Infor LN Analytics Foundation Installation Guide

10.5

Important Notices

Trademark Acknowledgements

Contents

About this guide

The objective of this guide is to provide information about the installation and configuration of Infor LN Analytics Foundation.

Intended audience

This guide is intended for use by administrators, responsible for installing and configuring the Infor LN Analytics Foundation.

Organization

This table lists the chapters of this guide:

Chapter	Description
About Infor LN Analytics Foundation	Provides a brief explanation of the Infor LN Analytics Foundation.
Installation	Describes the process to install and configure Infor LN Analytics Foundation.
Post installation tasks	Describes the Business Vault related task that must be performed after installing Infor LN Analytics Foundation.
Post installation tasks for Reports and Dashboards	Describes the post installation tasks that must be performed for Infor LN Analytics Foundation and Business Vault.

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About Infor LN Analytics Foundation

1

LN Analytics Foundation offers what business users in an organization require: a quick way to implement an advanced business intelligence environment for Infor LN. The application includes the most common metrics that business users require for sales, finance, production, and procurement analysis and reporting, making it easier for the users to accomplish daily tasks.

The application not only includes the content that is required from a business perspective but also manages the complex process of extracting, transforming and loading data from an ERP system into a BI environment, there by resolving the major problem experienced by companies when dealing with business intelligence.

Before the installation, you must familiarize yourself with the content of:

- Infor Connect documentation
- Infor Business Vault documentation
- Infor LN Integration Guide for Infor ION Business Vault
- Infor BI Installation Guide
- Infor BI Hardware Recommendations Guide
- Infor BI Platform Support.

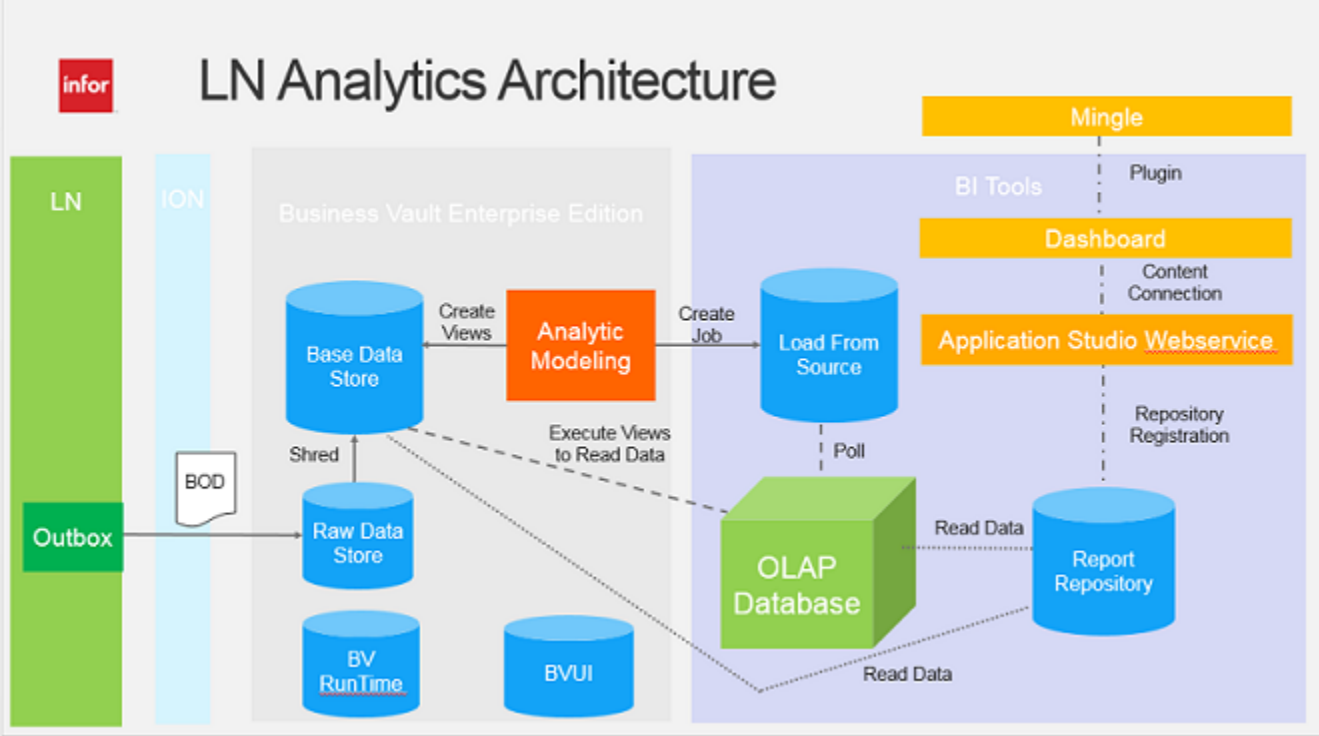
You can find these documents in the Documentation section of the Infor Xtreme Support portal at http://www.infor.com/inforxtreme.

Use this guide as a reference at your site. This guide explains the process to use the Infor DVD Browser and administrative and user functions to complete specific setup and maintenance tasks.

Architecture

2

Infor LN Analytics offers an optimal solution to implement an advanced business intelligence environment for the ERP system. The solution includes the common metrics that are required by the users for Quality Testing analysis and reporting. This helps the users to accomplish the daily tasks effectively.



Using the LN Analytics solution, you can extract, transform, and load the data from an LN system to a BI environment. By default, the Infor suite manages the communication between modules and the storage data in the Business Vault.

The Business Vault is the central staging area. The ERP system can be connected to the vault using the standard ION connectors, custom-built ION connectors, or point-to-point integrations. When an ION connector is used, information corresponding to each transaction, posted in ERP, is converted to a standardized XML file, called a BOD (Business Object Document). This document is transferred to the Infor Business Vault using ION Connect. The information is stored in a raw data format and is automatically transformed to a relational schema in the Base Data Store, using a transformation process known as Shredding.

Business Vault Analytic Modeling is used for filling the OLAP database. Information to create the dimensions and cubes are published to the Load From Source database and the Base Data Store during a publication process. After that the OLAP database will find the published information in the Load From Source database and uses this information and the information in the Base Data Store to create dimensions and cubes.

The reports are reading data from the OLAP database and Base Data Store. Web services and plugins are used to display the reports and metrics in Infor Ming.le.

Installation

3

The chapter describes the process to install LN Analytics Foundation. The chapter also lists the prerequisites for the installation process.

System requirements

Prerequisites for the LN analytics Foundation installation:

- SQL Server 2012

  Note: It is recommended to use the Simple Recovery model for the Base Data Store database.

- Infor LN
  - Infor LN 10.3 or later.
  - At a minimum, PMC solutions from January through May 2016 in generic KB article 22945150. You must also install the solution components of the BO2.1 packages.
- Infor BI
  - Infor ION BI 11.0 tools (see Infor BI installation Guide):
    - Infor BI Application Studio 11.0.0.237 including Web Services
    - Infor BI Dashboards 11.0.0.179
    - Infor BI OLAP Server 11.0.0.254
- ION
  - ION 11.2 including ION connect
- Business Vault
  - ION Business Vault Base Data Store 10.4.4
  - ION Business Vault Enterprise Edition 11.3

  Note:

  - In Business Vault, the database connection must point to the Base Data Store Database. Also, import the BOD mappings provided with the Base Data Store installation, to a data store definition that uses the same database connection.

Other prerequisites: Infor Ming.le

Installation overview

You can install the latest version of LN Analytics Foundation 10.5 or you can upgrade an older version of the application. When you upgrade the existing environment to LN Analytics Foundation 10.5, the existing version is overwritten.

Note: Infor does not support multiple installations of the application, on one server.

Back up for existing tables

During installation, all existing tables specific to the application are dropped and recreated. Prior to this, the system creates a backup for the tables delivered by Infor, that contain user-configured data. The backup tables are saved in the Business Vault Base Data Store database with a time stamp in the existing table name_version_time stamp format. The tables created by a customer are not dropped, Also, a back up of these tables is not created.

After the installation, you can migrate the data from the backup files to the new tables. The tables are created subject to normal housekeeping processes and routine. If the backup files are no longer required, you can delete the files.

Caution: If you have made changes to any other LN Analytic Foundation tables, your changes are lost unless you have taken a backup of those tables manually.

A further two tables are backed up automatically for security reasons. You must not edit these tables.

The system drops all other LN Analytics Foundation specific tables without taking a backup. If you have made changes to these tables, you must take a back up, else the changes are lost.

Installing a new version

The new version overwrites the existing version, making the existing version obsolete.

For all installations, the installer overwrites:

- The existing LN Analytics Foundation related database objects in the Business Vault Base Data Store.
- The Online Help files.

When a new version of the application is installed, not all existing components are overwritten, as some components are installed in a new path with a version specific component names.

Note:

- Infor does not support multiple installations of the application on one server.
- It is recommended to remove the components of the existing solution that are not deleted during the installation, after the new version is installed. See Chapter 5.

During an update of an existing version

When updating an existing version, the installer attempts to delete the existing components of the application and reinstall that component. Incase the installer is unable to delete these objects, you are prompted to delete the objects before you can complete the installation process.

Note: If you want to use the existing User Management configuration, select the **Export User Management Data** option to export User Management data before you delete the repository database and registration. After the installation, use **Import User Management Data** to import the exported User Management data.

Installer Component

This section describes the individual components in the installer. By default, the installer installs all the components on one server. To install specific components, click the drop-down box adjacent to the component and select 'X'.

Installing Repository Database and OLAP Database

This component:

- Installs the application Repository Database titled BA_Rep_LN_AF_10_4_2.
- Creates a repository registration titled LN Analytics Foundation 10.5.
- Installs the OLAP Database titled LN Analytics Foundation 10.5.
- Deploys SQL scripts to the Business Vault Base Data Store database.
- Configures a Database Alias titled LN AnalyticsFoundation.
- Configures a Database Alias titled BV_DataStore.

Note: You must install these components on the system which hosts Infor BI OLAP Server.

To install LN Analytics Foundation, Repository Database and OLAP Database:

1. Run the LN Analytics Foundation installer Setup.exe .
2. Oon the Welcome to the Installation Wizard for Infor LN Analytics Foundation window, click **Next**.
3. In the Custom Installation window, select **LN Analytics Foundation**, **Repository Database**, and **OLAP Database** .
4. Click **Next**.
5. In the Database Server window, set **Server Type** to **SQL Server**, specify the name of the database server on which the Repository database must be installed and click **Next**.
6. Specify the name of the server, Business Vault Data Store database, user name and the password in the Database Server - Relational Alias (BV_DataStore) window.
   This information is used to configure the BV_DataStore relational alias.

7 Click **Next**.

8 In the Script Execution dialog box, specify the server name, database name, user name and password of the Business Vault Data Store in which the scripts must be executed. By default, the information is copied from the previous step.

9 Click **Next**.

10 In the Repository window, specify the name of the server on which the OLAP runs and click **Next**.

11 In the Ready to Install the Program window, click **Install**.
The installation can take several minutes.

12 In the Installation Wizard Completed window, click **Finish**

Note: The OLAP database is installed in the Database root directory of the BI OLAP server.

Copying Analytic Modeling files

This component is used to copy the Analytical Modeling zip files to the `LN Analytics Foundation 10.5\Analytic Modeling` sub folder of the installation folder. The default installation folder is `C:\Program Files (x86)\Infor\BI\`.

The Analytic Modeling files must be installed on a machine with a browser. You must have access to the Business Vault Enterprise Edition URL.

To copy the Analytical Modeler files:

1 Run the LN Analytics Foundation installer Setup.exe.

2 In the Welcome to the Installation Wizard for Infor LN Analytics foundation window, click **Next**.

3 In the Custom Installation window, select **Copy Analytic Modeling Files**. If required change the installation folder and click **Next**.

4 In the Ready to Install the Program window, click **Install**.
The Installation can take several minutes.

5 In the Installation Wizard Completed window, click **Finish**.

Copying Online Help files

This component is used to copy the Online Help files to the `Application Studio\Webservices\Help\BA` sub folder of the installation folder. The default installation folder is `C:\Program Files (x86)\Infor\BI\`.

To overwrite existing online help files, select the parent folder of the Application Studio installation location as installation folder.

The online help files must be installed on the machine on which the Application Studio WebServices is installed.

To install the Online Help files:

1. Run the LN Analytics Foundation installer Setup.exe.
2. In the Welcome to the Installation Wizard for Infor LN Analytics Foundation window, click **Next**.
3. In the Custom Installation window, select **Copy Online Help Files**. If required change the installation folder and click **Next**.
4. In the Ready to Install the Program window, click **Install**.
   The installation begins and can take several minutes.
5. In the Installation Wizard Completed window, click **Finish**.

Copying Dashboard files

This component is used to copy the CFO.dashboards file to the `LN Analytics Foundation 10.5\Dashboards` sub folder of the installation folder. The default installation folder is `C:\Program Files (x86)\Infor\BI\`.

The dashboard files must be installed on a machine with a browser. You must have access to the BI Dashboard URL.

To install the dashboard file:

1. Run the LN Analytics Foundation installer Setup.exe.
2. In the Welcome to the Installation Wizard for Infor LN Analytics Foundation window, click **Next**.
3. In the Custom Installation window, select **Copy Dashboard Files**. If required change the installation folder and click **Next**.
4. In the Ready to Install the Program window, click **Install**.
   The installation can take several minutes.
5. In the Installation Wizard Completed window, click **Finish**.

Configuring Application Studio Web

This component is used to create an Application Studio Web Service. All LN Analytics are configured to a default Application Studio Web Service, titled LN_AnalyticsWebservice. If you want to reuse an existing Application Studio Web Service, this component is not required. The Application Studio Web Service must be installed on the machine on which Application Studio Web Services is installed.

To configure the Application Studio Web:

1. Run the LN Analytics Foundation installer Setup.exe.
2. In the Welcome to the Installation Wizard for Infor LN Analytics Foundation window, click **Next**.
3. In the Custom Installation window, select **Configure Application Studio Web** and click **Next**.
4. In the Ready to Install the Program window, click **Install** to start the installation.

In the Application Studio WebServices Name window, the default name LN_AnalyticsWebservice for the LN Analytics is displayed. This name is part of the URL used to access the LN Analytics Foundation reports through the Application Studio WebServices.

5 Click **Next**.

6 Select the method used to authenticate the Application Studio Web Services users.

Note: When using Ming.le, you must use IFS.

7 Click **Finish**.

8 To restart IIS, click **Yes**.

9 In the Configuration Progress window, click **Close**.

10 In the Installation Wizard Completed window, click **Finish**.

Configuring Dashboards Web and Content Connection

This component is used to create a BI dashboard and a content connection titled LN Analytics Foundation. All LN Analytics are configured for a default Dashboard titled of LN_AnalyticsDashboard. If you want to reuse an existing Dashboard, this component is not required. The Dashboard feature must be installed on the machine on which BI Dashboards is installed.

To configure the Dashboard Web and Content connection:

1 Run the LN Analytics Foundation installer Setup.exe.

2 In the Welcome to the Installation Wizard for Infor LN Analytics Foundation window, click **Next**.

3 In the Custom Installation window, select **Configure Dashboards Web and Content Connections** and click **Next**.

4 In the Ready to Install the Program window, click **Install**, to start the installation.

In the Infor BI Dashboard Name window, the default Dashboard name for Infor LN Analytics Foundation is displayed. This name is part of the URL used to access the LN Analytics Foundation Dashboards in Infor BI Dashboards.

5 Click **Next**.

6 In the dashboard Authentication window, select the method to be used to authenticate the Dashboards users.

Note: Select the method used to authenticate the Application Studio Web Services users. When using Mingle, you must use IFS.

7 Click **Finish**.

8 In the Configuration Progress window, click **Close**.

9 In the Installation Wizard Completed window, click **Finish**.

Note: This feature must be installed on the machine which hosts Infor BI Application StudioWebServices.

Post-installation: Filling the OLAP database 4

To fill the OLAP database, you must perform these tasks:

- Creating and configuring the OLAP LoadFromSource Database.
- Configuring Analytic Modeling in Business Vault.
- Executing the Publications

Creating and configuring the OLAP LoadFromSource database

The LoadFromSource database is the interface between the Business Vault and the Infor BI OLAP Server. The LoadFromSource database is a SQL Server relational database. From the Business Vault perspective this database is referred to as the 'target database', and from the OLAP Server perspective as the 'LoadFromSource database'. The Business Vault sends instructions to build dimensions, cubes, and load facts to the target database when dimensions and cubes are published. Infor BI OLAP Server reads instructions and processes jobs from the LoadFromSource database. First, you must create the LoadFromSource database and then configure the interface between the BI OLAP database and the LoadFromSource database. The interface between the Business Vault and the LoadFromSource database is configured later.

See *BI OLAP Server Administrator Manual*.

Creating the OLAP LoadFromSource database

1. In the SQL Server Management Studio, create a new database and specify a name such as,LNAnalyticsFoundationOLAPLoadFromSource.
2. In SQL Server Management Studio, create the tables for the LoadFromSource database by executingthe CreateOlapMetada.sql script in the database.

   Note: The CreateOlapMetada.sql script is copied during the BI OLAP server installation and canbe located in the bin64 folder of the BI OLAP server installation. The default path is: C:\ProgramFiles\Infor\BI\OLAP.

Configuring the OLAP LoadFromSource database in BI OLAP

The BI OLAP database must be configured so that the OLAP database can connect to the LoadFromSource database. The configuration process exists for setting the connection string and specifying the parameters that define the polling behavior of the OLAP database to the LoadFromSource database.

To configure the BI OLAP Server, execute these steps:

1. Access BI OLAP Administration and go to **Computer Configuration > Local Computer**. If the LN Analytics Foundation 10.5 database is not displayed, right-click on the Local computer and select **Add Database** to add the OLAP database.
2. In the LN Analytics Foundation 10.5 database section, select **Database Settings > LoadFromSourcedatabase > Connection string**.
3. Set the connection string.

   Examples of ODBC connection strings to the LoadFromSource database:

```
Driver={SQL Server};Server=MySERVERNAME;
Database=LNAnalyticsFoundationOLAPLoadFromSource;Trusted_Connection=
Yes;

Driver={SQL Server};Server=MySERVERNAME;
Database=LNAnalyticsFoundationOLAPLoadFromSource;Trusted_Connection=
No;UID=MySQLUser;PWD=MySQLPassword;
```

4. Specify the information required for the ODBC driver when the OLAP server just passes theconnection string to the ODBC library.
5. Specify the time period after which the OLAP database connects to the LoadFromSource databaseto check if a job is present for the OLAP database. In the LN Analytics Foundation 10.5 database, select **Scheduler Settings > Other > LoadfromSource** and set the value to **Yes**.
6. Select **Scheduler Settings > Other > LoadFromSource polling interval** and specify a value between **1** and **3**.
7. The modified settings of the OLAP database must be applied. Go to the Favorite Databases section and connect to the LN Analytics Foundation 10.5 database. If the database does not exist in the Favorite Database section, you must register the database.
8. Right-click database registration and select **Apply Runtime Settings**.

   Note:

   - A LoadFromsource database can only be used by one OLAP database.
   - When the connection string in the BI OLAP database is incorrect, the logging information isdisplayed in the ALEAPR.txt OLAP log file.

Configuring Analytic Modeling in the Business Vault

After the Creating and Configuring the OLAP LoadFromSource step is completed, you must configure the Business Vault to fill the OLAP database with data. It is assumed that users aer set up with the IFSroles and a standard database connection to a filled Base Data Store is available. These are the prerequisites to configure the Business Vault.

To configure the Analytic Modeling feature in Business Vault:

1. Import and Set up Models.
2. Set up a Data Store.
3. Set up an Application.
4. Import the Definitions.
5. Set up a Target.
6. Create Publications for Dimensions and Cubes.
7. Configure the Definitions.
8. Execute the Publications.

Importing and Setting up Models

Now you can import the models on the Standard database connection of the Base Data Store. For LN Analytics Foundation, you must import the following two models.

- Base Data Store Model (version 10.4.3)
- LN Analytics Foundation Model (version 10.5)

To import a model, use the Database Connections function. Database Connections is secured for users with the BVDatabaseAdmin role.

To import the models:

1. Select **Administration > Database Connections**.

   The Database Connections page opens.
2. Select the standard database connection that connects to the Base Data Store (For example, BaseDataStoreConnection and click **drill-down**.
3. Select the **Models** tab and click **Import**.

   The Import Wizard opens.
4. Browse and select the Infor Base Data Store 10.4.3 model.zip.

   During the installation, the Analytic Modeling zip files are copied to the LN Analytics Foundation 10.5\Analytic Modeling sub folder of the default installation folder ..Program Files (x86)\Infor\BI.
5. Follow the Import Wizard and select **Overwrite existing definitions with the imported versions**. Click **Import**.
6. To import the LN Analytics Foundation Model, repeat step 2 to step 5, and select the LN Analytics Foundation 10.5 BV Model.zip file.

7 When the models are displayed under the **Available grid in the Model** Tab, use the arrow to move the Base Data Store Model and LN Analytics Foundation model to the Selected grid.

8 Add the models to the selected grid in the correct order. Move the Base Data Store Model to the bottom.

Note:

- When the same version of the Base Data Store model exists, you are not required to re-import the model.
- The LN Analytics Foundation 10.5 model file overwrites the model file of any previous versions and the older Foundation analytic files are obsolete.
- The application selects the **Infor-Locked** check box. You can select and use an Infor-locked model with a database connection, but you cannot edit or delete the model or the objects in the model.

Setting up a Data Store

LN Analytics Foundation requires two Data Stores:

- The first data store is required to load the metadata mappings.
- The second data store is required for shredding LN application specific BODs.

Loading Metadata Mappings

To load the metadata, for LN Analytics Foundation BOD mappings, you must create a LN Analytics Foundation Data Store.

1 Select **Analytic Modeling > Data Stores**.

2 Click **New**.

3 On the New Data Store page, specify the **Name** such as, LNAnalyticsFoundationDataStore, **Description**, and **Database Connection**. For the database connection select the database connection to the Base Data Store (For example, BaseDataStoreConnection).

4 Click **Save**.

5 Import the meta data for LN Analytics Foundation BOD mappings into the new Data Store. Click **Import** and select the LN Analytics Foundation 10.5 BV Data Store.zip.

During the installation, the Analytic Modeling zip files are copied to the LN Analytics Foundation 10. 5\Analytic Modeling sub folder of the default installation folder ..Program Files (x86) \Infor\BI\

6 Click **Save** to save the data store definition.

Note:

- The status of the imported BOD Mappings and Data Store must always be set to **Inactive**. It is recommended to include this information in the Description of the data Store so that the status is not set to **Active** accidentally.
- When you upgrade from an earlier version of Foundation, the related Data Store is also available. You are only required to import the new file into the existing Data Store and the old BOD mapping

is overwritten. You must ensure that the two Data Stores with BOD mappings to different Foundation versions, do not exist on your system.

Shredding LN Application BODs

To shred the LN application specific BODs, you must create a LN Datastore:

1. Select **Analytic Modeling > Data Stores**.
2. Click **New**.
3. On the New Data Store page, specify the **Name** such as, LNDataStore, **Description**, and **Database Connection**. For the database connection select the database connection to the Base Data Store (For example, BaseDataStoreConnection).
4. Click **Save**.
5. Import the LN Application specific mappings into the new Data Store. Click **Import** and select the LN 10.5 BV Data Store.zip.

   During the installation, the Analytic Modeling zip files are copied to the LN Analytics Foundation 10. 5\Analytic Modeling sub folder of the default installation folder ..Program Files (x86) \Infor\BI\.
6. Activate the LNVendorRating BOD Mapping.
7. Activate the Data Store.
8.
9. Click **Save** to save the data store definition.
10. Publish the LNVendorRating BOD in LN to fill the Base Data Store.

Note:

- The LN Application specific BOD must be shredded in the Base Data Store. Therefore, BOD mapping and the status of the Data Store must be set to **Active**.
- When you upgrade from an earlier version of Foundation, the related Data Store is also available. You are only required to import the new file into the existing Data Store and the old BOD mapping is overwritten. You must ensure that the two Data Stores with BOD mappings to different Foundation versions, do not exist on your system.

Setting up an Application

To setup an application for LN Analytics Foundation:

1. Select **Administrations > Applications**.

   The Applications page opens.
2. Click **New** and create the new LN Analytics Foundation 10.5 application.

Note:

- During installation, Business Vault creates an application called Default, which is empty. When this default application is not used, you can also rename the Default application to LN Analytics Foundation 10.5.

- When an older version of Foundation exists in Business Vault, the existing application can be renamed to LN Analytics Foundation 10.5 and a new application is not required.

Importing the Definitions

To load the LN Analytics Foundation Definitions you must import the hierarchy, dimension, and cube LN Analytics Foundation Definitions. You can import the definitions, using the Cubes home page. You cannot select individual definitions in the import file.

During the import process the definitions are associated with the database connection that you specify. The definitions are also associated with the application that you are currently using.

Note:

- When you upgrade from an earlier version of LN Analytics Foundation, the existing definitions are overwritten. Therefore, before importing the definitions, it is recommended that you perform these tasks:
  - Note the current values of these dimensions present in the **Details** tab:
    - BA_FIGL_TIME_FISCAL
    - BA_PCXX_TIME_DELIVERY
    - BA_PCXX_TIME_ORDER
    - BA_PRXX_TIME_END
    - BA_PRXX_TIME_START
    - BA_SARE_TIME

    You can reuse these Time Dimension related values during the configuration process defined in the Configure the Definitions section of this chapter.
  - Create a definition to export these hierarchies when they are configured in the existing version:
    - Account mappings related:
      - BA_FIGL_MEASURE_GL_GAAP (Reduced)
      - BA_FIGL_MEASURE_GL_HGB (Main) (TCA) (Reduced)
      - BA_FIGL_MEASURE_GL_HGB Second (CSM) (Reduced)
      - BA_FIGL_MEASURE_GL_IFRS (Main) (TCA) (Reduced)
      - BA_FIGL_MEASURE_GL_IFRS (Second) (CSM) (Reduced)
      - BA_FIGL_MEASURE_GL_KPI (Reduced)
    - Time cluster related:
      - BA_PCXX_STATUS_CLUSTER all statuses
      - BA_PROA_TIME_CLUSTER
  - When the Analysis dimension names are configured, create a translation export of the BA_FIGL_DIMENSIONS dimensions for which the dimension names are configured. Switch off The subordinate flag so that the dimension names are only included.
- Ensure that you import the definition in the LN Analytics Foundation 10.5 version of the application.

1. Select **Analytic Modeling > Cubes**.
2. Click **Import**. The Import Wizard opens.
3. Click **Browse** and select the LN Analytics Foundation 10.5 BV Cube Definitions.zip file to import.

   During installation the Analytic Modeling zip files are copied to the `LN Analytics Foundation10.5\Analytic Modeling` sub folder of the default installation folder `..Program Files (x86)\Infor\BI\`
4. Follow the import wizard and select **Overwrite existing definitions with the imported versions**.
5. Select the **Database Connection** that connects to the Base Data Store (For example, BaseDataStoreConnection).
6. Click **Import** to import the definitions. The imported hierarchies are displayed in the Hierarchies page. Imported dimensions are displayed in the Dimensions page, and the imported cubes are displayed in the Cubes page. The Last Updated By and Last Updated On columns are updated. If imported definitions overwrite existing definitions, a new definition version is added.

Setting up an Application for LN Analytics Foundation

To setup an application for LN Analytics Foundation

1. Select **Administration > Applications**. The Applications page opens
2. By default a Default application is created.
3. Select the Default application and click **drill-down**.
4. Rename Default to LN Analytics Foundation.

Setting up a target

The LoadFromSource database is the interface between the Business Vault and the Infor BI OLAP Server. In the "Creating and Configuring OLAP LoadFromSource Database" section of this chapter, the OLAP database is configured to communicate with the LoadFromSource database. In this section, the Business Vault is configured to communicate with the LoadFromSource database.

First, you must create a Target Database Connection.

Note: From Business Vault perspective, the LoadFromSource database is referred to as the Target database.

Second, you must setup a publication target definition, that uses the created publication target. In the publication target definition, you must also specify the locales in which the dimensions and cubes must be published.

Setting a target database connection

To create a target database connection:

1. Select **Administration > Database Connections**.
2. On the Database Connections page, select **New Target Database Connection** or click **Drill-down** to update an existing target database connection that identifies the database in which the dimension, cube definitions and data are published.
3. Specify the information required to connect to the LoadFromSourceDatabase. Specify a name for the target database connection, such as LNAnalyticsFoundationOLAPLoadFromSource.
4. Click **Test Connection** to test the database connection.
5. Click **Save**.

   Note: While saving, you may be required to specify the user and password information.

Setting up a publication target and specifying locales

A publication target allows you to specify the database connection and locales information required to publish cubes, dimensions, and cube facts.

To create a new publication target:

1. Select **Analytic Modeling > Publication Targets**. The Publication Targets page opens.
2. Click **New**.
3. Specify the required information such as **Name**, **Target Database Connection** and select the Locales that must be published to the OLAP database.

   Specify a name for the publication target such as, LNAnalyticsFoundationOLAPTarget.

   Note:

   - The Default and English locales are mandatory for each publication.
   - Select the Target Database connection that is created in the Setup a target database section.
4. Click **Save** to save the publication target definition.
5. Click **Back** to return to the Publication Targets list.
6. Select the Publication Target and Activate.

Creating publications for dimensions and cubes

Creating a publication means publishing dimension(s) , cube(s) or both, and the information to a publication target – the OLAP database.

A publication contains instructions regarding what to publish and where to publish. A publication target allows you to specify the source of the data, the publication target, the cubes, facts, and dimensions

to publish. After you define a publication target, you can use publications to setup publication definitions and to run validation and publication processes

For LN Analytics Foundation, it is recommended to create:

- One publication that creates all cubes and dimensions in Finance.
- One publication that creates all cubes and dimensions in Procurement.
- One publication that creates all cubes and dimensions in Production.
- One publication that creates all cubes and dimensions in Sales.

For each of the suggested publication, the parameters are listed below.

Creating publications for Finance

To create the publication that creates all cubes:

1. Select **Analytic Modeling > Publications**.
2. Click **New**.
3. Specify the name of the publication such as, BA_Finance_Cubes_And_Dimensions.
4. Select **Database Connection**.

   Select the Database connection that is used to connect to the Base Data Store. See **Administration > Database Connections**.
5. Select the target.

   Select the Publication Target that connects to LN Analytics Foundation 10.5 OLAP database.
6. Select the Items to Publish.

   Note: Select the **Dimensions** and the **Cubes** check boxes. On the **Process Group** tab, you must not select any option.
7. On the **Cubes** tab, select the BA_FIGL_FINANCE and BA_FIZZ_HELPER cubes including all the related facts.
8. On the **Dimensions** tab, select all the available dimensions.
9. Click **Save**.

Creating publications for Procurement

To create the publication that creates all cubes:

1. Select **Analytic Modeling > Publications**.
2. Click **New**.
3. Specify the name of the publication such as, BA_Procurement_Cubes_And_Dimensions.
4. Select **Database Connection**.

   Select the Database connection that is used to connect to the Base Data Store. See **Administration > Database Connections**.
5. Select the target.

Select the Publication Target that connects to LN Analytics Foundation 10.5 OLAP database.

6 Select the Items to Publish.

Note: Select the **Dimensions** and the **Cubes** check boxes. On the **Process Group** tab, you must not select any option.

7 On the **Cubes** tab, select the BA_PCZZ_HELPER, BA_PCXX_PROCUREMENT, and BA_PCVR_VENDOR_RATING cubes including all the related facts.

8 On the **Dimensions** tab, select all the available dimensions.

9 Click **Save**.

Creating publications for Production

To create the publication that creates all cubes:

1 Select **Analytic Modeling > Publications**.

2 Click **New**.

3 Specify the name of the publication such as, BA_Production_Cubes_And_Dimensions.

4 Select **Database Connection**.

Select the Database connection that is used to connect to the Base Data Store. See **Administration > Database Connections**.

5 Select the target.

Select the Publication Target that connects to LN Analytics Foundation 10.5 OLAP database.

6 Select the Items to Publish.

Note: Select the **Dimensions** and the **Cubes** check boxes. On the **Process Group** tab, you must not select any option.

7 On the **Cubes** tab, select the BA_PRZZ_HELPER, BA_PROA_OPERATION_ANALYSIS, and BA_PROC_ORDER_COSTING cubes including all the related facts.

8 On the **Dimensions** tab, select all the available dimensions.

9 Click **Save**.

Creating publications for Sales

To create the publication that creates all cubes:

1 Select **Analytic Modeling > Publications**.

2 Click **New**.

3 Specify the name of the publication such as, BA_Sales_Cubes_And_Dimensions.

4 Select **Database Connection**.

Select the Database connection that is used to connect to the Base Data Store. See **Administration > Database Connections**.

5 Select the target.

Select the Publication Target that connects to LN Analytics Foundation 10.5 OLAP database.

6 Select the Items to Publish.

Note: Select the **Dimensions** and the **Cubes** check boxes. On the **Process Group** tab, you must not select any option.

7 On the **Cubes** tab, select the BA_SARE_SALES cube including all the related facts.

8 On the **Dimensions** tab, select all the available dimensions.

9 Click **Save**.

Configuring Definitions

After the definitions are imported, some of the definitions must be configured:

- Configurations for Finance
  - Configuring Time Dimension
  - Configuring Account Mappings
  - Configuring Net Profit Loss
  - Configuring Analysis Dimension Names
- Configurations for Procurement
  - Configuring Time Dimension
  - Configuring Time Cluster
  - Configuring Completeness
- Configurations for Production
  - Configuring Time Dimension
  - Configuring Clusters
- Configurations for Sales
  - Configuring Time Dimension

Finance

Configuring Time Dimension

In Finance, the BA_FIGL_TIME_FISCAL dimension must be configured.

To specify the number of history years loaded into the Finance cube:

1. Select **Analytic Modeling > Dimensions**.
2. Go to the BA_FIGL_TIME_FISCALdimension.
3. Specify the required **Start Year** in the YYYY format.
4. Click **Save**.

Configuring Account Mappings

It is recommended that this procedure must be executed by a single user who has a complete understanding of the General Ledger charts of accounts that are affected.

LN Analytics Foundation includes a predefined reporting structure on which the pre built dashboards and reports are based.

This reporting structure is predefined for these three taxonomies:

- German commercial law (HGB)
- International Financial Reporting Standard (IFRS)
- US Generally AcceptedAccounting Principles (GAAP)

For IFRS and HGB, the two expense methods are:

- Cost of Sales Management
- Total Cost Accounting

Individual financial accounts must be mapped to a minimum of one taxonomy and one IFRS and HGB expense method. This enables the generation of balance sheets and Income Statements in the taxonomy, also the Dashboard, Cashflow report, and additional KPI reports.

In Analytic Modeling, the process of mapping accounts to the predefined taxonomies is called assignment.

To assign the accounts to a taxonomy:

1. Select **Analytic Modeling > Hierarchies**.

   All the existing hierarchies are displayed. This includes Manual, Level-based, and Rule-based hierarchies are displayed.
2. Select the appropriate hierarchy:
   - BA_FIGL_MEASURE_GL GAAP (Reduced) for US Generally Accepted Accounting Principles (GAAP)
   - BA_FIGL_MEASURE_G L HG B Main (TCA) (Reduced)for German commercial law (HGB) - Total Cost Accounting
   - BA_FIGL_MEASURE_GL HGB Second(CSM) (Reduced) for German commercial law (HGB) - Cost ofSales Management
   - BA_FIGL_MEASURE_GL IFRS Main (TCA) (Reduced) for International Financial Reporting Standard (IFRS)- Total Cost Accounting
   - BA_FIGL_MEASURE_GL IFRS Second (CSM) (Reduced) for International Financial Reporting Standard (IFRS)- Cost of Sales Management
3. To edit the hierarchy definition, click **Drill-down**.

The Rule-based Hierarchy Details page is displayed.

4 Go to **Filters > ... > Details > Assignemnt** tab.

Note: Wait for the page to be populated with the data before you check the tab.

5 Assign accounts to the taxonomy structure:

To assign accounts to the taxonomy, you can use direct assignment or rule-based assignment. Each taxonomy structure member can have direct assignments, rule-based assignments, or both.

To directly assign accounting entities, drag the hierarchy structure member, identified as the parent, from the tree structure and drop, onto the accounting entity to which the member must be assigned.

For details on how to assign an account to the taxonomy, see Directly assigning a member chapter of the *Infor Business Vault Analytic Modeling User Guide*.

To use assignment rules:

a Select the target hierarchy structure member to which you want to assign accounting entities.

b Click **Rules** on the Assignments page.

The Assignments page is changed to a Rules Assignments area. The Rules page title changes to Rules for: the hierarchy member. The label Specify the selection criteria for the node, is displayed.

c Create simple or even complex rules as required. Click drop-down and select **Add Filter**. Continue to specify values in the selection criteria fields on the screen.

d For details on how to create rules, see Assigning Rules chapter of the *Infor Business Vault Analytic Modeling User Guide*.

Note: Infor recommends using Rules instead of direct assignments. Using rules improves the performance and the application picks the new accounts in the ERP system when the rules are created appropriately. To use direct assignments, you must re-map when a new account is added to the application. As mentioned before, Infor recommends using rules instead of direct assignments.

6 Continue to assign accounts until all relevant accounts are assigned.

7 Click **Save**.

8 Repeat steps 2 to 7 for all the taxonomies, that can be used for reporting.

Note:

- Transactions which, for some reason, do not refer an existing General Ledger account in the ERP system, are automatically mapped to the element 9998, to avoid errors.
- When you are upgrading from an earlier version and have already implemented the account mappings in the previous version, you can import the appropriate hierarchies that contain your account mappings. The Import Definitions section of this chapter includes information about the export of hierarchies for which account mappings are implemented. This export file can be re-imported including the account mappings.

ERP GL Accounts that, have not been mapped to any GL Measure owing to errors, are validated for Type and Natural Sign and are mapped to 9999 Balance Asset or Liability or Profit and Loss, by the system.

For this error handling to be effective, you must not manually map to the elements 9998 or 9999. If you do not want an ERP GL Account to be mapped to the Measure_GL structure, map the account

to 9997 in the appropriate taxonomy or leave the account unmapped. The system automatically maps the account to 9997.

Net Profit Loss

This task is applicable only if:

- You use HGB and/or IFRS, and
- You use only the Total Cost Accounting (TCA) expense method for Profit & Loss.

It is assumed that you use the Cost of Sales Management (CSM) expense method for Profit & Loss. In Analytic Modeling, a rule automatically puts the current year's Net profit/loss from the CSM instance (of the Net profit/loss account) into the balance liabilities.

Fo rCSM, the Net profit/loss account in MEASURE_GL is either K005HGBUKV or K005IFRSUKV based on the HGB or IFRS taxonomy used. The account suffix UKV indicates CSM.

However, if you use only TCA, the CSM instance of the Net profit/loss account is empty. Therefore, you must edit the rule in Analytic Modeling.

To calculate Net profit/loss for HGB or IFRS,based on the value of the TCA hierarchy:

1 Select **Analytic Modeling > Cubes**.
2 Go to BA_FIGL_FINANCE.
3 Select the **Cube Rules** tab.
This rule is displayed:

```
<Alea:Rules xmlns:Alea="http://www.misag.com" Accelerated="false"
Selected="false" User="Admin" Time="Mar/15/2014 02:13:28,725">
    <Alea:Rule Cells="All" Enabled="true" RuleID="000000000000"
Selected="true" Type="Cube">
          <Alea:Target>[MEASURE_GL:'K043HGB'] </Alea:Target>
          <Alea:Formula>[MEASURE_GL:'K005HGBUKV']</Alea:Formula>
          <Alea:Description/>
     </Alea:Rule>
     <Alea:Rule Cells="All" Enabled="true" RuleID="0X0000980000"
Selected="true" Type="Cube">
          <Alea:Target>[MEASURE_GL:'K043IFRS'] </Alea:Target>
          <Alea:Formula>[MEASURE_GL:'K005IFRSUKV']</Alea:Formula>
          <Alea:Description/>
      </Alea:Rule>

      <Alea:Rule Cells="All" Enabled="true" RuleID="0X0001300000"
Selected="true" Type="Cube">
          <Alea:Target>[MEASURE_GL:'K043HGBUKV'] </Alea:Target>
          <Alea:Formula>[MEASURE_GL:'K005HGBUKV']</Alea:Formula>
          <Alea:Description/>
       </Alea:Rule>
       <Alea:Rule Cells="All" Enabled="true" RuleID="0X0001C80000"
Selected="true" Type="Cube">
```

```
          <Alea:Target>[MEASURE_GL:'K043HGBGKV'] </Alea:Target>
          <Alea:Formula>[MEASURE_GL:'K005HGBGKV']</Alea:Formula>
          <Alea:Description/>
       </Alea:Rule>
       <Alea:Rule Cells="All" Enabled="true" RuleID="0X0002600000"
Selected="true" Type="Cube">
          <Alea:Target>[MEASURE_GL:'K043IFRSUKV'] </Alea:Target>
          <Alea:Formula>[MEASURE_GL:'K005IFRSUKV']</Alea:Formula>
          <Alea:Description/>
       </Alea:Rule>
       <Alea:Rule Cells="All" Enabled="true" RuleID="0X0002F80000"
Selected="true" Type="Cube">
          <Alea:Target>[MEASURE_GL:'K043IFRSGKV'] </Alea:Target>
          <Alea:Formula>[MEASURE_GL:'K005IFRSGKV']</Alea:Formula>
          <Alea:Description/>
        </Alea:Rule>

        <Alea:Rule Cells="All" Enabled="true" RuleID="0X0003900000"
Selected="true" Type="Cube">
           <Alea:Target>[MEASURE_GL:'K043GAAP'] </Alea:Target>
           <Alea:Formula>[MEASURE_GL:'K005GAAP']</Alea:Formula>
           <Alea:Description/>
         </Alea:Rule>
```

4 If you use HGB with TCA, change line 1 of the rule from:

```
<Alea:Rule Cells="All" Enabled="true" RuleID="000000000000"
Selected="true" Type="Cube">
    <Alea:Target>[MEASURE_GL:'K043HGB'] </Alea:Target>
    <Alea:Formula>[MEASURE_GL:'K005HGBUKV']</Alea:Formula>
    <Alea:Description/>
</Alea:Rule>
```

to

```
<Alea:Rule Cells="All" Enabled="true" RuleID="000000000000"
Selected="true" Type="Cube">
    <Alea:Target>[MEASURE_GL:'K043HGB'] </Alea:Target>
    <Alea:Formula>[MEASURE_GL:'K005HGBGKV']</Alea:Formula>
    <Alea:Description/>
</Alea:Rule>
```

5 If you use IFRS with TCA, change line 2 of the rule from

```
<Alea:Rule Cells="All" Enabled="true" RuleID="0X0000980000"
```

```
Selected="true" Type="Cube">
     <Alea:Target>[MEASURE_GL:'K043IFRS'] </Alea:Target>
     <Alea:Formula>[MEASURE_GL:'K005IFRSUKV']</Alea:Formula>
     <Alea:Description/>
</Alea:Rule>
```

to

```
<Alea:Rule Cells="All" Enabled="true" RuleID="0X0000980000"
Selected="true" Type="Cube">
     <Alea:Target>[MEASURE_GL:'K043IFRS'] </Alea:Target>
     <Alea:Formula>[MEASURE_GL:'K005IFRSGKV']</Alea:Formula>
     <Alea:Description/>
</Alea:Rule>
```

Configuring Analysis Dimension Names

The Finance domain contains ten analysis dimensions. These analysis dimensions can be used in the reports to filter, and analyze the codes. The names of the dimension range from BA_FIGL_DIMENSION01 to BA_FIGL_DIMENSION10. The application generates the dimensions from the code lists defined in the BOD accounting chart. Because the dimensions do not have fixed content, the application assigns generic display names such as, 'Analysis Dimension 1', 'Analysis Dimension2'. You can modify the display names and use the appropriate names for each installation.

Note: Modify only the localized display names. The default language is generic.

To change the display names of the analysis dimensions, execute these steps:

1. Select **Analytic Modeling > Dimensions**.
2. Select the dimensions to be translated. You can translate multiple dimensions in a single export or import operation.
3. Click **Export** and select **Translations** in the Export Wizard.
4. Open the excel file.
5. Update the translations for the displayName for the required languages.
6. Save the excel file in the same structure as that of the zipped files (the folder must contain the ReadMe.txt file).

   Note: You can import the dimension names if you are upgrading from an earlier version of Analytics Foundation with the analysis dimension names. The Import the Definitions section of this chapter includes the information about the export of the translations for the financial dimensions that are renamed. This export file can be re-imported including the dimension names.

7. Import the file in Analytic Modeling.
   a. Select the file.
   b. Select the required Database Connection.
   c. Click **Import**.

8 Publish the changes to OLAP Server.

Select **Analytic Modeling > Publications** and execute the publications that include the modified dimensions.

Identifying the analysis dimensions used

If you do not know the analysis dimensions that are used, publish the dimensions and view the reports on the Finance dashboard to view the Analysis Dimension lists populated.

Procurement

Configuring the Time Dimension

In Procurement, the BA_PCXX_TIME_DELIVERY and BA_PCXX_TIME_ORDER dimensions must be configured.

To specify the number of years of history that must be uploaded to the Procurement cube:

1 For the Time Delivery dimension:
   a Select **Analytic Modeling > Dimensions**.
   b Go to the BA_PCXX_TIME_ DELIVERY dimension.
   c Specify the required **From Date** in the YYYYMMDD format.
   This date is the earliest date in the Time dimension when the Procurement domain is created.
   d Specify the required **To Date** in the YYYYMMDD format.
   e Click **Save**.

2 For the Time Order dimension:
   a Select **Analytic Modeling > Dimensions**.
   b Go to BA_PCXX_TIME_ORDER dimension.
   c Specify the required **From Date** in the YYYYMMDD format.
   This date is the earliest date in the Time dimension when the Procurement domain is created.
   d Specify the required **To Date** in the YYYYMMDD format.
   e Click **Save**.

Configuring Time Clusters

The Status Cluster dimension contains time intervals for age analysis for the deliveries that are Early, On-time, or Late.

These are the measures for delivery performance in Procurement:

- Actual delivery time versus promised delivery time
- Actual delivery time versus required delivery time
- Promised delivery time versus required delivery time

By default, each of these types are allotted six time clusters to represent the deliveries that are late and six are allotted to represent the deliveries that are early. The time clusters are defined in hours. For example, the '3 to 5 days' early cluster starts at -72 hours and ends at -120 hours and the '3 to 5 days' late cluster starts at 72 hours and ends at 120 hours. You can modify the labels of the clusters and the number of hours. You can also localize the customizable elements of the hierarchy.

There is only one On-time cluster.

Note: This procedure requires input from a business user who can make the required decisions with regards to the type of periods, which can be considered as Late or Early.

To edit the time clusters, update the hierarchy in Analytic Modeling first. The changes must also be later applied to the Base Data Store.

1 In Analytic Modeling:

a Select **Analytic Modeling > Hierarchies**.

b Go to BA_PCXX_STATUS_CLUSTER all statuses hierarchy.

c Do not modify the default language display names on the **Tree** tab, as the names are generic. You can only change the localized display names (see steps g to k)

d On the **Details** tab, edit the attribute for the time range (RANGE field) with the required number of hours. Retain the other attributes as the reports may rely on the settings.

e Click **Save**.

f Click **Back** to access the Hierarchies List.

g Select the hierarchy BA_PCXX_STATUS_CLUSTER all statuses.

h Click **Export** and select **Translations** in the Export Wizard.

i Open the excel file.

j Update the translations for the displayName for the required languages.

k Save the excel file in the same structure as that of the zipped files (the folder must also contain the ReadMe.txt file).

l Import the file in Analytic Modeling.

1 Select the file.

2 Select the required Database Connection.

3 Click **Import**.

2 In the Base Data Store Database:

a Run the appropriate database management tool.For example, SQL Server Management Studio.

b Expand the Base Data Store database.

By default, the Base Data Store database is named BV_BDS.

c Expand **Tables**.

d Right-click dbo.BI_MAN_PCXX_STATUS_TIMECLUSTER_DEF table and select Edit Top 200 Rows.

The columns of the table and the current values are displayed.

e In the TO_HOURS column, edit the cluster values as required(must be identical to the hierarchy in Analytic Modeling).

3 Publish the changes to OLAP Server.

Select **Analytic Modeling > Publications** and execute the publications that include the modified dimensions.

Note: When you are upgrade from an earlier version of the Analytics Foundation and if the time cluster is customized, the configured Base Data Store table values are stored iin a table with an identical name such as dbo. BI_MAN_PCXX_STATUS_TIMECLUSTER_DEF _<VERSION>_<TIMESTAMP>. These values can be used to set the correct values again in BI_MAN_PCXX_STATUS_TIMECLUSTER_DEF

The analytic modeling configuration for the BA_PCXX_STATUS_CLUSTER all statuses hierarchy are stored in an export file as mentioned in the Import the Definitions section. This export file can be imported again and the configured dimension BA_PCXX_STATUS_CLUSTER all statuses hierarchy is displayed again.

Configuring Completeness

These measures can be configured:

- Number of order lines shipped complete
- Number of order lines undershipped
- Number of order lines overshipped

Typically, there is some tolerance for variances between the quantities ordered and the quantities actually delivered. The tolerance is defined using minimum and maximum values.

- If the quantity delivered ranges between the minimum and maximum values, the quantity is considered complete.
- If the quantity delivered is less than the minimum value, the quantity is undershipped.
- If the quantity is greater than the maximum value, the quantity is considered as overshipped.

The minimum and maximum values are specified as percentages. By default, the minimum value is set to 3% and the maximum value to 10%. You can modify these values in the Base Data Store database

To modify the tolerance values connect to the Base Data Store:

1 Run the appropriate database management tool. For example, SQL Server Management Studio.

2 Expand the Business Vault database.

By default, the Base Data Store database is named BV_BDS.

3 Expand **Tables**.

4 Right-click dbo. BI_MAN_PCXX_COMPLETE_QTY_DEF table and select Edit Top 200 Rows.

The columns of the table and the current values are displayed.

5 In the PERCENTAGE_DIFF_FROM_COMPLETE column, edit the values as required.

Note: When you are upgrade from an earlier version of the Analytics Foundation and if the completeness is customized, your configured Base Data Store table values are stored in a table with an identical name such as dbo. BI_MAN_PCXX_COMPLETE_QTY_DEF_<VERSION>_<TIMESTAMP>. These values can be used to set the correct values again in BI_MAN_PCXX_COMPLETE_QTY_DEF.

Production

Configuring the Time Dimension

In Production, the BA_PRXX_TIME_END and BA_PRXX_TIME_START dimensions must be configured to specify the number of years of history that is uploaded to the Production cube:

1. For the Time Start dimension:
   a. Select **Analytic Modeling > Dimensions**.
   b. Go to the BA_PRXX_TIME_START dimension.
   c. Specify the required **From Date** in the YYYYMMDD format.
      This date is the earliest date in the Time dimension when the Production domain is created.
   d. Specify the required **To Date** in the YYYYMMDD format.
   e. Click **Save**.
2. For the Time End dimension:
   a. Select **Analytic Modeling > Dimensions**.
   b. Go to the BA_PRXX_TIME_END dimension.
   c. Specify the required **From Date** in the YYYYMMDD format.
      This date is the earliest date in the Time dimension when the Production domain is created.
   d. Specify the required **To Date** in the YYYYMMDD format.
   e. Click **Save**.

Configuring Time Clusters

The TIME_CLUSTER dimension contains time intervals for age analysis orders that are Early, On-time, and late. There are 14 time clusters for late orders and 14 for early orders. For example, '1 to 3 months' late or '3 to 5 days early'. There is only one cluster for On-time orders. The time clusters intervals are defined in hours. For example, if '3 to 5 days' early, the cluster starts at -72 hours and ends at -120 hours. You can also modify the labels of the clusters and the number of hours that define the cluster boundaries.

See "Localizing customized hierarchies or elements in the OLAP model"on page 30.

Note: This procedure requires input from a business user in Production who can make the required decisions with regards to the type of periods that can be considered Late or Early.

To edit the time clusters, the hierarchy in Analytic Modeling must be updated first. The changes must also be applied to the Business Vault Database.

1 In Analytic Modeling:

a Select **Analytic Modeling > Hierarchies**.

b Go to the BA_PROA_TIME_CLUSTER hierarchy.

c Do not change the default language display names on the **Tree** tab, as the names are generic. You can only change the localized display names (see steps g to k).

d On the **Details** tab, edit the attribute for the time range (RANGE field) with the required number of hours. Retain the other attributes as the reports may rely on the settings.

e Click **Save**.

f Click **Back** to access the Hierarchies List.

g Select the BA_PROA_TIME_CLUSTER hierarchy.

h Click **Export** and select **Translations** in the Export Wizard.

i Open the excel file.

j Update the translations for the displayName for the required languages.

k Save the excel file in the same structure as that of the zipped files (the folder must also contain the ReadMe.txt file).

l Import the file to Analytic Modeling.

1 Select the file.

2 Select the required Database Connection.

3 Click **Import**.

2 In the Base Data Store:

a Run the appropriate database management tool. For example, SQL Server Management Studio.

b Expand the Base Data Store database.

By default, the Base Data Store database is named BV_BDS.

c Expand **Tables**.

d Right-click dbo.BI_MAN_PRD_TIME_CLUSTER_DEF and select **Edit Top 200 Rows**.

The columns of the table and the current table values are displayed.

e Edit the cluster values as required (must be identical to the hierarchy in Analytic Modeling).

3 Publish the changes to the OLAP Server. Select **Analytic Modeling > Publications** and execute the publications, which include the modified dimensions.

Note: When you upgrade from an earlier version of the Analytic Foundation and the time cluster is customized, the configured Base Data Store table values are stored in a table with an identical name such as dbo.BI_MAN_PRD_TIME_CLUSTER _<VERSION>_<TIMESTAMP>. These values can be used to set the correct values again in BI_MAN_PRD_TIME_CLUSTER.

The analytic modeling configuration for the BA_PROA_TIME_CLUSTER hierarchy are stored in an export file as mentioned in the Import the Definitions section. This export file can be imported and the configured dimension BA_PROA_TIME_CLUSTER hierarchy is present again.

Sales

Configuring Time Dimension

In Sales, the BA_SARE_TIME dimension must be configured.

To specify the number of years of history that are loaded to the Sales cube:

1. Select **Analytic Modeling > Dimensions**.
2. Go to Go to BA_SARE_TIME dimension.
3. Specify the required **From Date** in the YYYYMMDD format.

   The date that you specify is the earliest date in the Time dimension when the Production domain is created.
4. Specify the required **To Date** in the YYYYMMDD format.
5. Click **Save**.

Executing the Publications

You can execute the publications on demand or automatically based on a schedule.

To create the dimensions and cubes, execute these steps:

1. Execute the publication on demand.
   a. Select **Analytic Modeling > Publications**.
   b. Select the publication that you created for a functional area and click **Publish**.
   c. To view the result, select **Monitoring > Publication Monitor**.
2. Execute the publication on a regular basis.
   a. Select **Analytic Modeling > Publications Schedules**.
   b. Create the required publication schedules and set the recurrence pattern.
   c. Click **Activate** to activatet he publication.

Post-installation tasks for Reports and Dashboards

5

You must complete the post installation tasks for the reports and dashboards, after the Infor LN Analytics Foundation installation and the Business Vault Analytic Modeler post installation tasks are complete.

These tasks must be performed:

- Configuration in Application Studio.
- Configuring Repository Administration with IFS.
- Configuring Dashboard servicePlugin in Mingle.
- Configuring online help files.
- Importing LN Analytic Foundation dashboards.

Configuration in Application Studio

In the Application Studio, connect LN Analytics repository database using repository registration that is created during the installation process and looks like LN Analytics Foundation <version number>. The user name to connect is Admin. The password is not required.

Do the following:

- In the Database Structure section, verify that the BV_DataStore and LNAnalyticsFoundation database connections are working. If required change the database and authentication settings. Make sure that you set the **Connect at log-on** option to yes. After testing right-click the database connection and select **Logon**.
- Verify the default value of the _CurrentLanguage variable. Select **Accessories > Global Variables**. Right-click the _CurrentLanguage variable and select the **Manage Values** for **Variables** option. Change the default value to English, if it is set to a different value and click **OK**.

Configuring Repository Administration with IFS

If a dashboard is configured to the IFS, the repository must also be configured to the IFS.

1. Select **Start > All Programs > Business Intelligence > Repository Administration** .
2. Right-click **Repository Administration** and select **Run as Administrator**.
3. Right-click **User Management** and select **Authentication Systems**.
4. Select the Infor Fedration Services and provide the required information. You can register an IFS group or user. Assign the required roles to the selected user(s). See BI installation guide.

Configuring Dashboard Plug-in in Infor Ming.le

See BI Installation Guide.

Configuring Online help files

During the installation, the online help files are copied to the disk in the `Application Studio\Webservices\Help\BA` sub folder of the installation folder.

However, note that Foundation 10.5 still expects the online help files to be placed in the `\Webservices\Help\LNAnalyticsFoundation` sub folder of the Application Studio installation. Therefore copy the files to the specified location in the Application Studio installation folder.

Import Dashboards

In LN Analytics Foundation two CFO dashboards are delivered. However these dashboards must be imported.

To import the dashboards:

1. Login to Mingle
2. Go to Dashboard. Else, you must connect to your dashboard service URL as specified in the Configure Dashboards Web and Content Connections section of the Installation chapter.
3. In the Share icon, select Import Dashboards.
4. In the Import wizard, on the **Source** and **Target** Tab, specify the Import File by selecting the CFO.dashboards file from the `LN Analytics Foundation 10.5\Dashboards` sub folder of your installation folder (default `..\Program Files (x86)\Infor\BI`). Also specify the Target Folder and click **Next**.

5 On the **Dashboards** tab, select all dashboards and click **Next**.
6 On the **Content Connections** tab, select your existing Content connection and click **Next**.
7 On the **Summary** tab, click **Finish**.

The CFO dashboards are displayed on the **Dashboards** tab.

Removing Components of Older Releases 6

When you install a newer version of analytic while an older version exists, all the old components are not deleted automatically.

It is recommended to manually delete these old components:

- Repository registration: The repository registration can be deleted in Infor BI Repository Administration.
- Repository Database: The repository database can be deleted using SQL Server Management Studio or together with the repository registration using the **Delete Database** option in Infor BI Repository Administration.
- OLAP Database: The OLAP database can be removed by deleting the OLAP database folder from the Database Root Directory of the BI OLAP server. To delete the OLAP database, you must stop the OLAP database using the BI OLAP Administration.
- Analytic Modeling and Dashboard files: The Analytic Modeling and Dashboard files are copied to a version specific subfolder of the installation folder used during installation. Delete the subfolder that such as LN Analytics Foundation <X.Y.Z>, where X,Y,Z are numbers that match with the version number. The default installation folder is `C:\Program Files (x86)\Infor\BI`.