Infomart User Guide

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Pathway 3.09 (Thick Client Version)

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INFOMART USER GUIDE

Overview

Infomart Deployment, Installation and Rebuilds can be performed using Pathway to perform the tasks required to Import and Install Infomart.

The scripts required to create the Infomart database objects into your Pathway database can be imported, where they will be tailored to your specific installation using predefined System Parameters that will only need to be set up once.

Prior to installation the Infomart Parameters will be able to be viewed and set specific for a Site's installation.

Installing the scripts is as simple as clicking the Install button and in the case of Infomart using MS Sequel Server there is no longer any need to alter the scripts manually before execution. All this is handled by the new Pathway Infomart Installation software.

It is also now possible to execute the Infomart Rebuild process from Pathway.

The Rebuild process uses Multi Batching technology to make it possible to rebuild Datamarts asynchronously in an effort to reduce the total time taken to rebuild all Datamarts. The number of concurrent Datamart Rebuilds will depend on the number of Background Job Queues available at time of submission and Datamart dependencies.

By using the Pathway Batch Processing system Rebuilds are able to be scheduled to run at a later time. There is also control over which Datamarts are selected for Rebuilding.

Infomart Rebuild messages are able to be viewed from a Pathway session.

The details in this manual are in the order that the steps need to be performed when first installing Infomart.

Parameters

The following topics are included in this section:
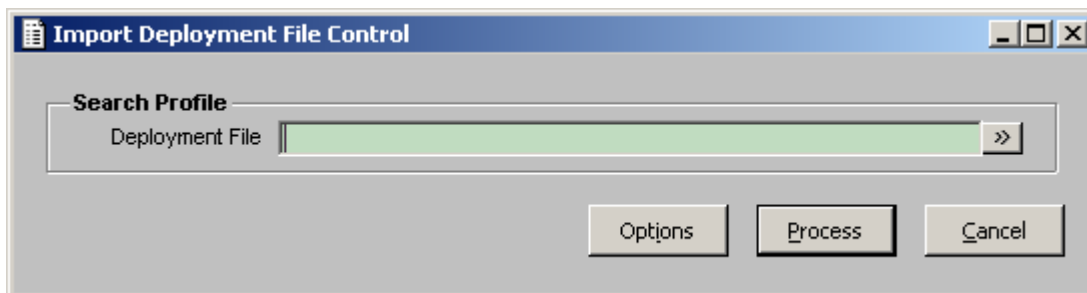
Import Deployment File

Import Deployment File Form

This form is used to Import the Deployment file. It can also be used to make any necessary amendments to the Deployment File. Only Applications flagged as Active will have Infomart scripts imported.

The Deployment file will contain the Datamart, Parameter and SQL Script details specific to a Pathway Release. The data in this file will used to generate tables and other database objects in the Infomart Database.

Import Deployment File Control Form

Deployment File
Enter or select the Deployment File location from the pop up.

Rebuild Parameter Maintenance

Rebuild Parameter Maintenance Form

This form is used to view set up Infomart Rebuild Parameters. These parameters control the data that is extracted from Pathway and populated into Infomart.

Rebuild Parameter Maintenance form

Section
This field displays the Pathway module name.

Item
This field displays the Parameter name.

A new parameter has been added in Release 2.21 to exclude Confidential Requests in Customer Service from the extraction. 'Request – Exclude Confidential – Yes' will prevent Confidential Requests from being extracted.

Data
Enter the type of data that is to be extracted for this parameter. For example, the Animals Current Period may be set to 2004.

Update Infomart
Pressing this button will copy the displayed parameter settings into the Infomart database which is defined in the System Parameters.

Delete Button
Pressing this button with a parameter selected will delete the parameter.

New Button
Press this button to add a new parameter.

Infomart System Parameter Maintenance

Infomart System Parameter Maintenance Form

This form is used to record the details of both the Infomart database and the Pathway database. The information on this form usually only needs to be set up once. It is then used by the Rebuild process to correctly populate data from Pathway into Infomart.

Infomart System Parameter Maintenance

DBMS Details – DBMS Type
This field displays the database type and its description.

DBMS Details – Version
This field displays the version of the database.

DBMS Details – Executable String
This field should not be maintained unless advised to by Infor. It displays the template to the database interface that is used by the Pathway software to execute SQL statements to the Database.

DBMS Details – Wait time in Hours
This field should not be maintained unless advised to by Infor. It is an override parameter used to by Pathway to time out unresponsive Datamarts. A value of zero indicates that no override is used.

DBMS Details – Global Names (Oracle only)
This field should not be maintained unless advised to by Infor. This value may also be set but using the 'Test Connection' button. This value actually exists in your Oracle Database and can be accessed using the following SQL in an SQL+ session. (SELECT value FROM v$parameter WHERE name = 'global_names';)

DBMS Details - Working Directory
This field is optional. Temporary work files will be created in this directory. Default value is the Pathway Environment working directory. Previous at Release 2.16 this value was C:\.

Infomart DBMS Details – Infomart Database Global Name (Oracle only)
This field is only available for an Oracle database. Enter the Oracle Listener Name for the Infomart database used in the "tnsnames.ora" file. This value actually exists in your Oracle Infomart Database and can be accessed using the following SQL in an SQL+ session. (SELECT * FROM global_name;)

Infomart DBMS Details – Infomart Server Name
Enter the database server name for Infomart. Double quotes are not required when entering a server name with a back slash.

Infomart DBMS Details – Infomart Database Name
Enter the Infomart database name.

Infomart DBMS Details – Infomart Database Userid (MS Sequel Server - Also known as Login)
Enter the Infomart database User ID.

Infomart DBMS Details – Infomart Database Password
Enter the password for the Infomart User ID.

Infomart DBMS Details – Infomart Database Password Confirm
Enter the password for the Infomart User ID as confirmation of the password.

Infomart DBMS Details – Infomart Schema Name (MS Sequel Server - Also known as User)
Enter the value of the schema name used. Usually this value is the same as the Userid. Default for MSS is INFODBO.

Pathway DBMS Details – Pathway Database Global Name (Oracle only)
This field is only available for an Oracle database. Enter the Oracle Listener Name for the Infomart database used in the "tnsnames.ora" file. This value actually exists in your Oracle Infomart Database and can be accessed using the following SQL in an SQL+ session. (SELECT * FROM global_name;)

Pathway DBMS Details – Pathway Server Name
Enter the database server name for Pathway. Double quotes are not required when entering a server name with a back slash.

Pathway DBMS Details – Pathway Database Name
Enter the Pathway database name.

Pathway DBMS Details – Pathway Database Userid (MS Sequel Server - Also known as Login)
Enter the Pathway database User ID.

Pathway DBMS Details – Pathway Database Password
Enter the password for the Pathway User ID.

Pathway DBMS Details – Pathway Database Password Confirm
Enter the password for the Pathway User ID as confirmation of the password.

Pathway DBMS Details – Pathway Schema Name (MS Sequel Server - Also known as User)
Enter the value of the schema name used. Usually this value is the same as the Userid. Default for MSS is PTHDBO.

Test DB Connection Button
Use this button to test the connection to the database. Please note that MSSQL or ORACLE needs to be installed on the PC that this test is performed from. Three connections will be tested.
1. Your PC to the Infomart Database.
2. Your PC to the Pathway Database.
3. Infomart Database link to Pathway Database.

Install Infomart Scripts

Install Infomart Form

Infomart Tables and objects can be created to the Infomart Database using the Infomart System Parameters and the Install Infomart process. Alternatively scripts can be written to file so that they can be tailored performed at a later date.

WARNING: Whilst running the Install Infomart process any other applications running on the PC will be unavailable.

Either all scripts can be loaded (for sites new to Infomart or for a new release level) or fixes can be loaded but the two cannot be run at the same time.

Install Infomart

Processing Options – Release
Enter the Infomart Release Level to be installed.

Processing Options – Install to Database
Check this check box on to populate the database with the scripts.

Processing Options – Extract to File
Check this check box on to extract the scripts to a file. This can be done at the same time as installing the scripts to the database.

Processing Options –Extract to Folder
This field is only available if the Extract to File check box is turned on. Either enter a folder destination or select a folder by using the detail button.

Outstanding Fixes to install – Load
Check this check box on to install the fix number.

Outstanding Fixes to install – Fix Number
This field displays the Infomart fix number that is ready to be installed.

Outstanding Fixes to install – Description

This field displays the description of the Infomart script to be installed.

Test DB Connection Button

Use this button to test the connection to the database. Please note that MSSQL or ORACLE needs to be installed on the PC that this test is performed from. Three connections will be tested.

1. Your PC to the Infomart Database.
2. Your PC to the Pathway Database.
3. Infomart Database link to Pathway Database.

Maintenance

The following topics are included in this section:

Infomart Maintenance

Infomart Maintenance Form

This form is used to control the Infomart Rebuild. Dependencies of a Datamart being successfully run before another Datamart can be run are specified and can be set to be ignored. Sites using an Oracle database also have additional choices about how to proceed if an error is encountered and if information is written to the log file.

Infomart Maintenance Form

Rebuild
Check this box on to include the Datamart in the rebuild.

Sequence
This field displays the sequence that the Datamart is run in.

Datamart
This field displays the Datamart Name.

Description
This field displays the Datamart Description.

Depends
The detail button navigates to the Datamart Dependencies Enquiry form where a dependent Datamart can be ignored.

For the USER datamart the Datamart Dependency Maintenance form will be displayed allowing users to specify dependencies.

End on Error
Check this box on if the rebuild process is to end if an error is encountered.

Tracking
Check this box on to include details in the log file produced by the Rebuild process.

Datamart Dependencies Enquiry Form

This form is used to determine if dependencies in the Infomart Rebuild are to be considered or ignored.

Datamart Dependencies Enquiry Form

Datamart
These fields display the Datamart Name and Description.

Depends on the completion of these Datamarts
These fields display the Datamart Name and Description that the Datamart is dependent on.

Ignore
Check this box on if the dependency is to be ignored.

Datamart Dependencies Enquiry Form

This form is used to set Dependencies for the User Datamart.

Datamart Dependencies Maintenance Form

Datamart

These fields display the Datamart Name and Description.

Does not Depend On

These fields display the Datamart Name and Description that the Datamart is not dependent on.

Depends On

These fields display the Datamart Name and Description that the Datamart is dependent on.

Ignore Failure

Check this box on if the dependent datamart is to be ignored if it fails to rebuild.

Rebuild Infomart

Infomart Rebuild Control Form

This form is used to submit the Infomart Rebuild.

Infomart Rebuild Control Form

Rebuild
Check this box on to include the Datamart as part of the Rebuild. Only Datamarts flagged to be rebuilt under Infomart Maintenance will be displayed and available for rebuilding.

Datamart
These fields display the Datamart name and Description.

Infomart Logs Maintenance Form

This form is used to display the logs form the rebuild process. Selecting a rebuild Job will enable additional information to be displayed about the time taken to run individual processes for a Datamart.

Infomart Logs Maintenance Form

Infomart Jobs – Job Description
This field displays the description of the rebuild when it was submitted.

Infomart Jobs – Date Started
This field displays the date and time that the rebuild was started.

Infomart Jobs – Ended
This field displays the date and time that the rebuild was started.

Infomart Jobs – Server Error
The server error checkbox is a indicator that shows whether a "Server: Msg xxxx" type error occurred during execution that may not be included in the displayed log entries but may be viewed in the "Session log" field at the bottom.

Session Log
This field displays the full session log for the selected rebuild.

Infomart Job Logs Enquiry Form

This form displays all of the individual components processed as part of the Infomart rebuild. It displays the time elapsed for a process and any errors encountered.

Infomart Job Logs Enquiry Form

Infomart Rebuild Job – Job Description
This field displays the description of the rebuild when it was submitted.

Infomart Rebuild Job – Date Started
This field displays the date and time that the rebuild was started.

Infomart Rebuild Job – Ended
This field displays the date and time that the rebuild was started.

Infomart Rebuild Job – Status
This field displays the Status of the Rebuild Job selected.

Infomart Rebuild Job Logs– Datamart
This field displays the Datamart Name.

Infomart Rebuild Job Logs– Procedure
This field displays the Procedure that was run for the Datamart.

Infomart Rebuild Job Logs– Type
This field displays the type of step that was run for the Procedure.

Infomart Rebuild Job Logs– Date/Time
This field displays the Date and Time that the Type of step took place.

Infomart Rebuild Job Logs– Elapsed
This field displays the amount of elapsed time for the Procedure to complete. If the Elapsed Time cannot be accurately calculated it will not be displayed for the Procedure.

Log Comments – Comment
This field displays a comment that better describes the Procedure

Log Comments – Error Description

This field displays the Error Description for the Procedure.

Sort by Datamart/Sort by Date/Time Button

This button changes the order that the Procedures are displayed. Depending in the view selected the label on the button will change. The Procedures can be viewed in Datamart or in Rebuild Order (Date/Time processed).

USER_REBUILD Datamart

USER_REBUILD.SQL script

Customers will be able to create their own USER Datamart to perform site specific SQL tasks over the Infomart Database. To use this functionality you need to perform these tasks…

- Create a User_Rebuild stored procedure in you Infomart Database…

MS Sequel Server script only

To create the USER_REBUILD stored procedure, customers and PS staff should use this template…

```
if exists (select name from sysobjects where uid in (select uid from sysusers where name = 'infodbo') and
name = 'User_Rebuild' and type='P')
        Drop procedure [infodbo].[User_Rebuild]
GO

Create procedure [infodbo].[User_Rebuild]
@job int = 0
as
set nocount on
declare @error_var int
exec [infodbo].[log_entry] @job,'I',0,'Vicval_10','Start User SQL.'

-- ******* Start User area for SQL statement
Print 'Start User SQL...'

-- INSERT YOUR SQL STATEMENTS HERE.  AFTER EACH STATEMENT YOU SHOULD CHECK THE
STATUS OF @@ERROR...
SET @error_var = @@ERROR
if @error_var <> 0
        exec [infodbo].[log_entry] @job,'E',@error_var,'User_Rebuild','Error occurred.'


-- IF YOU WISH TO CALL ANOTHER USER STORED PROCEDURE THE USE THE STATEMENT
BELOW...
-- 1. Change the 'USER_000' value to your SP name.
-- 2. Uncomment the line.
-- exec [infodbo].[rebuild_procedure] @job_id, 'USER_000'


Print 'End User SQL.'

-- ******* End User area for SQL statement
exec [infodbo].[log_entry] @job,'I',0,'Vicval_10','End User SQL.'

GO
```

Oracle script only

To create the USER_REBUILD stored procedure, customers and PS staff should use this template…

```
CREATE OR REPLACE PROCEDURE User_Rebuild
(
  p_JobId        INTEGER,
  p_Status    OUT INTEGER
)
-- Populate Animals
IS
  v_Procedure     VARCHAR2(20) := 'User_Rebuild';
  v_Parm_Value    VARCHAR2(80);
  v_Sysdate       DATE    := SYSDATE;
BEGIN
-- 0010
  -- Set Status to ERROR, reset on completion
  p_Status := -1;

  -- Checkpoint 0000
  SYSTEM.LOG(p_JobId,'C',0,v_Procedure,'CP0000');

  -- INSERT YOUR SQL STATEMENT HERE.

  -- Checkpoint 0010
  SYSTEM.LOG(p_JobId,'C',0,v_Procedure,'CP0010');

  -- INSERT YOUR NEXT SQL STATEMENT HERE.

  -- ...

  -- Set Completion Status to Good
  p_Status := 1;
--  error check
EXCEPTION
  -- log error
  WHEN OTHERS THEN
     COMMIT;
     SYSTEM.LOG(p_JobId,'E',SQLCODE,v_Procedure,NULL);
END;
```

Both MS Sequel Server and Oracle

- Modify the USER_REBUILD.SQL script

- Execute it in a session when connected to the Infomart Database.

Executing a USER_REBUILD in a Pathway session...

- Select System Administrator Menu - Production >> System Administration >> Infomart >> Rebuilding >> Datamart Maintenance

- The last record will be the USER datamart which will not be selected by default.

- Select it and the click OK.

- Select System Administrator Menu - Production >> System Administration >> Infomart >> Rebuilding >> Rebuild Infomart

- Unselect the datamarts you do not wish to run and select the USER datamart, again at the bottom of the list, and process to execute the USER datamart.

NOTE: Development and maintenance will always be the responsibility of the customer. Infor Professional Services may assist as required.