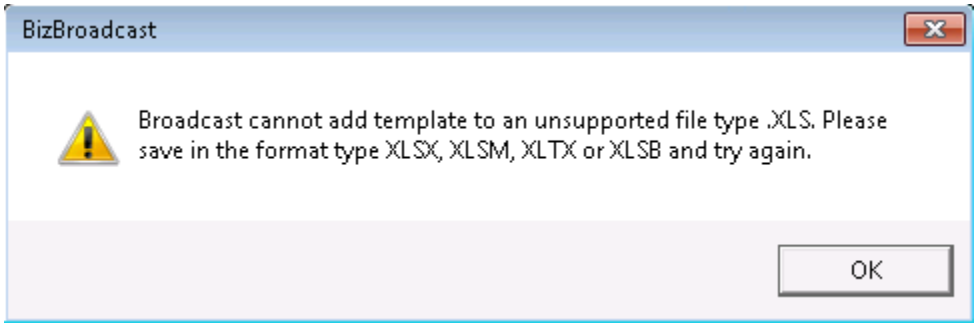
1. Click **New Distribution Template** to insert the default Distribution List template.



BizBroadcast inserts the default Distribution List template with the most commonly used BizBroadcast parameters included. The parameter names (also called column heading or fields) are bold.



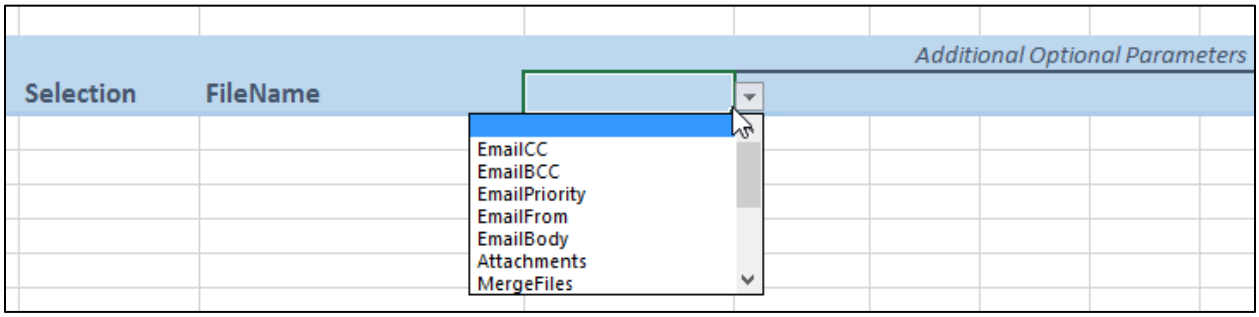
If the below error occurs, the workbook is in the old Excel 97-2003 (.xls) format. Save the workbook as a .xlsx and then close and reopen it to resolve the error.



2. Click a cell under each bold parameter name and enter a value for the parameter. Where possible, drop down lists or helper dialogs are available for the parameter fields. Click in the cell to see if there is a dropdown list or double-click to open the helper dialog, if one is available.

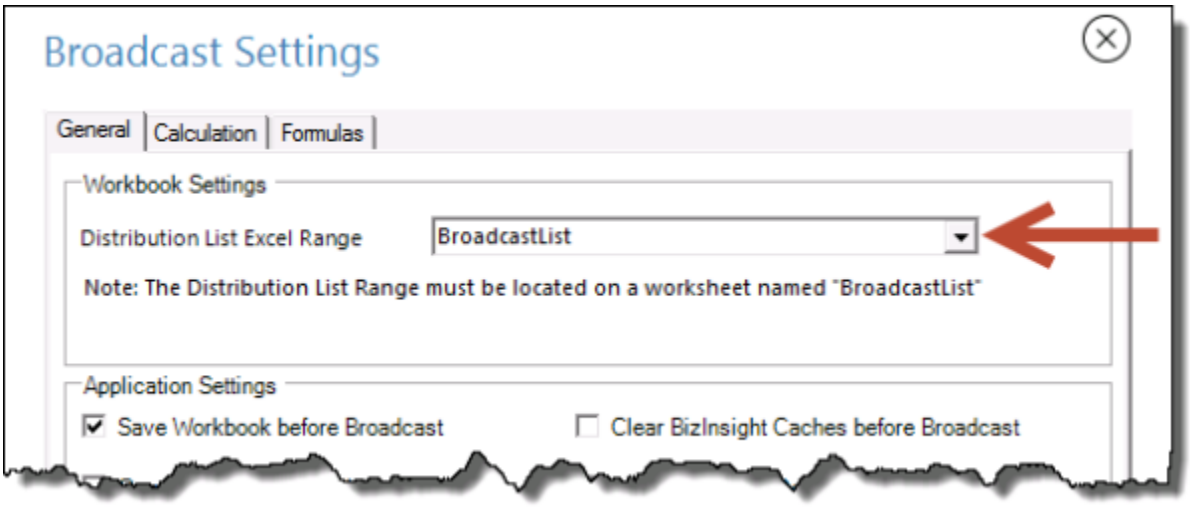
3. Use the Additional Optional Parameters section to add any of the other supported parameters to include in the distribution. For example, select the Attachments parameter to attach an additional file to an email distribution.

4. Select the blank entry in the drop-down list to enter a User-Defined parameter. See User-Defined Parameters for more information.



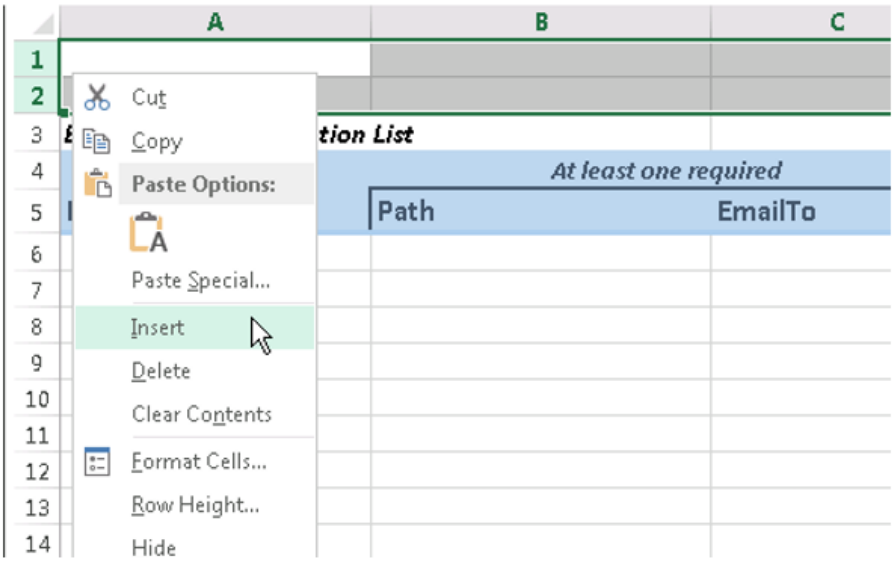
4.2 Create a Distribution List Manually

A workbook can contain multiple Distribution List definitions that represent the various timelines or audiences for the report. You can switch between these Distribution Lists by changing the range selected in the **Distribution List Excel Range** drop down list in the **Application Settings** dialog.



To manually create a Distribution List, do the following:

1. Insert new rows above the default Distribution List. All additional distribution lists **must** reside on the same sheet as the default Distribution List.



2. Enter your BizBroadcast parameters in separate columns on the same row. The order in which the parameters are presented is not important but the names must match the names of the pre-defined parameters. Refer to BizBroadcast Distribution Template for a list of the BizBroadcast pre-defined parameters.

   Include the required **RenderFormat** parameter as well as at least **one** of the two optional parameters:

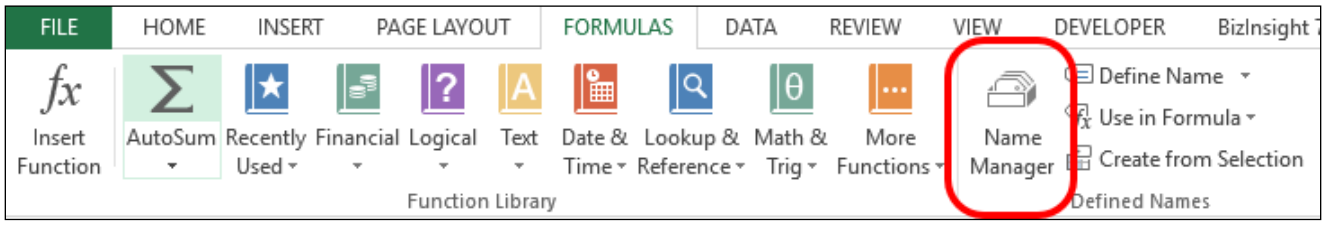
   - **Path** -- a local or UNC path where the report file should be written
   - **EmailTo** -- one or more semi-colon-separated email addresses for the end users who need to receive the report.

	A	B	C
1	My Manual List		
2	RenderFormat	EmailTo	
3	XLSX	tmoses@biznetsoftware.com	
4			
5			
6	***BizBroadcast Distribution List***		
7	*Required*	*At least one required*	
8	**RenderFormat**	**Path**	**EmailTo**
9			
10			

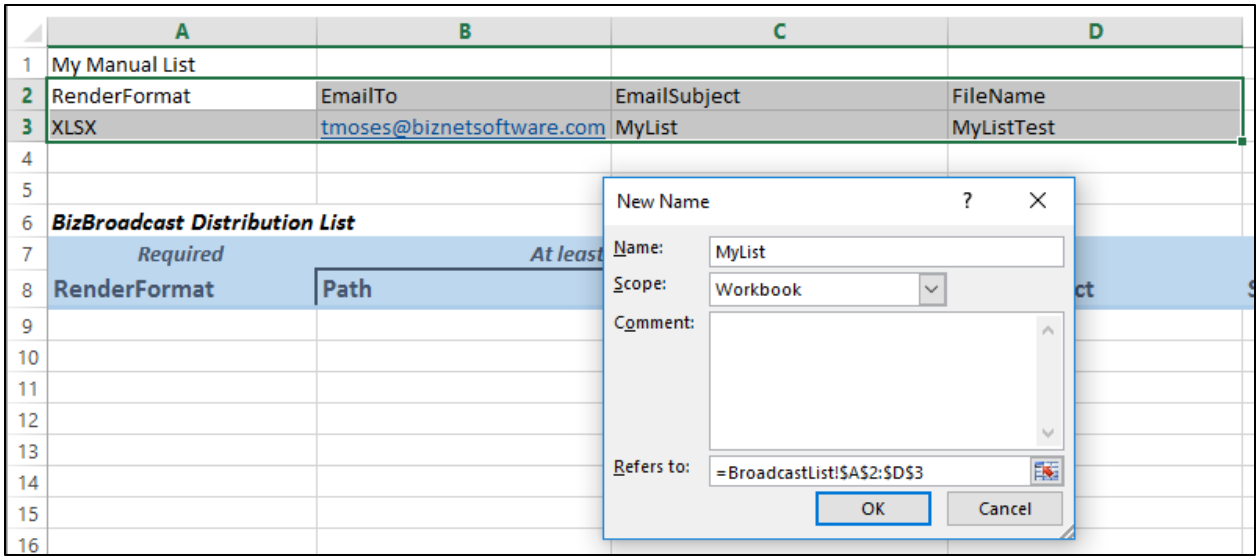
3. Include other distribution parameters as needed to specify email details, such as the **EmailSubject**, or **Selection** to specify the name(s) of the worksheet to include in the report if the entire workbook does not need to be sent. The following is an example of a simple Distribution List created manually:

	A	B	C	D
1	My Manual List			
2	RenderFormat	EmailTo	EmailSubject	FileName
3	XLSX	tmoses@biznetsoftware.com	MyList	MyListTest
4				
5				
6	***BizBroadcast Distribution List***			
7	*Required*	*At least one required*		
8	**RenderFormat**	**Path**	**EmailTo**	**EmailSubject**
9				
10				

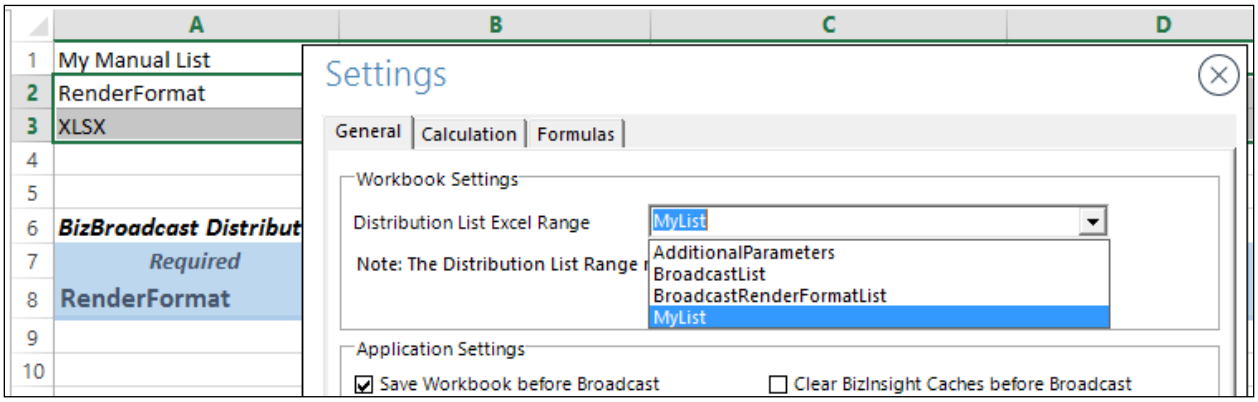
4. Create an Excel name that encompasses the header row of parameter names and each row of the new Distribution List.



For example, the range created for the above example must include at least Rows 2 through 3 and columns A through D, which is represented in Excel as the range $A$2:$D$3.



5. Click on the **Application Settings** button and select the new Distribution List from the **Distribution List Excel Range** drop down.

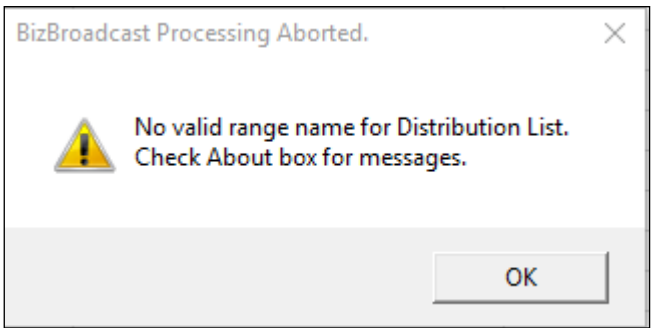


IMPORTANT

If the **Distribution List Excel Range** drop down is disabled, this is because the default Distribution Template has not been inserted into the workbook. Click on the **New Distribution Template** button to insert the default Distribution Template and then move the manually created Distribution List to that sheet.

If you try to run a BizBroadcast distribution without a distribution list selected in the Application Settings dialog OR your manual distribution list is not on the same sheet as the default Distribution Template, you will get the following error:

"No valid range name for Distribution List"



5. Distribution Template Options

Insert a BizBroadcast Distribution Template to specify the report file format, the report parameters, and the Distribution List (the specifications of what to send to the people receiving the report). BizBroadcast lets you use many different parameters to create a Distribution List and define a report distribution.

You can specify multiple report formats, email details, and optional parameters by typing the required information on different worksheet rows. Alternatively, multiple EmailTo addresses (separated by semicolons) can be specified on a single row of a Distribution Template if all other distribution details for a report are the same.

The following parameters are available with BizBroadcast:

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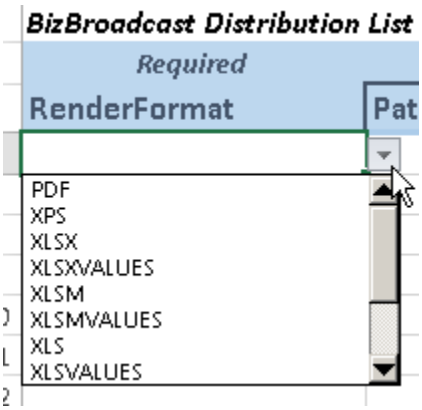
5.1.6 FileName 34
5.2 Additional Optional Parameters 35
5.2.1 Additional Email Parameters 35
5.2.2 Attachments 37
5.2.3 MergeFiles 39
5.2.4 PrinterName 41
5.2.5 Password 42
5.2.6 Calculation 42
5.2.7 Macros 44
5.2.8 Username 52
5.2.9 SendCredentials 52
5.2.10 User-Defined Parameters 52

5.1 Base Parameters

BizBroadcast Base parameters are the parameters displayed to the left of the Additional Optional Parameters section of the Distribution Template. These parameters are comprised of required, optionally required and most commonly used parameters.

5.1.1 RenderFormat (Required)



The RenderFormat parameter allows you to specify the output format of the report BizBroadcast produces. Supported RenderFormats include:

RenderFormat	Description
PDF	Adobe Acrobat Portable Document Format (PDF). When the PDF format is rendered, BizBroadcast creates a bookmark for each worksheet and page in the workbook. Bookmarks are an Adobe Reader capability and can only be seen when the PDF is opened with Adobe Reader. **Note** Excel 2007 requires the Microsoft's Save as PDF update in order to use the PDF render format. This add-in can be downloaded from 2007 Microsoft Office Add-in: Microsoft Save as PDF.
XPS	XML Paper Specification. Open, XML-based fixed document format developed by Microsoft and standardized internationally as ECMA 388. Using this format for reports requires the installation of the XPS Add-In for Excel.
XLSX	Excel file format for Excel 2007 or later.
XLSXVALUES	Static Excel file for Excel 2007 or later
XLSM	Excel file format for Excel 2007 or later that has Excel macro use enabled.

RenderFormat	Description
XLSMVALUES	Static Excel file in the format for Excel 2007 or later with Excel macro use enabled.
XLS	Excel file format for Excel 97-2003.
XLSVALUES	Static Excel file in the format for Excel 97-2003.
MHTML	Multi-purpose Internet Mail Extension (MIME) Hypertext Markup Language (HTML) file for display in a web browser. MHTML files include archiving support and can be used when offline.
HTML	Hypertext Markup Language file for display in a web browser. BizBroadcast is able to publish an HTML document to a website directly. For information on how to publish an HTML document to a website, see HTML Publishing.
CSV	Comma-Separated Values format for simple spreadsheet data.
XML	Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding documents in a format which is both human-readable and machine-readable. **Note** BizBroadcast will produce the XML output as unmapped elements. XML schema file (.xsd) and Extensible Stylesheet Language Transformation (.xslt) are not currently supported.
TEXT	Tab-delimited text output
PACKANDGO	This RenderFormat option produces a disconnected version of the report that does not require database connectivity. Report recipients need BizInsight 7 installed to use the report. For more information on using the PACKANDGO RenderFormat, see PackNGo Distributions. For more information on Pack N Go capabilities, see the BizInsight 7 User Guide.

Static vs Dynamic RenderFormats

Some BizBroadcast capabilities only apply to certain RenderFormats; the characteristic that drives this differentiation is whether the RenderFormat is static or dynamic.

Static RenderFormats

A static output format is any RenderFormat that contains values instead of the original formulas. The BizBroadcast static output RenderFormats are the following:

- PDF
- XPS
- XLSVALUES
- XLSMVALUES
- XLSXVALUES
- HTML
- MHTML
- XML
- CSV
- TEXT

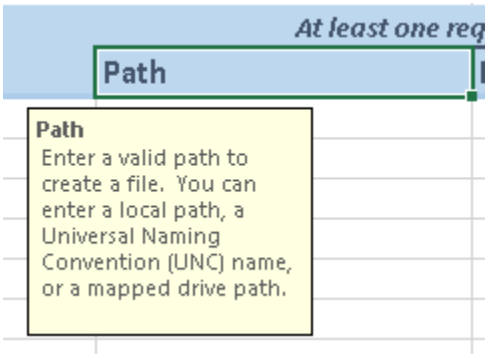
Dynamic RenderFormats

The BizBroadcast dynamic RenderFormats are the following:

- XLS
- XLSX
- XLSM
- PACKANDGO

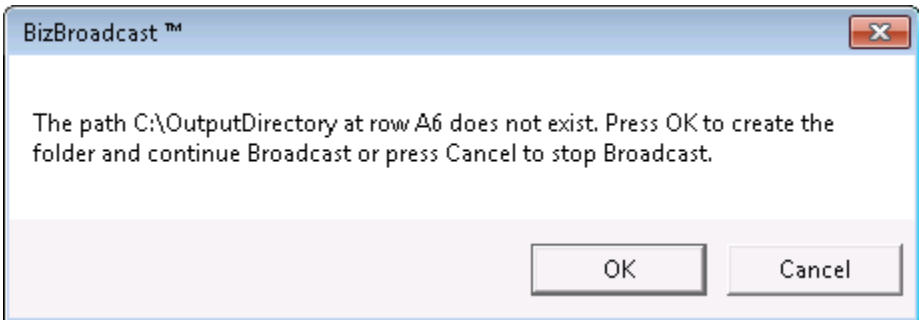
These RenderFormats are considered dynamic because all functions in the resulting output file are fully functional. All Dynamic RenderFormats with the exception of PACKANDGO require database connectivity.

5.1.2 Path (Optionally Required)



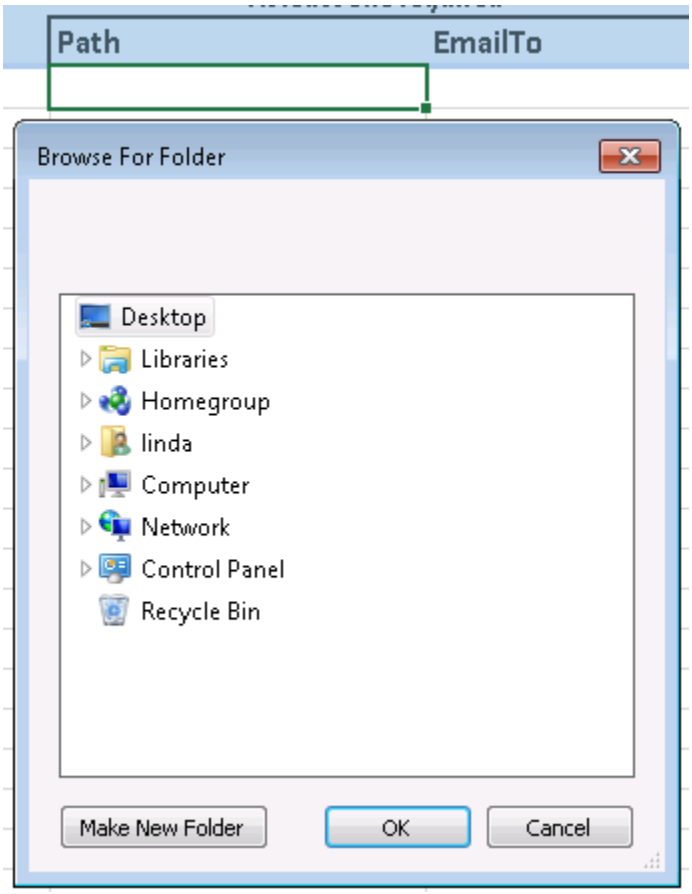
The Path parameter allows you to specify a directory to which BizBroadcast will save the resulting output file. The path can be a local path, a Universal Naming Convention (UNC) path, mapped drive or Sharepoint directory.

If the path does not already exist, BizBroadcast will prompt to create the directory and proceed with the distribution. The user running the distribution must have rights to create the directory in the specified location.



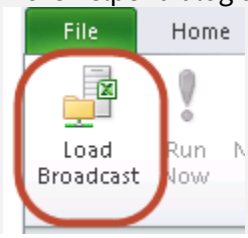
The Path parameter is an optionally required parameter that must be provided when the **EmailTo** parameter is empty.

Double-clicking in the Path cell of the distribution row will open a dialog that will allow you to browse for the directory to which the output should be saved.



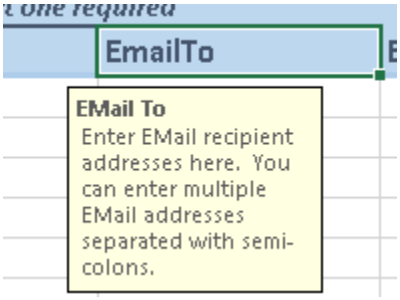
IMPORTANT

If the helper dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.

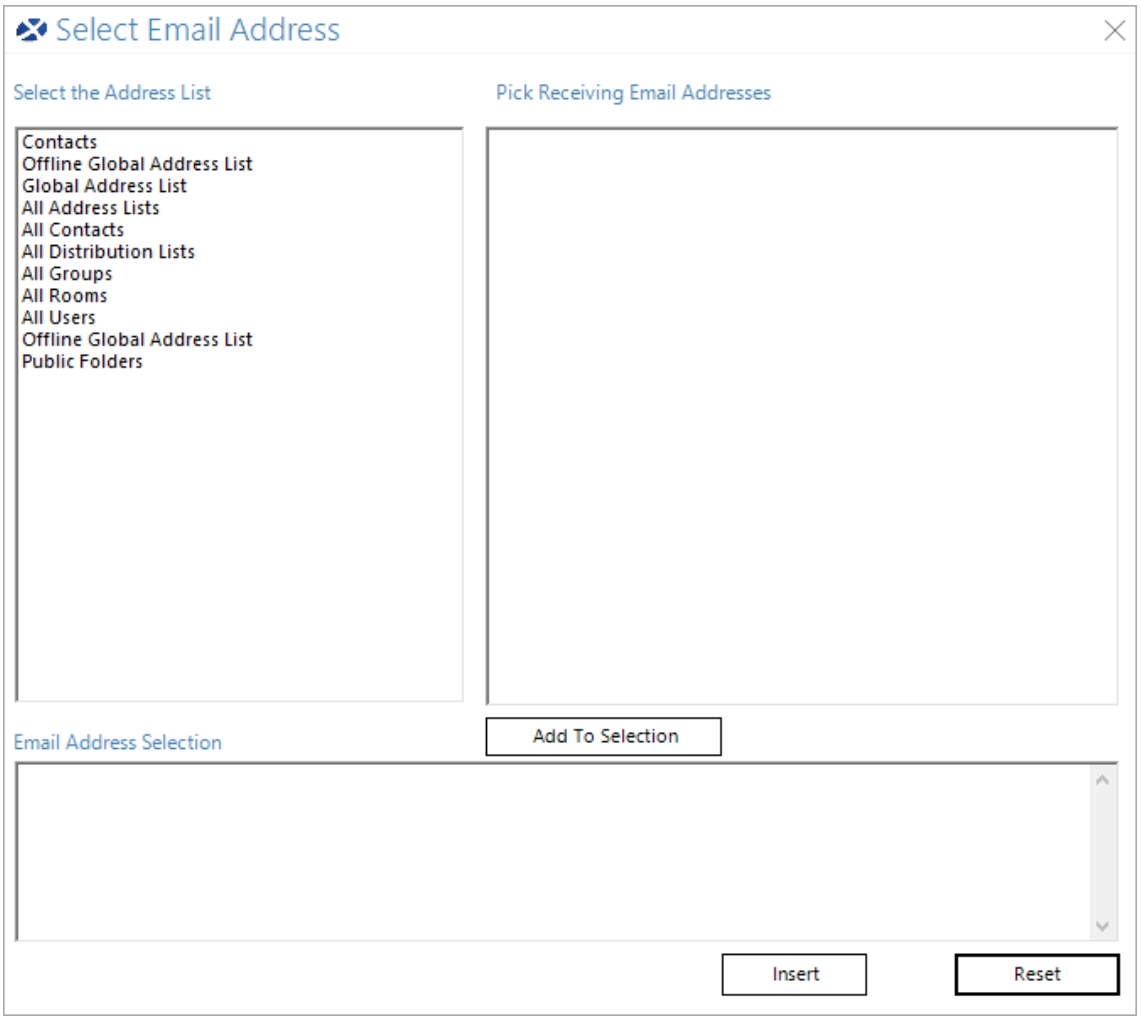


5.1.3 EmailTo (Optionally Required)

The **EmailTo** parameter is required when the **Path** parameter is empty.

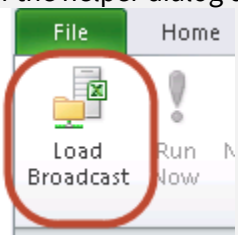


Use this parameter to specify one or more email addresses to which BizBroadcast will email the resulting output file. Double-click on the EmailTo cell of a distribution row to open the **Select Email Address** dialog. This dialog can be used to select individual and group email addresses to which the distribution will be sent.

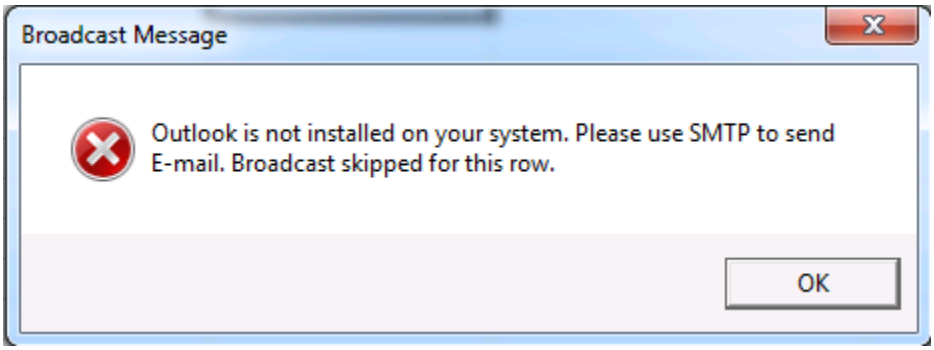


IMPORTANT

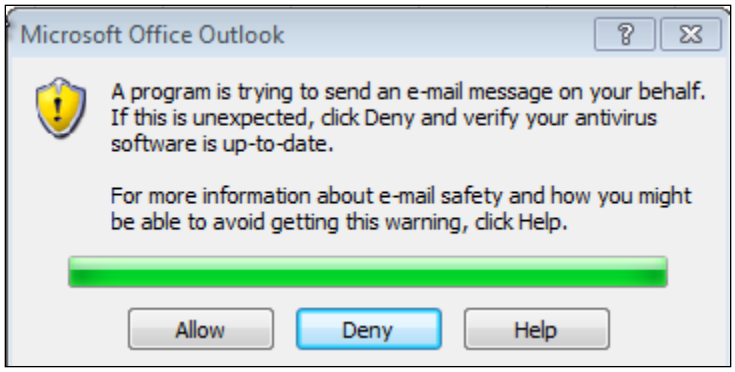
If the helper dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.



If Outlook is not installed, the following message will be displayed and email addresses must be manually entered in the **EmailTo** field, separated by semi-colons (";").



If the following Outlook security warning occurs when running a BizBroadcast distribution that sends the results via email, check the anti-virus status of the workstation.



Outlook will disable security warnings if the installed anti-virus software satisfies the following three conditions:

1. Anti-virus software shares its status with third-party software through the Windows Security Center ("WSC").

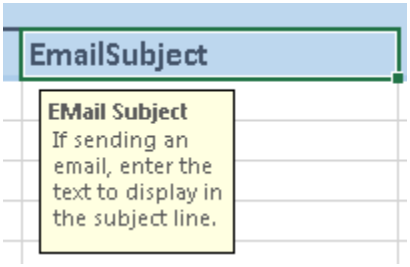
2. The anti-virus software is up to date.

3. Virus scanning is enabled on access.

IMPORTANT

If you plan to use a different email provider than Outlook, for example Gmail, that email provider may have security settings that need to be adjusted in order for BizBroadcast to send a distribution. Troubleshooting SMTP distribution problems are outside the scope of BizNet Software Support.

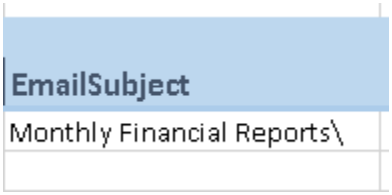
5.1.4 EmailSubject



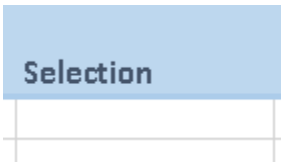
If BizBroadcast will be emailing the resulting output file, this parameter can be used to provide a subject line for the email.

By default, the email subject will be appended with the text “generated by BizBroadcast™”.

To suppress this behavior, add a backslash “\” after the email subject text.



5.1.5 Selection

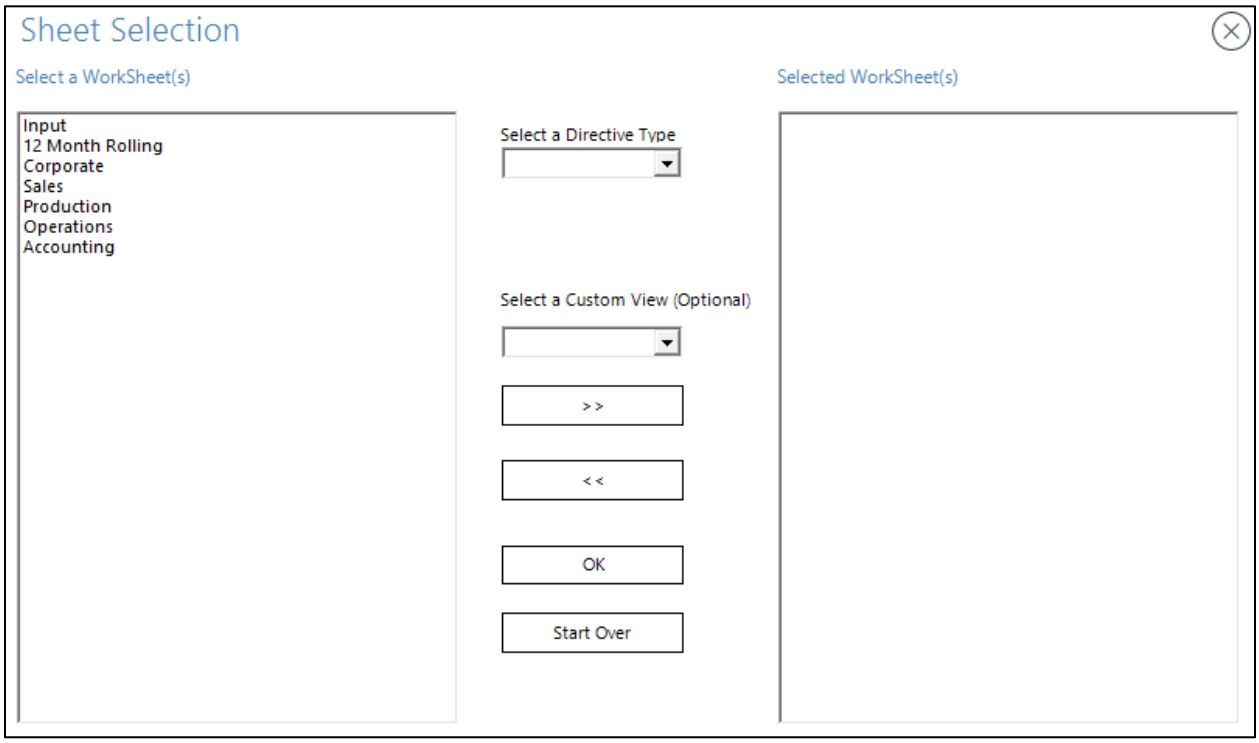


Use this parameter to specify how to handle the various worksheets within the source workbook during distribution. Worksheets can be included, hidden, deleted, password protected, etc. When the **Selection** parameter is left empty, BizBroadcast sends all tabs in the workbook.

Double-click in the **Selection** cell of the distribution row to open a dialog to build your selections.

IMPORTANT

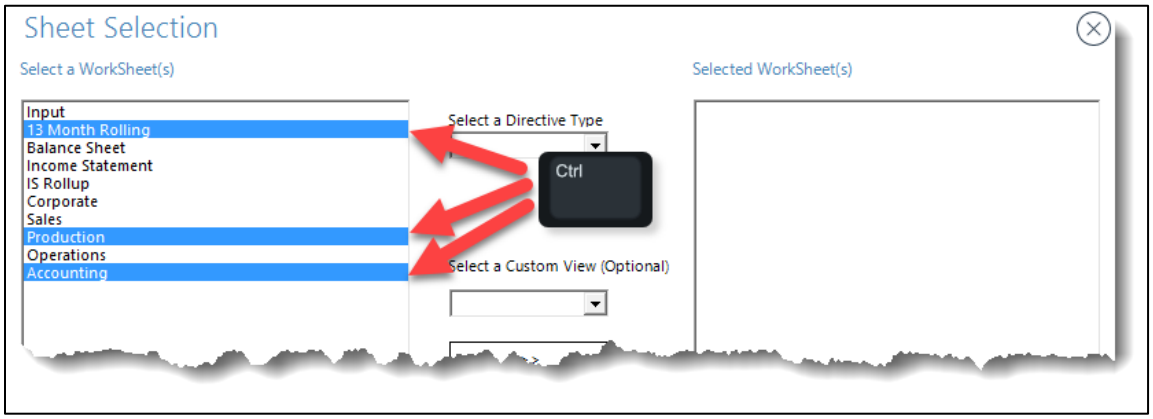
If the below dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.



Note

The left pane will only display visible worksheets. Hidden sheets and chart sheets will not be displayed and cannot be distributed by BizBroadcast. To include charts in a distribution, add charts to worksheets and include those worksheets in the Selection parameter.

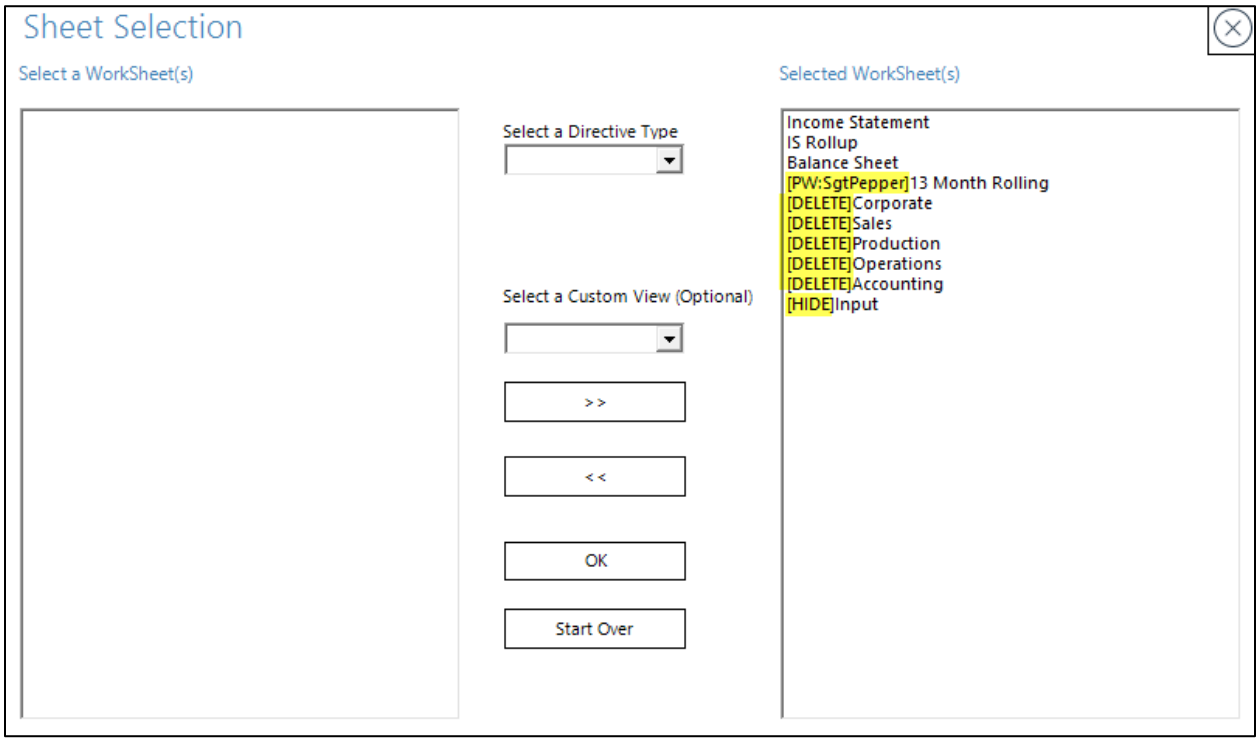
Select one or more worksheets in the left pane and click **Add to Selection** to include those worksheets in the distributed report. Use the **CTRL** button to select non-contiguous worksheets.



If selecting the **Add to Selection** button does not add the selected sheet(s) to the right-hand pane, make sure a RenderFormat is selected for the distribution row.

Use the **Remove Selection** button to remove a sheet (or sheets) from the **Selected Worksheet(s)** list or click the **Start Over** button to completely clear the **Selected Worksheet(s)** pane.

Selection Directives



Use the **Select a Directive Type** drop down list to select a directive for the sheet when it is added to the **Selected Worksheet(s)** list.

Note

Selection Directives only apply to dynamic RenderFormats. For more information, see Static vs Dynamic RenderFormats.

The available Selection directives are:

[DELETE] - The [DELETE] directive is used to instruct BizBroadcast to delete the worksheet from the resulting output file. By default, BizBroadcast will delete any sheets not specified in the Selection parameter when the parameter is populated. This directive becomes useful when BizBroadcast's default behavior has been changed in the Application Settings dialog to hide workbooks not being included in the output.

[HIDE] - The [HIDE] directive is used to identify sheets that BizBroadcast should include in the resulting output file but be hidden. Similar to the [DELETE] directive, it can be used to override BizBroadcast's default behavior to delete sheets not being included in the output.

The following table provides Selection examples for a workbook with Sheet1, Sheet2, Sheet3, Sheet4 **and** BizBroadcast's default behavior is set to “Hide”:

Directive Usage	Output Result
Sheet1,Sheet2	Includes Sheet1 and Sheet2. Hides Sheet3 and Sheet4.
Sheet1,Sheet2;[DELETE]	Includes Sheet1 and Sheet2. Deletes Sheet3 and Sheet4.
Sheet1,Sheet2;[DELETE]Sheet3	Includes Sheet1 and Sheet2. Deletes Sheet3. Hides Sheet4.
[HIDE]Sheet3	Includes all sheets except Sheet3. Sheet3 will be hidden.
[DELETE]Sheet3	Includes all sheets except Sheet3. Sheet3 will be deleted.
[DELETE]Sheet2;[HIDE]Sheet1,Sheet3	Deletes Sheet2. Hides Sheet1 and Sheet3. Sheet4 will remain visible. Equivalent to “Sheet4;[DELETE]Sheet2”
Sheet1;[HIDE]Sheet2;[DELETE]	Includes Sheet1. Sheet2 is included but hidden (as in a Parameters sheet). Sheet3 and Sheet4 are deleted.

Note

The [DELETE] and [HIDE] directives can be used to override the **Default Sheet Removal Behavior** selection made in the Application Settings dialog. See Calculation Tab for more information about this configuration option.

[PW:] - This directive can be used to password protect a worksheet in the resulting BizBroadcast output file. See Assigning Sheet Protection Passwords for more details.

[HIDE][PW:] – The [HIDE][PW] directive can be used to include a worksheet in the resulting output file that is hidden and password protected by the supplied password.

[PRESERVE] – Use the [PRESERVE] directive to specify that any functions listed in the Application Settings > Formulas dialog are preserved in the resulting broadcast output.

[NOPRESERVE] – If BizBroadcast has been configured to preserve specific formulas by default (i.e. the Preserve Formulas for each Broadcast Item option under **Application Settings** > **Formulas** is checked), the [NOPRESERVE] directive can be used to override that default setting for a specific distribution row to ensure that all formulas are kept in the resulting BizBroadcast output instead of only the ones listed in the Preserved Formulas list.

Note

The [PRESERVE] and [NOPRESERVE] directives can only be used with XLSX and XLSM render formats.

[CALC] - Use this directive to specifically instruct BizBroadcast to calculate the specified worksheet. This directive is not available via the Selection dialog but can be manually typed in the Selection parameter field after closing the Selection dialog. This directive is most commonly used when the distribution includes a parameter driven analysis set.

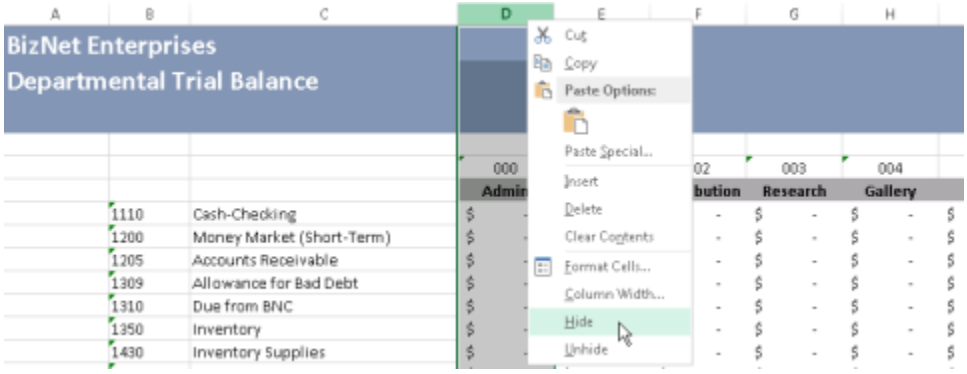
Using Custom Views

The **Select a Custom View** drop down provides the ability to apply an Excel Custom View to a worksheet that is being distributed.

Excel Custom Views allow you save a specific display setting for a worksheet. A user can make changes to the worksheet display so that the worksheet window appears exactly as desired each time the view is selected. Display settings can be altered such as column widths, row heights, hidden rows and columns, cell selections, filter settings, and window settings. Print settings can be altered such as page settings, margins, headers and footers, and sheet settings.

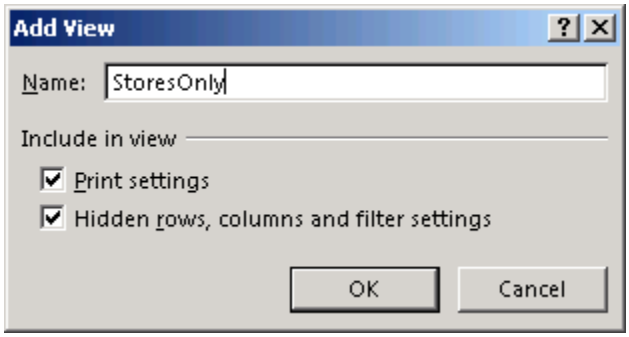
To broadcast output using a Custom View, do the following:

1. Adjust the worksheet as desired so the content is displayed as you would like it to be presented to the BizBroadcast recipient.



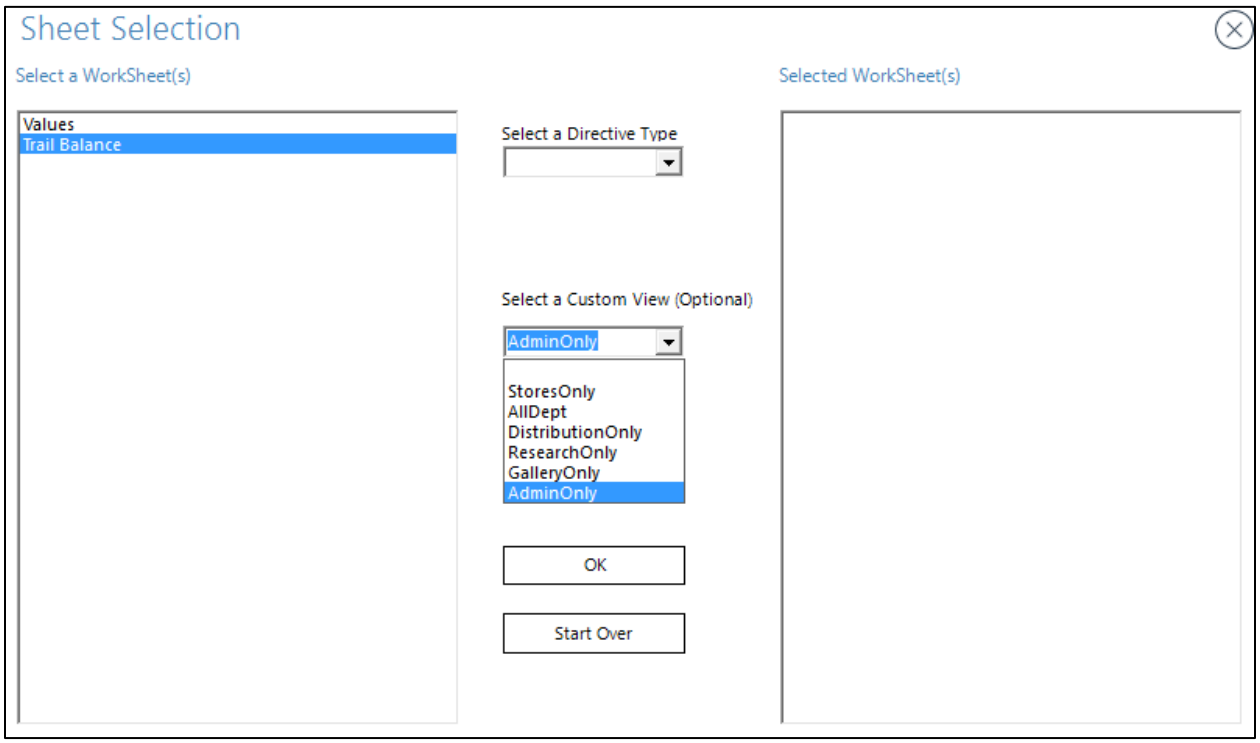
2. Go to the **View** tab of the ribbon and choose **Custom Views**.

3. Click **Add** and assign a name to the view. Click **OK**.



4. Double-click the **Selection** cell of the distribution row to open the **Broadcast Sheet Selection** dialog.

5. Select the sheet in the left pane, click on the **Select a Custom View** drop down and select the desired view.

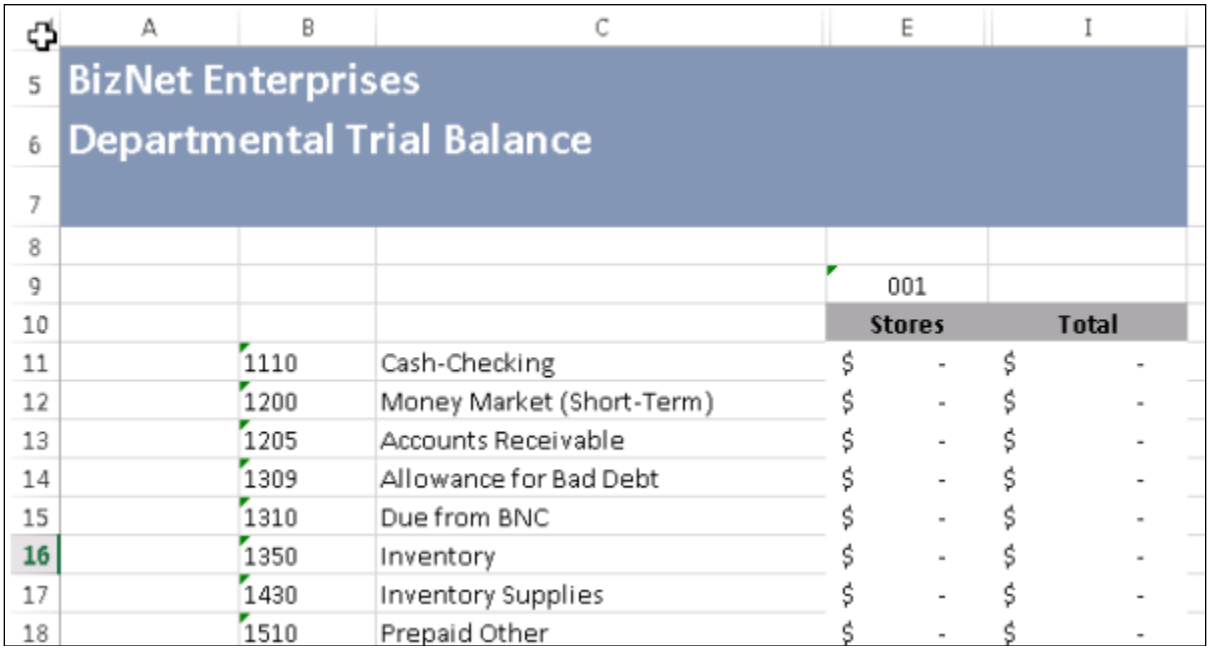


6. Click **OK** when finished.

Selection	FileName
[VIEW:AdminOnly]Trial Balance	CustomViewExample-Admin
[VIEW:StoresOnly]Trial Balance	CustomViewExample-Stores
[VIEW:DistributionOnly]Trial Balance	CustomViewExample-Distribution

Example distribution with Custom Views applied

7. When the distribution is run, the output will display as defined by the Custom View.



	A	B	C	E	I
5	BizNet Enterprises				
6	Departmental Trial Balance				
7					
8					
9				001	
10				Stores	Total
11		1110	Cash-Checking	$ -	$ -
12		1200	Money Market (Short-Term)	$ -	$ -
13		1205	Accounts Receivable	$ -	$ -
14		1309	Allowance for Bad Debt	$ -	$ -
15		1310	Due from BNC	$ -	$ -
16		1350	Inventory	$ -	$ -
17		1430	Inventory Supplies	$ -	$ -
18		1510	Prepaid Other	$ -	$ -

IMPORTANT

1. Custom views do not work with tabbed parameter reports.
2. Custom views can only be selected from the distribution workbook and in the scenario of merging workbooks, BizBroadcast is unable to detect Custom Views from other workbooks.
3. Hidden rows and columns still exist in the output and can be unhidden if the RenderFormat is an Excel workbook.
4. Custom Views work with any of the Excel based RenderFormats (XLSX, XLSXVALUES, XLS, or XLSVALUES) or PDF.
5. If any worksheet in the workbook contains an Excel table, the Custom Views command on the ribbon button will be disabled. BizBroadcast will detect the Custom View but the Custom View will not be applied during distribution.

5.1.6 FileName

Provides an alternate filename to use for the resulting output file. BizBroadcast uses the source workbook name for the output filename unless a different name is specified for the FileName parameter.

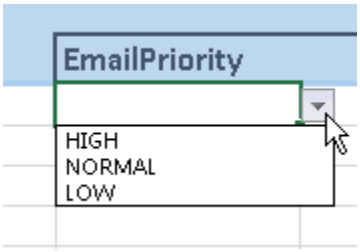
Note

No file extension is required for this parameter because the selected RenderFormat dictates the file extension.

5.2 Additional Optional Parameters

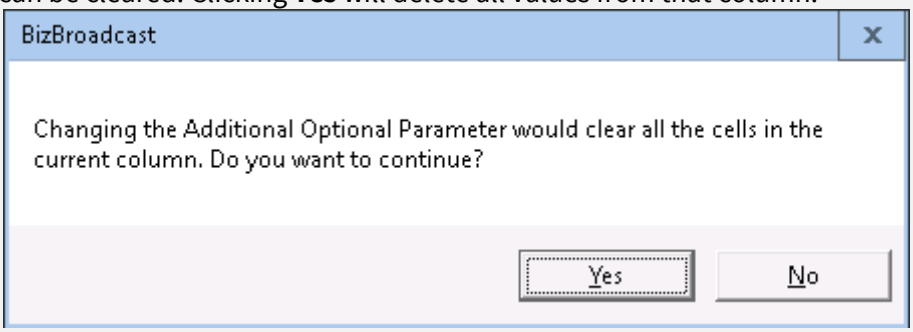
There are additional distribution parameters that do not have dedicated columns in the default Distribution Template. These parameters are provided in drop down lists in the Additional Optional Parameters section.

Several of the optional parameters have helpful drop down lists of valid values. After selecting a parameter from the drop down list, double-click the cell below to generate supporting drop down lists or open helper dialogs.



WARNING

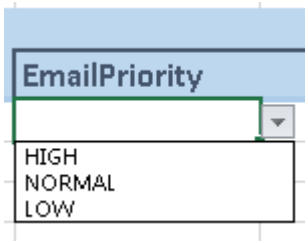
Once a drop down list has been generated for a distribution row, that list will remain attached to that cell. If a different parameter is chosen for that column, BizBroadcast will ask if the cells of that column can be cleared. Clicking **Yes** will delete all values from that column.



5.2.1 Additional Email Parameters

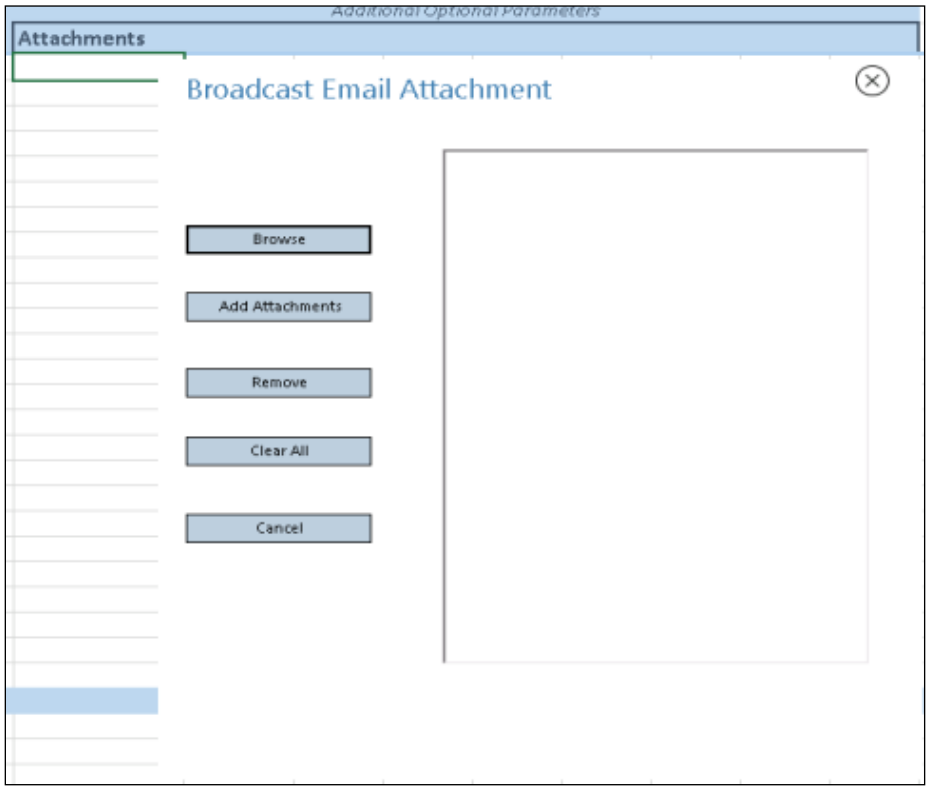
BizBroadcast provides parameters to specify additional email handling options.

Parameter	Description
EmailCC	Allows you to supply email addresses of recipients to be carbon copied on the email produced by BizBroadcast. Values for this parameter will be ignored if the EmailTo parameter is blank.

Parameter	Description
EmailBCC	Allows you to supply an email address for a recipient who should be blind carbon copied on the email produced by BizBroadcast. Values for this parameter will be ignored if the EmailTo parameter is blank.
EmailFrom	Allows you to specify the From address to be used when an SMTP server is sending the emails produced by BizBroadcast. If your Email Settings are set to Outlook Client, the From email address will be that of the default Outlook profile. **IMPORTANT** If BizBroadcast is configured to use SMTP and the SMTP server uses the TLS protocol, the EmailFrom parameter **must** be selected and a valid email address used in order for the distribution to succeed.
EmailBody	The text for the body of an email produced by BizBroadcast.
EmailPriority	The EmailPriority parameter can be used to specify the priority for the email produced by BizBroadcast. When an EmailPriority is not specified, the email's priority defaults to Normal. When EmailPriority is selected as an optional parameter, double-click on the EmailPriority cell for the distribution row to get a drop down list of valid email priorities: 

5.2.2 Attachments

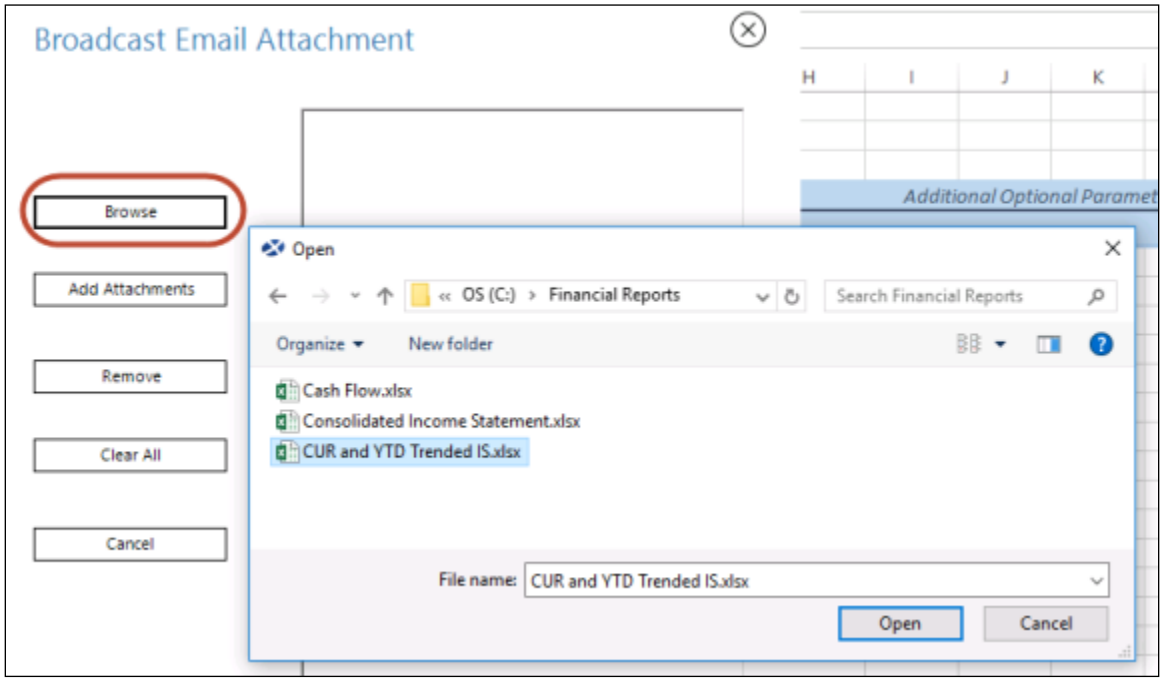
The Attachments parameter can be used to provide a path to one or more files that you would like attached to the email output. With the Attachments parameter selected, double-click on a cell below to open a helper dialog.



IMPORTANT

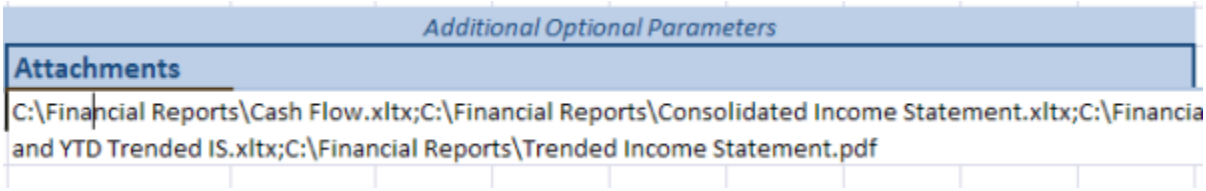
If the helper dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.

Click the **Browse** button to browse to the file(s) to attach.



Use the **Remove File** button to remove any inadvertent file selections that have been made.

Click the **Add Attachments** button to add selected attachments to the distribution row.



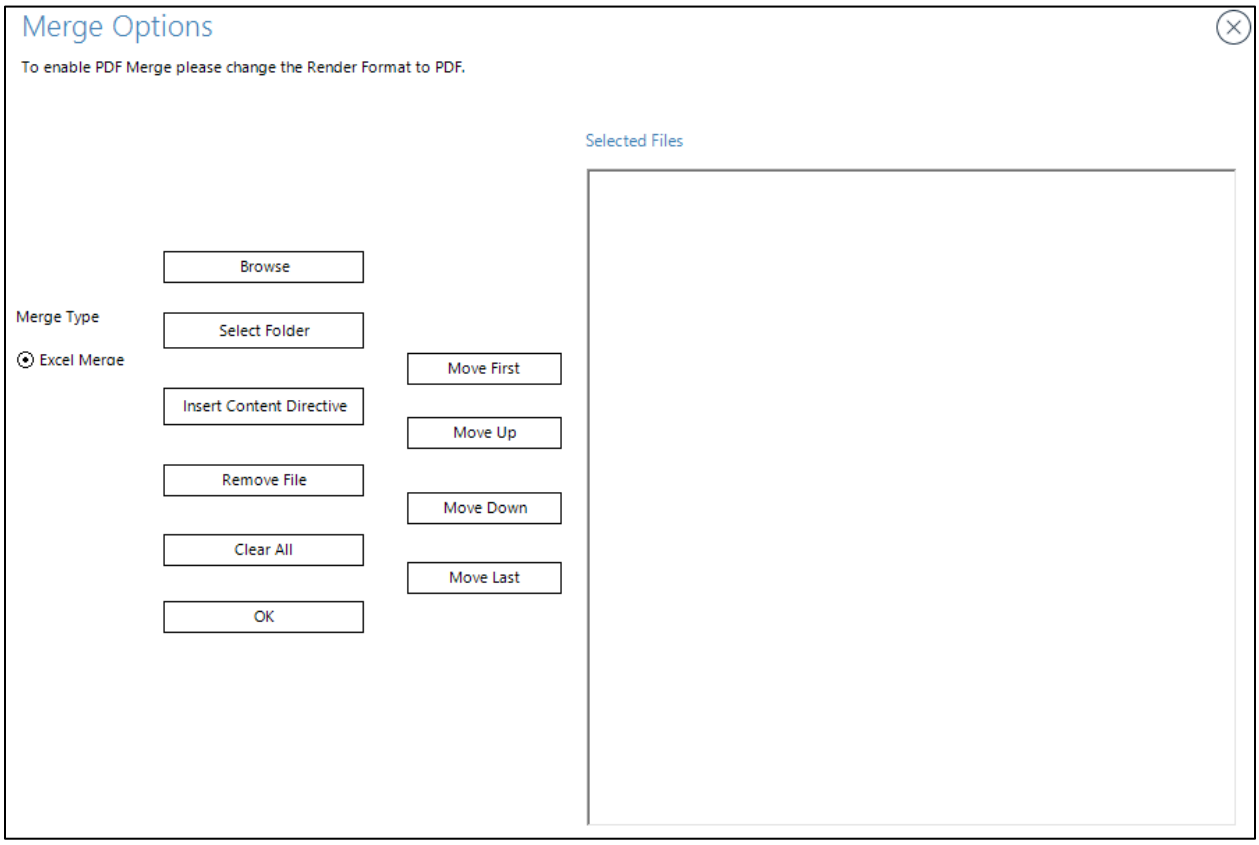
Wildcard characters can be used to control which files are retrieved from the specified directory. For example, providing C:\Reports*2009*.xlsx will attach only those .xlsx files located in C:\Reports that contain “2009” in their filename.

Note

Wildcards cannot be entered using the Attachments dialog and must be manually typed in the Attachments cell of the distribution row.

5.2.3 MergeFiles

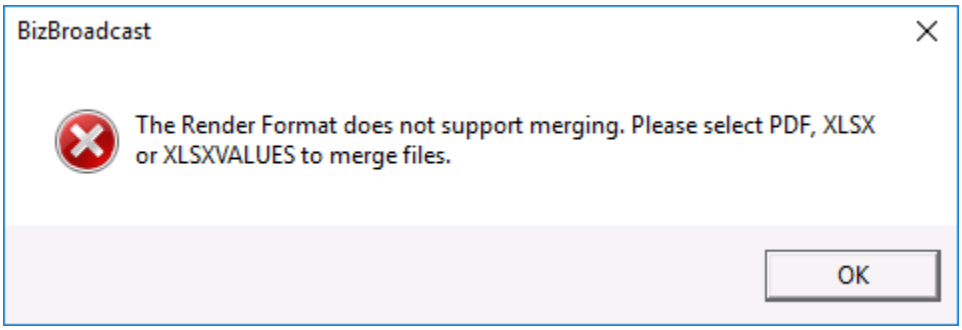
Use the MergeFiles parameter to specify additional content to merge with the BizBroadcast output. This parameter can only be used with the PDF, XLSX or XLSXVALUES render formats. After selecting the MergeFiles parameter, double-click the cell of the distribution row to open a dialog to assist with the selection of the files to merge.



IMPORTANT

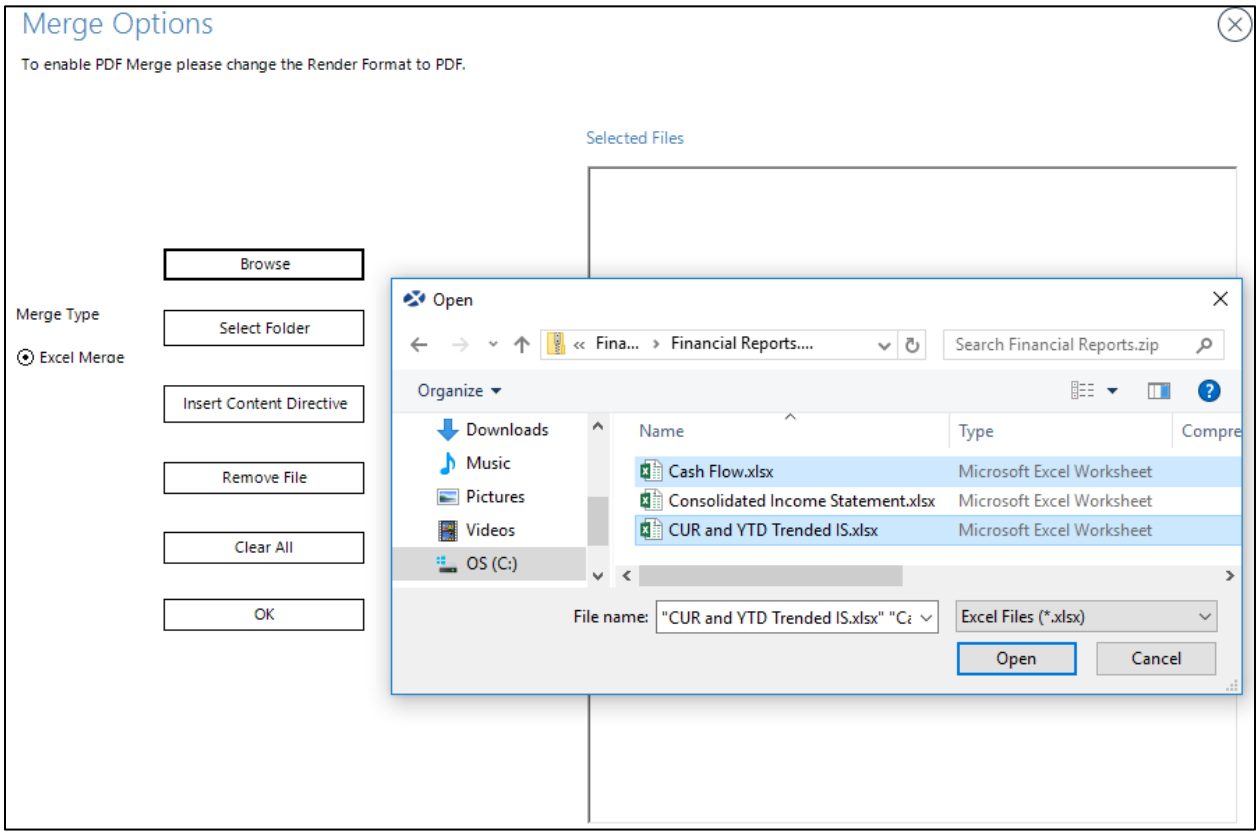
If the helper dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.

If one of the supported render formats is not selected for the distribution row, the following error will occur when double-clicking on the MergeFiles cell of the distribution row:



The **Choose Merge Type** radio button is defaulted based on the RenderFormat selected for the distribution row.

Click the **Browse** button to browse to a directory and select files to be merged.

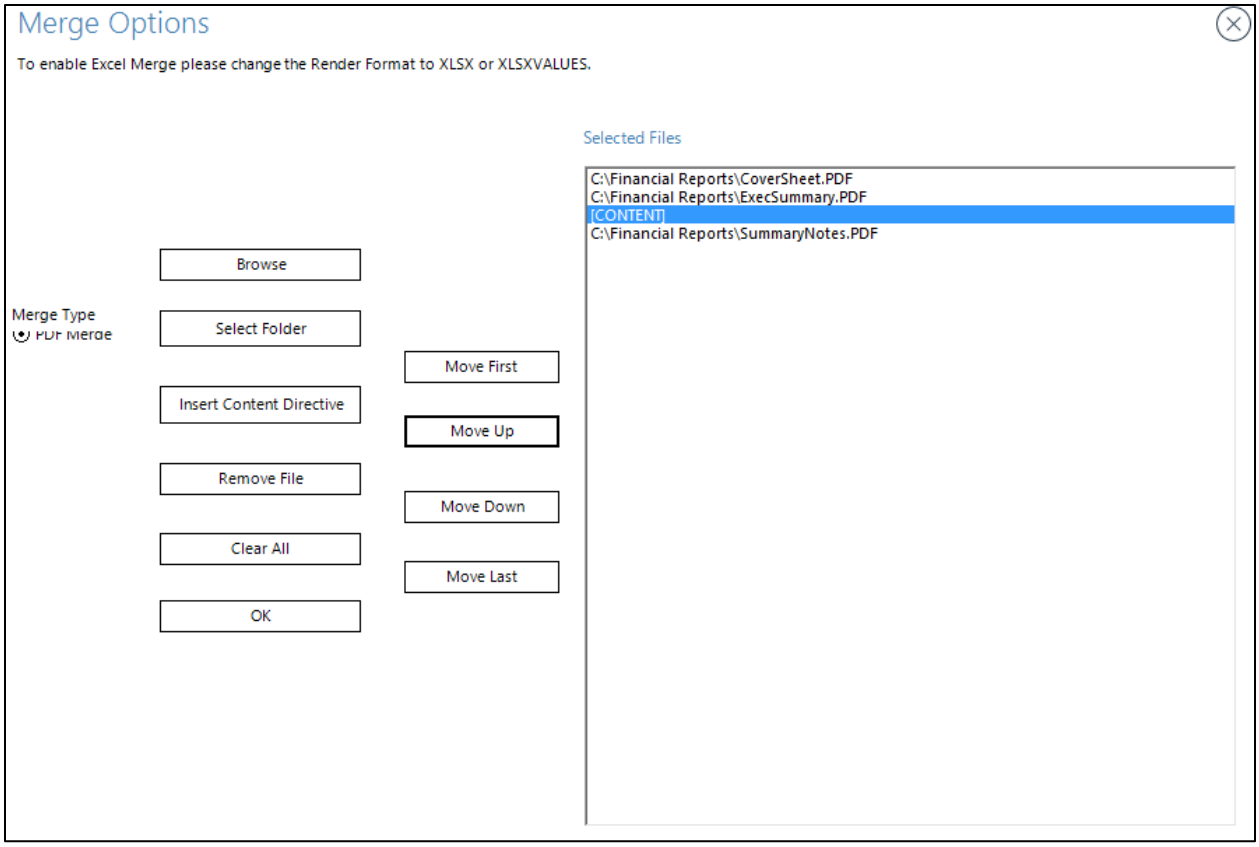


IMPORTANT

The file types of the files to be merged must be of the same type as the selected RenderFormat. If the RenderFormat is XLSX, the additional files to be merged must also be .XLSX files. If the RenderFormat is PDF, then the additional files to be merged must be .PDF files.

Use the **Select Folder** button to specify a folder that contains all the files to be merged. BizBroadcast will merge all files in that directory that have the same file format as the selected RenderFormat of the distribution row.

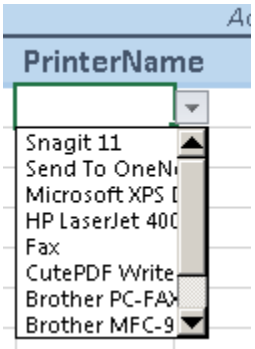
Use the **Insert Content Directive** button to specify where the output for the current distribution item will be placed in the resulting merge file. For example, entering the following for the MERGEFILES parameter would result in a single PDF output file with the contents of the existing PDF files named CoverSheet.pdf and ExecSummary.pdf being placed first in the PDF file followed by the result of the current BizBroadcast distribution and the content of the existing SummaryNotes.pdf being merged in last.



Use the **Move** buttons (Move First, Move Up, Move Down, Move Last) to reorder selections to achieve the desired order.

5.2.4 PrinterName

Use this parameter with a PDF or XPS RenderFormat to send the BizBroadcast output to a printer. Double-click on the PrinterName cell of the distribution row to get a drop down list of installed printers.



Note

This parameter will only work with PDF or XPS RenderFormats.

5.2.5 Password

The Password parameter has two uses:

1. The Password parameter can be used to specify a password that will be required to open the resulting workbook produced by a distribution. See Password Protection for more information on the password protection capabilities of BizBroadcast.

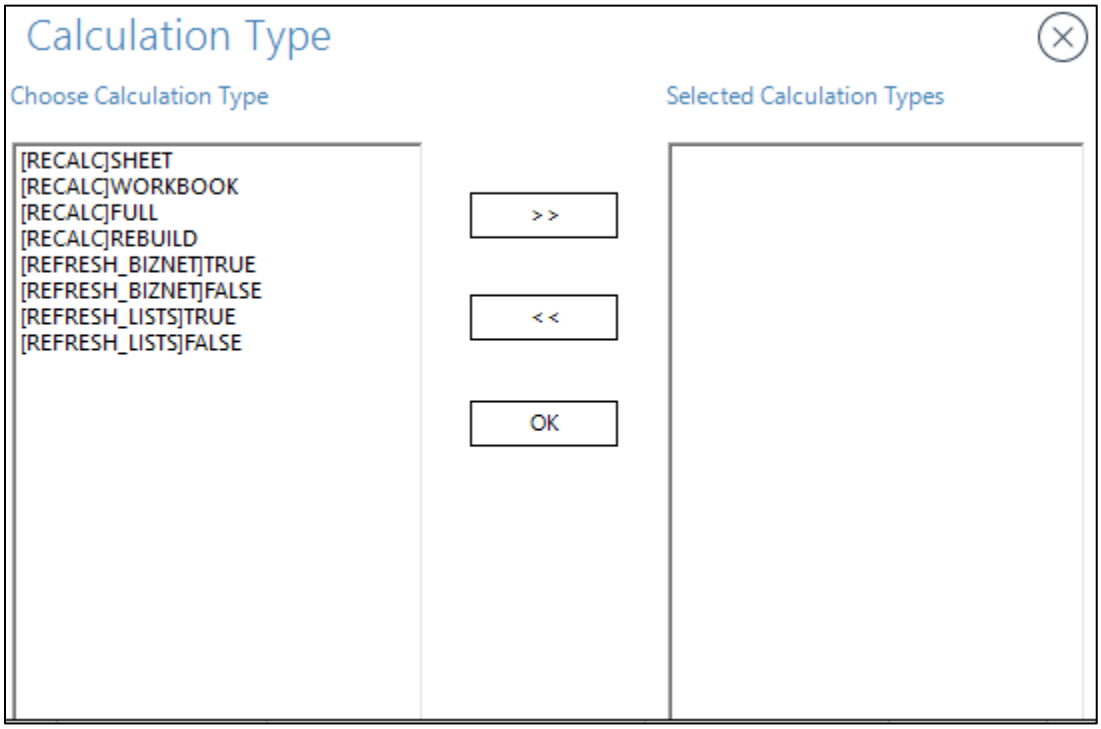
   IMPORTANT

   This parameter cannot be used to supply a password for BizBroadcast to use to open a password protected source workbook.

2. The Password parameter is also used in conjunction with the **Username** parameter to supply credentials for HTML publishing. For more information about how to publish an HTML document to a website, see HTML Publishing.

5.2.6 Calculation

The Calculation parameter is used to specify Distribution Item-level calculation instructions. After selecting the Calculation parameter, double-click the Calculation cell of the distribution row to open a dialog to assist with setting calculation options.



IMPORTANT

If the helper dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.

This parameter supports the following directives:

Directive	Options	Calculation Tab Equivalent
[RECALC]	SHEET or WORKBOOK	For Each Broadcast Item
[RECALC]	FULL or REBUILD	For Each Broadcast Item
[REFRESH_BIZNET]	TRUE, FALSE	Refresh Analysis Sets
[REFRESH_LISTS]	TRUE, FALSE	Refresh User Lists

[RECALC]Sheet/Workbook – Use this directive to control whether recalculation is performed for just the selected sheets or for the whole workbook.

[RECALC]Full/Rebuild – Use this directive to specify a full calculation or a full calculation with a rebuild of the Excel dependency tree.

[REFRESH_BIZNET]True/False – Use this directive to specify whether to refresh BizNet lists within the workbook. True will instruct BizBroadcast to refresh all BizNet lists.

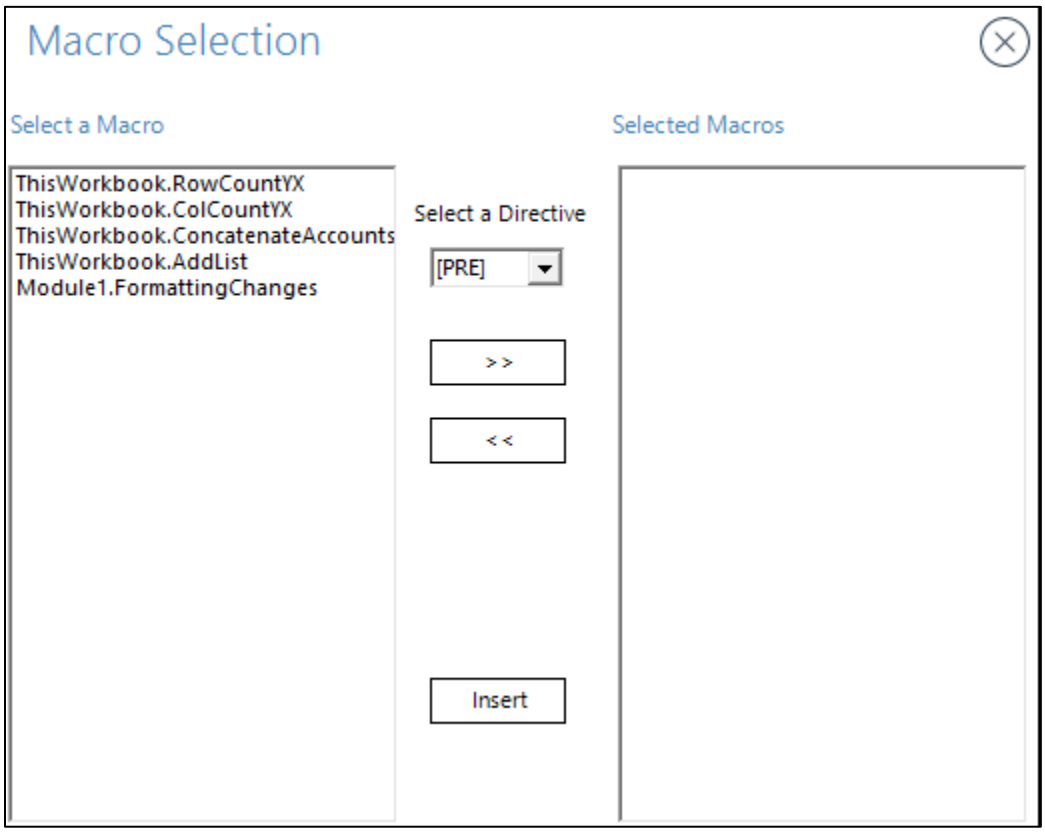
[REFRESH_LISTS]True/False – Use this directive to specify whether non-BizNet lists connected to external data are refreshed during broadcast.

Note

Calculation directives are used to override default settings specified in **Application Settings** > **Calculation**. See Calculation Tab for more information about BizBroadcast calculation settings.

5.2.7 Macros

Use the Macros parameter to instruct BizBroadcast to run a macro before or after calculation of the distribution workbook.

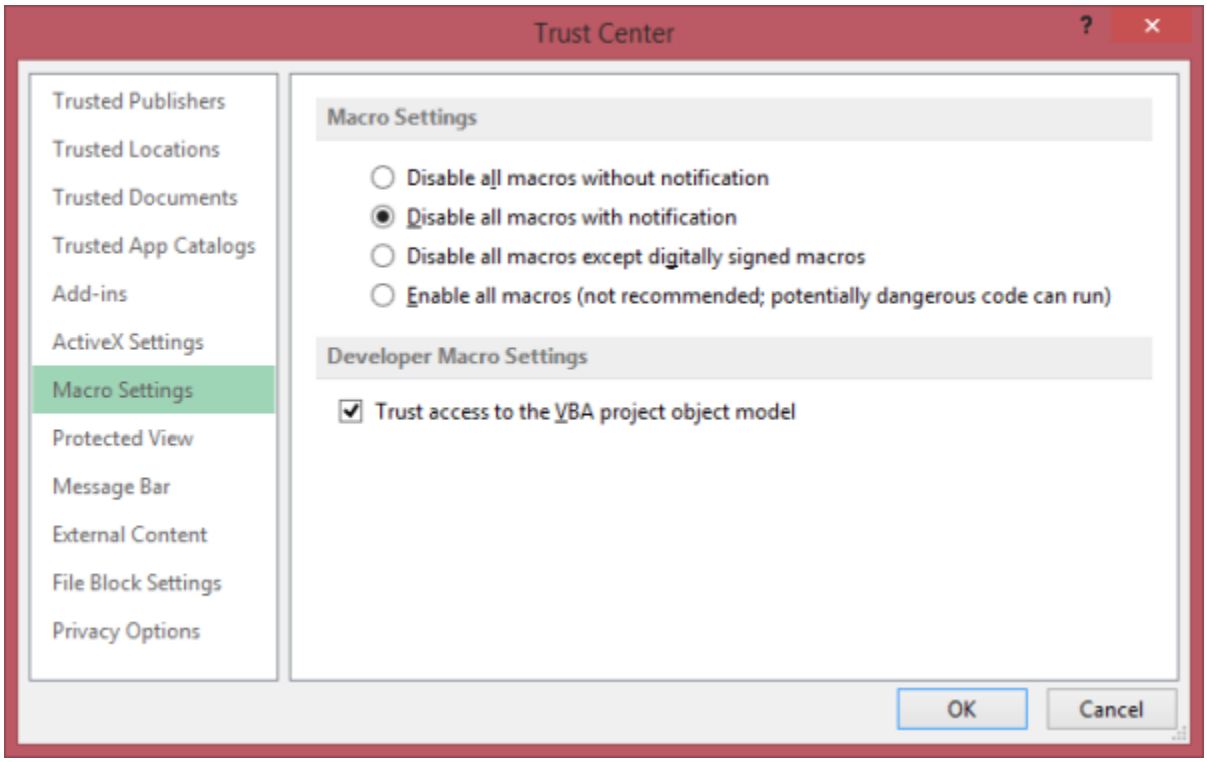


Macro Requirements

Macro-enabled workbooks and macros being executed by BizBroadcast must satisfy the following requirements:

1. The source workbook containing the Distribution Template must be a macro-enabled workbook. (.xlsm).

2. The **Trust access to the VBA project object model** check-box must be checked in Excel's Trust Center.



Instructions for accessing the Trust Center settings are as follows:

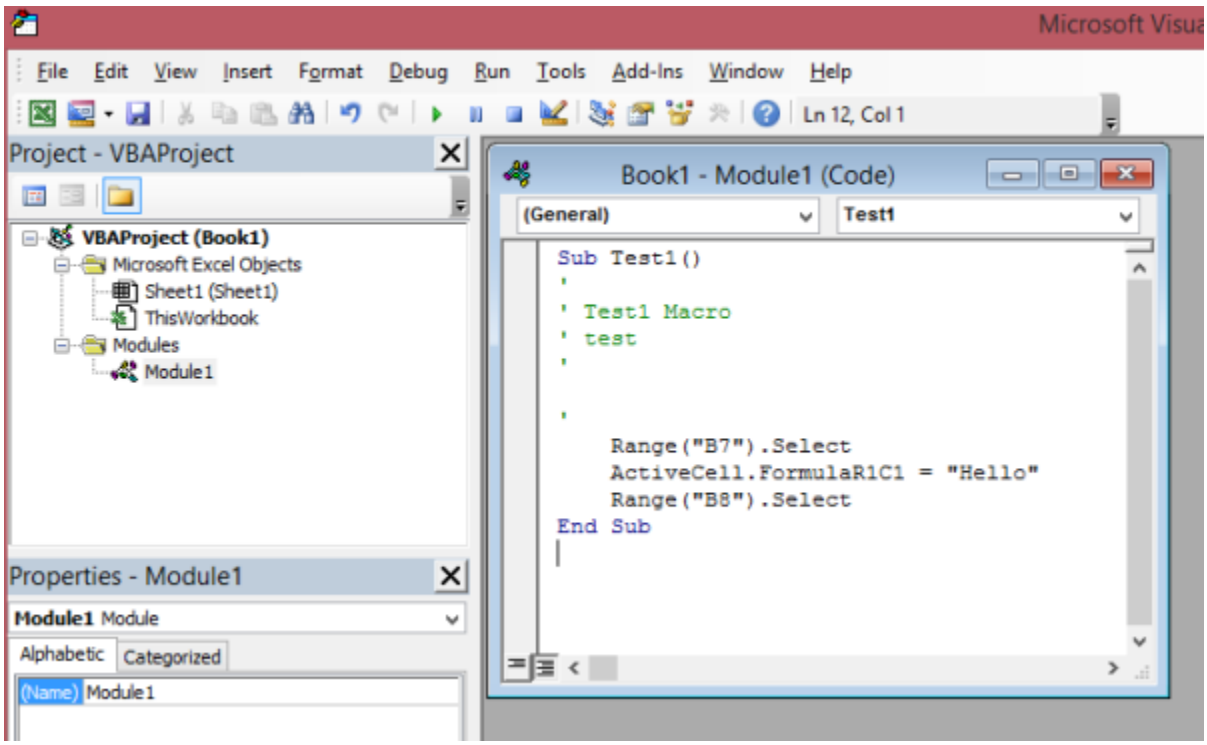
Excel Version	Steps
Excel 2007	Office button > Excel Options > Trust Center > Trust Center Settings > Macro Settings
Excel 2010/2013/2016	File > Options > Trust Center > Trust Center Settings > Macro Settings

IMPORTANT

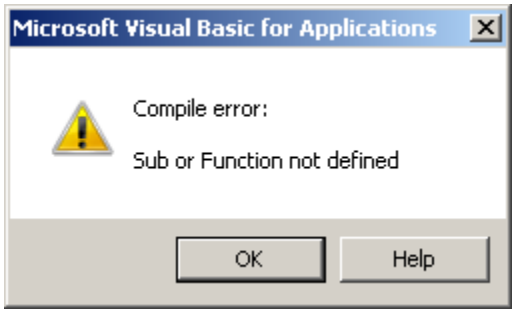
Organizations have the ability to implement policies to prevent changes to these settings. If these settings are grayed out, check with your company's System Administrator for assistance.

3. Macros to be executed must exist in the source workbook. Macros stored in a user's Excel Personal.xlsb are not supported.

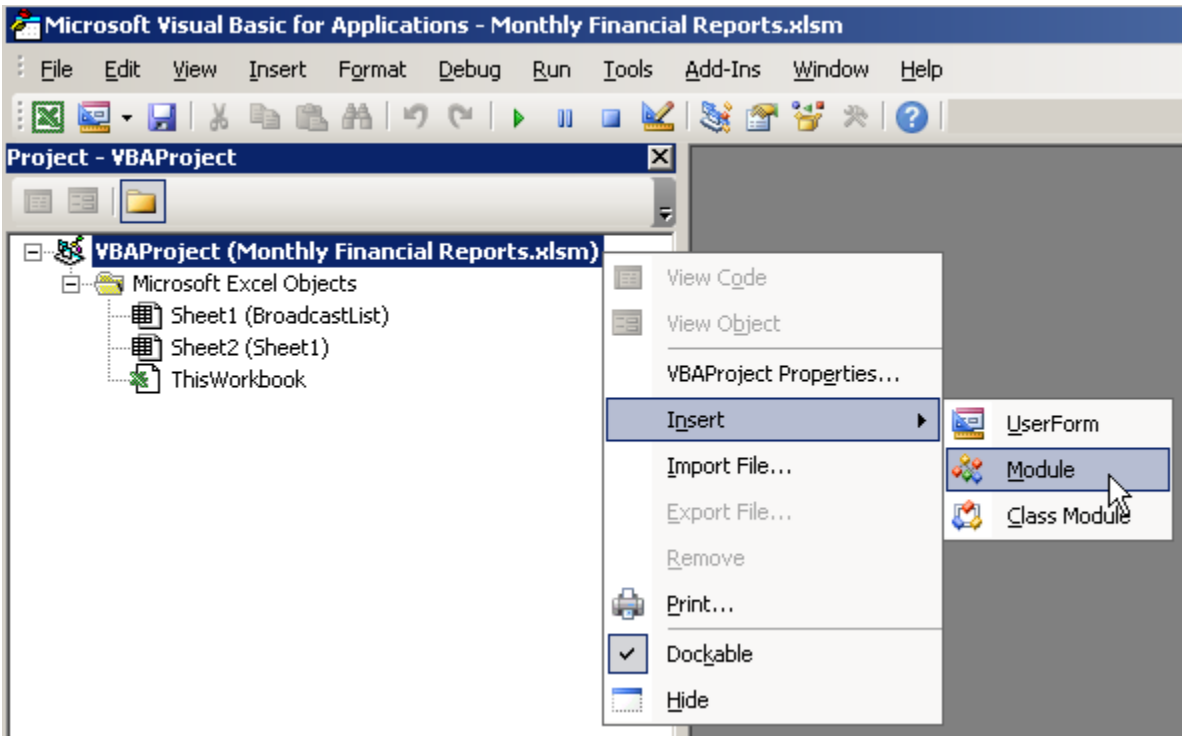
4. Macros must be written in the Module object instead of the Worksheet object.



If a macro is selected that is not written in the Module object, the following error will occur during broadcast:



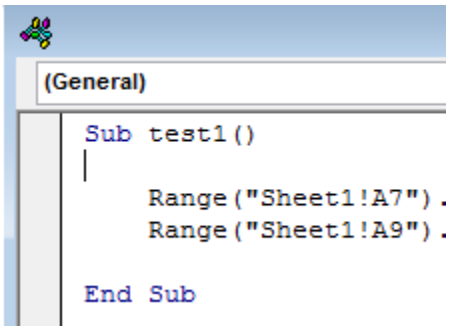
To add a Module object to a workbook, right-click on the VBAProject node, choose **Insert** > **Module**.



Note

When the **Trust access to the VBA project object model** Trust Center setting is enabled, all recorded macros are created in the Module object by default.

5. Range commands within the macro being executed must include an Excel worksheet reference. A worksheet reference is a cell reference which includes a worksheet name. For example:

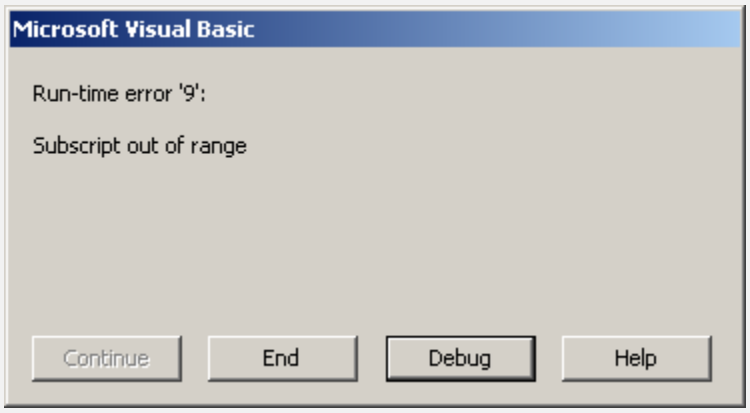


Depending on the structure of the macro, worksheets referenced may also need to be included in the distribution output file.

IMPORTANT

1. Macros are not supported with Tabbed Parameter reports.

2. Macros using the [POST] directive cannot be used with distributions that include more than one User-Defined parameter because BizBroadcast will append parameter values to the sheet names. Since macros must use Excel worksheet references, the changed sheet names will result in an error when the macro runs because the referenced sheet no longer exists.



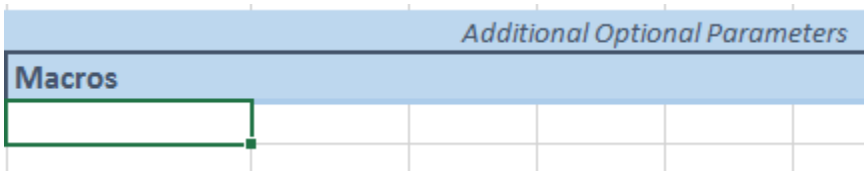
   See Sheet Renaming with Multiple User-Defined Parameters for suggested alternate designs.

3. BizNet Software Support will not provide assistance with writing or debugging macros.

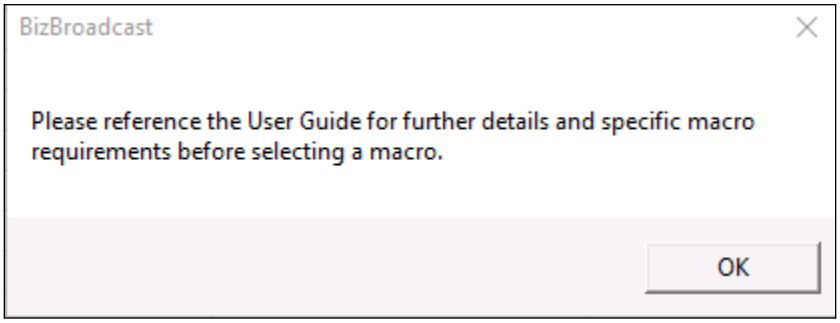
How to Select Macros with BizBroadcast

Once a macro has been created that satisfies the stated requirements for BizBroadcast, the macro can be added to a BizBroadcast distribution as follows:

1. Select **Macros** from the Additional Optional Parameters drop down list of the Distribution Template.



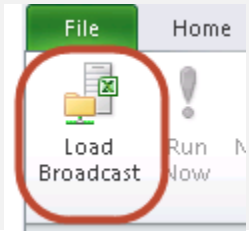
2. Click **OK** to the warning.



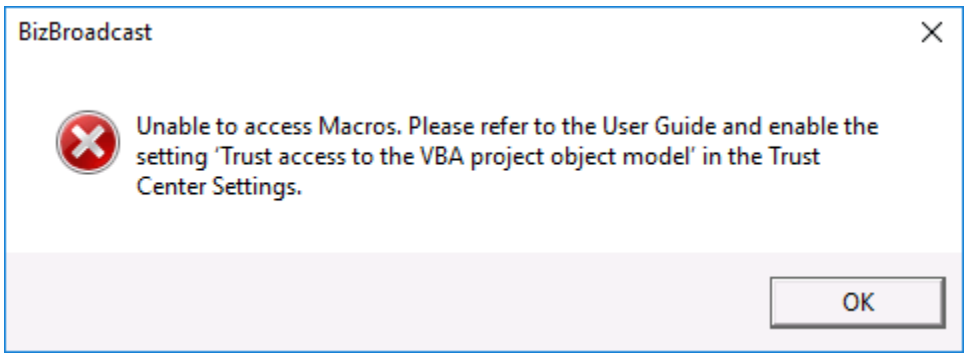
3. Double-click the cell under the Macros header to open the **Macro Selection Form** dialog.

IMPORTANT

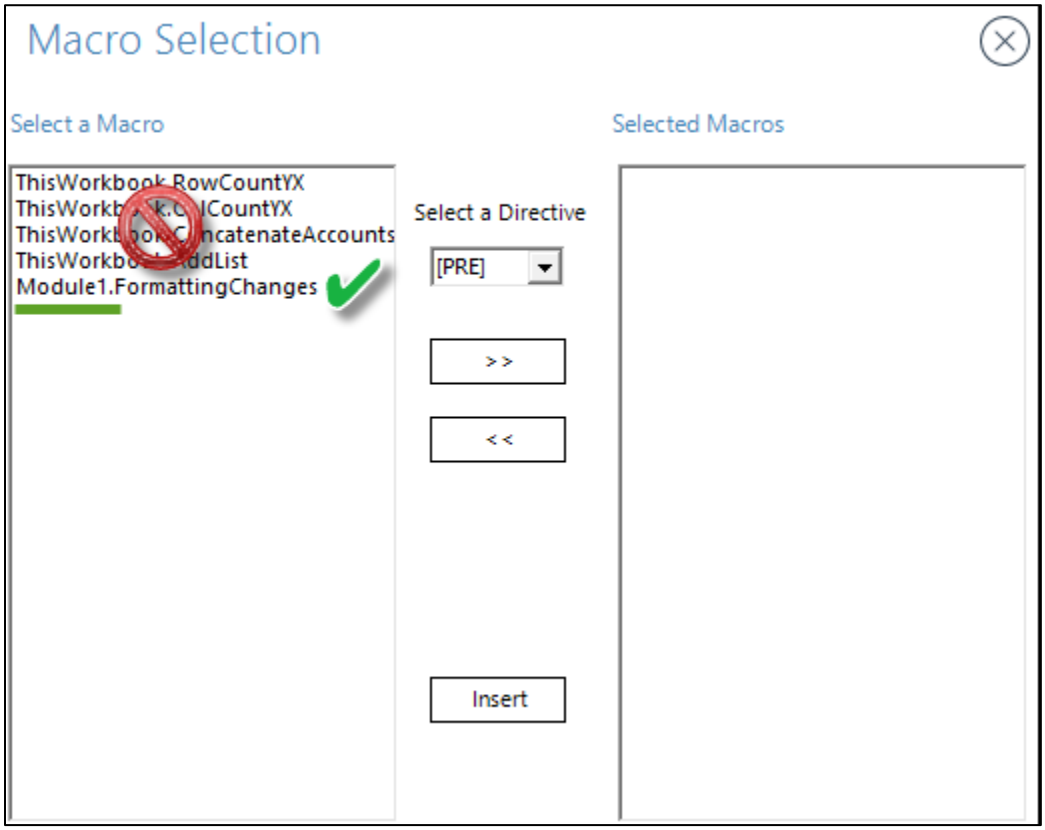
If the helper dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.



The following error will occur if the required Trust Center setting has not been enabled. See Macro Requirements.



4. The left pane will display all macros stored in the workbook and the object location of the macro will be displayed (Sheet, Workbook or Module).



Reminder

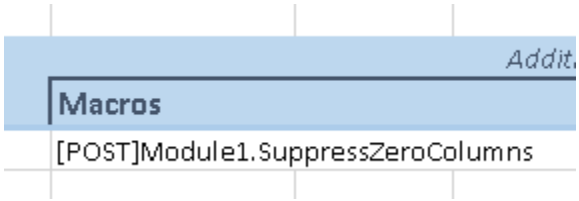
Only Module object macros can be executed by BizBroadcast.

5. Select a directive and click the **Add** button

   - [PRE] – macros are executed before the Excel calculation
   - [POST] – macros are executed after the Excel calculation

6. Click the **Insert** button to add the macros to the distribution row.

7. All selected macros are listed with directives.

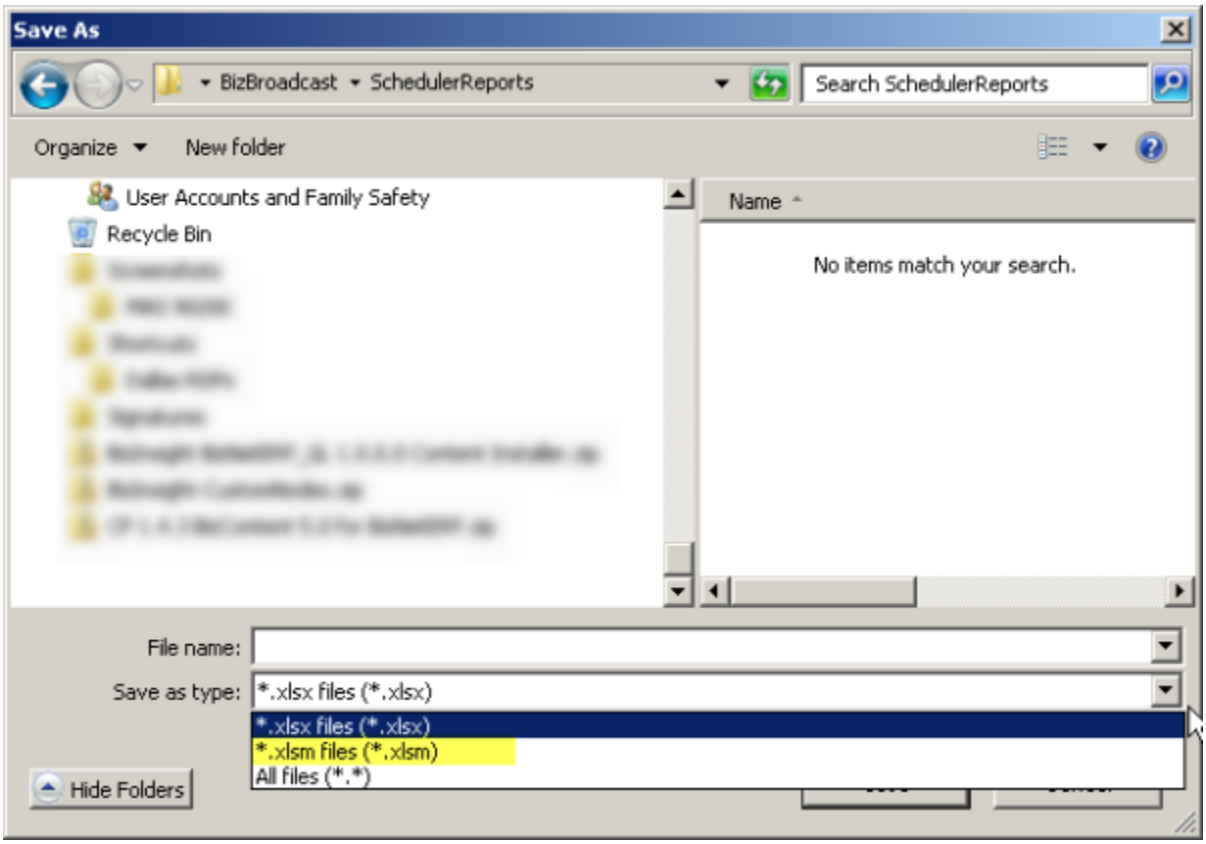


Macros Example.xlsm
Macros - Pre and Post Directives.xlsm

Macro-Enabled Workbooks and Scheduler

When saving macro-enabled workbooks as scheduled reports, it is important to ensure that the workbook file extension remains .xlsm

After clicking the **Save as Schedule File** button to save the schedule, the .xlsm format must be selected from the **Save as type** drop-down menu to save the schedule in the macro-enabled format.



5.2.8 Username

The Username parameter is used in conjunction with the **Password** parameter to supply credentials for HTML publishing. For more information about how to publish an HTML document to a website, see HTML Publishing.

5.2.9 SendCredentials

The SendCredentials parameter is an optional parameter for HTML publishing. When added to a distribution row that publishes an HTML document to a website and set to TRUE, BizBroadcast will include the Username and Password supplied by the RecipientCredentials parameter in the email along with a hyperlink to the document. If user credentials are not supplied using the RecipientCredentials parameter, Biz Broadcast will provide the credentials used to publish the HTML content.

IMPORTANT

The credentials used to publish the HTML content must have rights to create the HTML document on the website. Using the SendCredentials parameter to send those same credentials to the end recipient gives the recipient more access to the website than they need to view the document using an internet browser.

For more information about how to publish an HTML document to a website, see HTML Publishing.

5.2.10 Recipient Credentials

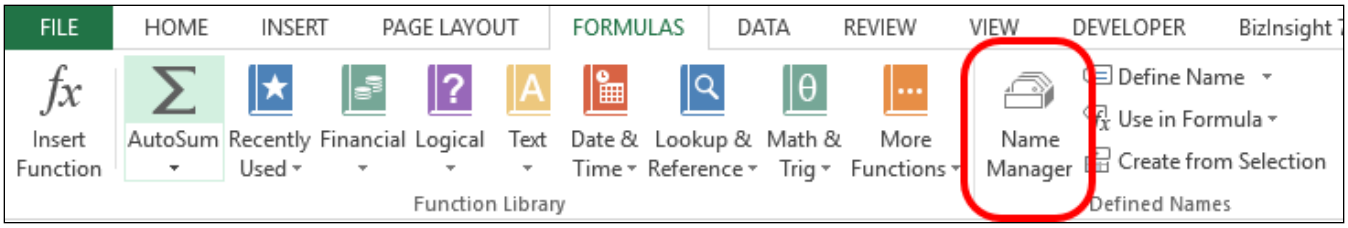
The RecipientCredentials parameter is an optional parameter for HTML publishing and can be used to provide lesser privileged credentials for users to access the published HTML content. The credentials should be provided in the format of username;password.

5.2.11 User-Defined Parameters

In addition to the pre-defined parameters, BizBroadcast supports the use of Excel named ranges as parameters; this type of parameter is called a "User-Defined" parameter. By assigning an Excel name to a cell within the source workbook and using that range name as a parameter, BizBroadcast can be used to supply values to those cells at run-time. These User-Defined parameters can be used to pass input values for BizInsight functions as well as custom text or titles to a report to achieve a customized BizBroadcast distribution.

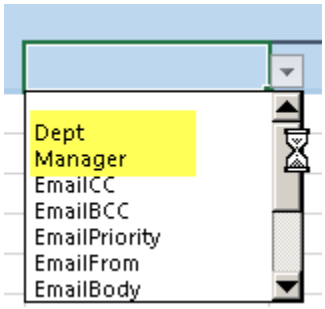
To add a User-Defined parameter to a BizBroadcast distribution, do the following:

1. Define an Excel name for a cell in the workbook that you want BizBroadcast to pass a value into. The most common use for a User-Defined parameter is for a cell that contains a value that is an input parameter for BizInsight functions.



2. Add a Distribution Template to the workbook if one is not already added.

3. Double-click the optional parameter cell. This will add all Excel named ranges to the optional parameters drop down list.

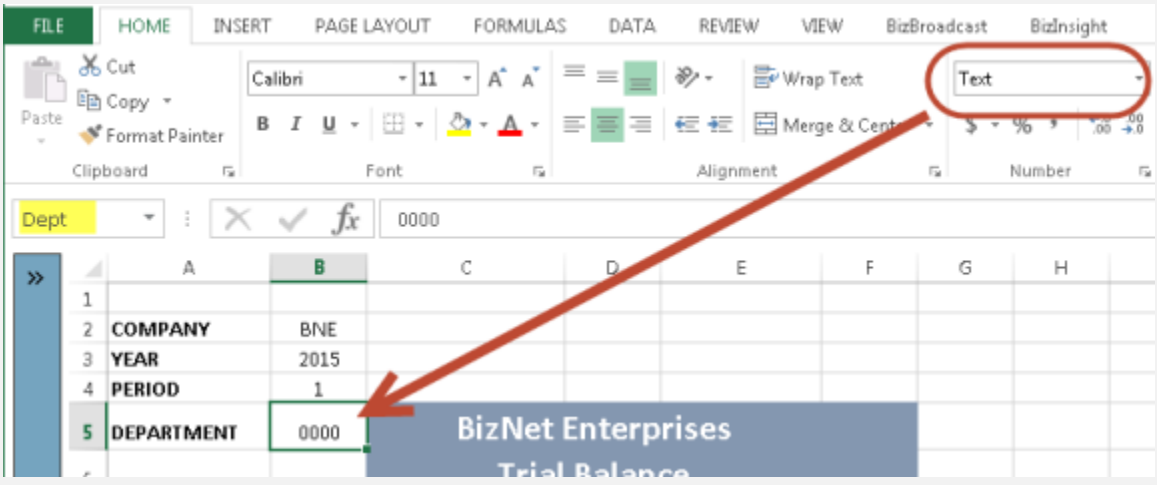


4. Select the Excel name to be used.

5. Enter values in this column for BizBroadcast to pass during distribution.

Note

When using a User-Defined parameter to pass values with leading zeros into cells, be sure to format the destination cell as text. Although the parameter may be entered as '01 in the BizBroadcast distribution row, Excel will strip the leading zero if the destination cell is not formated as text.



Leading Zeros.xlsx

IMPORTANT

If the User-Defined parameter is being used as the lookup value for a VLOOKUP, the VLOOKUP **must** be performed on the same sheet where that parameter's Excel name is defined.

User-Defined Parameter Example

Below is a report that will be distributed to customers to inform them of their orders for the month.

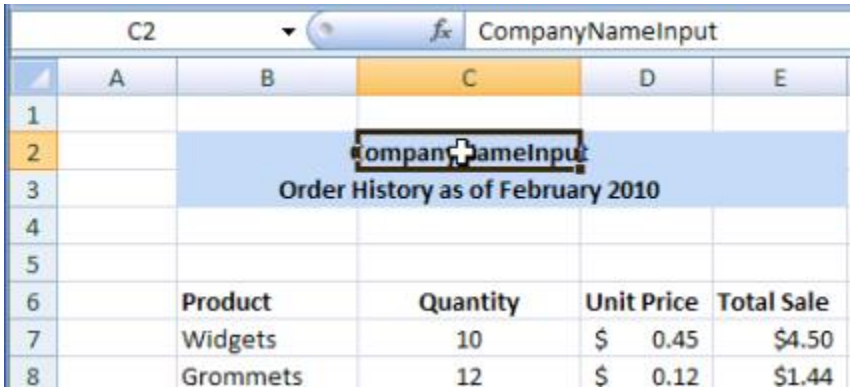
User Defined Parameters.xlsx

	A	B	C	D	E	F
1						
2		CompanyNameInput				
3		Order History as of January 2010				
4						
5						
6		**Product**	**Quantity**	**Unit Price**	**Total Sale**	
7		Widgets	10	$ 0.45	$4.50	
8		Grommets	12	$ 0.12	$1.44	
9		Cylinders	3	$ 1.50	$4.50	
10						
11				**Total**	$10.44	
12						

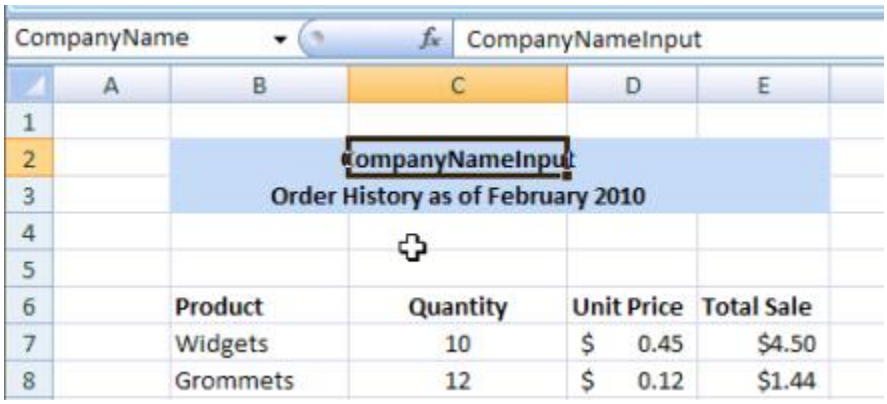
In this example, BizBroadcast passes the company name into cell C2. This report is using an Excel VLookup to retrieve the quantity ordered of each product sold based on the company name in cell C2.

Perform the following steps to prepare the report for distribution:

1. Click cell C2 to position the cursor there.



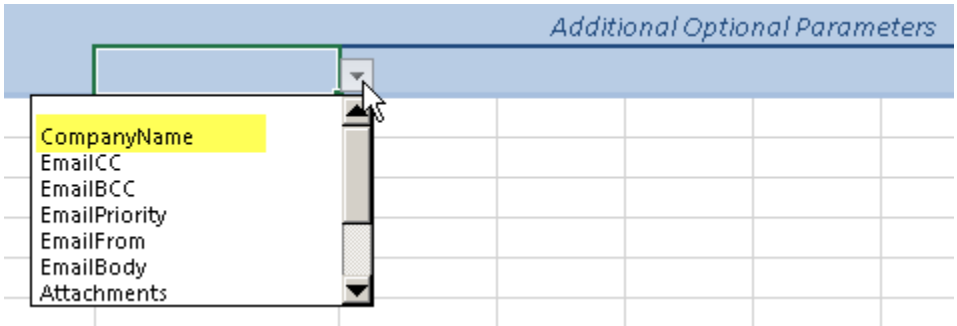
2. Click in the Name Box on the left side of the Excel Formula bar; type a name and press ENTER. This creates an Excel name that can be used to refer to cell C2. In this example, the Excel name is called "CompanyName".



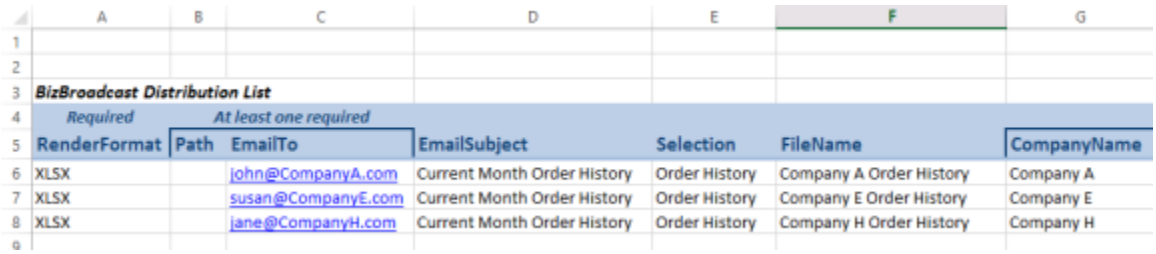
3. Click on the **New Distribution Template** button to add the default Distribution Template.

4. On the BroadcastList sheet, double-click an empty cell of the **Additional Optional Parameters** section.

5. Click the drop-down list and select the range name just created.



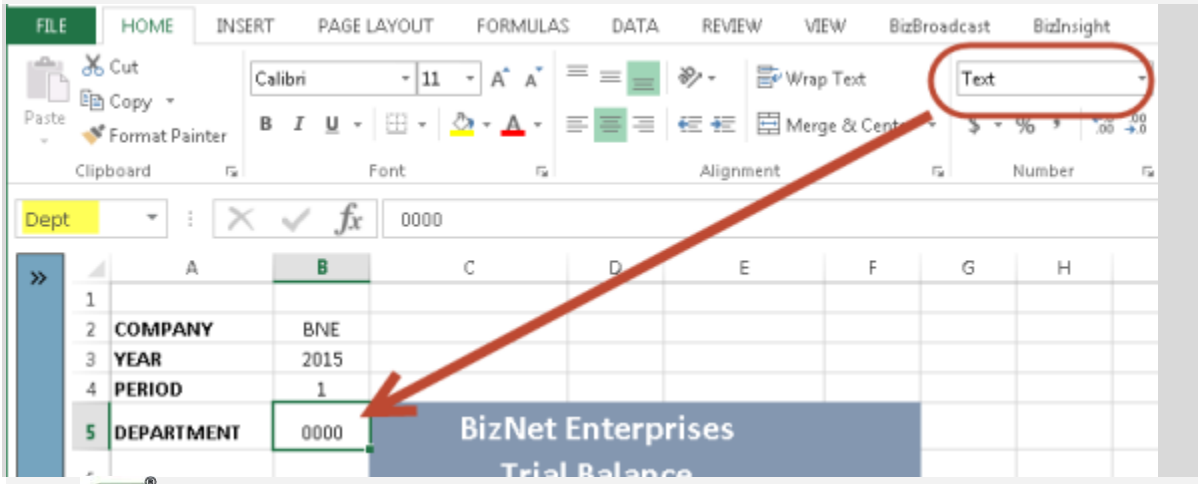
6. Enter values for each parameter in the Distribution list that you want BizBroadcast to use at run-time.



	A	B	C	D	E	F	G
1							
2							
3	***BizBroadcast Distribution List***						
4	*Required*		*At least one required*				
5	**RenderFormat**	**Path**	**EmailTo**	**EmailSubject**	**Selection**	**FileName**	**CompanyName**
6	XLSX		john@CompanyA.com	Current Month Order History	Order History	Company A Order History	Company A
7	XLSX		susan@CompanyE.com	Current Month Order History	Order History	Company E Order History	Company E
8	XLSX		jane@CompanyH.com	Current Month Order History	Order History	Company H Order History	Company H
9							

IMPORTANT

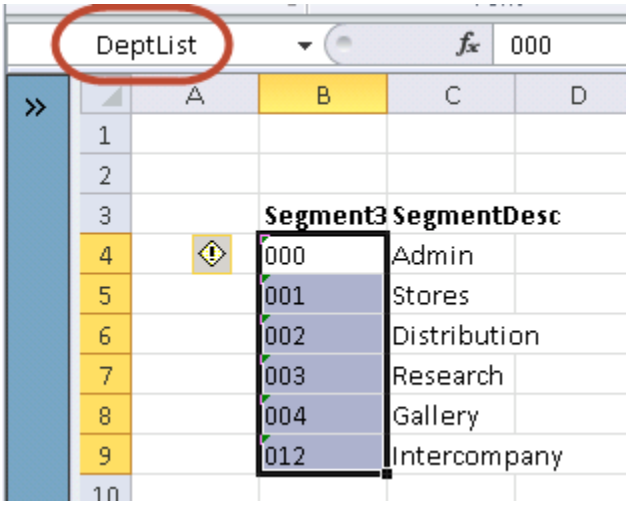
When using a User-Defined parameter to pass values with leading zeros into cells, be sure to format the destination cell as text. Although the parameter may be entered as '01 in the BizBroadcast distribution row, Excel will strip the leading zero if the destination cell is not formatted as text.



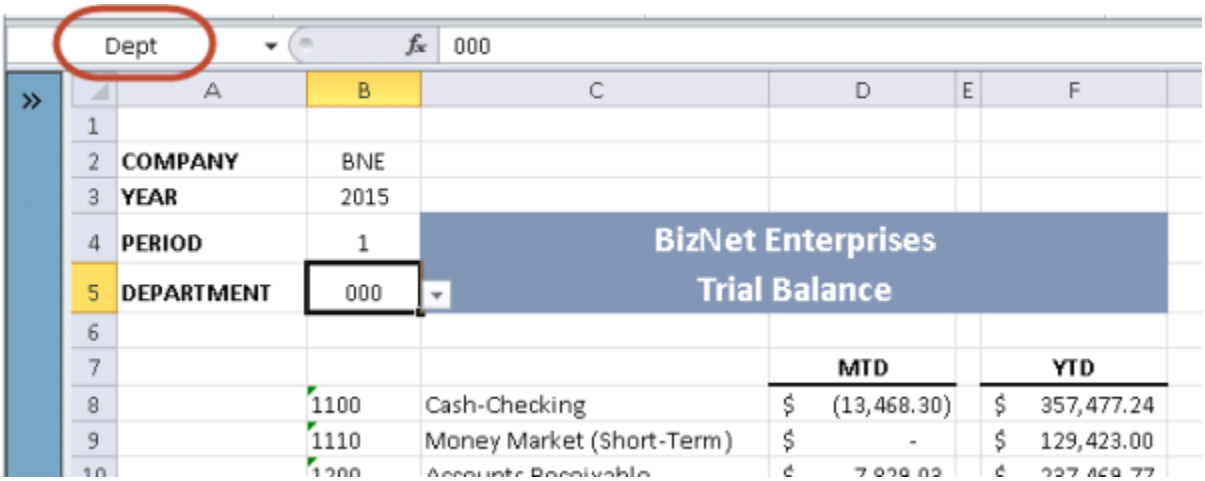
Leading Zeros.xlsx

Tabbed Parameters

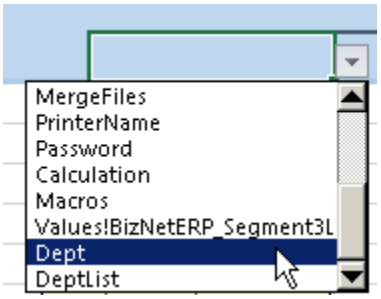
BizBroadcast supports specifying multiple values for the User-Defined parameters of a Distribution Template. Each parameter will be processed and a separate worksheet will be created within the output file. BizBroadcast provides a helper dialog to assist with setting up the Tabbed Parameter input string. Prior to using the Tabbed Parameters helper dialog, the values to be used for the Tabbed Parameters must be listed in the workbook and have an Excel name assigned. For example:



An Excel name should be created for the cell into which BizBroadcast will enter the Tabbed Parameter values during distribution. This will be referred to as the "Target range name".



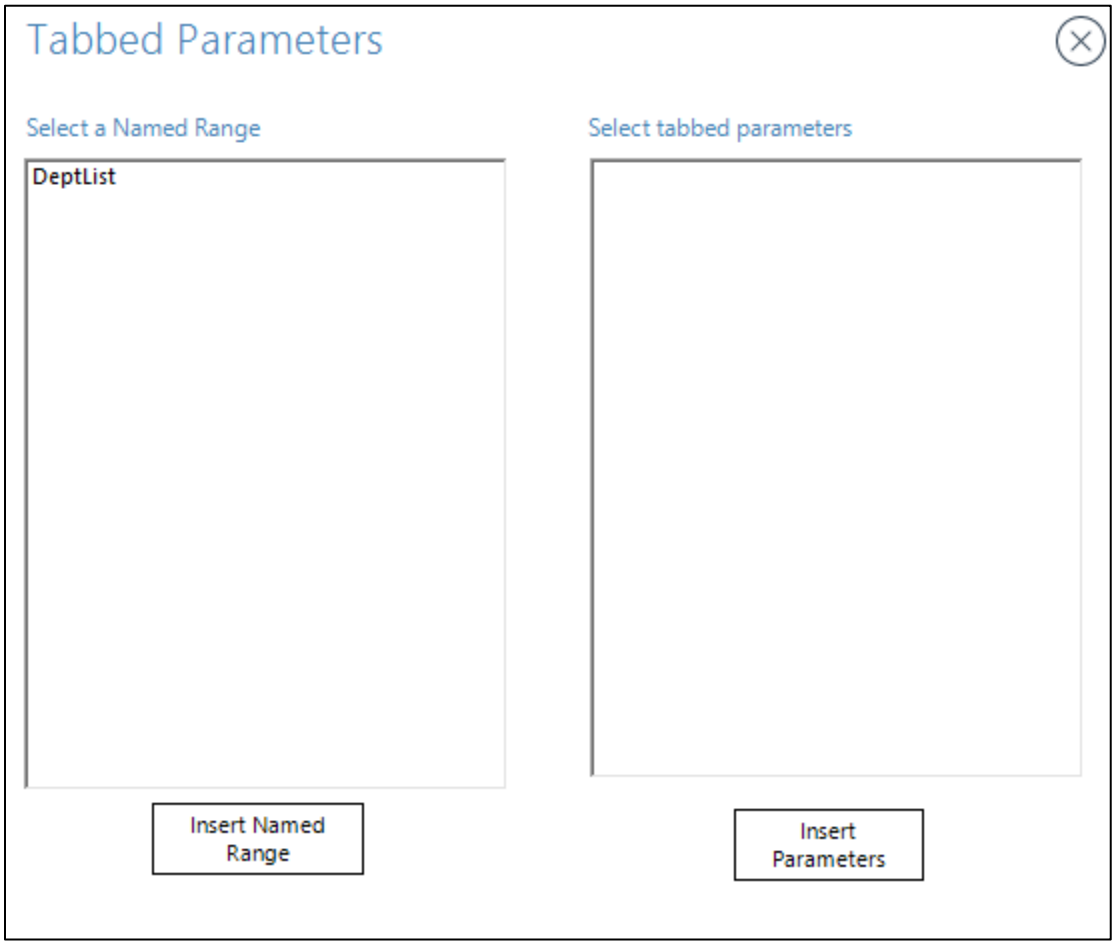
After both Excel names have been created, go to the Distribution List and add the Target range name as an Additional Parameter.



Note

To select the Target range name from the Additional Parameters drop down list, double-click the Additional Parameter cell.

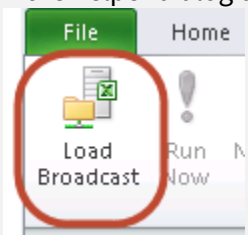
Once the Target range name has been selected for the Additional Parameters field, double-click the cell below to open the helper dialog.



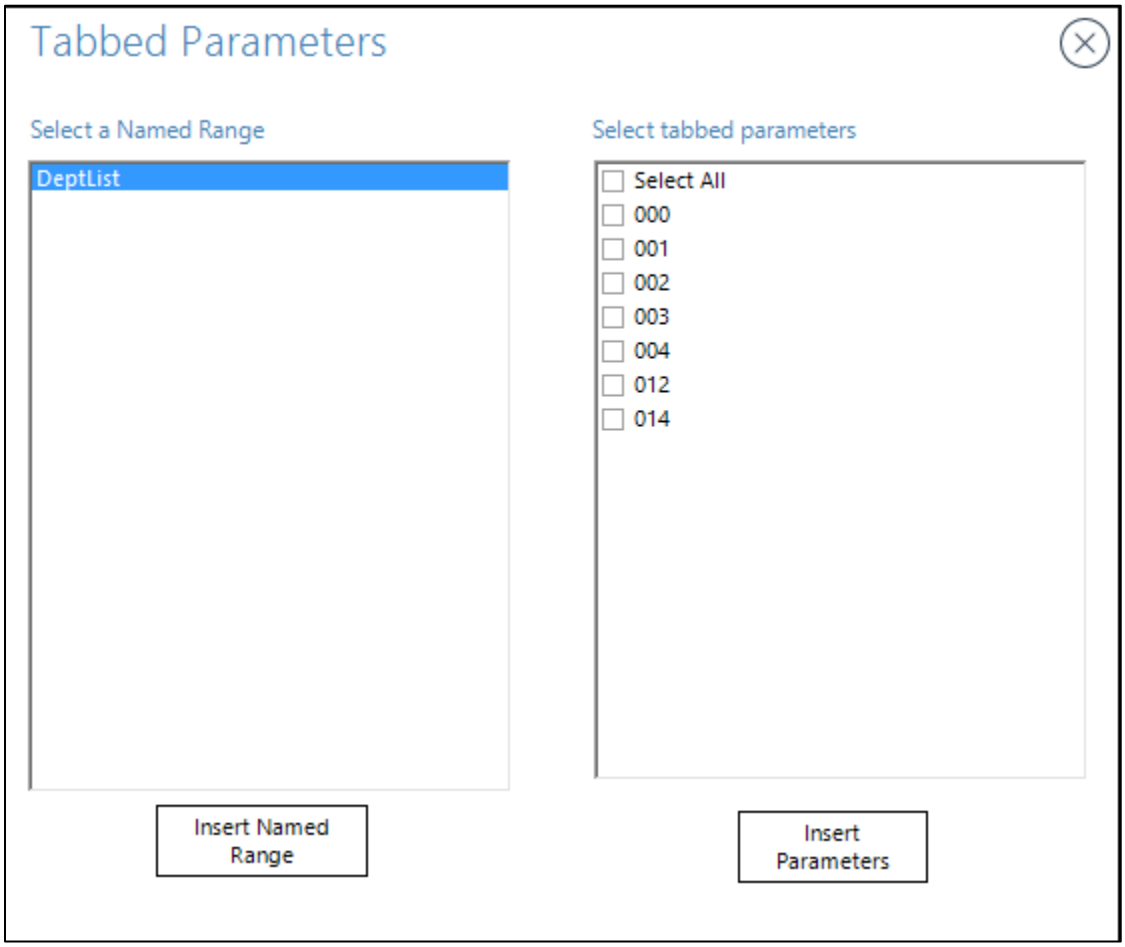
When the dialog is opened, the left pane will list all Excel named ranges that exist in the workbook including BizInsight analysis set lists.

IMPORTANT

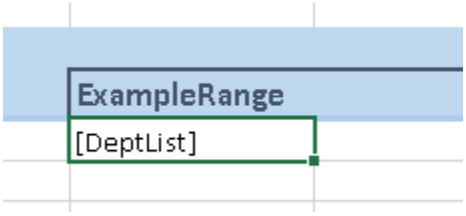
If the helper dialog does not open when the cell is double-clicked, make sure BizBroadcast is loaded.



Select the Excel name that contains the values to use for the Tabbed Parameters. The right pane displays the values in the selected named range.

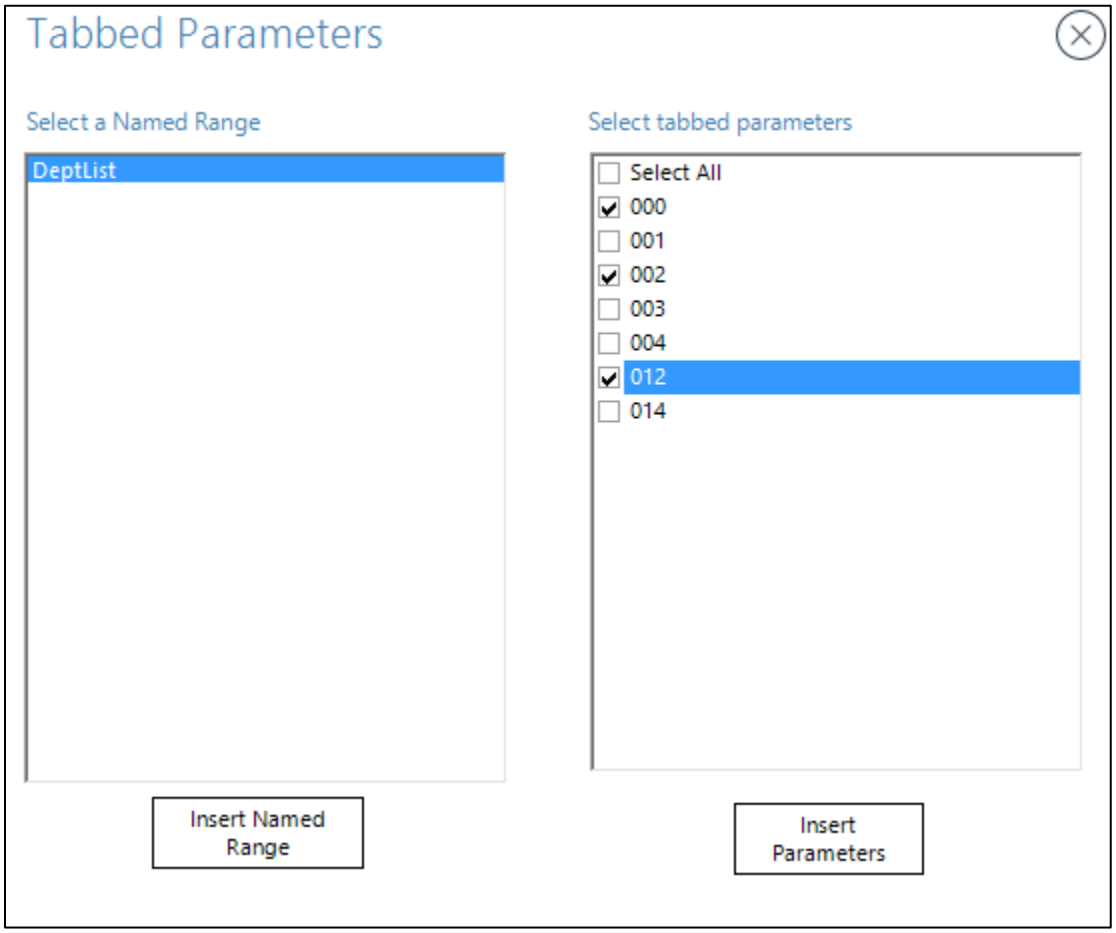


To use the entire contents of the Excel name, click the **Insert Named Range** button. BizBroadcast will place the Excel name in the cell of the distribution list.

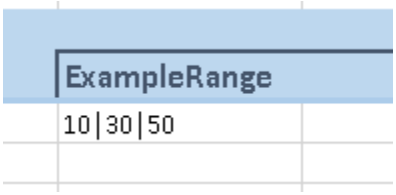


BizNet Software recommends using an Excel name for the Tabbed Parameter values because they can be easily expanded to include new values without requiring an update to the Tabbed Parameters input string.

To use specific values from a particular Excel name, select the checkbox next to the desired values and click the **Insert Parameters** button.



BizBroadcast will place the individual values in the Distribution List cell with the required pipe delimiter "|".

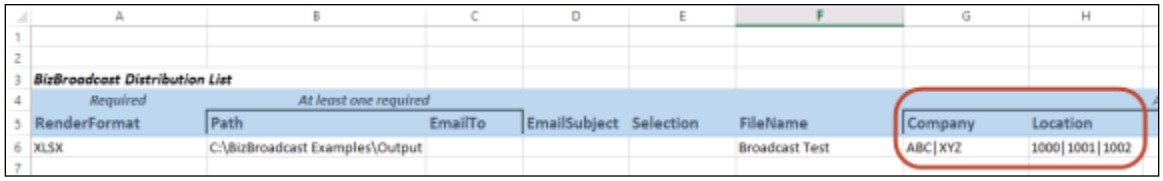


Note

Using the **Select All** checkbox will check all parameters and the text will change to **Unselect all**. In addition, the **Insert Parameters** button will not work.

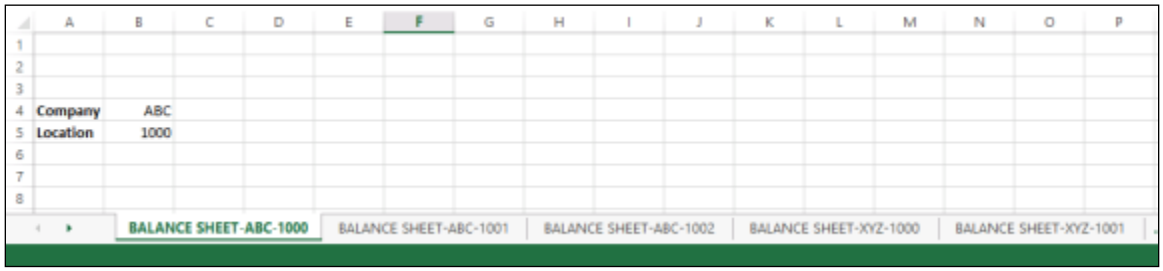
A report tab (new worksheet) will be generated for each combination of parameters. If a source sheet has two multi-value parameters with three values each there will be nine sheets generated (3 x 3 = 9).

For example, the following distribution list uses multiple values for both the Location (1000|1001|1002) and Company (ABC|XYZ) parameters. There is only one sheet that will be distributed to users named “BALANCE SHEET”. While the source workbook also contains the “BroadcastList” sheet, this sheet is never included in the resulting output files because it contains the distribution list.



	A	B	C	D	E	F	G	H
1								
2								
3	***BizBroadcast Distribution List***							
4	*Required*	*At least one required*						
5	RenderFormat	Path	EmailTo	EmailSubject	Selection	FileName	Company	Location
6	XLSX	C:\BizBroadcast Examples\Output				Broadcast Test	ABC|XYZ	1000|1001|1002
7								

The following screenshot illustrates the resulting output file produced by BizBroadcast. Notice that each sheet is named with the source sheet name, “BALANCE SHEET”, followed by the parameter values that were used for that sheet.



	A	B
1		
2		
3		
4	Company	ABC
5	Location	1000
6		
7		
8		

BALANCE SHEET-ABC-1000 | BALANCE SHEET-ABC-1001 | BALANCE SHEET-ABC-1002 | BALANCE SHEET-XYZ-1000 | BALANCE SHEET-XYZ-1001

BALANCE SHEET-ABC-1000
BALANCE SHEET-ABC-1001
BALANCE SHEET-ABC-1002
BALANCE SHEET-XYZ-1000
BALANCE SHEET-XYZ-1001
BALANCE SHEET-XYZ-1002

If the User-Defined parameter order on the distribution list is reversed, i.e. Location is the first column and Company is the second column, the sheets are generated as follows:

BALANCE SHEET-1000-ABC
BALANCE SHEET-1000-XYZ
BALANCE SHEET-1001-ABC
BALANCE SHEET-1001-XYZ
BALANCE SHEET-1002-ABC
BALANCE SHEET-1002-XYZ

IMPORTANT

1. ALL references to cells on a Tabbed Parameter sheet will be broken in the resulting output file because Tabbed Parameter functionality creates multiple copies of the same worksheet and Excel

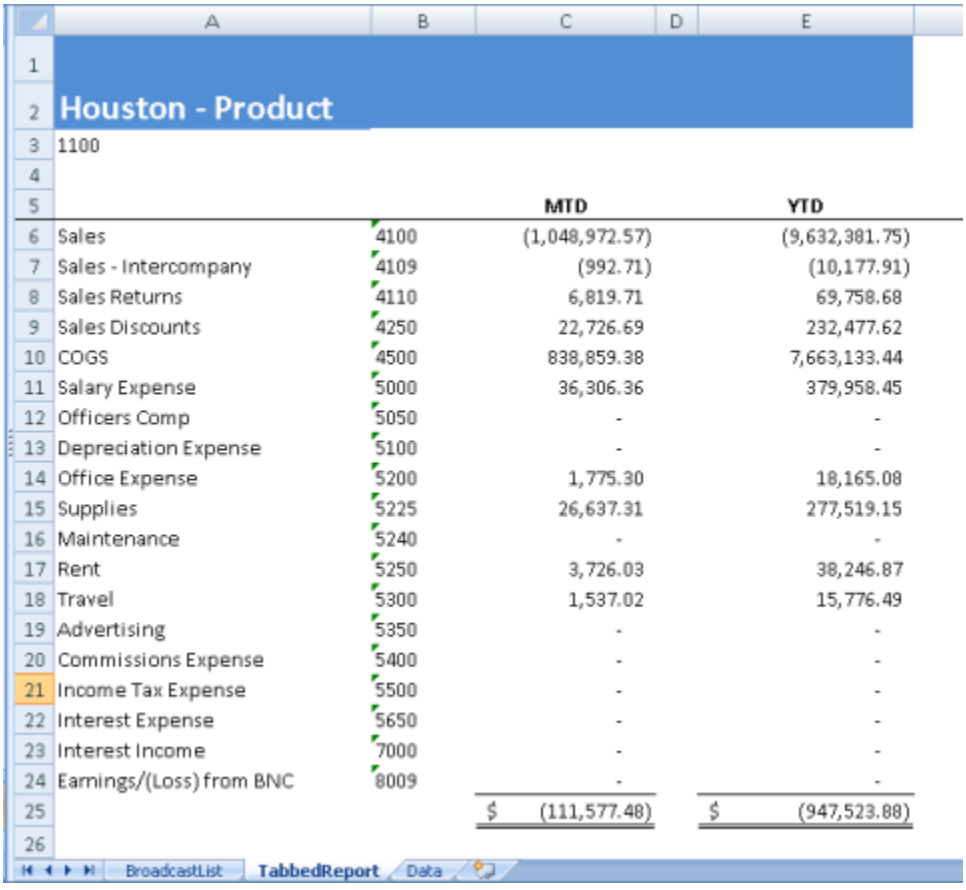
requires every sheet in a workbook to have a unique name. The references will be broken because the cell references will still refer to the original sheet name, not the new sheet name.

2. Multiple values for several parameters will increase workbook file size and add worksheet tabs. For example, a source sheet with two multiple-value parameters that have three values each will generate nine worksheets (3 x 3 = 9). Three multiple-value parameters on the same source sheet with three values each results in 27 sheets being generated (3 x 3 x 3).

3. It is possible for the sheet name to exceed the 32 character limit because worksheets are named by appending each parameter value to the original sheet name. In the situation where the generated sheet name will exceed that 32 character limit, sheet names will be truncated to fit within the size limit.

Single Sheet Tabbed Parameter Example

The following example report will be used to illustrate a simple (i.e. only one sheet is being distributed) Tabbed Parameter distribution. The cell A3 (Location) is used as an input parameter for the functions located in columns C and E. BizBroadcast will be used to create a report with a sheet for each Location.



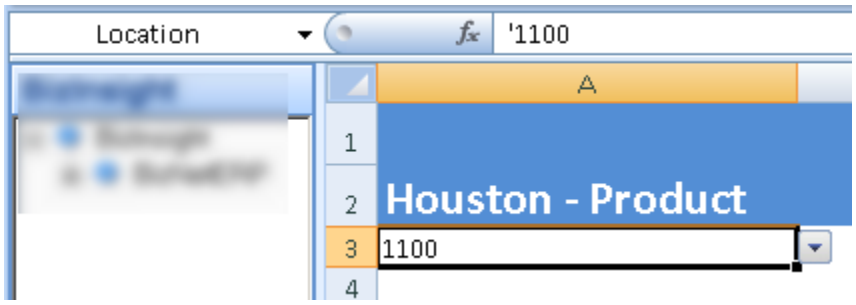
	A	B	C	D	E
1					
2	**Houston - Product**				
3	1100				
4					
5			MTD		YTD
6	Sales	4100	(1,048,972.57)		(9,632,381.75)
7	Sales - Intercompany	4109	(992.71)		(10,177.91)
8	Sales Returns	4110	6,819.71		69,758.68
9	Sales Discounts	4250	22,726.69		232,477.62
10	COGS	4500	838,859.38		7,663,133.44
11	Salary Expense	5000	36,306.36		379,958.45
12	Officers Comp	5050	-		-
13	Depreciation Expense	5100	-		-
14	Office Expense	5200	1,775.30		18,165.08
15	Supplies	5225	26,637.31		277,519.15
16	Maintenance	5240	-		-
17	Rent	5250	3,726.03		38,246.87
18	Travel	5300	1,537.02		15,776.49
19	Advertising	5350	-		-
20	Commissions Expense	5400	-		-
21	Income Tax Expense	5500	-		-
22	Interest Expense	5650	-		-
23	Interest Income	7000	-		-
24	Earnings/(Loss) from BNC	8009	-		-
25			$ (111,577.48)		$ (947,523.88)
26					

BroadcastList | TabbedReport | Data

The report is on the sheet named “TabbedReport”. The supporting data for the data validation lists (and in this example, the actual data) are on the sheet named “Data”.

To produce a Tabbed Parameter output of the preceding report, the following steps were taken.

1. An Excel named range, “Location”, was assigned to cell A3.



Note

Because one Location value is 0000, the cell A3 is formatted as text to ensure that when BizBroadcast passes that Location value into the cell, all four zeros are preserved.

2. All Locations were listed on the Data sheet of the workbook and an Excel named range, "LocationList", was assigned to that list.

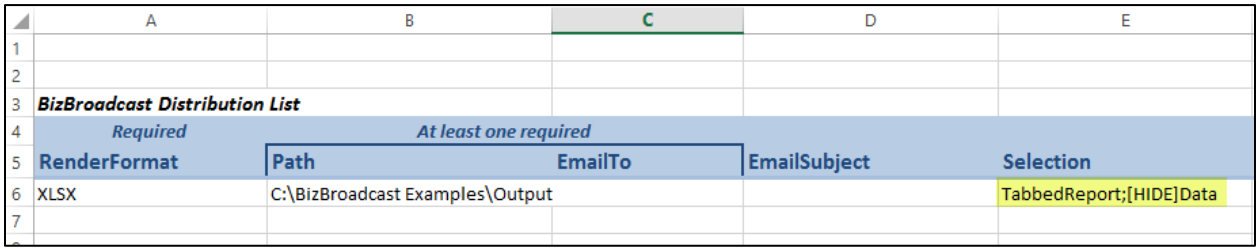
3. A Distribution Template was inserted into the workbook using the **New Distribution Template** button on the BizBroadcast ribbon tab. This added a new sheet named “BroadcastList” to the workbook.

4. XLSX was selected for the **RenderFormat** parameter.

	A	B	C
1			
2			
3	***BizBroadcast Distribution List***		
4	*Required*	*At least one required*	
5	**RenderFormat**	**Path**	**EmailTo**
6	XLSX	C:\BizBroadcast Examples\Output	
7			
8			

5. A path was filled in for the **Path** parameter.

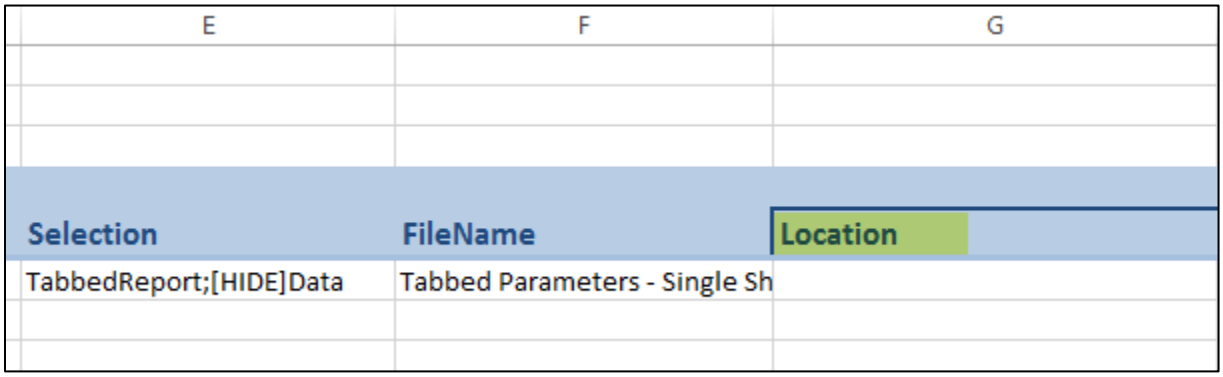
6. For the **Selection** parameter, we want to send the "TabbedReport" sheet but also include the "Data" sheet to ensure that data validation lists remain functional. To do this, the Data sheet was included in the **Selection** parameter with the [HIDE] directive.



	A	B	C	D	E
1					
2					
3	***BizBroadcast Distribution List***				
4	*Required*	*At least one required*			
5	**RenderFormat**	**Path**	**EmailTo**	**EmailSubject**	**Selection**
6	XLSX	C:\BizBroadcast Examples\Output			TabbedReport;[HIDE]Data
7					

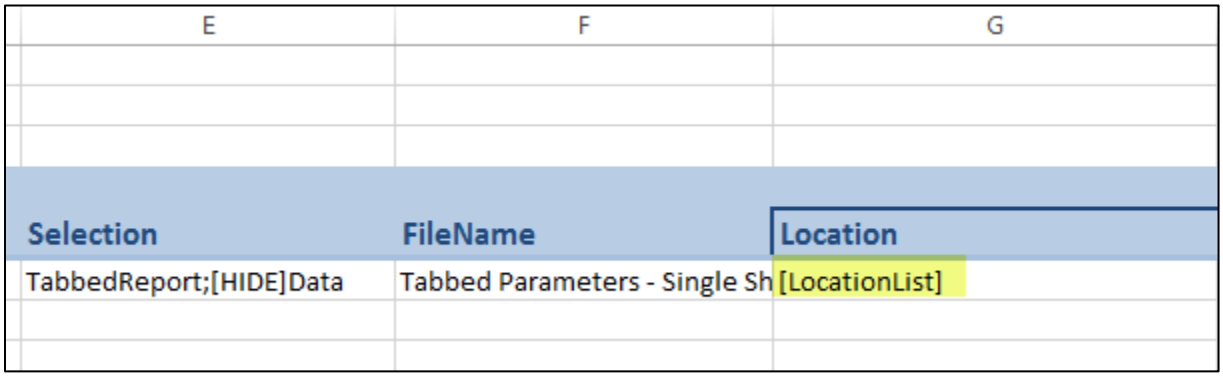
7. A filename was entered for the **FileName** parameter.

8. In the **Additional Parameters** section, the Excel name created in Step 1 was added to the first column's header field by double-clicking on the cell to update the drop down list and the Excel name was chosen from the drop down list.



E	F	G
Selection	**FileName**	**Location**
TabbedReport;[HIDE]Data	Tabbed Parameters - Single Sh	

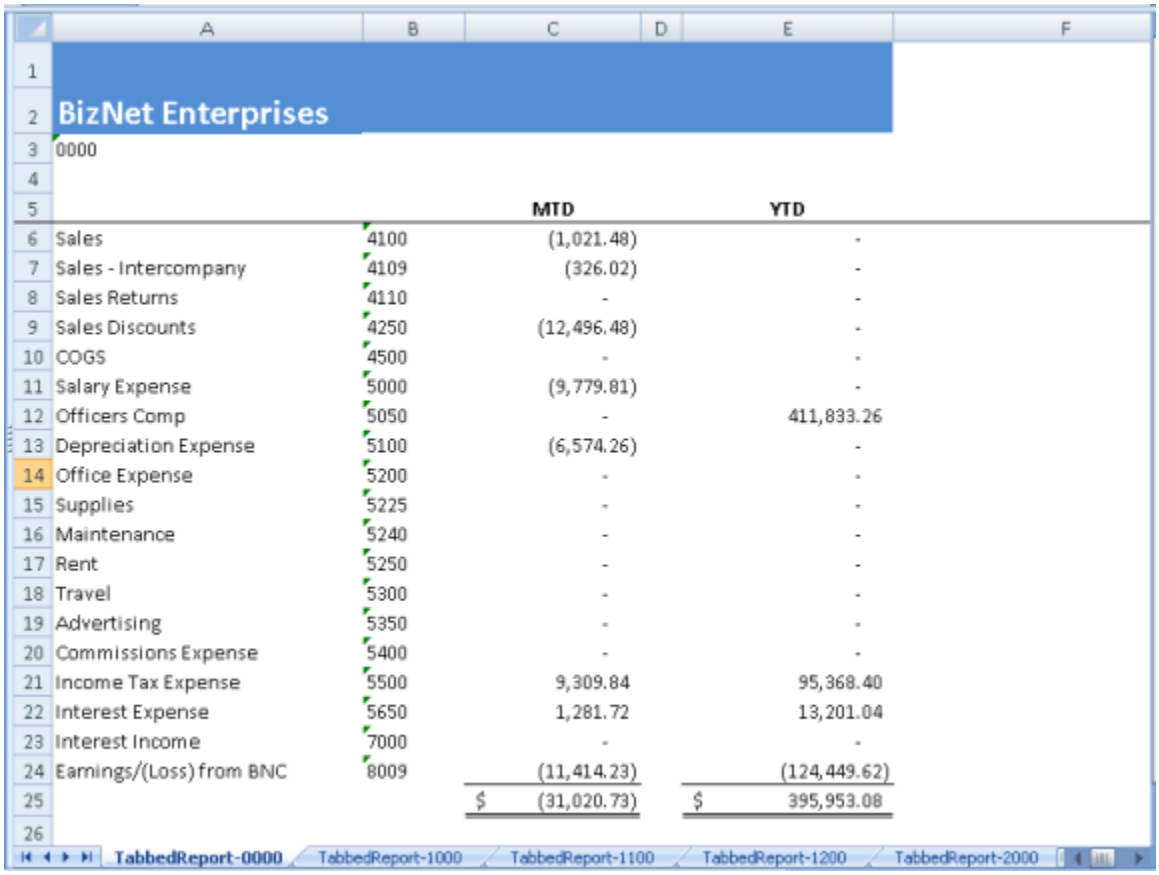
9. The cell under the Location parameter was double-clicked to open the Tabbed Parameters helper dialog. The Excel name for the list of locations was selected and the **Insert Named Range** button was clicked.



E	F	G
Selection	**FileName**	**Location**
TabbedReport;[HIDE]Data	Tabbed Parameters - Single Sh	[LocationList]

10. When the report was ready to be distributed, the **Run Now** button was clicked on the BizBroadcast ribbon tab.

    The following was the resulting output:



	A	B	C	D	E	F
1						
2	**BizNet Enterprises**					
3	0000					
4						
5			**MTD**		**YTD**	
6	Sales	4100	(1,021.48)		-	
7	Sales - Intercompany	4109	(326.02)		-	
8	Sales Returns	4110	-		-	
9	Sales Discounts	4250	(12,496.48)		-	
10	COGS	4500	-		-	
11	Salary Expense	5000	(9,779.81)		-	
12	Officers Comp	5050	-		411,833.26	
13	Depreciation Expense	5100	(6,574.26)		-	
14	Office Expense	5200	-		-	
15	Supplies	5225	-		-	
16	Maintenance	5240	-		-	
17	Rent	5250	-		-	
18	Travel	5300	-		-	
19	Advertising	5350	-		-	
20	Commissions Expense	5400	-		-	
21	Income Tax Expense	5500	9,309.84		95,368.40	
22	Interest Expense	5650	1,281.72		13,201.04	
23	Interest Income	7000	-		-	
24	Earnings/(Loss) from BNC	8009	(11,414.23)		(124,449.62)	
25			$ (31,020.73)		$ 395,953.08	
26						

TabbedReport-0000 | TabbedReport-1000 | TabbedReport-1100 | TabbedReport-1200 | TabbedReport-2000

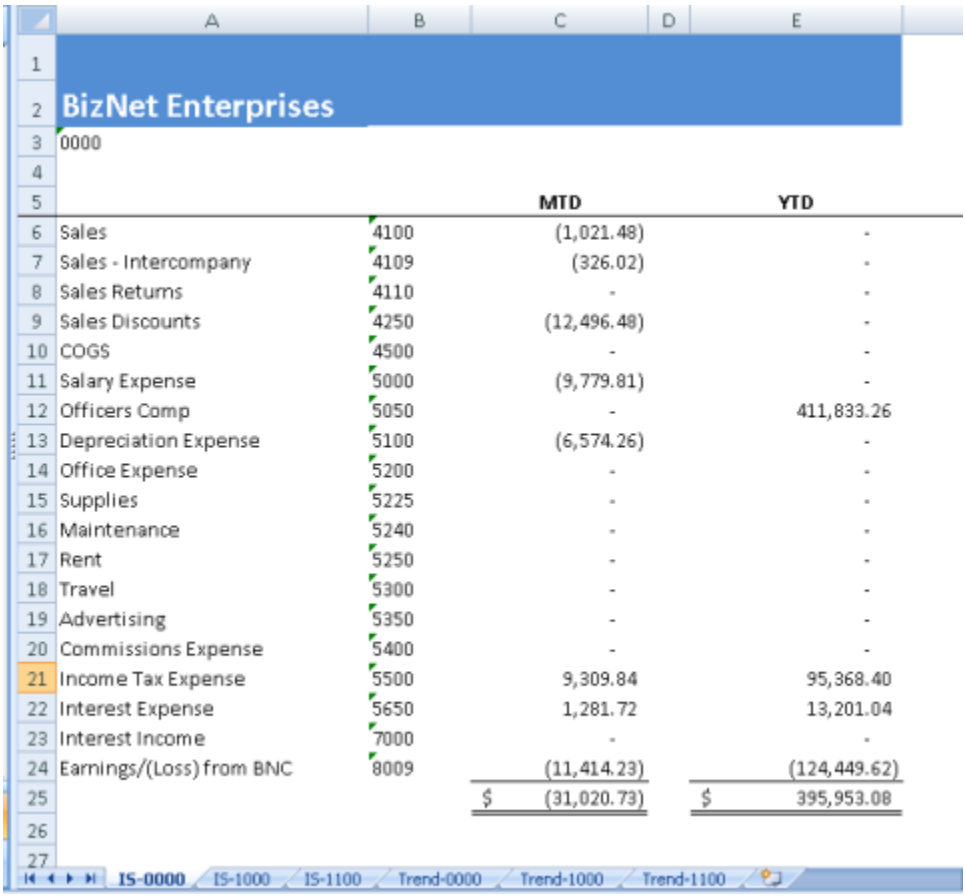
    Notice that each sheet is comprised of the original source sheet name and the Location that was passed in for that sheet.

Tabbed Parameters - Single Sheet Example.xlsx

Multi-Sheet Tabbed Parameter Reports

When creating a Tabbed Parameter report for a workbook with multiple sheets, the RenderFormat of the resulting output file is an important factor in determining how you setup your distribution. If you are using a static RenderFormat, you can use a single Excel name for your input parameters. If you plan to produce the output file in one of the dynamic RenderFormats, you will need to define an Excel name for your input parameter on each sheet of your source worksheets that you plan to include in the distribution.

The following example illustrates the design when using a dynamic RenderFormat since it is more complex. The example produces the following output file:

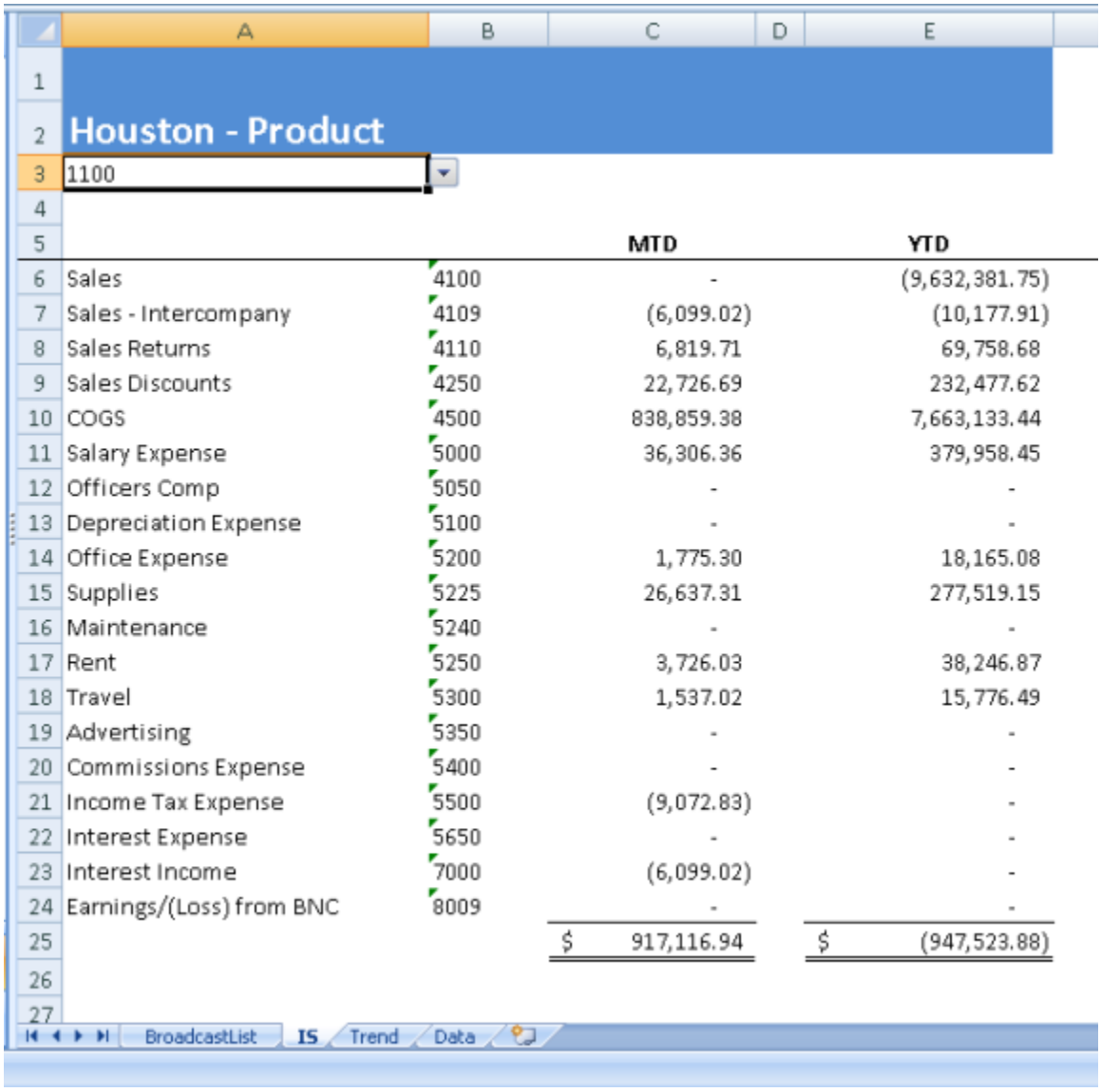


	A	B	C	D	E
1					
2	**BizNet Enterprises**				
3	0000				
4					
5			**MTD**		**YTD**
6	Sales	4100	(1,021.48)		-
7	Sales - Intercompany	4109	(326.02)		-
8	Sales Returns	4110	-		-
9	Sales Discounts	4250	(12,496.48)		-
10	COGS	4500	-		-
11	Salary Expense	5000	(9,779.81)		-
12	Officers Comp	5050	-		411,833.26
13	Depreciation Expense	5100	(6,574.26)		-
14	Office Expense	5200	-		-
15	Supplies	5225	-		-
16	Maintenance	5240	-		-
17	Rent	5250	-		-
18	Travel	5300	-		-
19	Advertising	5350	-		-
20	Commissions Expense	5400	-		-
21	Income Tax Expense	5500	9,309.84		95,368.40
22	Interest Expense	5650	1,281.72		13,201.04
23	Interest Income	7000	-		-
24	Earnings/(Loss) from BNC	8009	(11,414.23)		(124,449.62)
25			$ (31,020.73)		$ 395,953.08
26					
27					

IS-0000 | IS-1000 | IS-1100 | Trend-0000 | Trend-1000 | Trend-1100

The following steps were taken to create the preceding report:

1. The source report was created. It consists of two sheets, one named “IS” and the other named “Trend”.



	A	B	C	D	E
1					
2	**Houston - Product**				
3	1100				
4					
5			MTD		YTD
6	Sales	4100	-		(9,632,381.75)
7	Sales - Intercompany	4109	(6,099.02)		(10,177.91)
8	Sales Returns	4110	6,819.71		69,758.68
9	Sales Discounts	4250	22,726.69		232,477.62
10	COGS	4500	838,859.38		7,663,133.44
11	Salary Expense	5000	36,306.36		379,958.45
12	Officers Comp	5050	-		-
13	Depreciation Expense	5100	-		-
14	Office Expense	5200	1,775.30		18,165.08
15	Supplies	5225	26,637.31		277,519.15
16	Maintenance	5240	-		-
17	Rent	5250	3,726.03		38,246.87
18	Travel	5300	1,537.02		15,776.49
19	Advertising	5350	-		-
20	Commissions Expense	5400	-		-
21	Income Tax Expense	5500	(9,072.83)		-
22	Interest Expense	5650	-		-
23	Interest Income	7000	(6,099.02)		-
24	Earnings/(Loss) from BNC	8009	-		-
25			$ 917,116.94		$ (947,523.88)
26					
27					

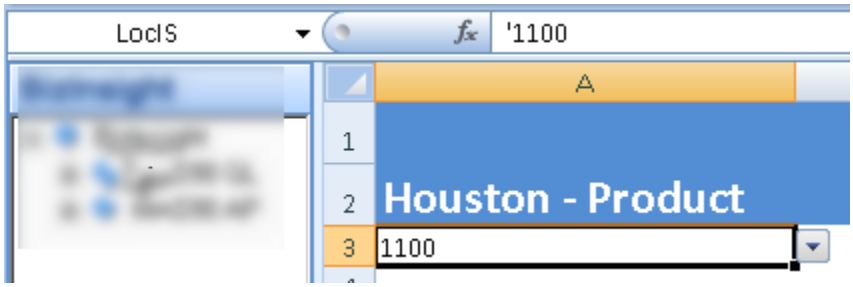
BroadcastList | IS | Trend | Data

There is a sheet named "Data" with values for data validation lists and, in this example, the actual data for the report.

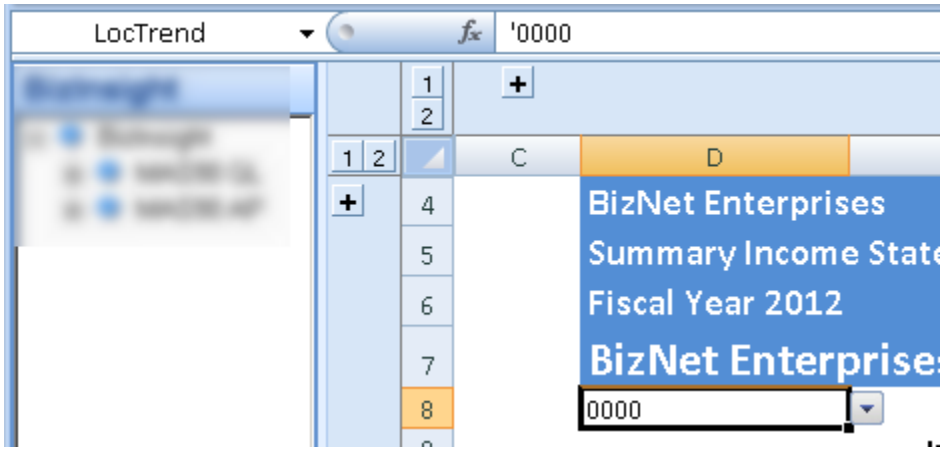
The **New Distribution Template** button was used to add the default Distribution Template sheet named “BroadcastList”.

There is a Data Validation list at the top of each sheet which provides the Location to the functions on the sheet. At run-time, BizBroadcast will create a separate sheet for each Location in the resulting output file.

2. An Excel named range, “LocIS”, was assigned to cell A3 on the IS sheet.



3. An Excel named range, “LocTrend”, was assigned to cell D8 on the Trend sheet.



4. On the BroadcastList sheet, the distribution was defined as follows:

   a. **RenderFormat** = XLSX

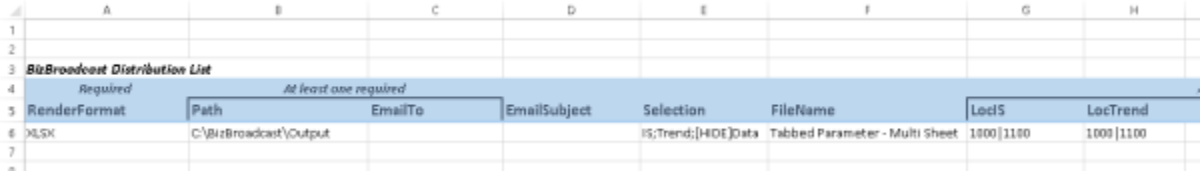
   b. **Path** = C:\BizBroadcast Examples\Output

   c. **Selection** = IS;Trend;[HIDE]Data

   d. **FileName** = Tabbed Parameter - Multi Sheet

   e. User-Defined parameter named LocIS = 1000|1100

   f. User-Defined parameter named LocTrend = 1000|1100



5. The **Run Now** button was clicked on the BizBroadcast ribbon tab to produce the output file.

Tabbed Parameters -Multi-Sheet Example.xlsx

Parameter Input Sheets (Indirect Parameters)

A parameter input sheet is a worksheet in which you enter all of your function input parameters (Company, Year, Period, etc.) and all other worksheets in your report reference this input sheet for their values. This design allows you to change input parameters on one sheet and those new values will flow through to all the other worksheets in your report. Input parameters that are on a different sheet than where the functions exist are considered "indirect parameters" and may require special handling when generating Tabbed Parameter reports depending on the RenderFormat selected for the distribution.

BizBroadcast Tabbed Parameter reports with parameter input sheets will work if the RenderFormat is a static output format. A static output format is any RenderFormat that contains values instead of the original formulas. The BizBroadcast static output RenderFormats are as follows:

- PDF
- XPS
- XLSVALUES
- XLSMVALUES
- XLSXVALUES
- HTML
- MHTML
- XML
- CSV
- TEXT

If the Tabbed Parameter report uses a dynamic RenderFormat, the report cannot use a parameter input sheet. The BizBroadcast dynamic RenderFormats are as follows:

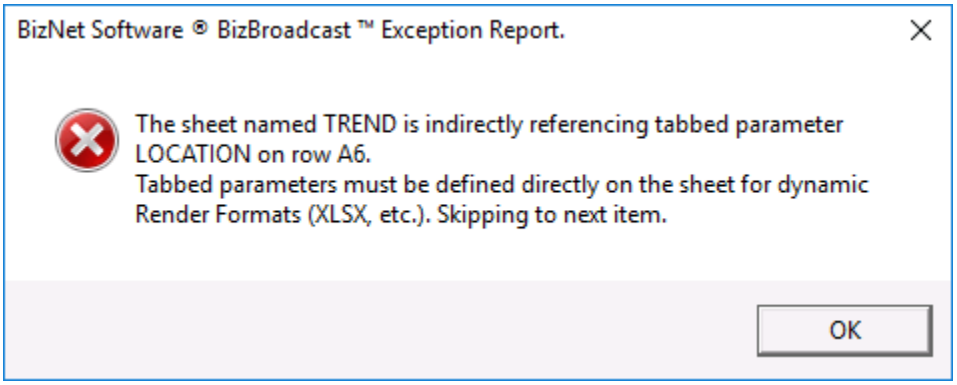
- XLS
- XLSX
- XLSM

When using a dynamic RenderFormat and Tabbed Parameters, the User-Defined parameter must be defined on the same sheet as the functions that reference it. The reason for this requirement is that a single cell on a parameter input sheet cannot simultaneously hold more than one value. In the case of Tabbed Parameters, each value in a Tabbed Parameter distribution generates a separate worksheet. Each generated worksheet references the same cell on the parameter input sheet which can only have one value.

For example, if you have an Income Statement worksheet and a Cash Flow worksheet and you want to generate separate tabs by department, you would assign separate Excel named ranges to both the Income Statement and Cash Flow worksheets. This allows BizBroadcast to pass a value to each sheet. An Excel name called “Inc_Dept” would be defined on the Income Statement worksheet and

"CF_Dept" would be defined on the Cash Flow worksheet. The "Inc_Dept" and "CF_Dept" Excel named ranges would be added as User-Defined parameters to the Distribution List as separate parameters. In this way the individual department values can be properly set as each dynamic sheet is generated.

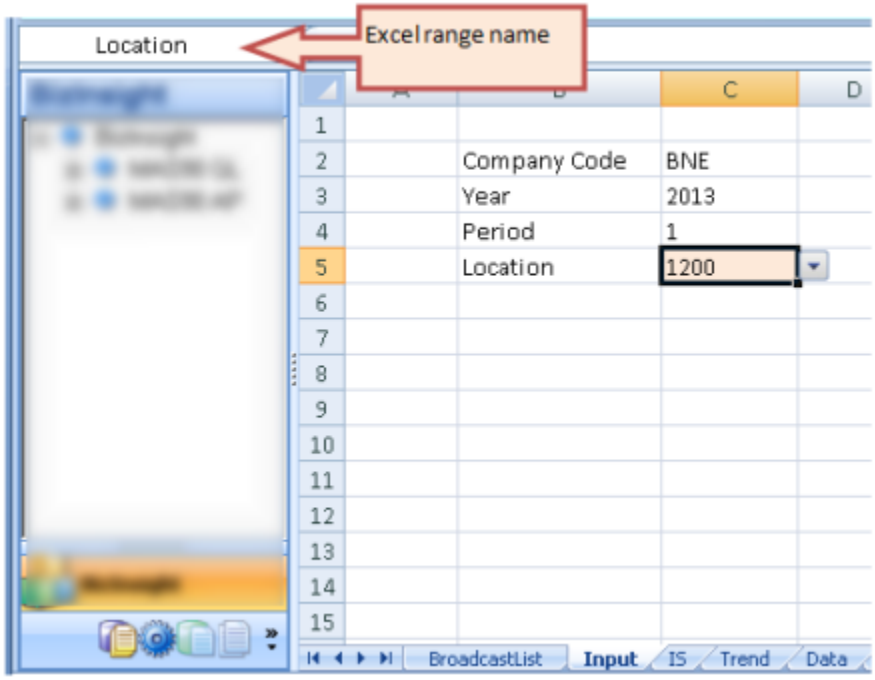
If a dynamic RenderFormat is selected and a distribution item is designed to pass a value to an input sheet, the following error will occur when the distribution is run:

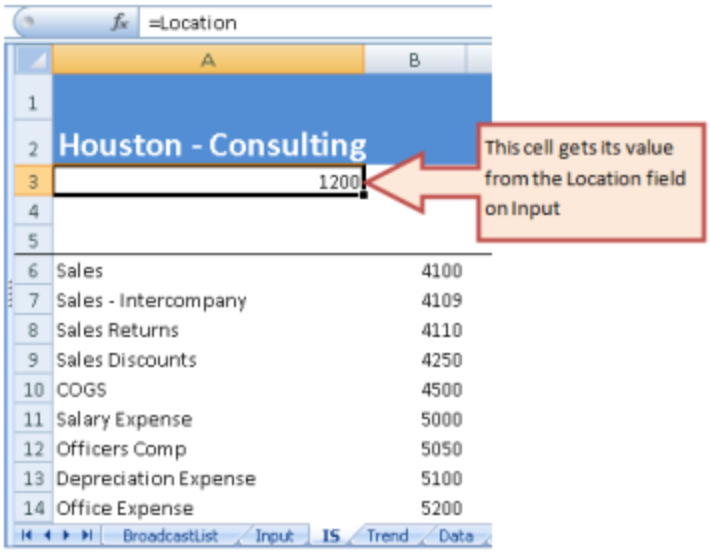


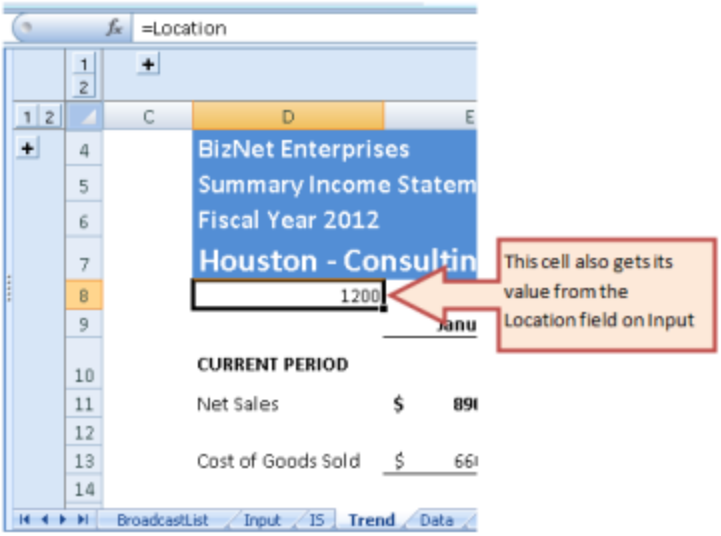
Converting an Input sheet report for Tabbed Parameters

You may have existing reports that have been built to use a parameter Input sheet for parameters. The report will need to be adjusted in order to use the Tabbed Parameters capability **and** distribute that report in a dynamic RenderFormat (XLS, XLSX, or XLSM).

The following screenshots illustrate a parameter input sheet and worksheet that references it.

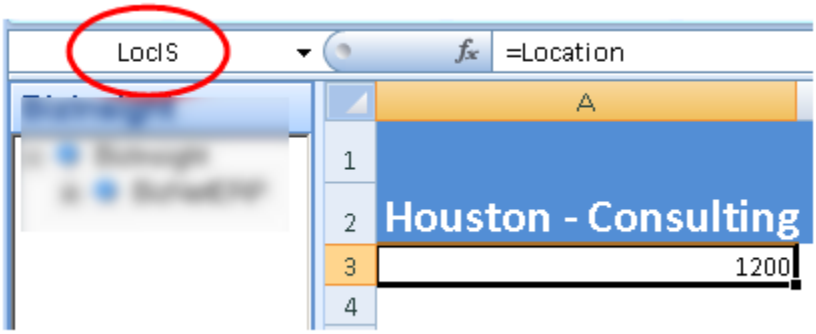



=Location
Houston - Consulting
1200
This cell gets its value from the Location field on Input
Sales 4100
Sales - Intercompany 4109
Sales Returns 4110
Sales Discounts 4250
COGS 4500
Salary Expense 5000
Officers Comp 5050
Depreciation Expense 5100
Office Expense 5200
BroadcastList Input IS Trend Data

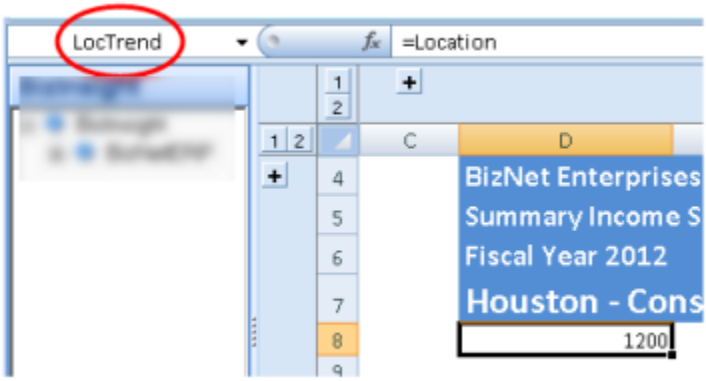

=Location
BizNet Enterprises
Summary Income Statem
Fiscal Year 2012
Houston - Consultin
1200
This cell also gets its value from the Location field on Input
CURRENT PERIOD
Net Sales
Cost of Goods Sold
BroadcastList Input IS Trend Data

To convert this report for use with the Tabbed Parameters feature and a dynamic RenderFormat, take the following steps:

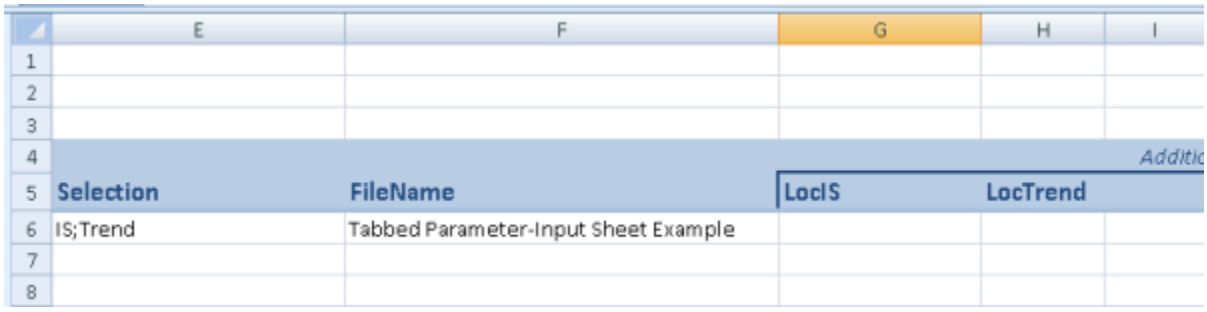
1. On the IS tab, create an Excel name for the cell that should contain the Location. In this example, the Excel named range, “LocIS”, is assigned to cell A3.



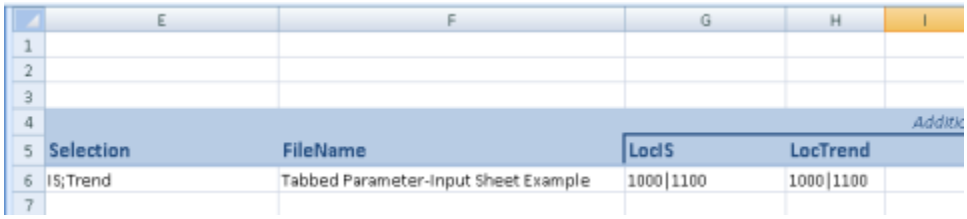
2. On the Trend tab, create another Excel name for the cell that contains the Location. In this example, the name “LocTrend” is assigned to cell D8.



3. Insert the default Distribution template if it does not already exist and add two User-Defined parameters, “LocIS” and “LocTrend”.

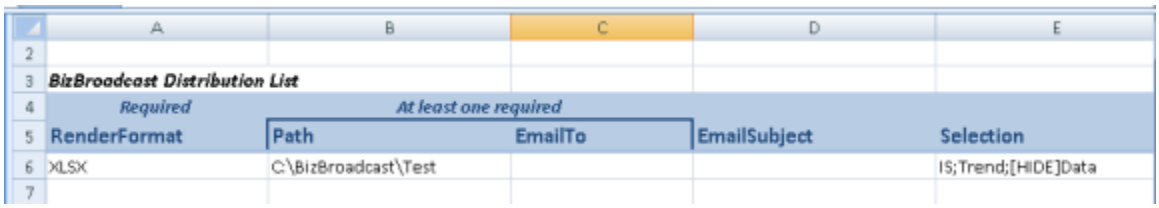


4. Make sure all valid Location values are listed in the workbook and an Excel name is assigned to those cells then double-click on the cell under each User-Defined parameter. This will open the Tabbed Parameters helper dialog. Either insert the entire named range or select the desired Location values as shown below.



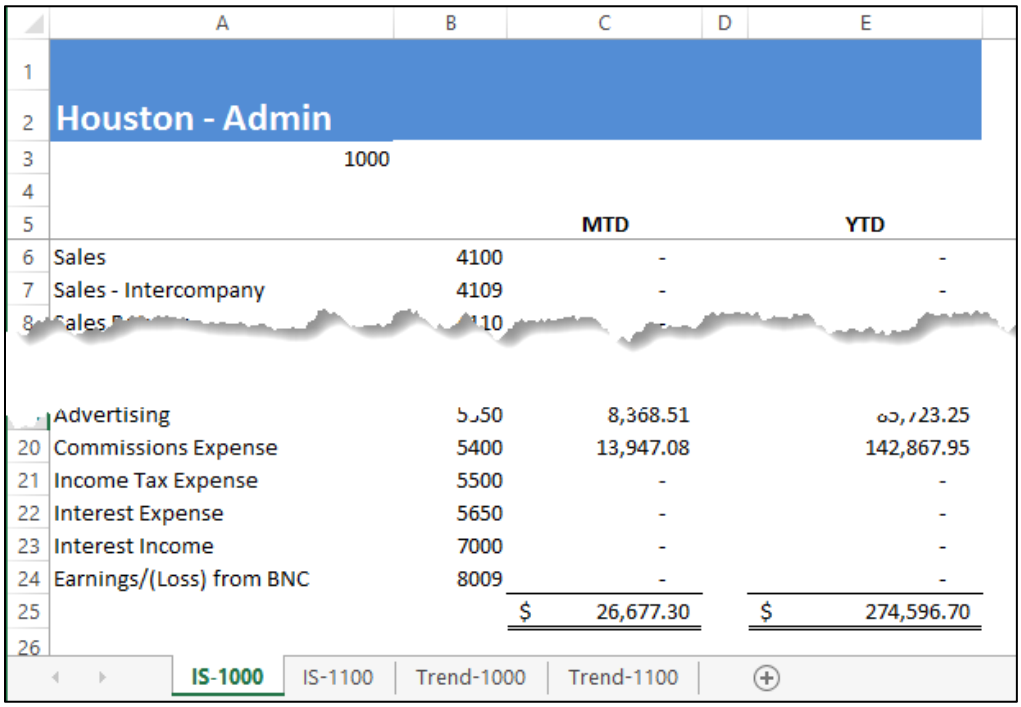
	E	F	G	H	I
1					
2					
3					
4					Additi
5	**Selection**	**FileName**	**LocIS**	**LocTrend**	
6	IS;Trend	Tabbed Parameter-Input Sheet Example	1000|1100	1000|1100	
7					

5. Since this distribution will use a dynamic RenderFormat, be sure to include the Data tab in the Selection with the [HIDE] directive.



	A	B	C	D	E
2					
3	***BizBroadcast Distribution List***				
4	*Required*		*At least one required*		
5	**RenderFormat**	**Path**	**EmailTo**	**EmailSubject**	**Selection**
6	XLSX	C:\BizBroadcast\Test			IS;Trend;[HIDE]Data
7					

6. Run the distribution by clicking on **Run Now** on the BizBroadcast ribbon tab. The result of the distribution will look like this:



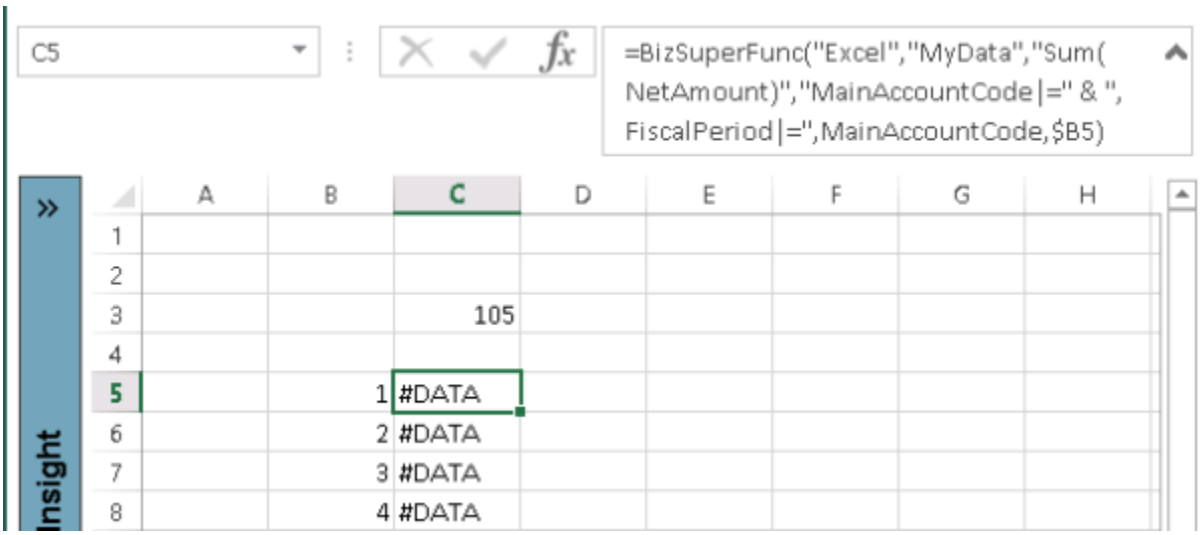
	A	B	C	D	E
1					
2	**Houston - Admin**				
3		1000			
4					
5			**MTD**		**YTD**
6	Sales	4100	-		-
7	Sales - Intercompany	4109	-		-
8	Sales R...	4110	-		-
19	Advertising	5450	8,368.51		65,723.25
20	Commissions Expense	5400	13,947.08		142,867.95
21	Income Tax Expense	5500	-		-
22	Interest Expense	5650	-		-
23	Interest Income	7000	-		-
24	Earnings/(Loss) from BNC	8009	-		-
25			$ 26,677.30		$ 274,596.70
26					

IS-1000 | IS-1100 | Trend-1000 | Trend-1100

Tabbed Parameters - Input Sheet Example.xlsx

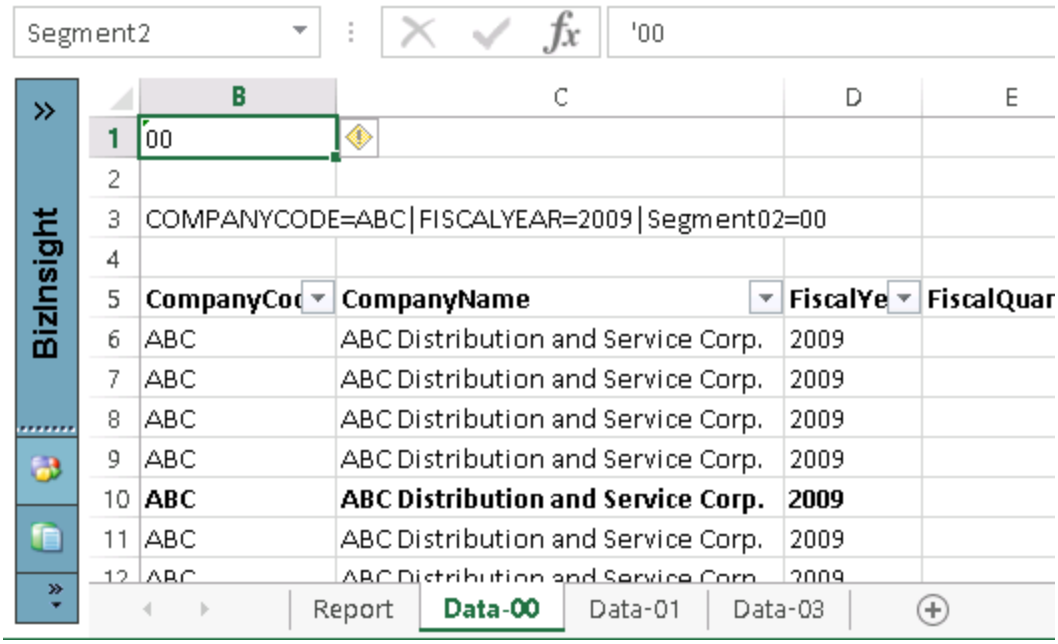
BizInsight 7 and Tabbed Parameters

To avoid BizBroadcast distributed reports from displaying #DATA for BizInsight 7 (formerly known as BizInsight Desktop Edition) functions or tables, worksheets that contain data source(s) for those objects must be included in the output file:



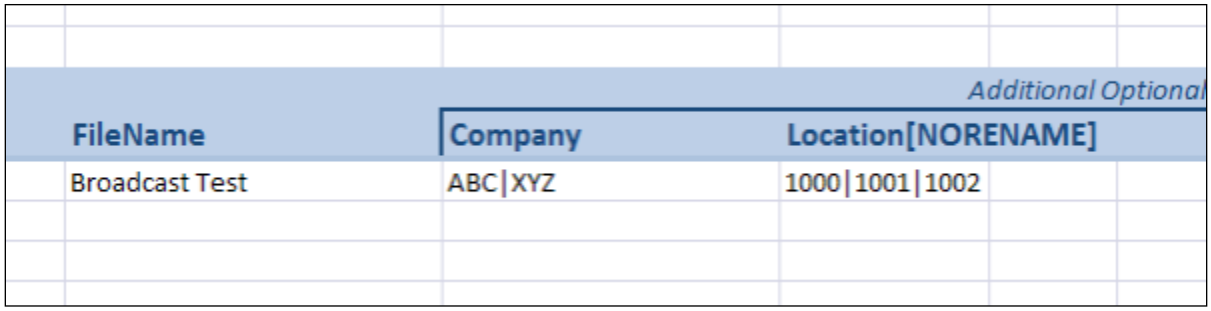
While Tabbed Parameter functionality is available for filtering worksheets containing BizInsight 7 objects, it will not work on worksheets that are included as a data source.

Since the Tabbed Parameter feature creates a new, separate sheet for each parameter passed, using BizBroadcast to pass multiple values to filter a BizInsight 7 data source will result in a distribution output with several iterations of the data source worksheet(s). In this situation, the BizInsight 7 objects are unable to determine which data source to use, resulting in a #DATA error for those objects.



[NORENAME] Directive

BizBroadcast will use the parameter values as part of the worksheet name when multiple User-Defined parameters are used. There may be times when you do not want a parameter's value to be used in the worksheet name. The [NORENAME] parameter directive may be appended to the User-Defined parameter name to prevent the parameter's value from being used in worksheet naming. In the below example, [NORENAME] is appended to the Year parameter to keep the year from being included in the worksheet name.

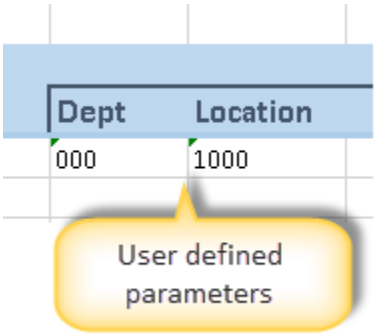


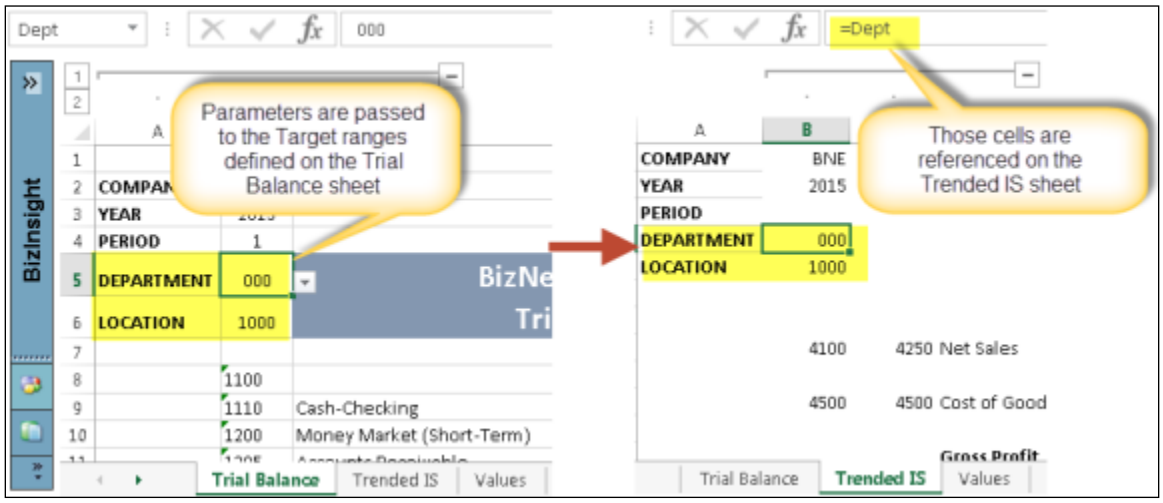
BizBroadcast resolves any resulting worksheet name collisions by adding an incremental integer value to the worksheet name. Based on the above example, BizBroadcast creates the following worksheet names:

BALANCE SHEET-ABC
BALANCE SHEET-ABC1
BALANCE SHEET-ABC2
BALANCE SHEET-XYZ
BALANCE SHEET-XYZ1
BALANCE SHEET-XYZ2

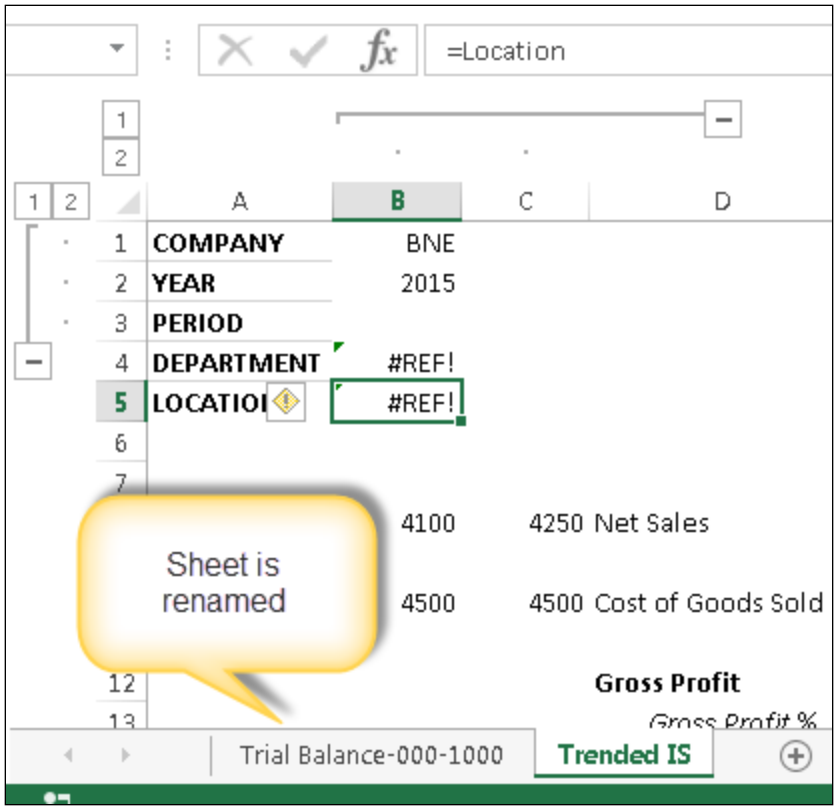
Sheet Renaming with Multiple User-Defined Parameters

When multiple parameters are being passed by BizBroadcast, the sheet names will be appended with the parameter values similar to what occurs when BizBroadcast is creating a Tabbed Parameter output. This design can cause reference problems when the parameters being passed are referenced on other sheets. For example:





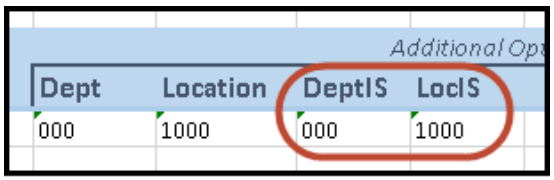
In this situation, the sheet names in the resulting output file will be renamed causing the cell references on the Trended IS sheet to display #REF.


=Location
A
B
C
D
1 COMPANY BNE
2 YEAR 2015
3 PERIOD
4 DEPARTMENT #REF!
5 LOCATIOI #REF!
4100 4250 Net Sales
4500 4500 Cost of Goods Sold
Gross Profit
Sheet is renamed
Trial Balance-000-1000
Trended IS

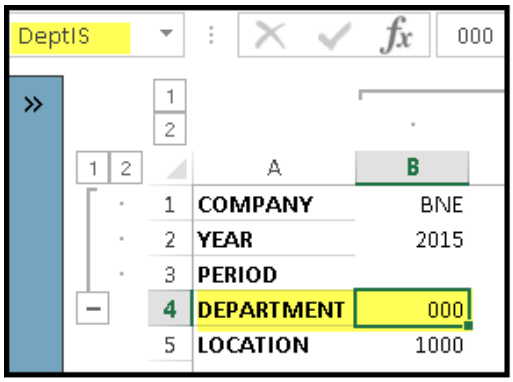
There are two options for resolving this issue:

1. Create a second set of target ranges for the other worksheets to supply the desired parameters.

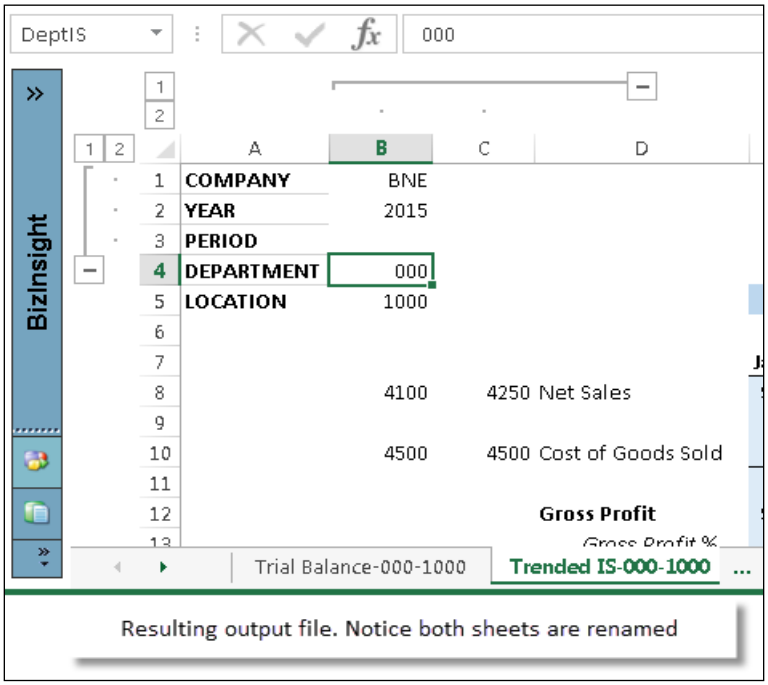
   For example:



User defined parameters



New Target ranges on Trended IS sheet

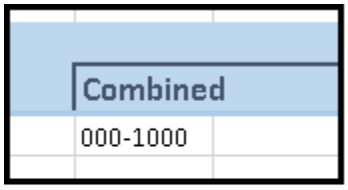


Resulting output file. Notice both sheets are renamed

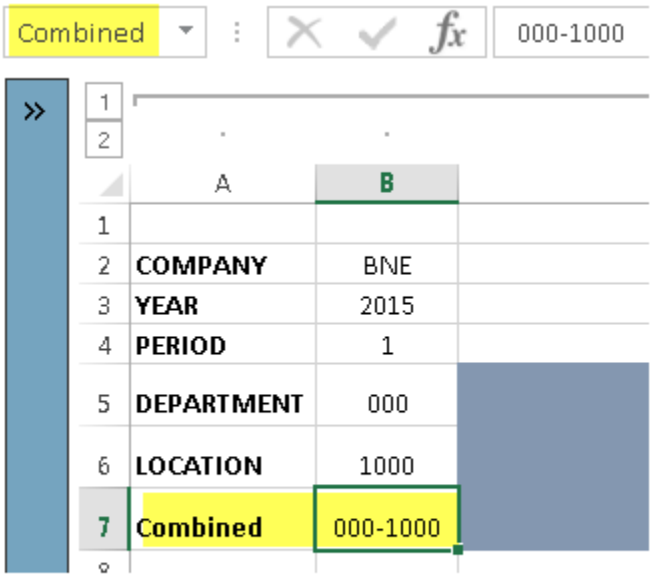
IMPORTANT

This option cannot be used with parameter driven analysis sets (see Parameter-Driven Analysis Set Lists). Option 2 must be used in that situation.

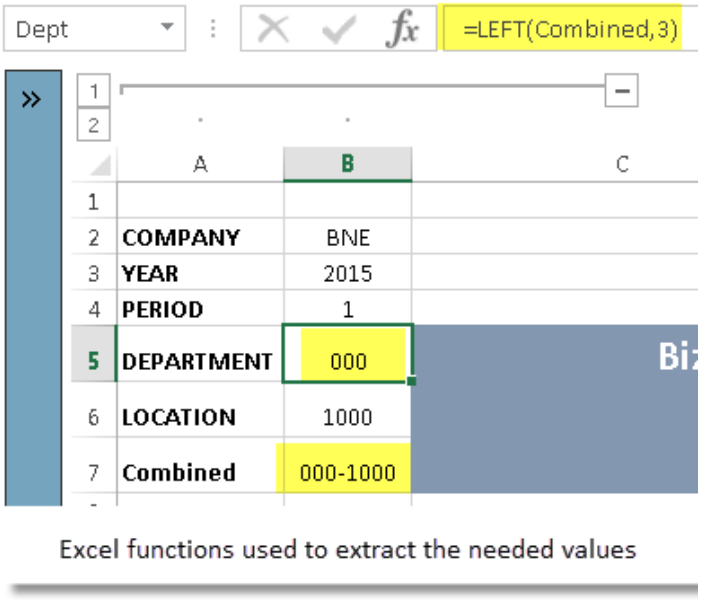
2. Consolidate the parameters into a single parameter and use Excel functions to extract the necessary values into other cells. For example:



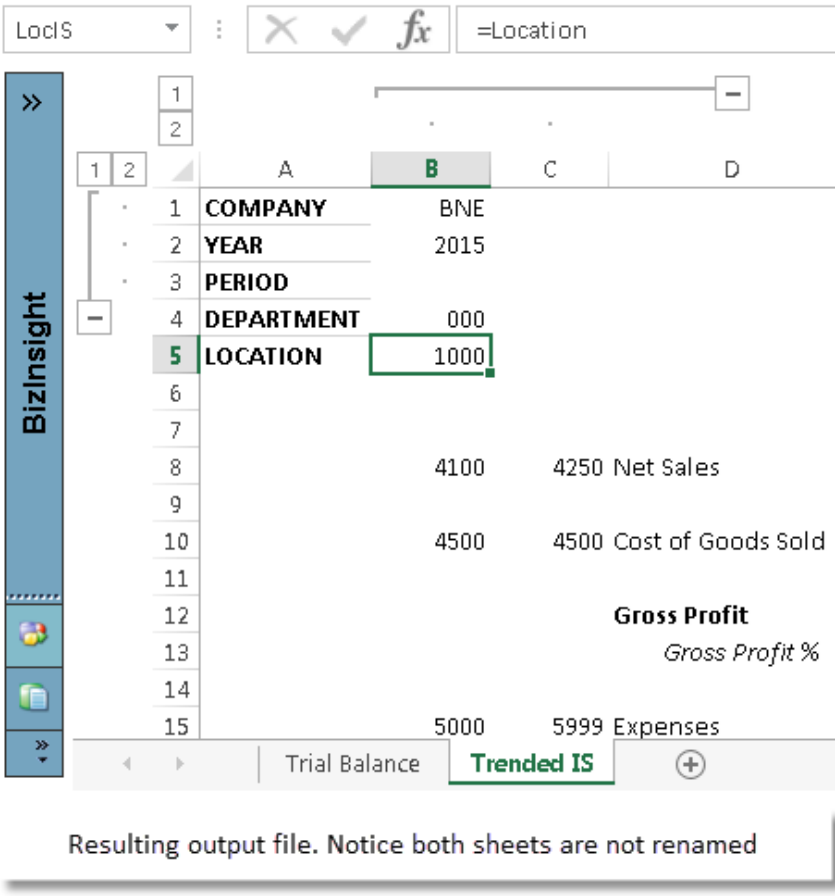
Single parameter with values combined



New target range



Excel functions used to extract the needed values



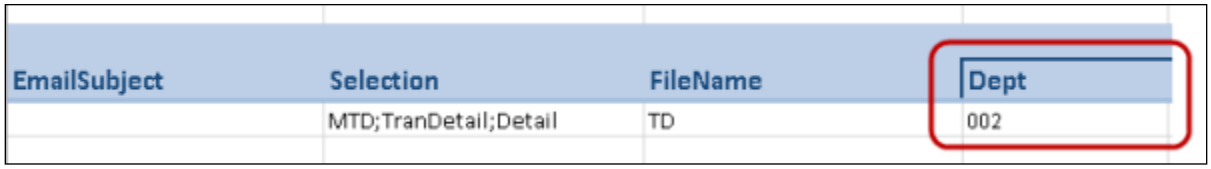
Resulting output file. Notice both sheets are not renamed

Sheet Renaming-Issue Illustration.xlsx
Sheet Renaming-Option1 Example.xlsx
Sheet Renaming-Option2 Example.xlsx

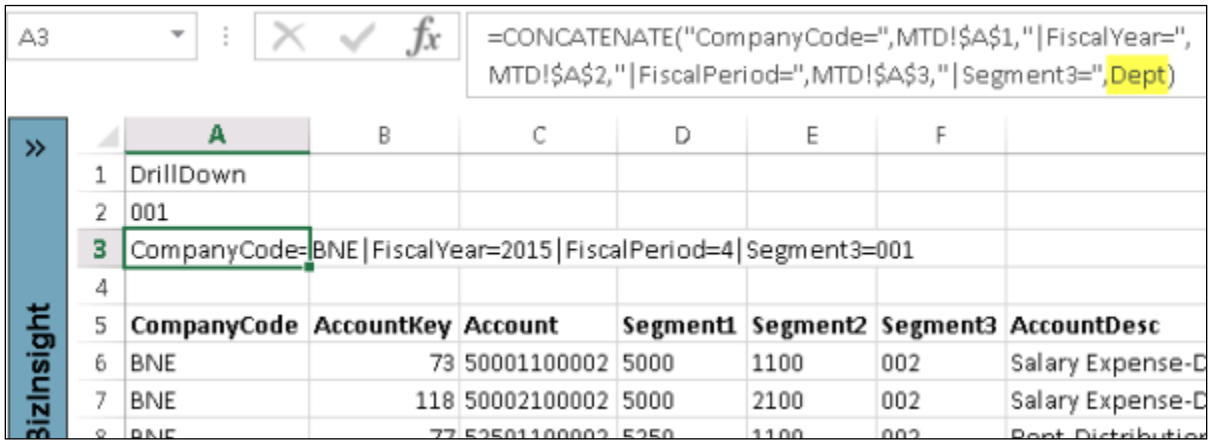
Parameter-Driven Analysis Set Lists

A BizInsight 5.0 analysis set list may be setup to use parameters located in a cell on a different worksheet which makes them dynamic. For more information about how to create dynamic analysis sets, refer to the BizInsight 5.0 User Guide.

When distributing a dynamic analysis set using BizBroadcast, the value being used to filter the analysis set must be passed to the sheet containing the analysis set. If BizBroadcast does not pass the filter value to the sheet containing the analysis set, BizBroadcast will not recalculate the sheet resulting in the analysis set not being updated to reflect the filtered data.



EmailSubject	Selection	FileName	Dept
	MTD;TranDetail;Detail	TD	002



A3

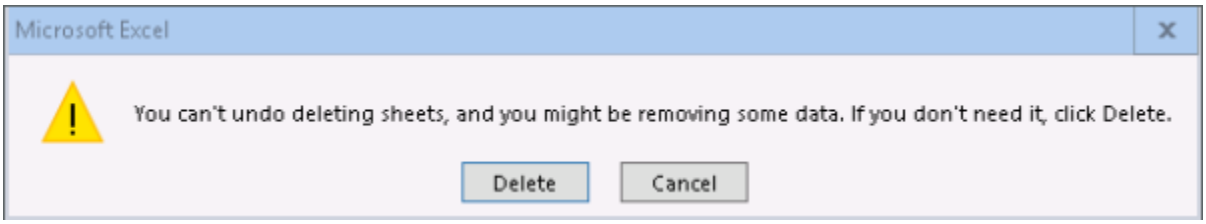
=CONCATENATE("CompanyCode=",MTD!$A$1,"|FiscalYear=",MTD!$A$2,"|FiscalPeriod=",MTD!$A$3,"|Segment3=",Dept)

BizInsight

	A	B	C	D	E	F	
1	DrillDown						
2	001						
3	CompanyCode=BNE|FiscalYear=2015|FiscalPeriod=4|Segment3=001						
4							
5	**CompanyCode**	**AccountKey**	**Account**	**Segment1**	**Segment2**	**Segment3**	**AccountDesc**
6	BNE	73	50001100002	5000	1100	002	Salary Expense-D
7	BNE	118	50002100002	5000	2100	002	Salary Expense-D

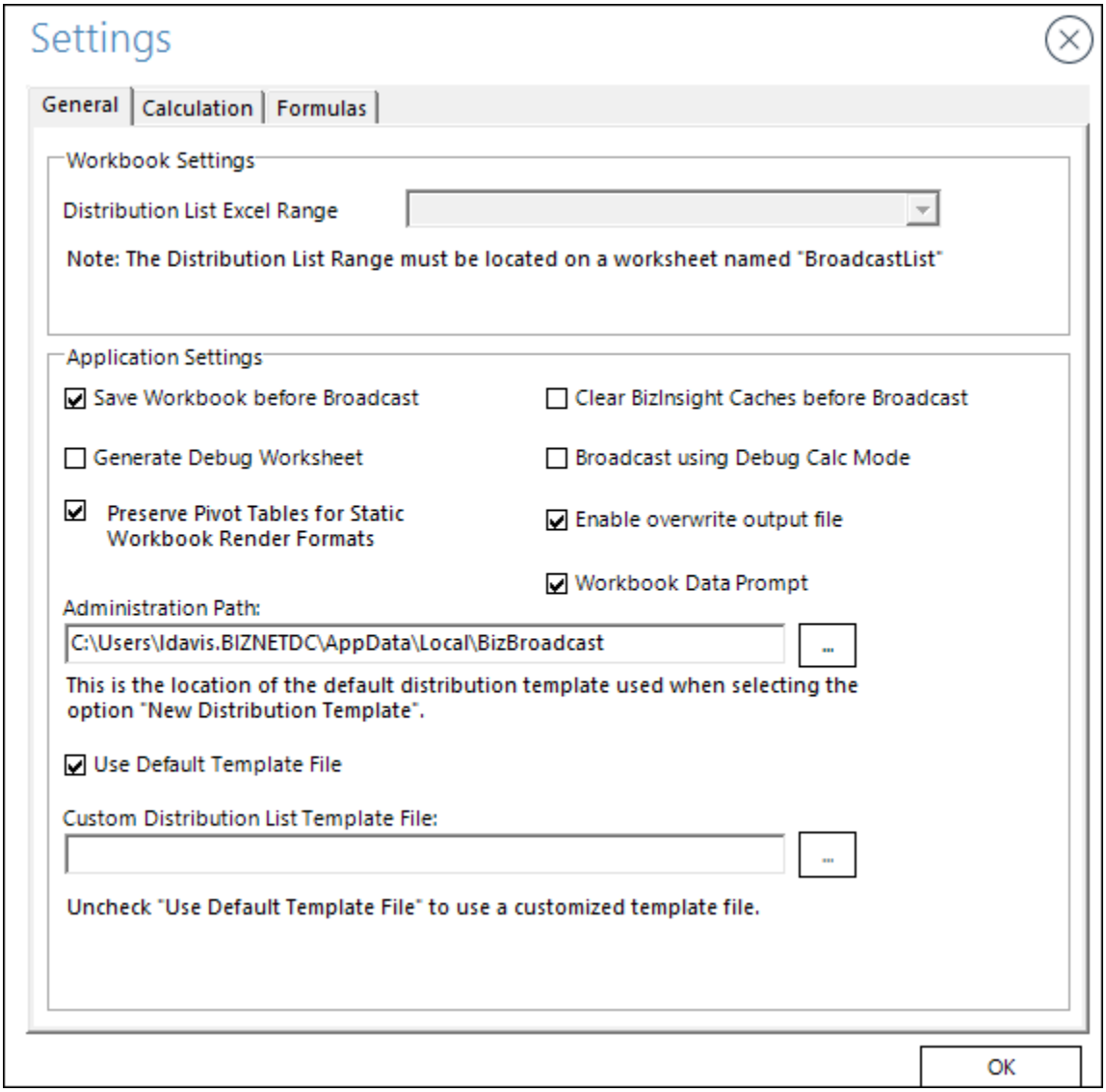
BizBroadcast detects if it is updating a parameter for an analysis set list and refreshes the table after setting the parameter.

If the following error occurs, turn off the Generate Debug Worksheet option.

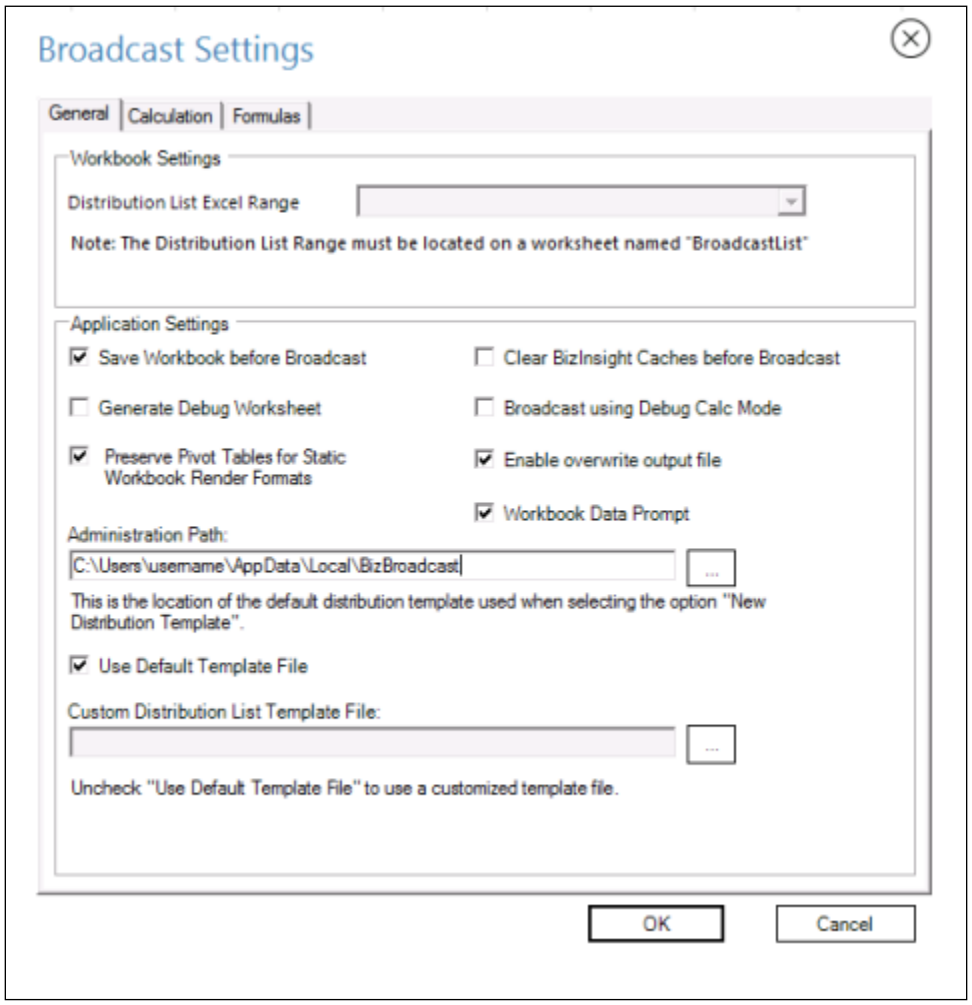


6. Application Settings

The Application Settings dialog is the primary area for adjusting BizBroadcast settings. The dialog consists of three tabs: **General**, **Calculation** and **Formulas**.



6.1 General Tab



Workbook Settings Area

Distribution List Excel Range: The BizBroadcast parameters and their values must be assigned an Excel named range; this named range is referred to as the "distribution list". This drop down list is where you can tell BizBroadcast what Excel name contains the parameters and values you want to use for your distribution. BizBroadcast supports multiple distribution lists but they have to exist on the BroadcastList worksheet created by clicking on the New Distribution Template button on the ribbon. See BizBroadcast Distribution Template for more information about creating Distribution Templates.

Application Settings Area

Save Workbook before Broadcast: This checkbox is enabled by default and instructs BizBroadcast to save the active workbook at the beginning of the distribution. This makes sure any changes have been made to the workbook are saved before starting the distribution.

Generate Debug Worksheet: This checkbox will cause an additional sheet to be added to the active workbook at the conclusion of a distribution with detailed information about the run. This checkbox is useful for troubleshooting BizBroadcast behavior and performance.

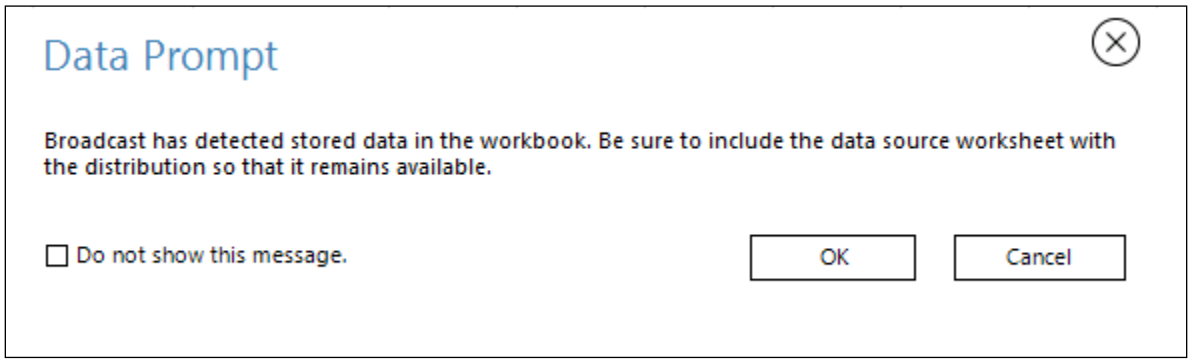
Preserve Pivot Tables for Static Workbook RenderFormats: When this option is checked, BizBroadcast will preserve any pivot tables in the output worksheets instead of creating a values representation for them. The data for the pivot table will remain in the Pivot Cache. Filtering and expanding/collapsing pivot rows will continue to work. Double-clicking a pivot table value will open a worksheet with the detail.

Clear BizInsight Caches before Broadcast: By default, BizBroadcast will use the current in memory data caches at DrillDown. Use this checkbox to instruct BizBroadcast to build new caches before a broadcast run to ensure the resulting report contains the most current data. The caches are refreshed once at the start of the broadcast run.

Broadcast using Debug Calc Mode: This checkbox allows you to specify whether to use the most conservative sheet handling and calculation settings for the broadcast. It will allow you to quickly use these settings without changing the overall Calculation Settings. This has been added as a support tool to help debug issues where the broadcast is acting in an unexpected manner. If the Debug Calc Mode settings work, then the problem is most likely with settings or selection criteria.

Enable overwrite output file: With this option enabled, BizBroadcast overwrites the output file if one already exists. This option is enabled by default.

Workbook Data Prompt: When distributing a report with BizInsight Desktop Edition SuperFunctions or Tables, the sheets containing the data source(s) for the Desktop Edition objects must also be included with the output file. When BizBroadcast detects that Desktop Edition is installed, it will display the following reminder at the start of the distribution:



Checking the **Do not show this message** checkbox will prevent the pop-up for future distributions. The setting can be changed again via the **Workbook Data Prompt** checkbox in Application Settings.

Administration Path: Specifies the path where BizBroadcast was installed. Change the default path only if the Distribution List template has been moved from the default path. Type the new path or select the browse button (ellipsis) to navigate the new location.

Use Default Template File: By default, BizBroadcast uses the Distribution Template workbook that is provided with the product. If you want to use a custom template, uncheck this checkbox. Once unchecked, the browse button is enabled and you can select a different workbook to use as the default template when the **New Distribution Template** button is clicked.

6.2 Calculation Tab

The Calculation tab provides the user the ability to control the calculation behavior of a broadcast distribution. The default options are generally acceptable for the majority of distributions and will not need adjusting.

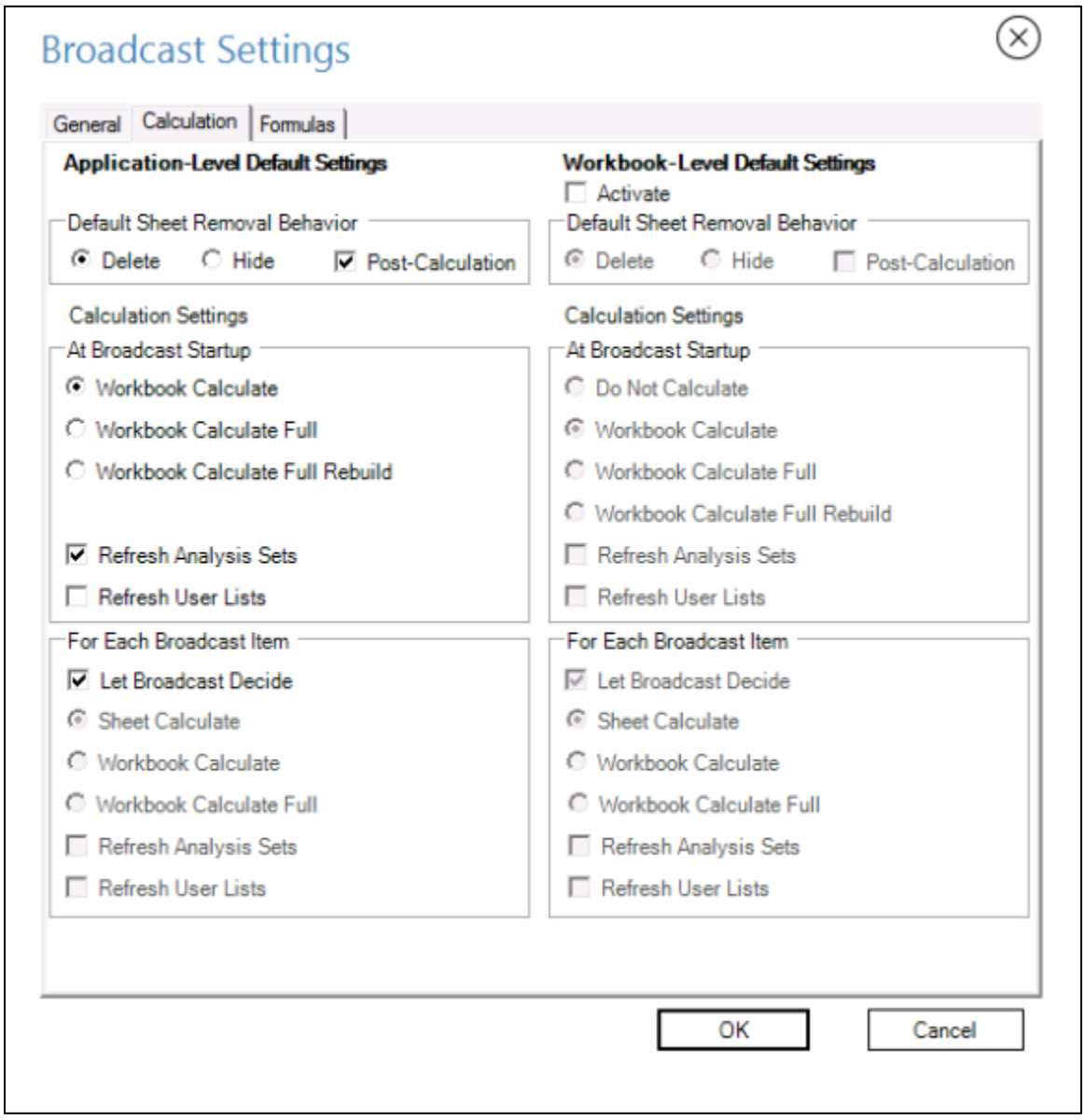
Depending on the nature and complexity of the workbook being broadcast, a workbook may require no recalculation, full recalculation or something in between. Since most of the time in a distribution is spent on recalculation, BizBroadcast provides several calculation options that can be used to improve performance.

Calculation settings may be made at three levels:

- **Application-Level Default Settings** – Overall application default settings are used unless overridden at the other levels.
- **Workbook-Level Default Settings** – These settings apply to the individual workbook and will override Application-Level Default Settings. Workbook-Level settings will apply to all of the Distribution Items in the workbook unless overridden by Distribution Item-Level settings.
- **Distribution Item-Level Settings**- These settings apply to the individual Distribution Item and are specified on the distribution row. All distribution item-level settings override settings specified on the Calculation Tab.

6.2.1 Application-Level and Workbook-Level Calculation Settings

Application-Level and Workbook-Level default settings are managed through the Calculation tab of the Application Settings dialog.



The Calculation tab is divided vertically with the left side for Application-Level settings and the right side for Workbook-Level settings. Application-Level settings apply to all workbooks unless they are overridden by Workbook-Level settings or Distribution Item-Level settings. Workbook-Level settings are activated by checking the **Activate** check box just under the "Workbook-Level Default Settings" heading.

The following settings can be managed through this dialog:

- **Default Sheet Removal Behavior Section** – For render formats that produce Excel workbooks, worksheets that will not be included in the output can be hidden or deleted. This section specifies BizBroadcast's default behavior for handling unused worksheets.

  - **Delete** will reduce the size of the broadcast workbooks and keep unnecessary or sensitive information from being sent out with the workbooks. When combined with unchecking the Post-Calculation checkbox, it can also significantly improve calculation performance because sheets are being deleted before calculation is performed.

  - **Hide** ensures that all sheets in the workbook are included in the broadcast workbook, but hidden, without having to remember to include them through the Selection parameter of the distribution item. This may slow down broadcast performance because all sheets remain in the workbook and are being included in the calculation phase of the broadcast run. The [DELETE] directive can be used in combination with this option to specify certain sheets to be removed before calculation is performed and reduce the scope of what is being calculated.

  - **Post-Calculation** check box is a performance tuning option. Sheet removal can occur before or after calculations are performed. If unneeded sheets are removed before calculation (Post-Calculation unchecked), then the calculation process can run faster. However, if you uncheck this option and do not include all supporting sheets in the Selection criteria using a [CALC] directive, functions that rely on information on those supporting sheets (such as VLOOKUPs) will have errors because the supporting sheets will be removed before they have been recalculated. If Post-Calculation is checked, all sheets remain in the workbook until all sheets have been calculated.

- **Calculation Settings Section** – Calculation Settings are set in two places: At Broadcast Startup and For Each Broadcast Item. BizBroadcast turns off automatic calculation while it is broadcasting. This allows calculations to be performed when BizBroadcast makes changes to the workbook to set parameters and to control the level of calculation performed.

  - **At Broadcast Startup** – When BizBroadcast first starts processing Distribution Items it will initially perform a workbook calculation to get the workbook up-to-date. You can set the type of workbook calculation performed:

    - **Do Not Calculate** – This setting is **only** available at the Workbook Level. With this option selected, BizBroadcast will not perform an initial calculation before processing Distribution Items. Use this setting only if you're certain no initial calculation is needed. This can significantly reduce startup time for large workbooks.

    - **Workbook Calculate** – Excel will determine what cells in the workbook need to be recalculated based on any changes made since the last calculation. This is the fastest of the workbook calculation settings.

- **Workbook Calculate Full** – This setting tells Excel to calculate all cells in the workbook without trying to determine which cells need it. This can be much slower than a Calculate, but ensures all cells are calculated.

- **Workbook Calculate Full Rebuild** – In addition to calculating all cells in the workbook, Excel will also rebuild its dependency tree from scratch which is used to determine the order in which cells are calculated. Slowest.

- **Refresh Analysis Sets** – If checked, this setting will refresh all BizNet analysis sets to ensure they are up-to-date.

- **Refresh User Lists** – If checked, this setting will refresh non-BizNet list tables that use external data connections to ensure they are up-to-date.

- **For Each Broadcast Item** – These settings will be used as BizBroadcast processes each Distribution Item:

  - **Let Broadcast Decide** – If the Distribution Item will result in Tabbed Parameters and is passing values to an input sheet, BizBroadcast uses a SHEET calculation as each worksheet tab is generated. Otherwise, BizBroadcast uses a WORKBOOK calculation.

  - **Sheet Calculate** – BizBroadcast attempts to determine which sheets are required to be calculated and only calculates those sheets. The sheet calculation is performed only if BizBroadcast has placed parameters. This setting results in the best performance and is the default for Tabbed Parameter distributions that pass the parameters to input sheets.

    IMPORTANT

    With this option selected, the worksheet may not always calculate completely. See Providing a Calculation Hint for Sheet Calculation for an explanation and workaround for calculation issues.

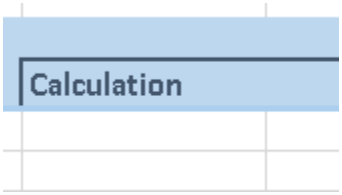
  - **Workbook Calculate** – With this option selected, Excel determines what cells in the workbook need to be recalculated based on any changes made since the last calculation. This may be slower than Sheet Calculate, but will typically ensure all recalculations are performed. This is the default calculation mode for all distributions except those using Tabbed Parameters with Indirect Parameters. See Parameter Input Sheets (Indirect Parameters) for more information.

  - **Workbook Calculate Full** – This setting tells Excel to calculate all cells in the workbook without trying to determine which cells need it. This can be much slower than a Workbook Calculate, but ensures all cells are calculated.

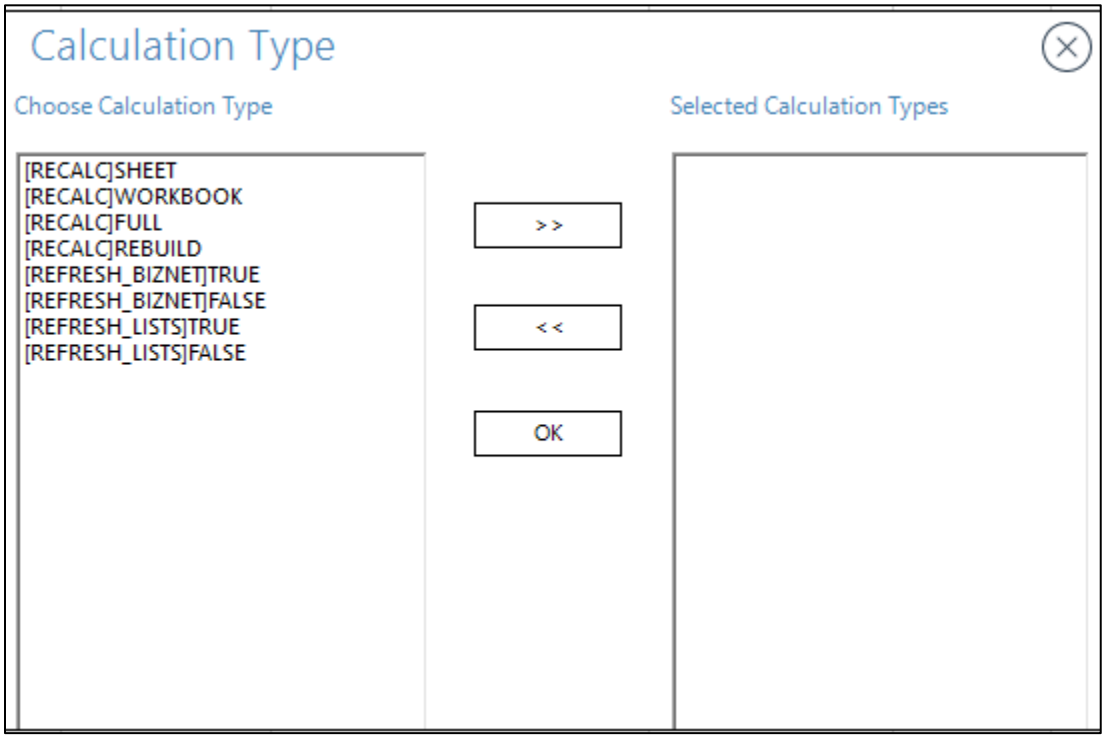
- **Workbook Calculate Full Rebuild** – In addition to calculating all cells in the workbook, Excel will also rebuild its dependency tree from scratch which is used to determine the order in which cells are calculated. Slowest.
- **Refresh Analysis Sets** – If checked, BizBroadcast will refresh all BizNet analysis sets to ensure they are up-to-date.
- **Refresh User Lists** – If checked, BizBroadcast will refresh non-BizNet list tables that use external data connections to ensure they are up-to-date.

6.2.2 Distribution Item-Level Calculation Settings

Calculation settings defined at the Distribution Item-Level will override the settings specified on the Calculation tab. Use the **Calculation** parameter to assign Distribution Item-Level calculation settings.



After selecting the **Calculation** parameter, double-click the cell below to open a helper dialog:



The Item-Level calculation settings consist of the following directives:

Directive	Options	Calculation Tab Equivalent
[RECALC]	SHEET or WORKBOOK	For Each Broadcast Item
[RECALC]	FULL or REBUILD	For Each Broadcast Item
[REFRESH_BIZNET]	TRUE, FALSE	Refresh Analysis Sets
[REFRESH_LISTS]	TRUE, FALSE	Refresh User Lists

6.2.3 Providing a Calculation Hint for Sheet Calculation

The best performing Application-Level calculation settings are:

- The **Default Sheet Removal Behavior** is set to Delete
- The **Post-Calculation** checkbox is unchecked
- The **At Broadcast Startup** is set to Workbook Calculation
- The **For Each Broadcast Item** selection is Sheet Calculation

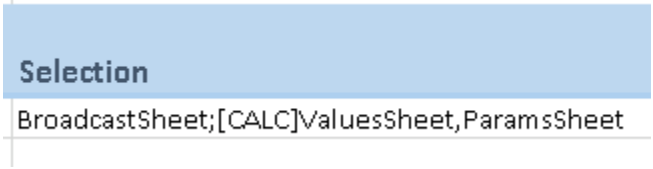
This will ensure that when the calculations are performed there are as few sheets as possible remaining in the workbook and each worksheet that BizBroadcast changes (sets parameters, refreshes) will be calculated, but no others.

BizBroadcast determines what sheets need to be calculated for Sheet Calculation by tracking where it has placed parameters. After BizBroadcast places the parameters for each broadcast sheet, both the parameter sheet and the sheets being broadcast will be calculated. If other sheets are needed to ensure correct calculation results, BizBroadcast will not be able to detect them and may lead to incorrect results.

BizBroadcast provides the [CALC] directive to address this problem. For example, a workbook could have two supporting sheets:

- a "ParamsSheet" that contains Fiscal Year, Fiscal Period, and Department values for functions, and
- a "ValuesSheet" that contains VLOOKUP tables that are used to provide user friendly department descriptions

When both sheets are needed to complete the calculation of the sheet being broadcast, the [CALC] directive is used as follows:

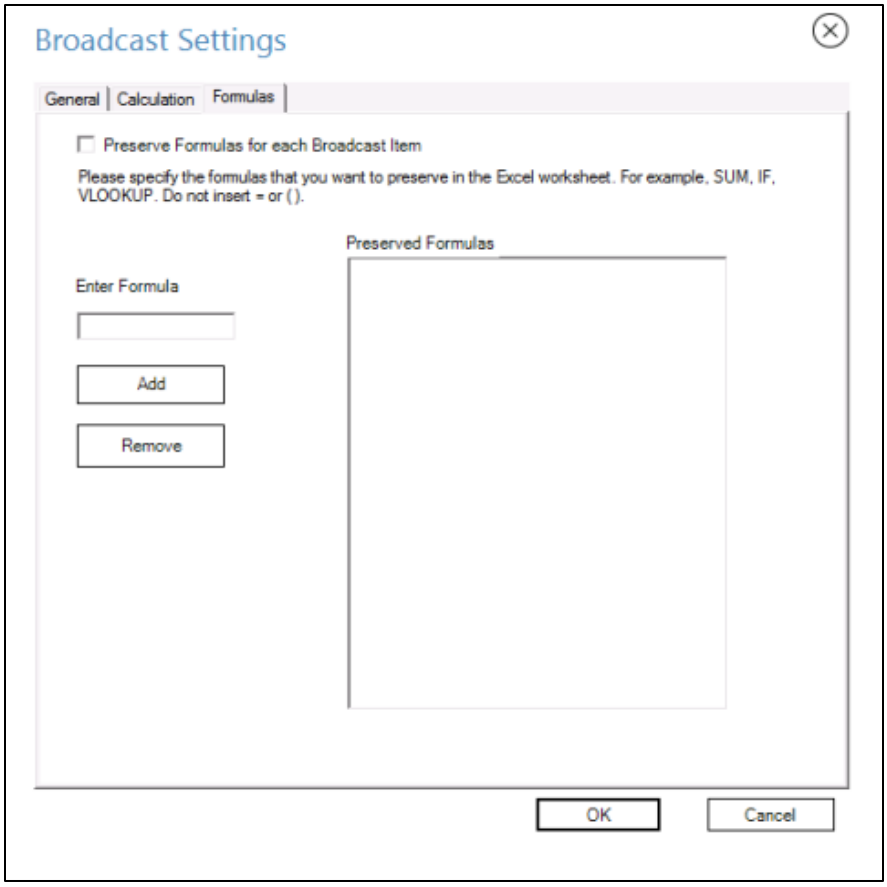


This selection criteria specifies that “BroadcastSheet” will be in the resulting output file and “ValuesSheet” and “ParamsSheet” need to be included when doing a SHEET Calculate. The [CALC] directive provides a hint to BizBroadcast to include the supporting sheets and calculate them in the order specified.

There are two special sheet names that BizBroadcast will recognize. Worksheets named **“Input”** and **“Values”** will be recognized as supporting sheets and will be automatically included as part of SHEET calculations. They will be calculated in the order of “Values” and then “Input” followed by any other sheets determined to be part of the broadcast.

6.3 Formulas Tab

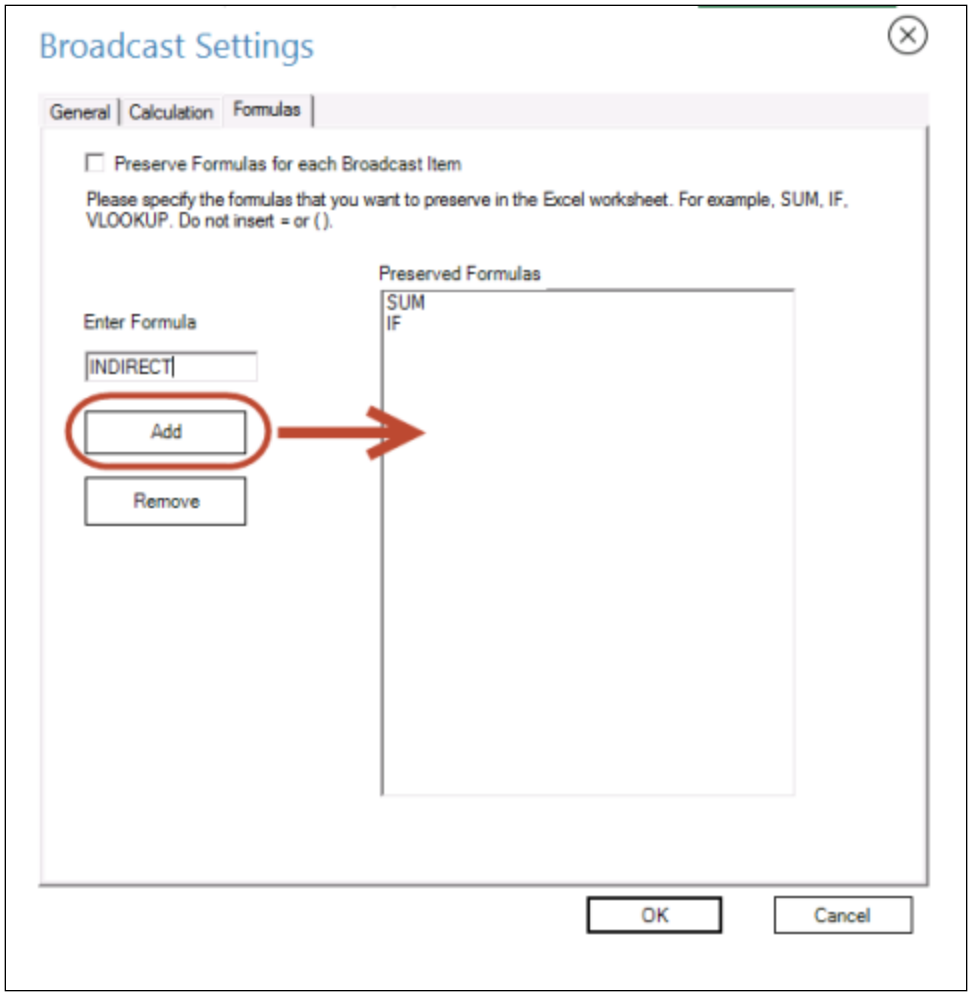
The Formulas tab controls, at an application level, whether BizBroadcast will preserve certain formulas when running a distribution. **This option only applies to the XLSX and XLSM render formats.**



Check the **Preserve Formulas for each Broadcast Item** checkbox to change BizBroadcast's default behavior to always preserve the listed formulas with every broadcast of one of the supported render formats (XLSX or XLSM). To control this behavior on a distribution item level, add the [PRESERVE] and [NOPRESERVE] directives to the Selection field of the distribution row.

Regardless of the selection made for the **Preserve Formulas for each Broadcast Item** checkbox, the formulas to be preserved must be added to the **Preserved Formulas** list on this tab.

Type the formula to preserve in the **Enter Formula** field then click on the **Add Formula** button to add the formula to the **Preserved Formulas** list. Both BizInsight and Excel formulas can be added to this list.



Use the **Remove Formula** button to remove an entry from the Preserved Formulas list.

IMPORTANT

If any part of a cell in the worksheet contains one of the listed formulas, the ***entire cell*** will be preserved including any formulas not listed. For example:

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

In this example, the IF has been specified as a preserved formula so the MTDNET formula will be preserved even though it is not specified in the **Preserved Formulas** list.

A workaround to remove the MTDNET formula is to reference a cell containing the BizInsight formula in the IF statement. For example, in the below formula, $B$1 contains the MTDNET function and would not be preserved because it is not inside the IF statement:

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

Note

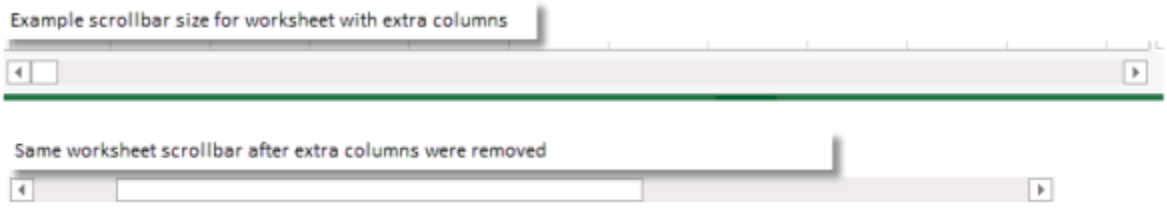
Variance calculations in a BizInsight report provide a challenge because they do not use an Excel function. To preserve a variance formula, BizNet suggests wrapping that formula in an Excel function, for example ROUND() which will not significantly affect the result of the variance calculation but will provide the ability to preserve that variance calculation in the output.

Performance Tips

There is a performance impact on the distribution processing time when this option is used because each cell of the sheet(s) being broadcast has to be inspected to determine whether the formula in the cell should be preserved. Before using Preserve Formulas, do the following:

1. If the source workbook contains many worksheets, of which only a few are being distributed, uncheck the **Post-Calculation** checkbox on the Calculation tab for better performance. See Application-Level and Workbook-Level Calculation Settings for more information about this option. Keep in mind that the source workbook design impacts whether turning this option off is advisable.

2. Remove all unused rows and columns from worksheets being distributed. The size of the vertical and horizontal scroll bars for a sheet can provide an idea of how many rows or columns or on the sheet. If there are only a few rows



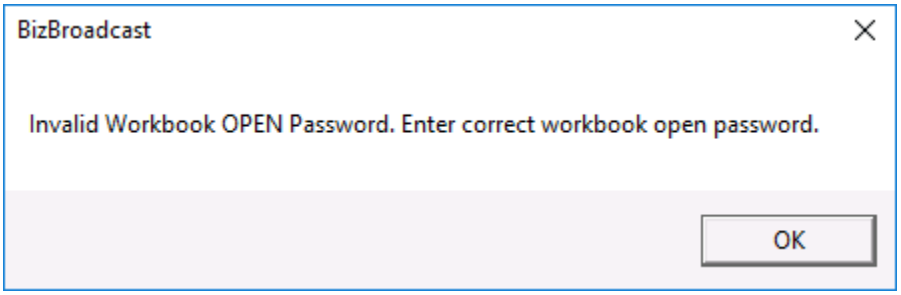
3. Remove all formatting that is applied to entire rows and columns. Even if the cells are empty, the fact that they are formatted causes them to be treated as populated and thus, needing to be evaluated.

7. Password Protection

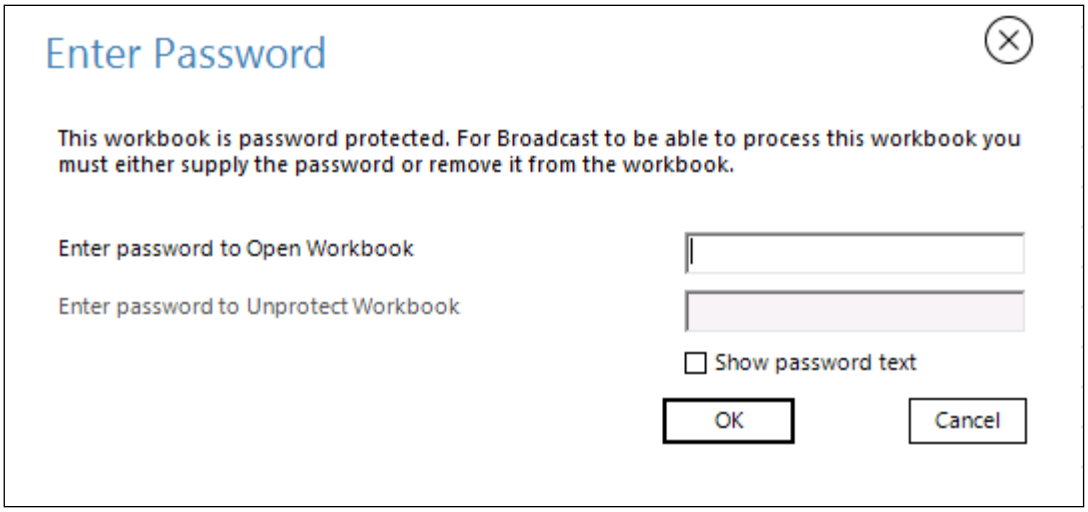
BizBroadcast is designed to work with workbooks that require a password to be opened, to assign passwords to workbooks or PDFs that are being distributed and to assign passwords to protected worksheets.

7.1 Password Protected Source Workbooks

BizBroadcast creates a working copy of the workbook to do its processing. If the source workbook requires a password in order to be opened, BizBroadcast displays a dialog to indicate that it has detected the need for a password.



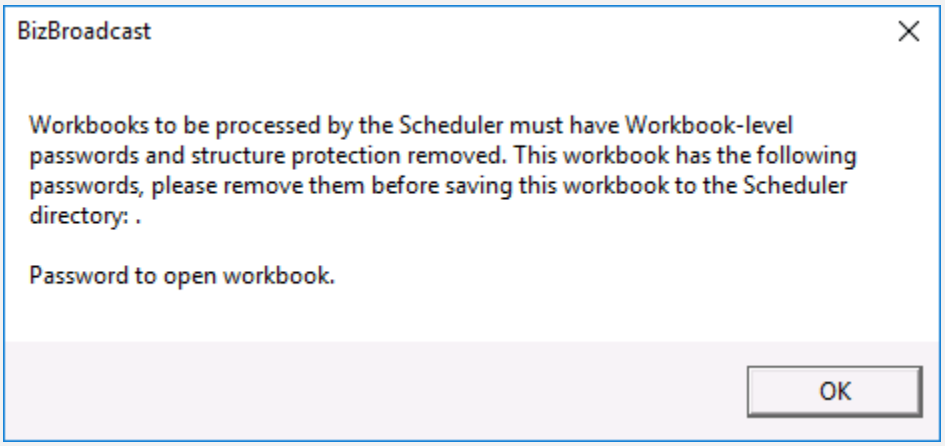
After this dialog is closed, BizBroadcast prompts for the workbook password:



The passwords are stored only in memory and are retained between distribution runs so they only need to be entered once. If Excel is closed and restarted, the passwords will need to be re-entered by the user. If the passwords are changed between distributions, BizBroadcast will re-display the Password dialog so that the new password can be entered.

IMPORTANT

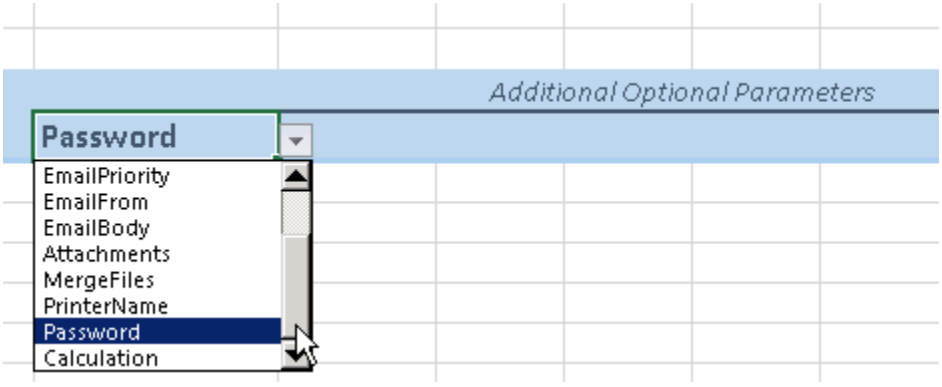
Password protected workbooks cannot be scheduled to be run by the Scheduler. BizBroadcast checks to see if workbook passwords are set when the "Save as Schedule File" button is clicked and, if passwords are set, display a warning dialog:



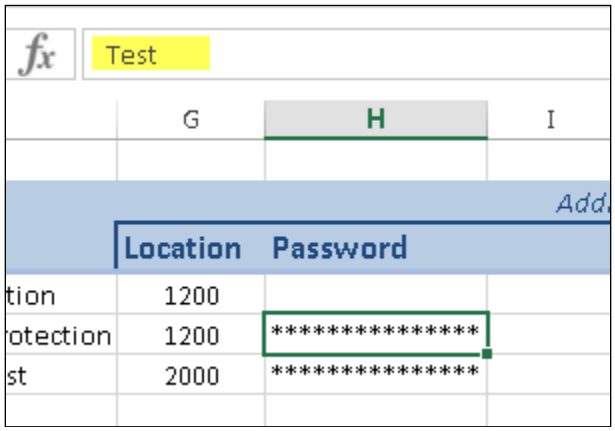
If a password protected workbook is manually moved to the Scheduler-monitored folder, the Scheduler will fail to read properties from the encrypted workbook file, will not recognize the file as one having a schedule and will ignore the workbook.

7.2 Password Protecting Distributed Workbooks or PDFs

A password to protect the workbook or PDF when opened can be specified for a distribution item. Use the **Password** parameter from the Additional Optional Parameters drop down list to specify the password.



The password entered in the cell of the distribution row will be masked to protect against casual observation by persons passing by but the password can be viewed in Excel's formula bar when the cell is selected.

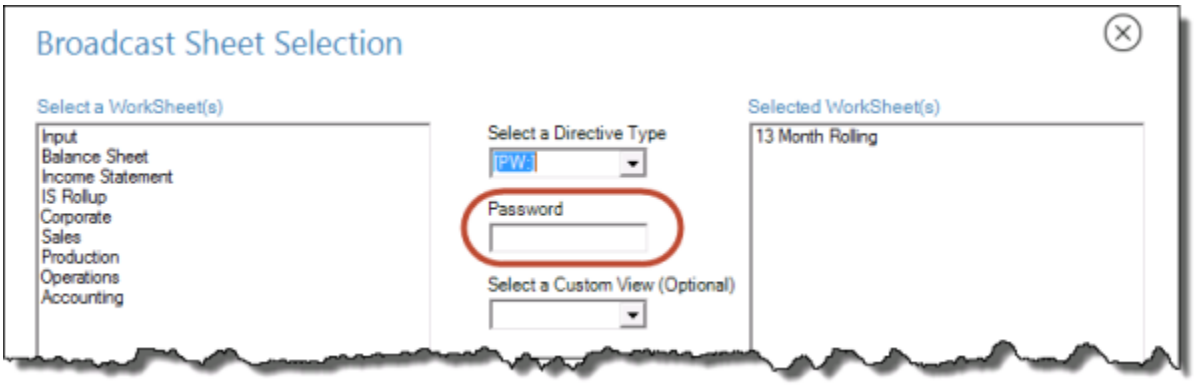


Assigning Sheet Protection Passwords

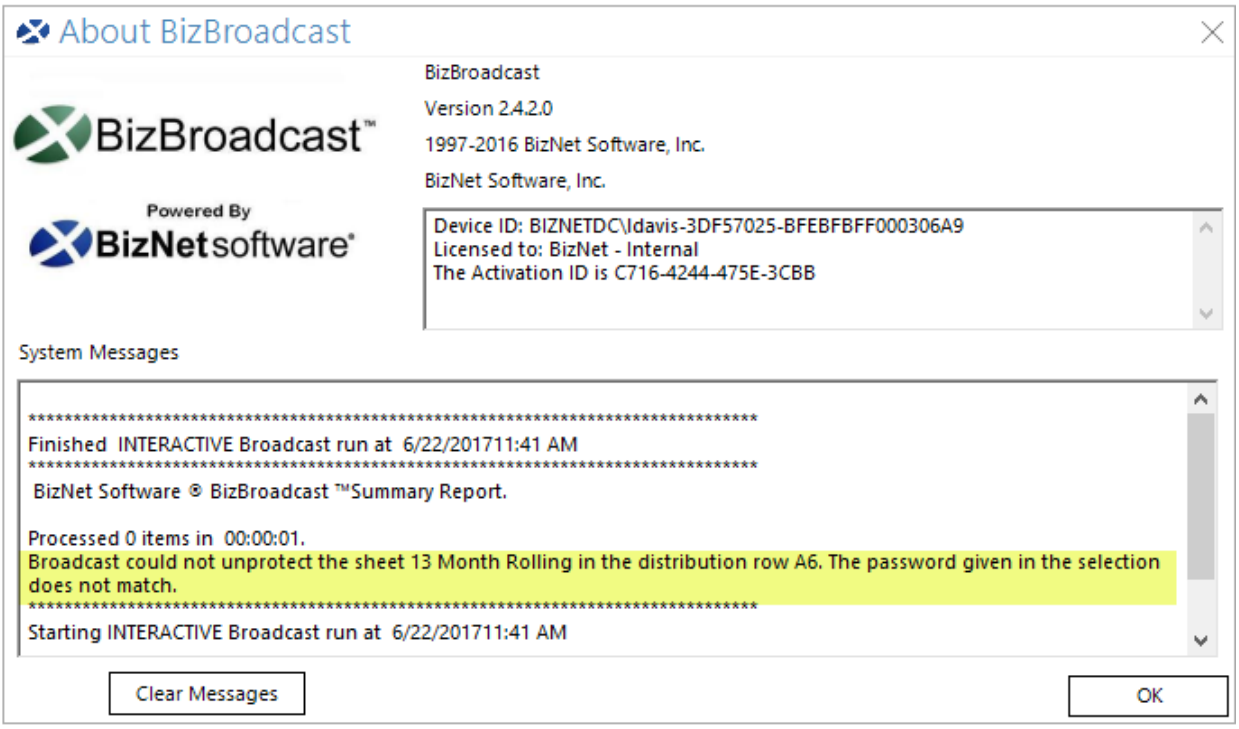
Sheet protection passwords may be specified when adding a worksheet to the Selection parameter of a Distribution row. This is accomplished using the [PW] directive from the **Choose A Directive Type** drop down list.

If sheet protection is enabled on the source worksheets, BizBroadcast will carry that protection forward to worksheets in the generated output provided the selected RenderFormat produces a workbook as output. BizBroadcast will unprotect worksheets during processing and will re-apply the sheet protection settings when processing is completed. Passwords can be assigned to the protected sheets in the resulting output file by using the [PW:] directive in the Selection parameter. When the

[PW:] directive is used to specify a password for a worksheet that is not protected, the password will be ignored.
When the [PW:] directive is selected, the Sheet Selection dialog will display a password field for entering the password.

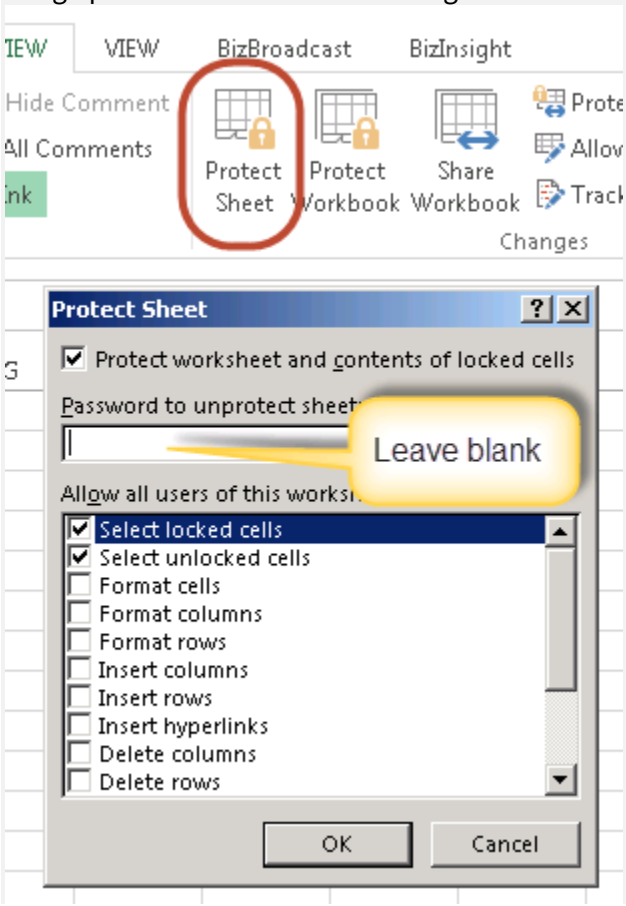


If BizBroadcast is unable to unprotect a password protected worksheet, it will continue processing the distribution item and may complete successfully. If BizBroadcast fails to complete processing due to not having the correct worksheet password, the following message will be displayed:



IMPORTANT

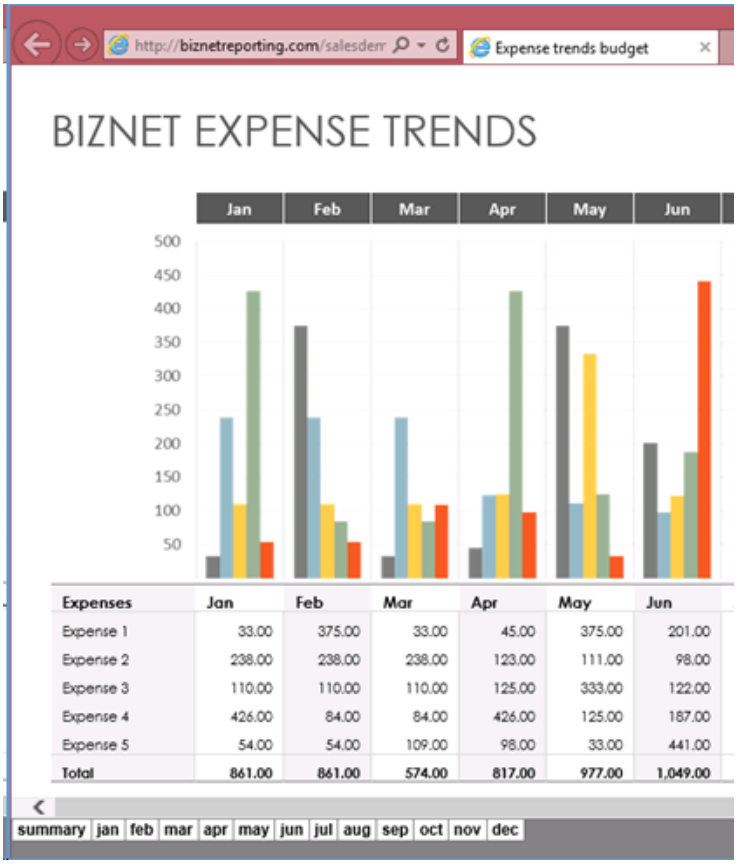
When protecting the source sheet, leave the password field blank and then use the [PW] directive to assign passwords to the sheet during distribution.



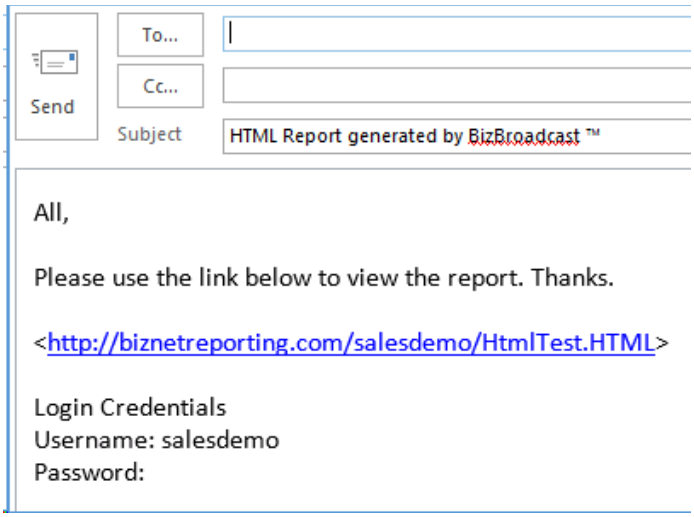
Password Protection.xlsx

8. HTML Publishing

BizBroadcastprovides the ability to publish HTML output to a website from which users can view the content using any internet browser.



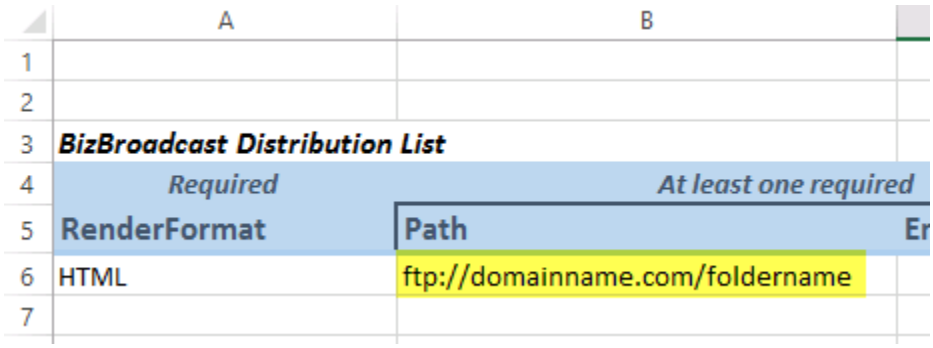
When the EmailTo parameter of the Distribution Template is populated, a hyperlink to the published content will be appended to the email body and, optionally, credentials for accessing the site will be included.



To publish HTML content to a website, make the following selections in your Distribution Template:

1. Select **HTML** for the RenderFormat parameter.

2. Enter an **FTP link and folder name** for the Path parameter.



	A	B
1		
2		
3	***BizBroadcast Distribution List***	
4	*Required*	*At least one required*
5	**RenderFormat**	**Path** **Er**
6	HTML	ftp://domainname.com/foldername
7		

3. Select the **Username** optional parameter and enter a login id that has rights to create an object on the website.

4. Select the **Password** optional parameter and enter the password for the login provided by the Username parameter.

5. If you would like to send an email with a hyperlink to the document, make the following additional selections:

   - Enter recipient(s) email addresses in the **EmailTo** parameter.

   - Optional: Select the **Email Body** optional parameter and type in a message to include in the email.

   - Optional: Select the **SendCredentials** parameter to include the credentials provided by the Username and Password parameters in the email body and select TRUE for that parameter. This parameter is not required and the credentials will not be sent unless TRUE is selected for the parameter value.

   - Optional: If SendCredentials is set to TRUE, BizBroadcast will provide the same credentials that were used to publish the HTML content. Use the **RecipientCredentials** parameter to supply different user credentials than those used to publish the HTML content.

When publishing HTML content with BizBroadcast, the credentials provided for the UserName and Password parameters must have rights to access and modify the website.

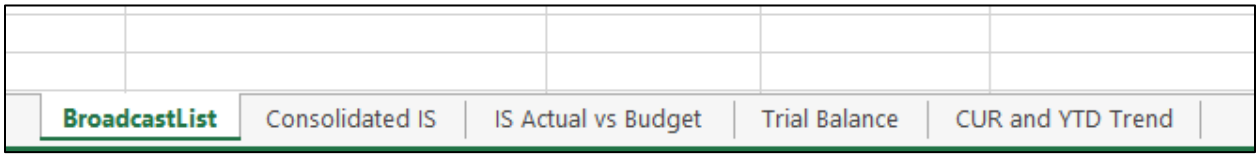
9. PDF and Excel File Merge

When using the PDF, XLSX or XLSXVALUES RenderFormats, additional files of the same file type can be merged in with the current BizBroadcast distribution content. The MergeFiles parameter is used to specify the location and filename of all additional PDF content to be merged.

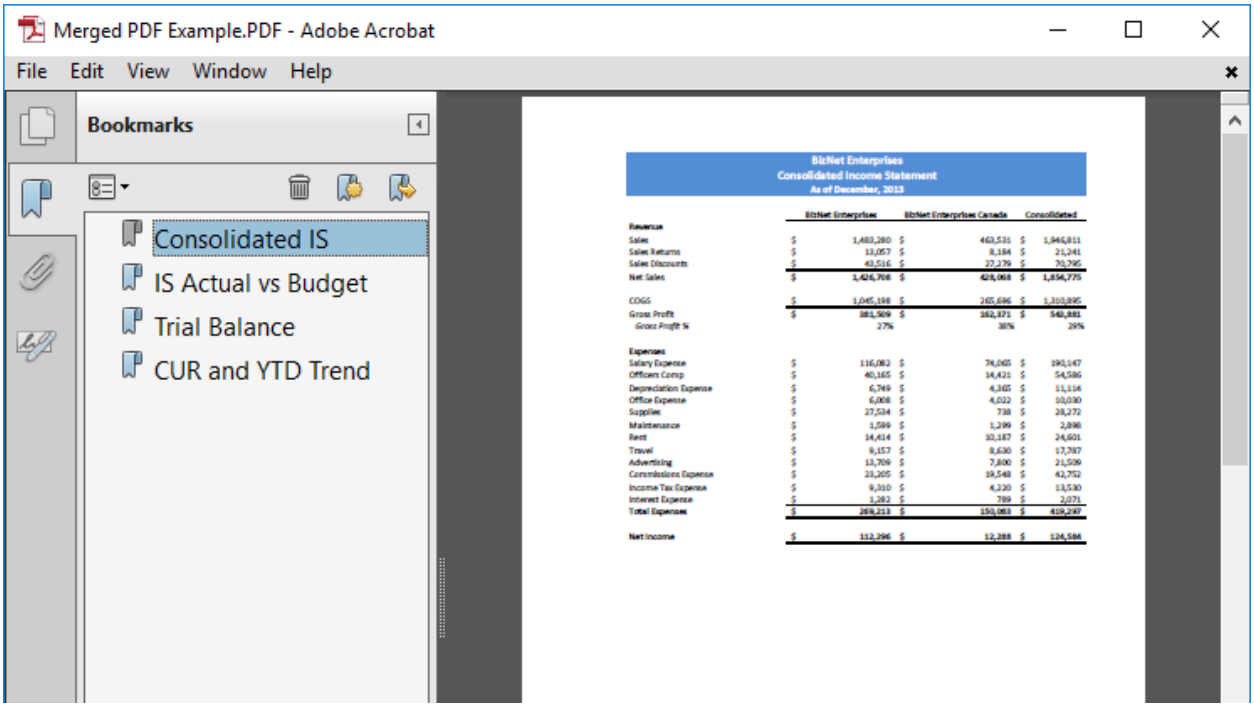
The following example distribution illustrates one possible approach to producing a merged PDF file:

	A	B	E	F	G
1					
2					
3	***BizNetBroadcast Distribution List***				
4	*Required*	*At least one required*			
5	**RenderFormat**	**Path**	**Selection**	**FileName**	**MergeFiles**
6	PDF	C:\BizBroadcast Examples\FilesToMerge	Consolidated IS	Consolidated IS	
7	PDF	C:\BizBroadcast Examples\FilesToMerge	IS Actual vs Budget	IS Actual vs Budget	
8	PDF	C:\BizBroadcast Examples\FilesToMerge	Trial Balance	Trial Balance	
9	PDF	C:\BizBroadcast Examples\Output	CUR and YTD Trend	Merged PDF Example	C:\BizBroadcast Examples\FilesToMerge*.PDF
10					

The source BizBroadcast workbook has the following sheets:

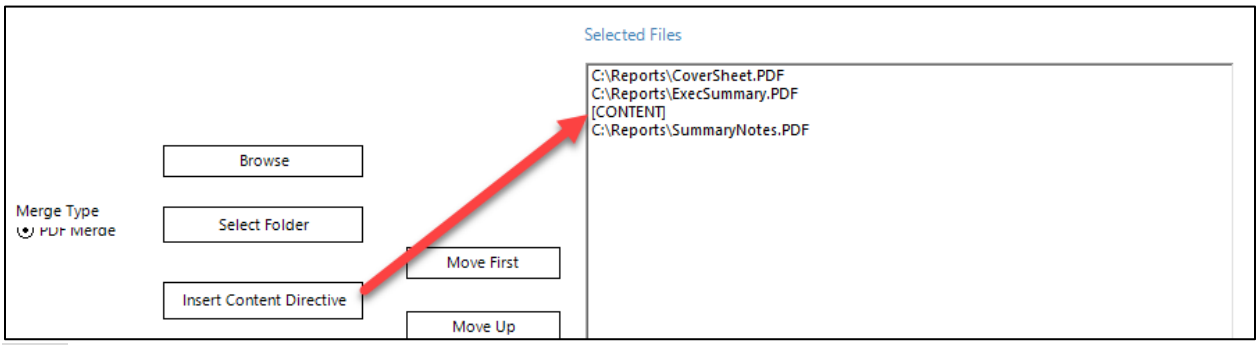


The distribution list produces each sheet as a single PDF file and then merges those resulting PDF files into one PDF plus the CUR and YTD Trend worksheet.



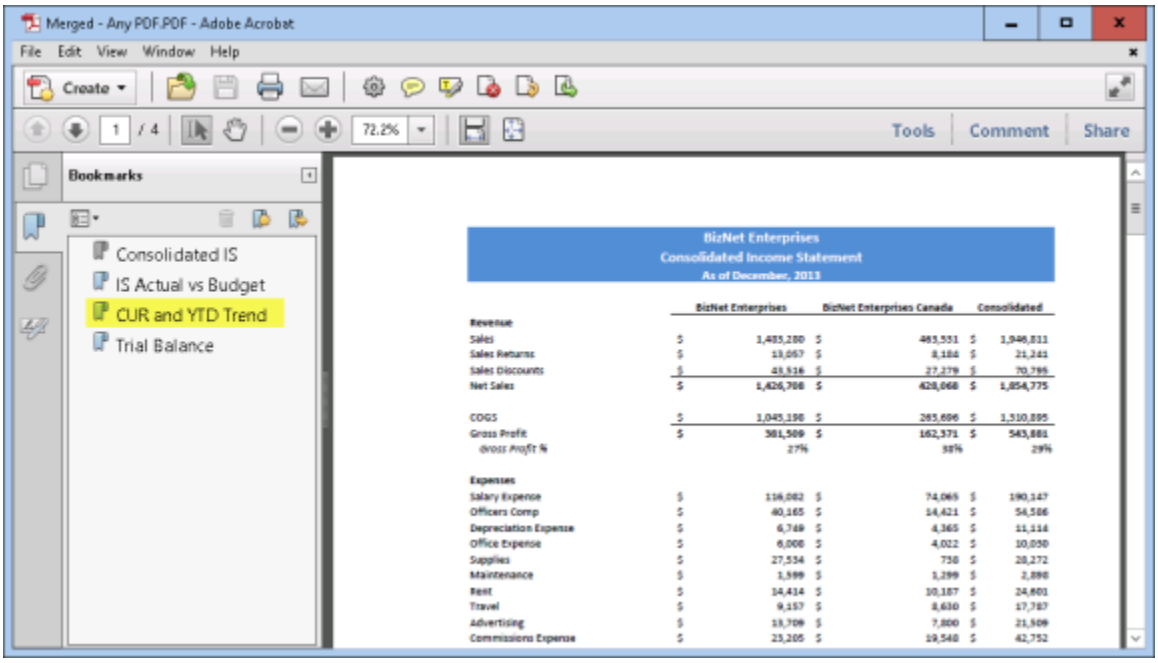
Use the **[CONTENT]** directive to indicate the placement of the current BizBroadcast distribution content relative to the other PDF files being merged. By default, the current BizBroadcast content will be added to the end unless indicated otherwise with the [CONTENT] directive.

The following example demonstrates using the [CONTENT] directive to control where the current BizBroadcast distribution content is placed in the resulting merged .PDF file.



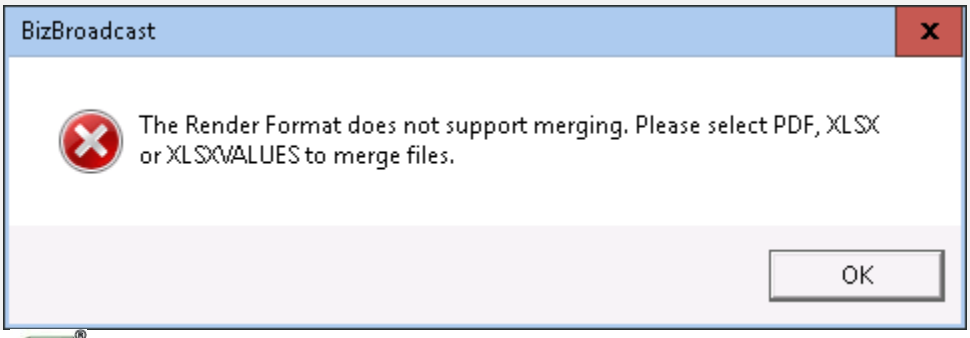
Hint Double-click on the MergeFiles cell of the distribution row to open the Broadcast Merge Options dialog.

The resulting output file shows the current BizBroadcast distribution content ("CUR and YTD Trend") is located after "IS ACTUAL VS BUDGET" and before "TRIAL BALANCE".



IMPORTANT

The MergeFiles parameter is not supported with the XLSM RenderFormat.



Merged PDF Files.xlsx

10. PackNGo Distributions

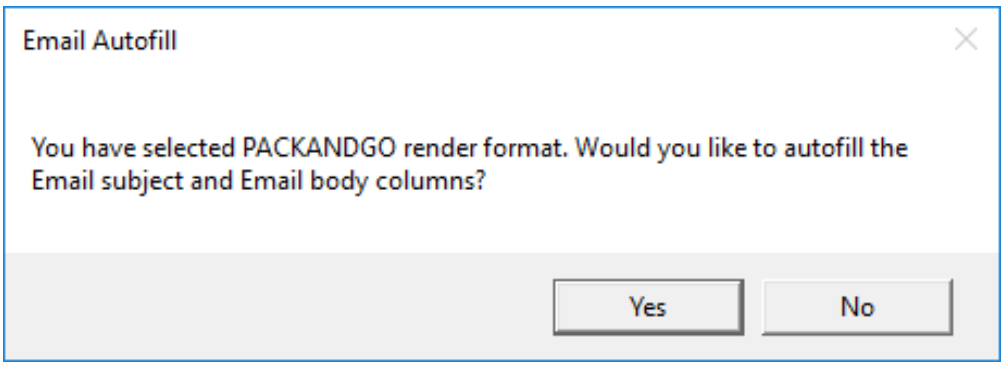
BizBroadcast can be used to distribute data retrieved by a BizInsight 7 Connector to other BizInsight 7 users who do not have data connectivity. Users who receive PackNGo workbooks can interact with the workbook and drill down on the numbers.

IMPORTANT

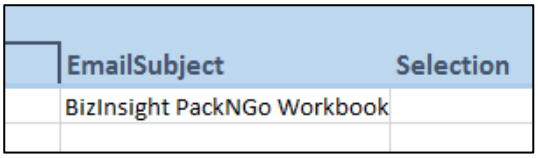
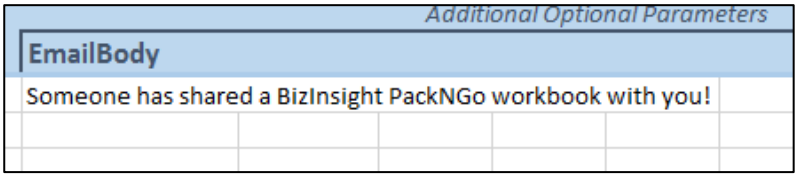
PackNGo distributions will only include BizInsight 7 data caches. If BizInsight 5.0 functions are also included in the report, be sure to use the Preserve Formulas capability to convert the formulas to static values.

In order for data to be included in the PackNGo workbook, it must be referenced by a function or table in the workbook at the time of distribution. This becomes important for workbooks with data validation lists of values users can select. The PACKANDGO RenderFormat will pack and include data for the currently selected values in data validation lists at the time of distribution. To include data for multiple values of a data validation list, use the Tabbed Parameters capability. A worksheet will be created in the PackNGo workbook for each parameter value.

When the PACKANDGO RenderFormat is selected, the user is asked if they want to autofill the email subject and body.

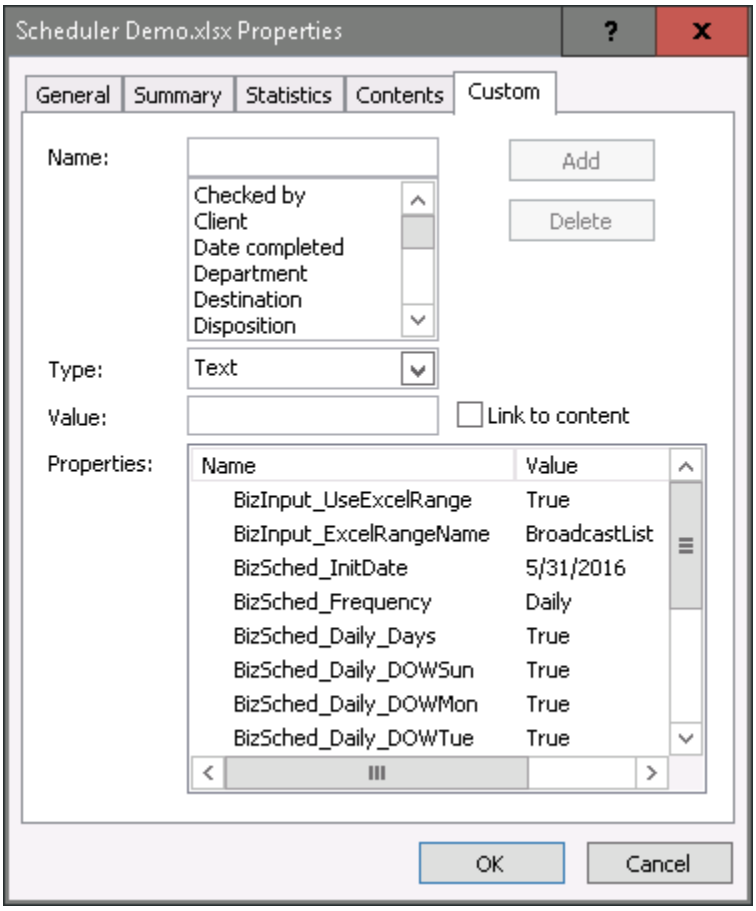


Clicking **Yes** will automatically populate the EmailSubject and EmailBody parameters with the following default values:

Distribution Template Parameter	Default Wording
EmailSubject	
EmailBody	 This default language can be changed. In addition, the following information is added to the email body by the product during distribution below the EmailBody text: To view this workbook, please follow these instructions: 1. Open Excel and Load BizInsight. If you do not have BizInsight installed, you can Download it here 2. Save the attached PackNGo workbook on your machine. 3. Open the workbook and follow the prompt instructions.

11. Scheduler

BizBroadcast provides the ability to schedule reports to run at predefined frequencies and times of day. Reports can have schedules set for them using the **Set Schedule** button of the BizBroadcast ribbon. When the Schedule is saved, a copy of the report is saved to the folder being monitored by the Scheduler. The schedule selections are stored as custom properties of the saved schedule file:



The Scheduler checks the properties of the workbooks in the monitored folder at a User-Defined interval and when it detects that a report is due to be run, it will execute the Distribution List defined within the report. Using the Scheduler requires an Excel session to be left running on a workstation.

IMPORTANT

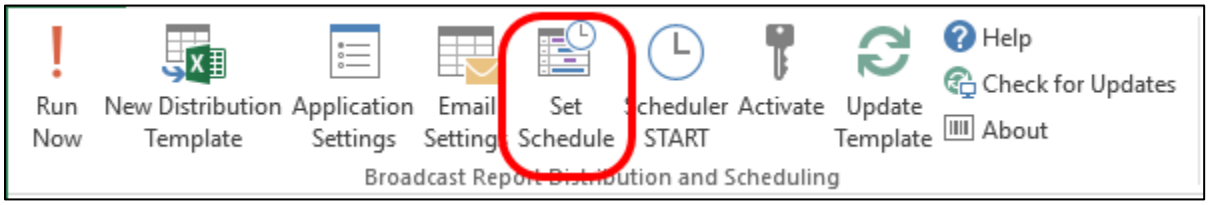
The Scheduler is designed for interactive desktop use only and is not recommended for use in a Terminal Services/Citrix environment where sessions can timeout.

11.1 Create a Schedule

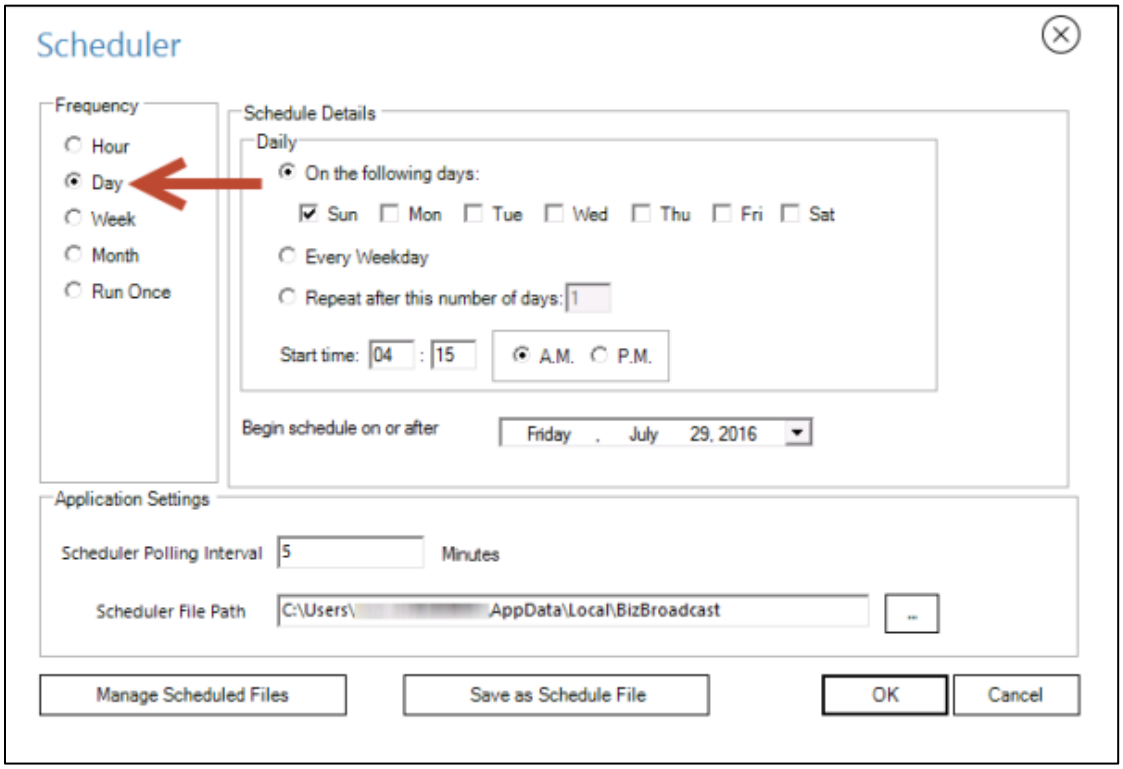
To create a Schedule for a report, perform the following steps:

1. Insert a Distribution Template in the report you want to schedule and define your parameters.

2. Click on the **Set Schedule** button on the BizBroadcast ribbon.

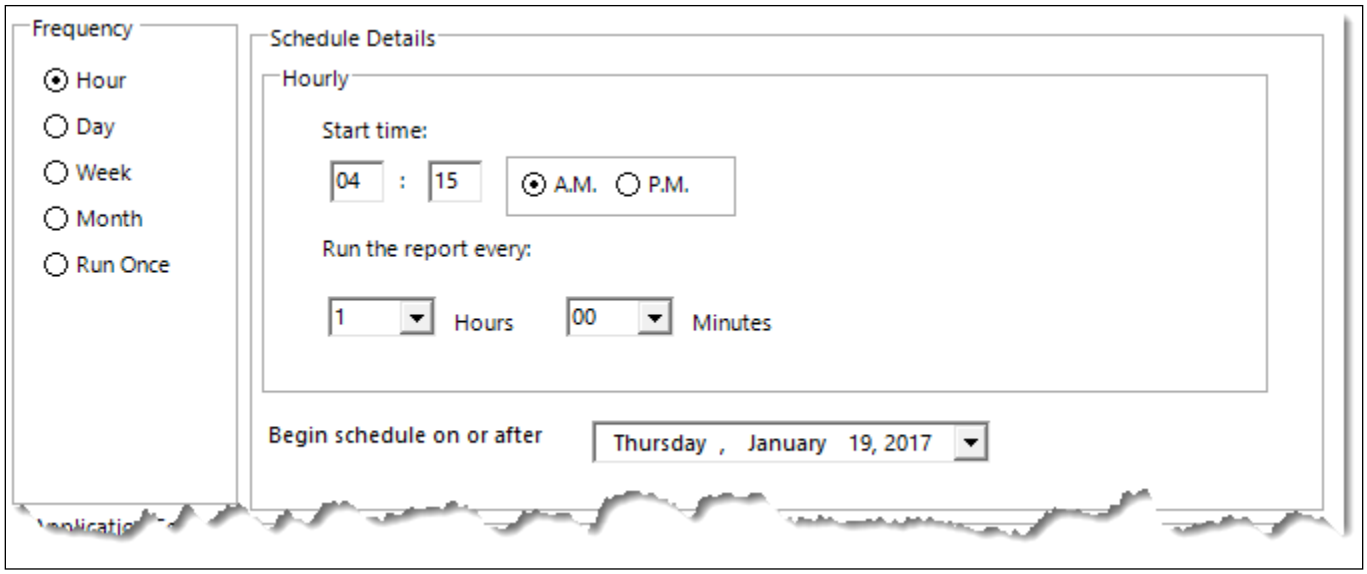


3. Set the **Frequency** with which you want the report refreshed.

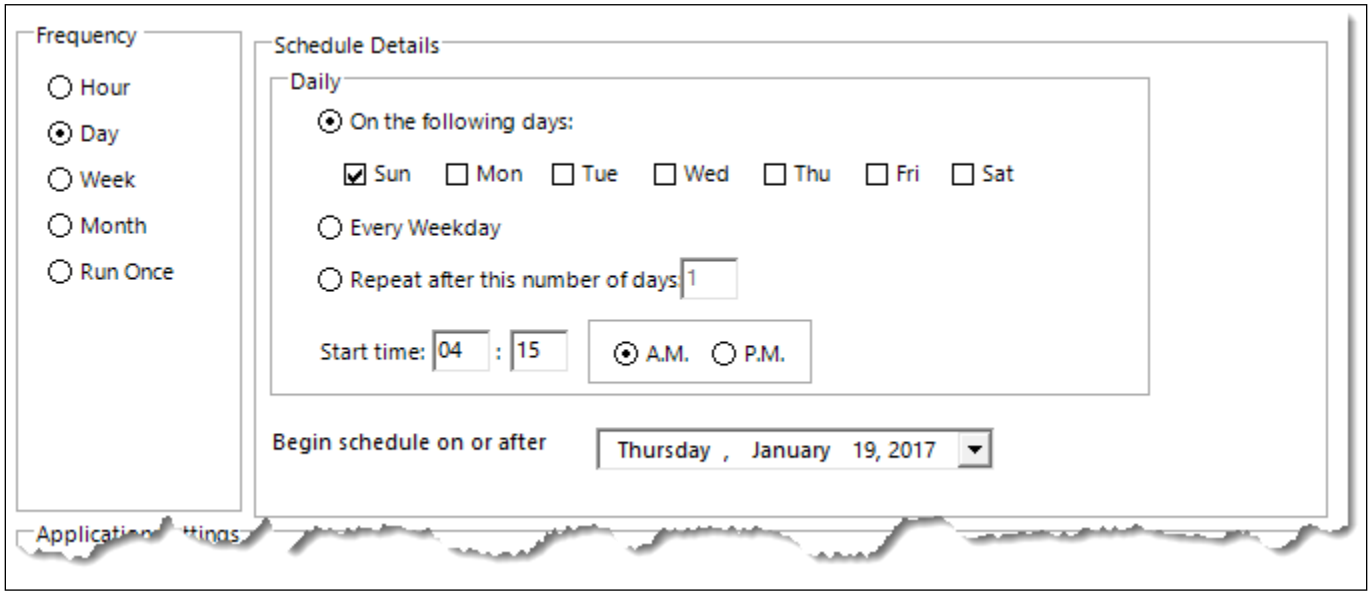


The **Schedule Details** section will change with the Frequency that has been selected.

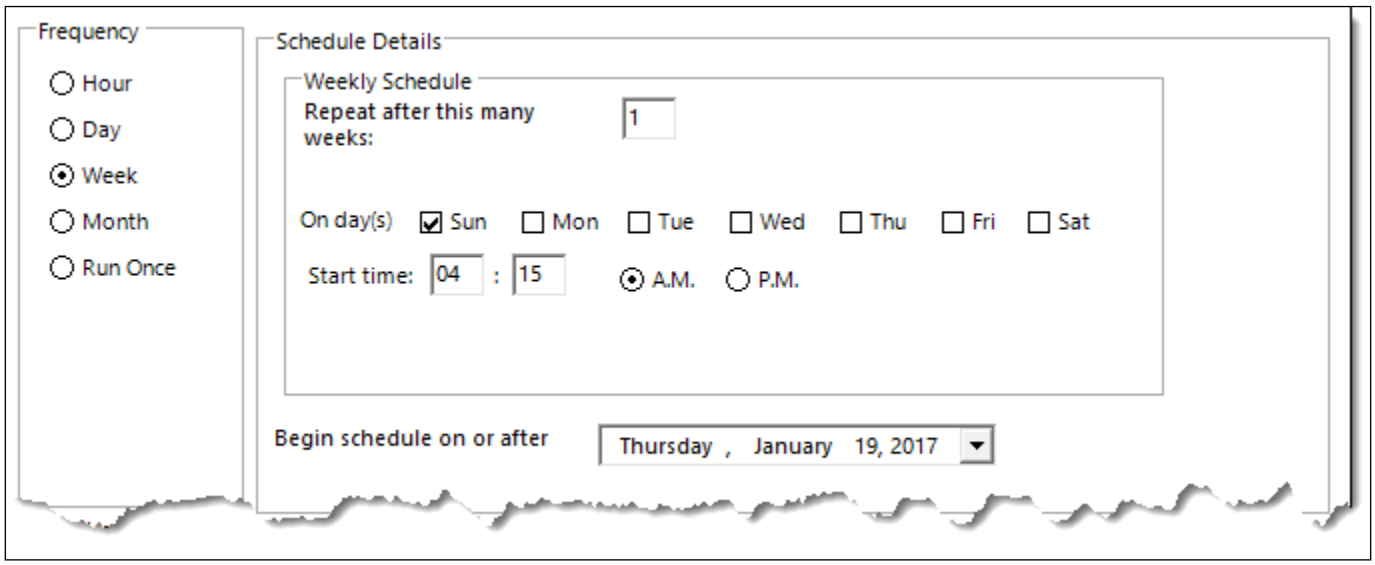
Hourly:



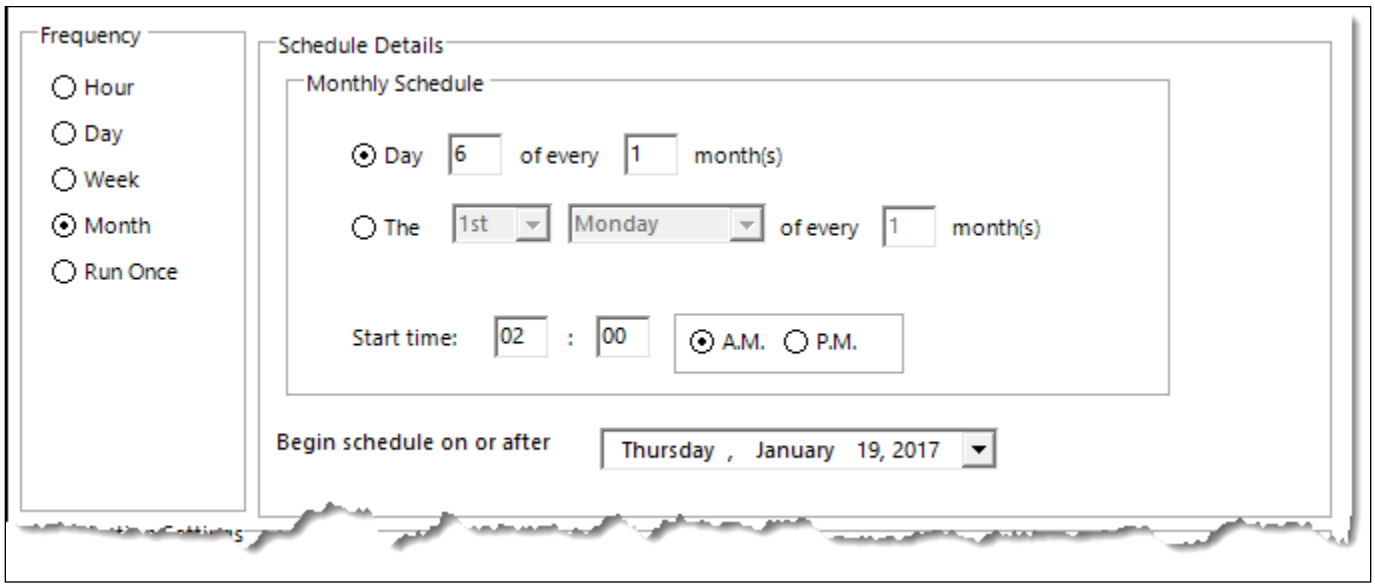
Daily:



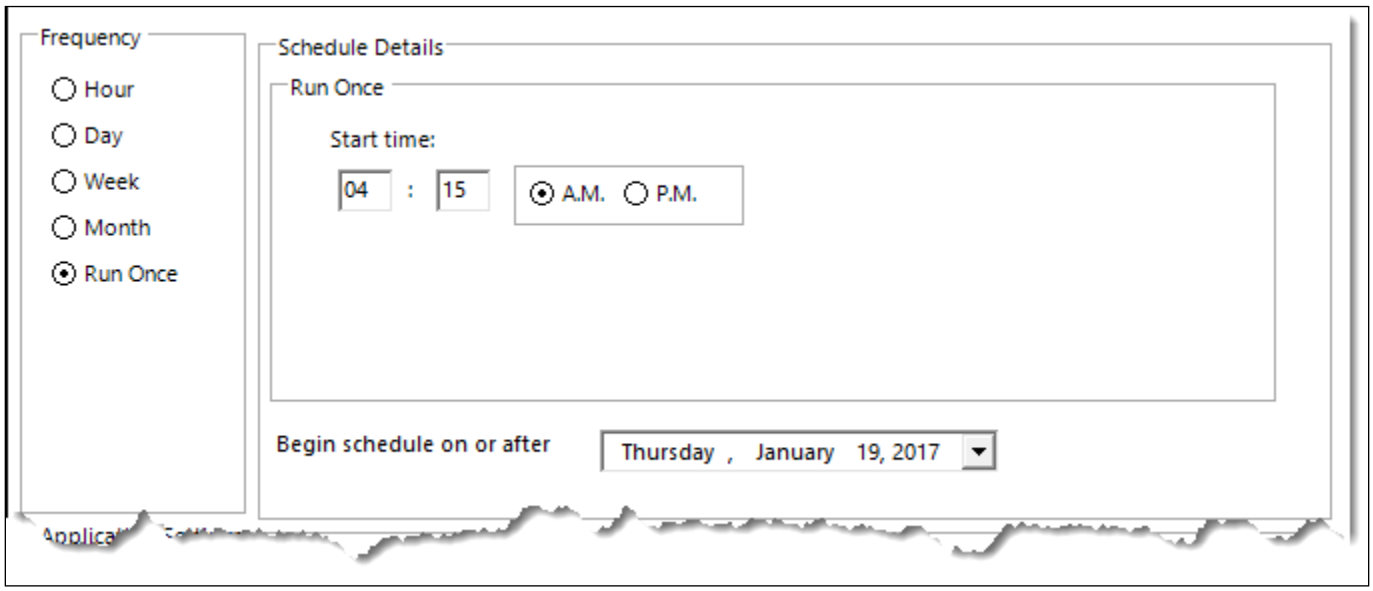
Weekly:



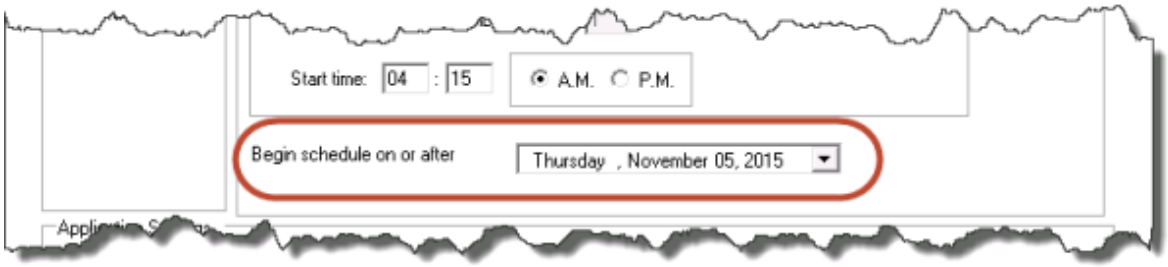
Monthly:



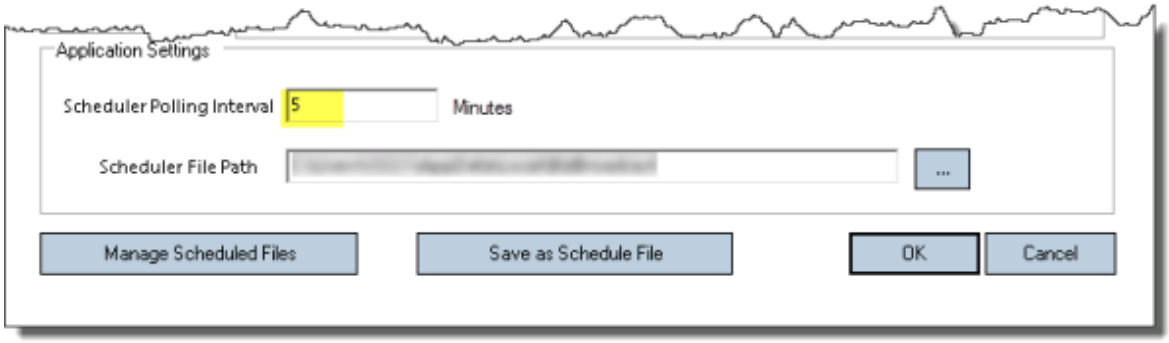
Run Once



4. Set the **Begin schedule on or after** field to the date you would like the Scheduler to start including the report in its evaluation of what reports to process.



5. Optionally adjust the **Scheduler Polling Interval** field to change the polling interval and the Scheduler File Path that is monitor for scheduled reports to process.



6. Click **OK** to save the Schedule in the report.

7. Click the **Save as Schedule File** button to save a copy of the report to the folder that will be monitored by the Scheduler.

11.2 Starting the Scheduler

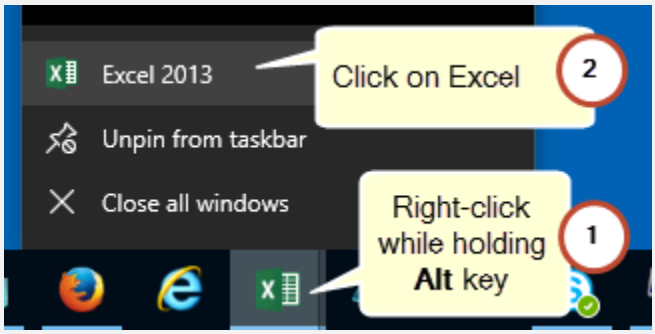
When you want the Scheduler to start processing scheduled reports, perform the following steps:

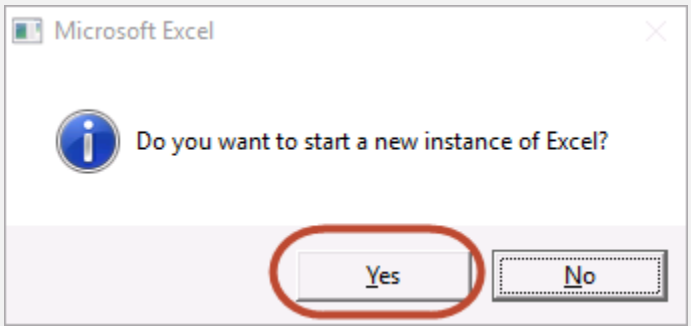
1. Start a new Excel session. It is important that the Scheduler runs in its **own** Excel session and that session is not used for anything except the Scheduler.

Note

To start a separate Excel session with versions earlier than Excel 2013, simply click on the Excel program on the menu or double-click your shortcut.

For Excel 2013 or higher users, hold the **Alt** key and then **right-click** on the Excel icon on the task bar and choose Excel.

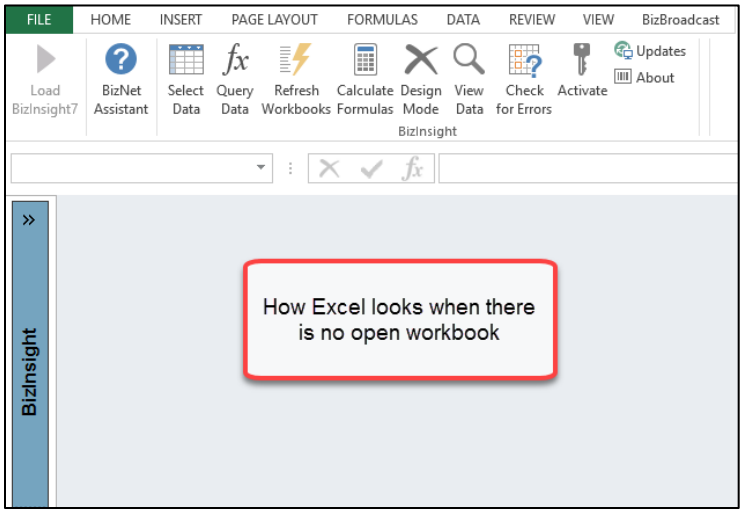




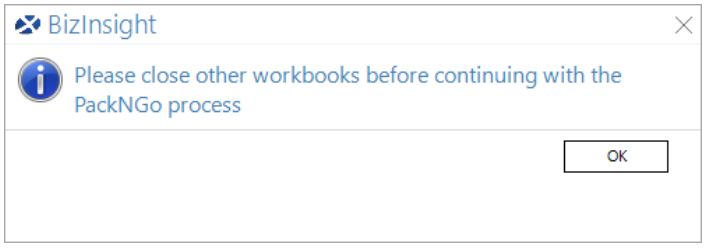
2. If the Scheduler will be refreshing and distributing BizInsight reports, load BizInsight by clicking on the **BizInsight Explorer** button on the BizInsight ribbon tab.

IMPORTANT

If any of the reports being distributed use the PACKANDGO RenderFormat, all open workbooks must be closed, including hidden Personal.xlsb files. Click on **File** > **Close** to close any open workbooks.

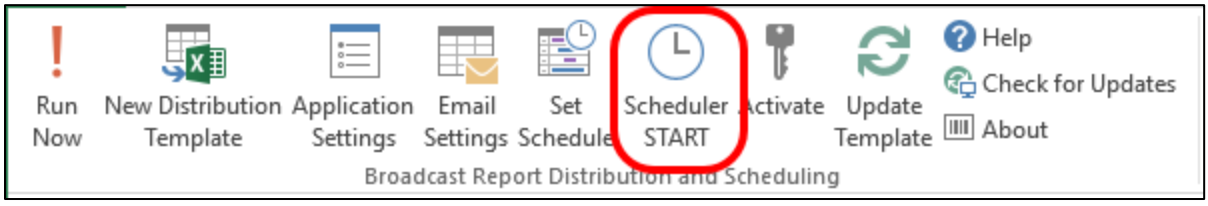


If the Excel version being used is older than Excel 2013, a distribution that uses the PACKANDGO RenderFormat will cause a prompt to occur during distribution that must be cleared before the distribution will proceed.

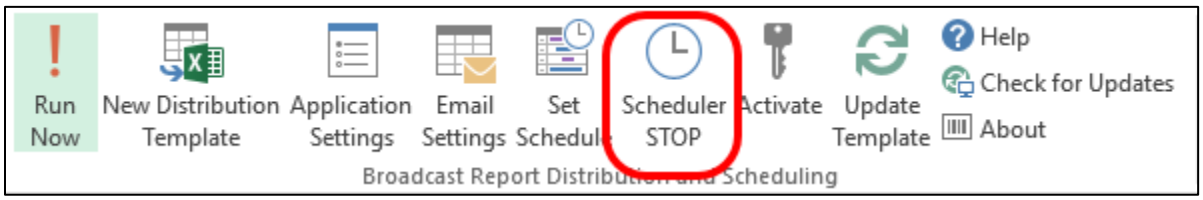


To resolve this issue, upgrade to a supported Excel version that is 2013 or newer.

3. On the BizBroadcast ribbon tab, click on the **Scheduler START** button.



4. When the Scheduler is started, the **Scheduler START** button will update to display **"Scheduler STOP"**.

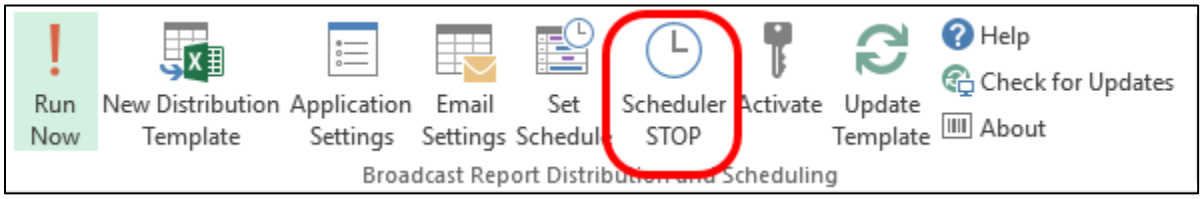


IMPORTANT

Minimize the Excel session that is running Scheduler and do not use it for any other Excel work. Start a second Excel to continue working with Excel worksheets or BizInsight reports.

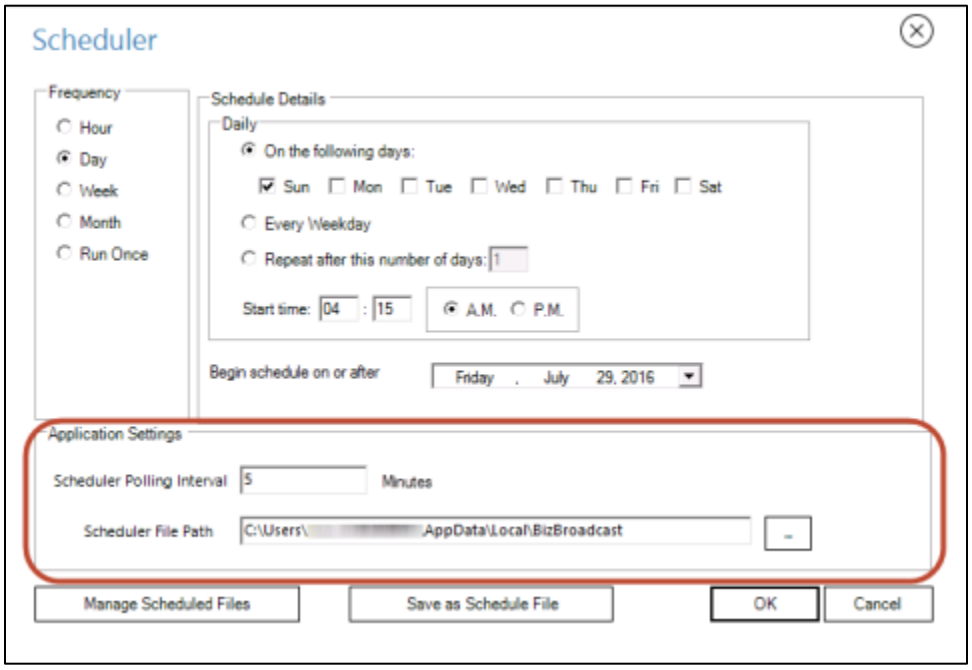
11.3 Stopping the Scheduler

To stop the Scheduler, click on the **Scheduler STOP** button. This will stop Scheduler from polling the Scheduler directory for reports to run.



11.4 Managing the Scheduler

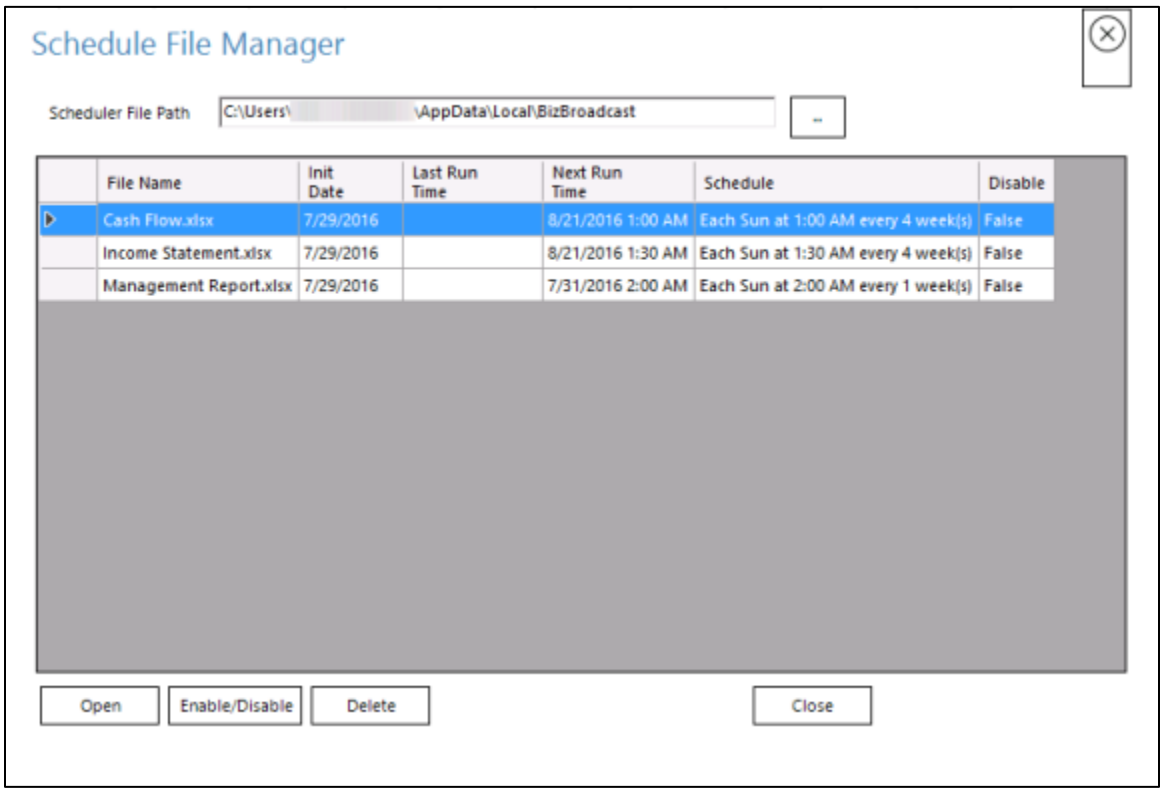
There are some options for the Scheduler that can be managed using the Set Schedule dialog.



Use the **Scheduler Polling Interval** field to change how frequently the Scheduler checks for reports that need to be run. The minimum allowable minutes for this setting is 1 minute; the maximum number of minutes allowed is 1,440 minutes which is approximately 24 hours.

The folder that the Scheduler monitors for reports to be processed can be changed using the **Scheduler File Path** field. Type in a path or click on the ellipses button to browse to the desired folder. The folder must already exist and all users who will be saving reports to that folder must have Modify rights to the directory.

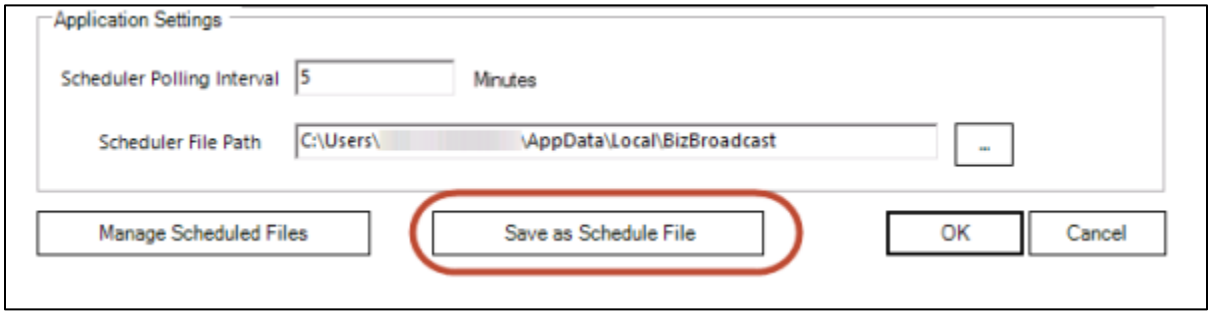
The **Manage Scheduled Files** button opens a dialog displaying the contents of the Scheduler File Path.



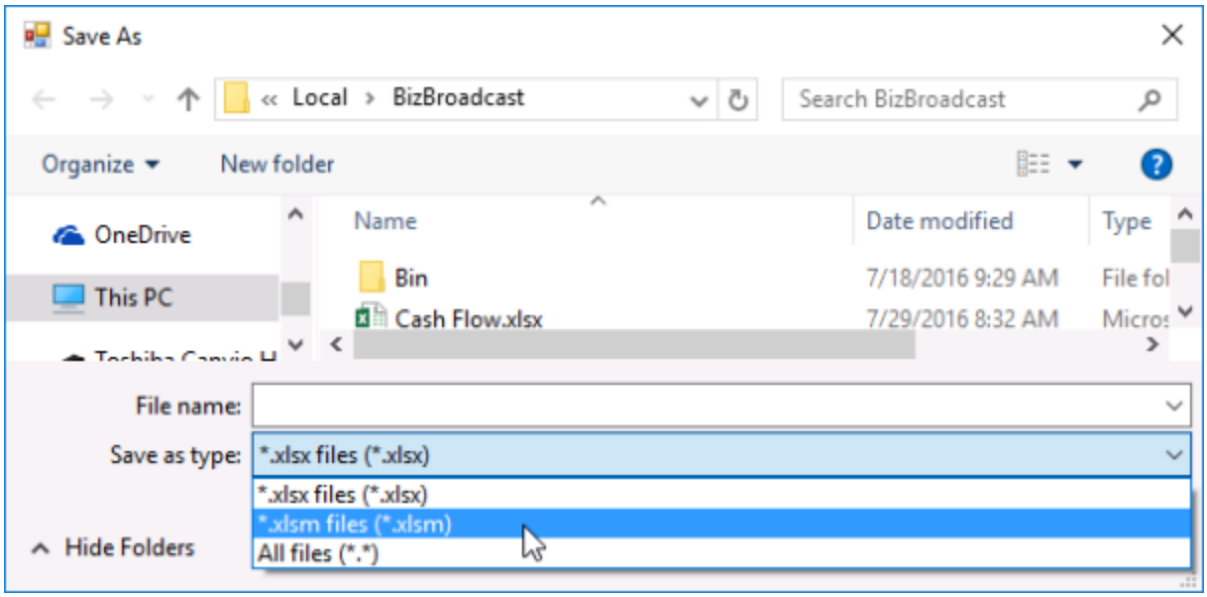
11.5 Scheduling Macro-Enabled Workbooks

The Scheduler is able to process macro-enabled workbooks but when saving the workbook as a scheduler file, the format defaults to the .xlsx file type. To ensure the workbook is saved as a macro-enabled workbook, do the following:

1. After selecting the schedule frequency, click the **Save as Schedule File** button to save the schedule.



2. In the **Save As** menu, select the **Save as type** drop-down menu and save the schedule as .xlsm format.



IMPORTANT

The scheduled file must be saved as .xlsm to distribute a macro-enabled workbook. Macros will fail to execute if .xlsx is left selected.

12. Conditional Formulas

Using Excel conditional formulas enables powerful functionality. It enables control of when a row of a Distribution List is processed, or determines alerting.

Conditional behavior is triggered when BizBroadcast encounters the phrase “DoNotProcess” as the value for either the Path or EmailTo parameter for a row in the Distribution List; BizBroadcast skips the row. Specifying a DoNotProcess value can be used to process parameters or perform alerting conditionally.

Using the below Order History example, suppose a particular company does not have any orders for a particular month. You can use an Excel IF statement to evaluate whether there were any items ordered and, if not, cause BizBroadcast to skip the distribution of a report for that particular company.

	A	B	C	D	E	F
2		CompanyNameInput				
3		Order History as of January 2010				
4						
5						
6		**Product**	**Quantity**	**Unit Price**	**Total Sale**	
7		Widgets	10	$ 0.45	$4.50	
8		Grommets	12	$ 0.12	$1.44	
9		Cylinders	3	$ 1.50	$4.50	
10						
11				**Total**	$10.44	
12						

To accomplish this, the following IF statement can be added to the EmailTo parameter to check whether the Total Sales for the company is $0.00:

=IF('Order History'!E11>0,"john@CompanyA.com","DoNotProcess")

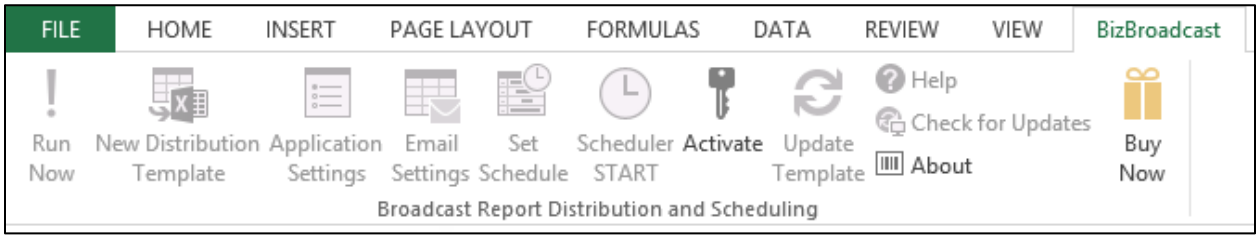
This IF statement evaluates the cell E11 on the Order History tab, in order to determine if it is greater than 0. If it is greater than 0, the email address of the recipient is placed in the EmailTo parameter for that row. If the cell E11 evaluates to 0 or less, the text “DoNotProcess” is placed in the EmailTo parameter field for that row and BizBroadcast will skip that row in the distribution.

This can be used very effectively to achieve alerting. An email can be sent to alert an individual to a situation, perhaps low inventory levels or an account balance dropping below a desired level. Simply ensure that the report contains a cell with the value to be measured and then create an IF statement in the EmailTo parameter of a Distribution List that evaluates that cell and supplies the email address of the recipient when the desired criteria is satisfied.

Conditional Formulas Example.xlsx

13. Licensing

BizBroadcast comes with a 45 day trial during which all capabilities are functional. Once the trial is expired or if BizBroadcast has been installed on the workstation before, the ribbon will only have a few buttons enabled until the product is activated.



For instructions on how to license BizBroadcast or move a BizBroadcast license, see the document titled *Managing BizNet Product Licenses* included in the product documentation download or on the online product documentation site, http://biznetsupport.net/webhelp/.

14. Important Tips for Achieving Best Results

When using BizBroadcast, the following guidelines should be followed to achieve the best results:

1. When a distribution is running, do not multi-task. The Excel session in which the distribution is running should always have the current focus. If the reports being distributed are complex and take time to complete, BizNet Software recommends moving BizBroadcast to a dedicated workstation (or virtual image).

   Multi-tasking while a BizBroadcast distribution is running can cause incorrect values in the resulting output.

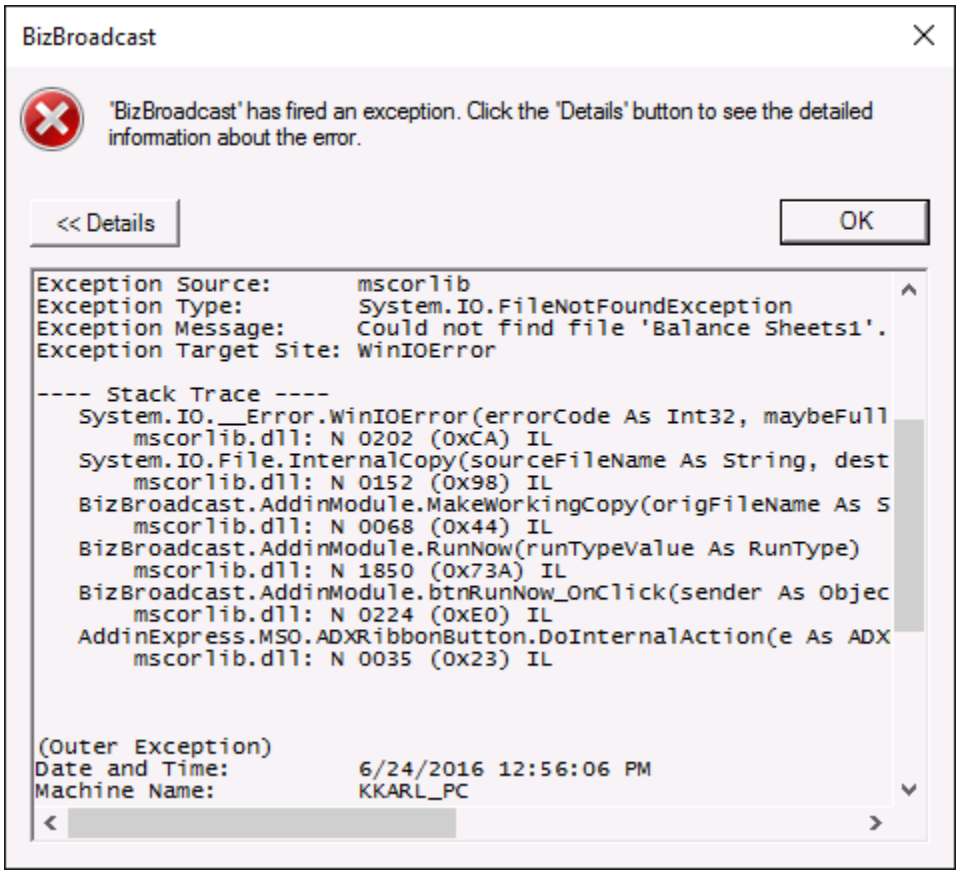
2. It is recommended that source workbooks reside on the workstation where BizBroadcast is installed and that output be saved to a local directory. This eliminates problems that can be caused by interruptions to access of those locations.

3. When using Tabbed Parameters, better performance can be achieved by breaking the parameters into smaller distributions. If the output needs to be in a single file, use the MergeFiles capability to merge the results back together.

BizBroadcast Distribution List

Required	*At least one required*						*Additio*
RenderFormat	Path	EmailTo	EmailSubject	Selection	FileName	Dept	MergeFiles
XLSX	c:\BizBroadcast\MergeFiles			Report	Merge1	001|002|003|004|005|006	
XLSX	c:\BizBroadcast\MergeFiles			Report	Merge2	007|008|009|010|011|012|013|014	
XLSX	c:\BizBroadcast\MergeFiles			Report	Merge3	015|017|020|021|100	
XLSX	c:\BizBroadcast\MergeFiles			Report	Final Report	200|201|202|203	C:\BizBroadcast\MergeFiles\Merge1.xlsx;c:\BizBroadcast\MergeFiles\Merge2.xlsx;c:\BizBroadcast\MergeFiles\Merge3.xlsx

4. If you plan to add a workbook to the BizInsight Navigation Pane that contains a BizBroadcast distribution list, you need to save the workbook that is created by the drag and drop before trying to run the distribution. If you do not save it before trying to run the distribution, the following error occurs:

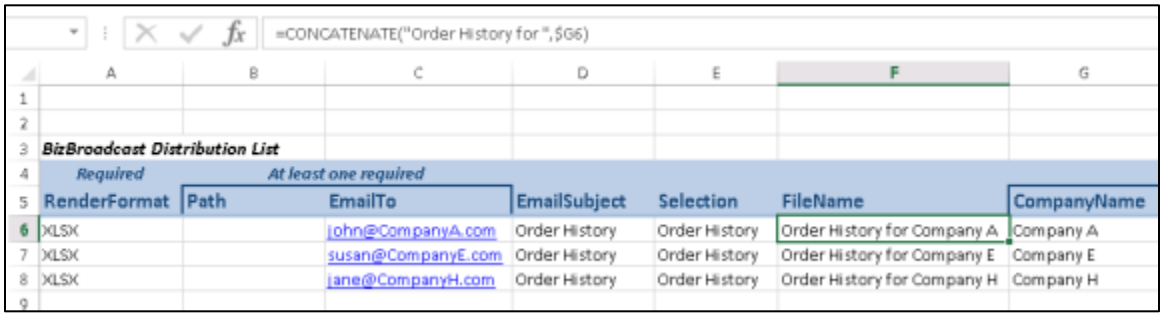


Exception Source: mscorlib
Exception Type: System.IO.FileNotFoundException
Exception Message: Could not find file '*sheetname*'.
Exception Target Site: WinIOError

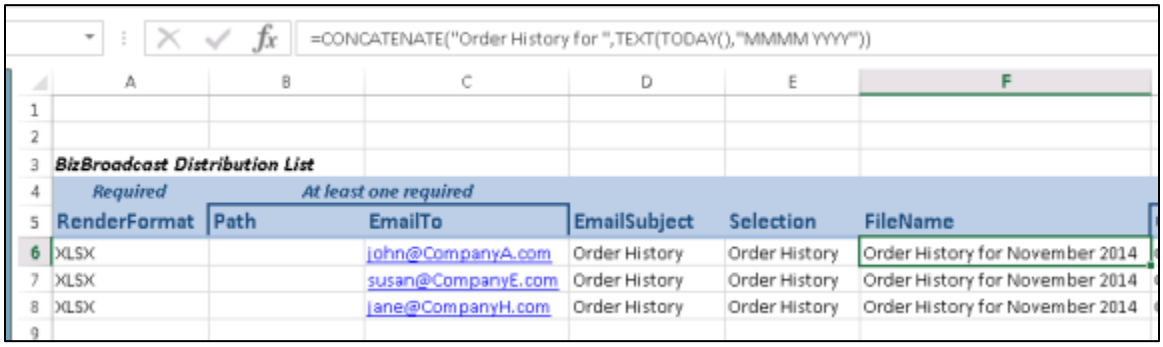
15. Useful Excel Capabilities

Because BizBroadcast is 100% Excel based, many of Excel's capabilities can be used to customize a report. For example, an Excel **IF()** function can be used to perform conditional evaluation of some criteria and control whether a report is distributed or not.

Excel's **CONCATENATE()** function can be used to concatenate strings for your report. For example, in the below screenshot, the CompanyName parameter value is concatenated with the string "Order History for ".



The current date could also be concatenated as a string using the **TODAY()** function. For example, the month and year are concatenated to the FileName parameter in the below screenshot.



16. Directive Quick Reference

Directive	Purpose	Where Used
[NORENAME]	Can be used to prevent a User-Defined parameter value from being used in a worksheet name created by BizBroadcast	Add immediately after the User-Defined parameter name in the Additional Optional Parameters section of the Distribution Template
[CONTENT]	Used to specify where the BizBroadcast output will be placed in a resulting PDF file that merges additional PDF files together.	Included in the value being used for the MERGEFILES optional parameter. Paths to all PDF files being merged are combined and separated with semi-colons. The [CONTENT] directive is included as semi-colon delimited value. For example: C:\CoverSheet.pdf;C:\ExecSummary.pdf;[CONTENT];C:\SummaryNotes.pdf
[HIDE]	The [HIDE] directive can be used to include input sheets and data validation list source data to ensure that the data validation lists continue to function in the resulting distribution output but keep the sheets hidden for user friendliness.	Use in the Selection distribution parameter in front of the sheet or sheets to be included but hidden in the resulting distribution output.
[DELETE]	The [DELETE] directive can be used to specify one or more sheets to be deleted from the resulting distribution output file.	Use in the Selection distribution parameter in front of the sheet or sheets to be removed from the resulting distribution output
[RECALC]	Can be used to override the "For Each BizBroadcast Item" calculation setting in Calculation Settings. Supported values are: Sheet, Workbook, Full or Rebuild	Used with the Calculation optional parameter.
[REFRESH_BizNet]	Can be used to override the "Refresh Analysis Sets" setting in Calculation	Used with the Calculation optional parameter.

Directive	Purpose	Where Used
	Settings. Supported values are True or False	
[REFRESH_LISTS]	Can be used to override the "Refresh User Lists" setting in Calculation Settings. Supported values are True or False	Used with the Calculation optional parameter.
[CALC]	Used to let BizBroadcast know about all supporting sheets that may be required for functions to properly recalculate.	Used in the Selection parameter of the BizBroadcast Distribution Template. Precedes the names of all supporting sheets separate by commas.
[PW:]	Used to set a password for a protected sheet.	Used in the Selection parameter field. It should follow any other directives and the password is supplied within the directive such as [PW: margarine]
[PRESERVE]	Used to instruct BizBroadcast to preserve formulas that are listed in the Application Settings > Formulas > Preserved Formulas list for the specified sheet.	Used in the Selection parameter field.
[NOPRESERVE]	If the Preserve Formulas for each Broadcast Item is enabled in Application Settings > Formulas, this directive can be used to override that option and preserve all formulas in the specified sheet.	Used in the Selection parameter field.
[PRE]	Used to instruct BizBroadcast to run a macro before Excel calculation	Used in the Macros dialog.
[POST]	Used to instruct BizBroadcast to run a macro after Excel calculation	Used in the Macros dialog.