Infor CloudSuite Business Analytics Administration Guide

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Contents

About this guide

This guide contains conceptual information on basic and advanced features of Infor CloudSuite Business Analytics. This guide describes the components of the analytics and how to set up and configure these components for your organization.

Intended audience

This guide is for administrators, business consultants, system engineers, and super users who maintain and configure Infor CloudSuite Business Analytics to monitor the performance of their business.

Related documents

You can find these documents in the product documentation section of the Infor Xtreme Support portal.

- *Infor Xi Platform Administration Guide*
- *Infor Business Vault Administration Guide*
- *Infor Business Vault Analytic Modeling User Guide*
- *Infor BI OLAP Server Administration Guide*
- *Infor BI Platform Support Guide*

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this Web site periodically for updated documentation.

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Chapter 1 Overview

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About Infor CloudSuite Business Analytics

Infor CloudSuite Business Analytics refers to the content of the Infor BI Application Studio package. The application collects the data from Infor CloudSuite Business. Infor CloudSuite Business Analytics provides users with strategic and tactical business intelligence by generating these types of measures for analytic data or reports:

- Key Performance Indicators (KPIs): Provide future-oriented measures which direct you to critical areas of business performance that need improvement.

The reports generated by Infor CloudSuite Business Analytics may cover these topic areas:

- Sales: Customer, product, and sales organization, revenues and margins, revenue leakage, delivery performance, sales booking, and sales versus budget or forecast
- Finance: Customer payments and debt, financial key ratios, profit and loss, balance sheet, account receivable, and account payable
- Inventory & Purchasing: Inventory/warehouse cost, vendor received
- Production: Production efficiency, Inventory turnover, scrap and yield, resource utilization, and job efficiency
- Human Resource: Recruitment, employee salary, and employment
- Service: Incident and service order

Infor CloudSuite Business Analytics components

This section describes the basic components of Infor CloudSuite Business Analytics to help you search for and navigate to the information that you need.

- Business Measurement Models (BMMs): BMMs extract and transform the source data into an analytical data model that contains fact tables and dimension tables.
- Online Analytical Processing (OLAP) cubes: The OLAP cubes summarize data along defined dimensions and hierarchies. The cubes also contain dimensions for time and time-series analysis, making it easy to compare years or periods on various levels. The OLAP cubes contain a set of dimensions and hierarchies. These may need to be adjusted during implementation. To improve performance of the cubes, you can remove unnecessary dimensions and hierarchies.

- Entities
- Dashboards: Dashboards enable a single view of a number of KPIs that are relevant to a specific business process. They present varied information such as summaries, key trends, comparisons, and exceptions through charts and graphs with metrics.

  The dashboards delivered in Infor CloudSuite Business Analytics are designed to cover a business process within a single domain in a company, as well as cover a specific topic within a domain in the company. Several dashboards in the Financials, Sales, Inventory, Service, and Production domains are designed based on this logic.

  Each dashboard is built up by a number of widgets. Within the dashboard, all widgets are connected with each other through the widget communication. This means that if a user performs changes for one widget, for example changing a filter, that change is propagated through all widgets within the dashboard.

Prerequisites and related software components

Infor CloudSuite Business Analytics uses these applications to help you view, analyze, and manage generated reports:

- Infor Business Intelligence
  - Infor BI OLAP Server
  - Infor BI Application Studio
  - Infor BI Office Plus
  - Infor BI Dashboards
  - Infor BI Self Services
- Infor Business Vault Enterprise Edition
- Infor Xi Platform including Infor Ming.le™

Chapter 2 Accounts structure definition

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Cash flow

A cashflow must be defined properly through Financial Statement Definition within Infor CloudSuite Business before loading transaction data for cash flow reporting.

Note: In cash flow analysis, the cash account does not use the net income type, instead, revenue accounts and expense accounts should be set separately within the financial statement definition.

Sales controlling

If the customer has more accounts than the default sales accounts set in Infor CloudSuite Business, you must define the sales controlling accounts via Financial Statement Definition as below before loading Sales Controlling Account dimension.

- Report ID: BI_Sales
- Description: Sales controlling accounts
- Task Name: Sales Controlling Account
- Define the lines as below in Financial Statement Line Definition:

Text of total	Description	Sample Accounts	Balance Type
Revenue	Revenue accounts	40000 (sales account) 40450 (sales discount)	Balance/Both Action/subtract
COGS	Cost of goods sold accounts	43210 (COGS-material)	Balance/Debit Action/Add
SG&A	Sales general & administration accounts	Selling Expense Sales Commissions and Fees	Balance/Debit Action/Add

		Marketing and Advertising Expense Product Warranty Expense Travel and Entertainment Expense Labor and Related Expense General and Administrative Expense	
Other	All other cost accounts	12728 (inventory outside services)	Balance/Debit Action/Add

Chapter 3 BI Setting

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The BI Setting form in Infor CloudSuite Business is used to set the currency code, sites, database name, server, and site description for reporting.

Currency code

The drop down list is initialized by filling with all currency codes in the site. The default value is blank, but you must select one currency then you can save the settings.

Site / database name / server name / site description

The site data grid contains site, database name, server name and site description columns. It is used to set the relationship between site and database server. With the setting, you can do reporting for all the sites listed in the grid.

- Site: The drop down list contains all sites in Infor CloudSuite Business. You can select the sites you want to report for.
- Database: It is the database name, defaults from the site. You can change the database name.
- Server: It is the server name, defaults from the site. You can change the server name.
- Description: It is the site description.

Note: You should be aware that when system works on cloud, all the database names and server names in the grid must be left blank. If there are default values in the database name and server name fields, user must remove them for loud. When system works on premise, users must set a value for each field of database name and server name.

Update button

After you set everything properly, click the update button to save all settings.

Chapter 4 Moving data staging

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A series of real tables, called staging tables, which are used to store the fact data, are added into Infor CloudSuite Business database, so that the data loading performance can be improved significantly. You must be aware that the fact data must be moved into the staging tables first, otherwise there will be no data when publishing cube to OLAP server. There are two methods to move the fact data from Infor CloudSuite Business tables to staging tables. One is through the BI Staging Schedule form in Infor CloudSuite Business, and the other is through the Publications/Publication Schedules in Business Vault.Delivery Performance model.

BI Staging Schedule

Within BI Staging Schedule, you can select one cube or select all cubes. You can also click Run to move the fact data from Infor CloudSuite Business to staging tables at once, or you can select one cube or select all cubes, and set the schedule for those cubes when you click Schedule.

Publications/Publication Schedules

Within Publications of Business Vault, you can select any prepare data links, for example D_Prepare_Booking, or select the D_Prepare_Data for all the prepare data links. Click Publish to move the fact data from Infor CloudSuite Business to staging tables at once.

Within Publication Schedules in Business Vault, you can set a schedule each prepare data link, through which the system moves the fact data from Infor CloudSuite Business to staging tables when the schedule time is reached.

Publish Cubes

After the staging tables are populated with fact data, you can load the cube data to OLAP server. Within Publications in Business Vault, you can select any cubes. Click Publish to load cube data into OLAP server.

Within Publication Schedules in Business Vault, you can set a schedule for each cube. When the schedule time is reached, the system loads cube data from staging tables into OLAP server.

Chapter 5 User Management

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Application Roles

Infor CloudSuite Business Analytics provides several pre-defined application roles. With the roles, different users can access different dashboards and reports.

Infor CloudSuite Business Analytics provides the following pre-defined application roles:

- Report Designer
- Report Viewer
- SI_CEO
- SI_CFO
- SI_Finance
- SI_HR
- SI_Logistics
- SI_Production
- SI_Sales
- SI_Service

If you need additional application roles, you can create the application roles through Infor BI Repository Administration.

Manage users

Open **Repository Administration** as administrator, and then:

1. Expand **Infor BI Repository Administration > Repository Registration**s.
2. Click the repository name and select **User Management**.

   The Users and Groups tab shows the users that are available for the permission managements in Repository, and the groups that have been added from external authentication systems. The Basic Groups tab shows the Basic Groups and the predefined roles.
3. To add a user to the list below:
   a. Select the **Users and Groups** tab
   b. Click **Add users and groups**

- c Select **Register Windows Users and Group**s.
- d Select your domain from the **Domain** drop down list.
- e Click **Search.**
- f In the Search for Users and Groups window, specify the user or group name or the account name.
- g Click **Search**.
- h Select the name displayed in the search results and click **OK**. The user name added is displayed on the Users and Groups tab.

4 To add a single user to a role:

- a Select the **Users and Groups** tab.
- b Right-click the user. Select **Basic Groups**.
- c In the Assign Basic Groups window, select a group name and click **Add** or double-click the group name. The selected group name is added to the list of basic groups assigned to the user.
- d Click **OK**.

5 To add multiple users to one role:

- a Select the **Basic Groups** tab.
- b Right-click a role, and select **Assign Users and Groups.**
- c In the Assign Users and Groups window, select a user name and click **Add** or double-click the user name. Repeat this step for all the user names that must be added to the specified basic group.
- d Click **OK**.

Appendix A : Troubleshooting

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For general troubleshooting, refer to the individual product guides for information. For Business Vault, refer to the Infor Business Vault Administration Guide for data store and BOD mapping errors. For analytic modeling issues, including publication errors, refer to the Infor Business Vault Analytic Modeling User Guide.