Installation & Configuration guide

Business Analyze 4

simplifying leadership

Focus • Visualization • Effect • Result

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Idea: Business Analyze AS.

Documentation: Business Analyze AS.

Internet: www.businessanalyze.com

Innhold

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Note! There is a new version of our installation guide online. This document has some obsolete information but can be used if you need to install and configure modules and packages prior to Business Analyze version 4.0.

See online install guide at our community website.

Prerequisites / Requirements

In order to successfully install and run Business Analyze there are several prerequisites/requirements that will have to be met. The requirements are listed in this section.

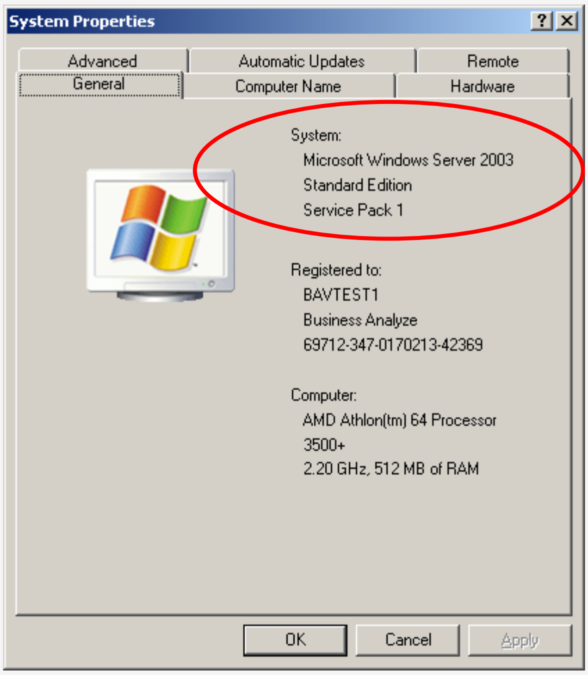
Server - Operating System Requirements

The minimum OS requirement for the Business Analyze 4.0 Framework is Windows 2003 Server or newer.

Business Analyze 4.0 has been tested on the following operating systems:

- Microsoft Windows Server 2003
- Microsoft Windows Server 2003 R2
- Microsoft Windows Server 2008
- Microsoft Windows Server 2008 R2

HOW TO	On the web server: Start the file browser and right click *My Computer*. Select *Properties*. The text under *System* should reveal the OS version.



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Installation in Windows 2003 Server environment

Before you go on and install the software in a Windows 2003 Server you need to install the Internet Information Services if it is not installed.

HOW TO CHECK

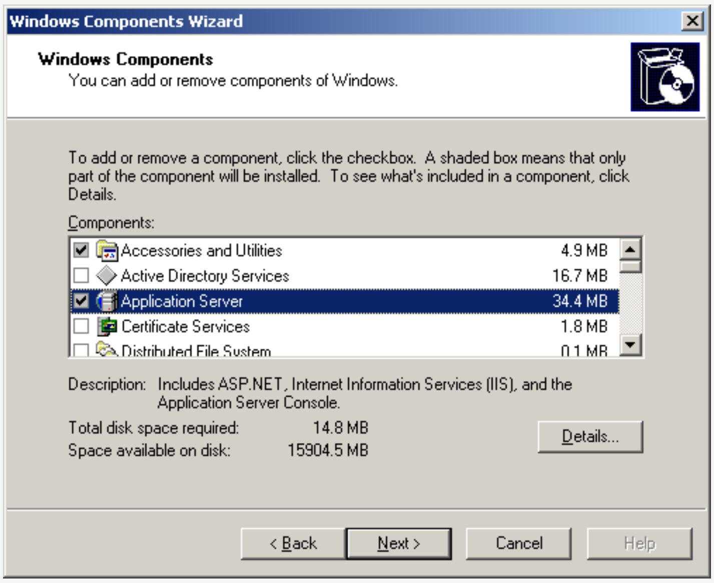
Before installing Business Analyze, please ensure that the Internet Information Service (IIS) is installed and running by performing the two steps below:

1. Click *Start -> Settings -> Control Panel -> Administrative Tools -> Services* (or click *Start -> Run,* type *"services.msc"* and press *Enter).* This will bring up a list of the services installed on your computer. Look for a service named *World Wide Web Publishing Service* near the bottom of the list. If this item exists in the list, the Internet Information Service (IIS) service is installed.

2. Check to see if the Internet Information Server (IIS) service is started. If the status column does not indicate that the service is started, right click on the service in Service Manager, and select *Start*. Alternatively, you can start the service from a command window or from *Start* -> *Run* by typing "*net start w3svc".*

HOW TO ENABLE IIS

If you need to install it following these steps:
Click *Start -> Settings -> Control Panel -> Add or Remove Programs -> Add/Remove Windows Components*



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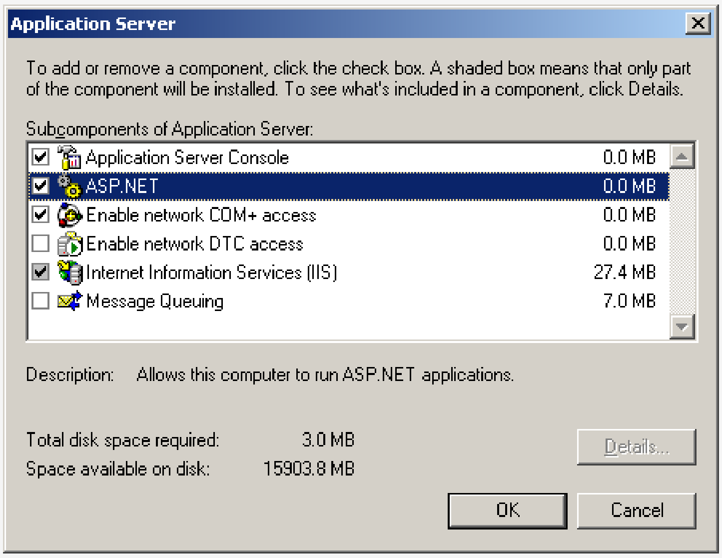
Check the “Application Server” and click on the details and check also “ASP.NET”:

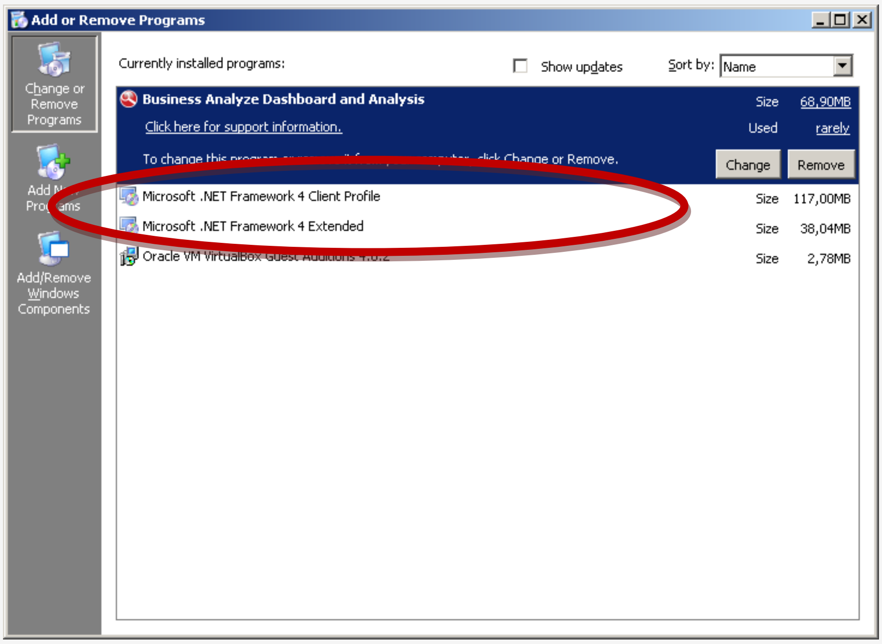


Before you can continue with the setup you need to install the Microsoft .Net Framework 4.0 if not installed.

HOW TO CHECK

Check if the Microsoft .Net Framework 4.0 is installed:

1. Click *Start -> Settings -> Control Panel -> Add or Remove Programs -> Add/Remove Windows Components*



For information about how to install the .Net framework. See the section “Common preparation for all operating system”.

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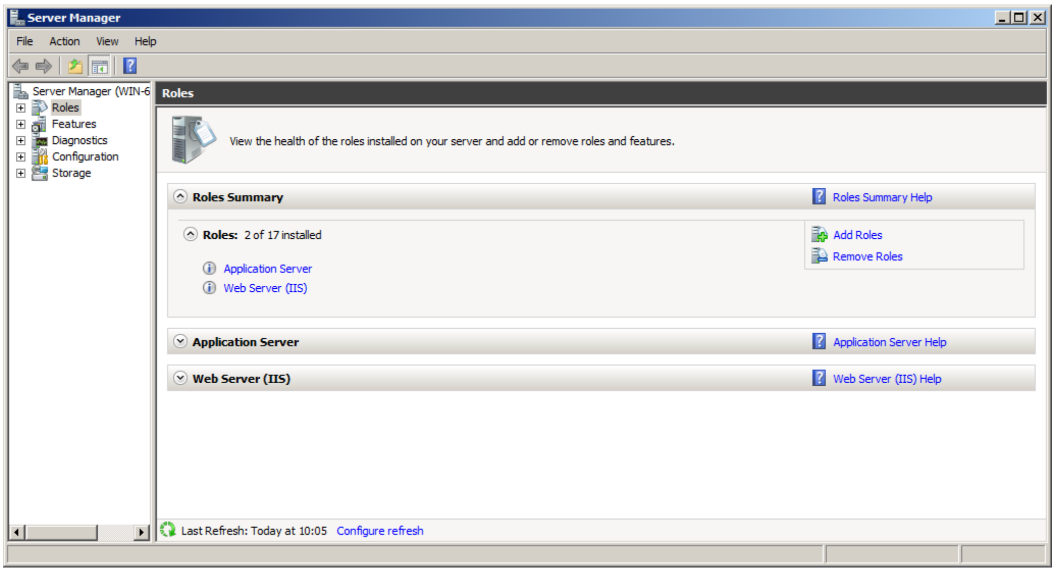
Installation in Windows 2008 Server environment

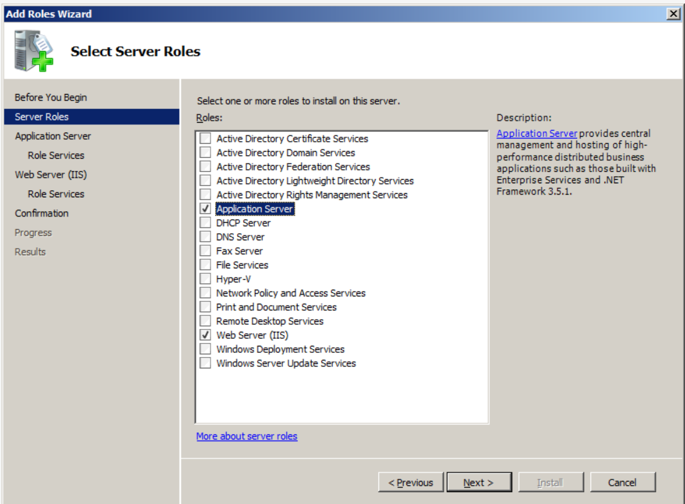
Before you go on and install the software in a Windows 2008 Server you need to install the Application Server and Web Server (IIS) if it is not installed.

You can obtain this from:

Start -> Control Panel -> Administrative Tools -> Server Manager



HOW TO INSTALL	How to install the Application Server and Web Server (IIS): Click Start -> Control Panel -> Administrative Tools -> Server Manager -> Add Roles



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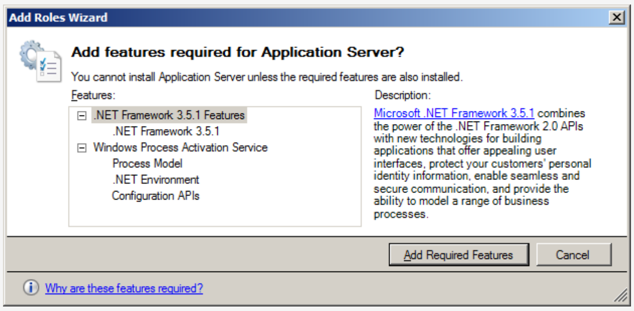
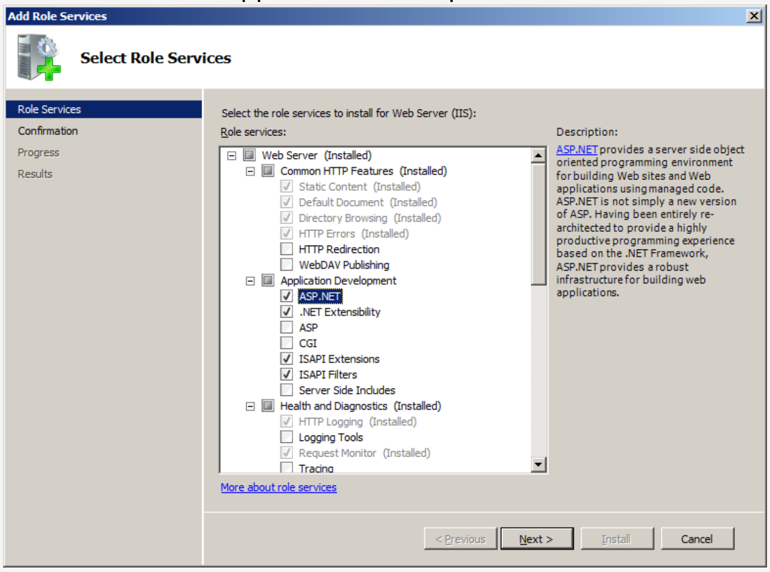
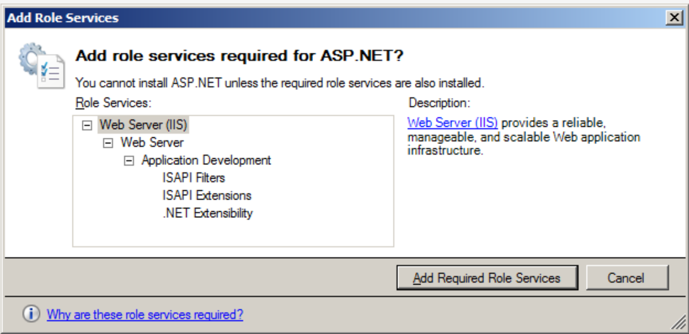
Click Add Required Features:



Check the "ASP.NET" under the Application Development below Web Server:



Add Required Role Services:



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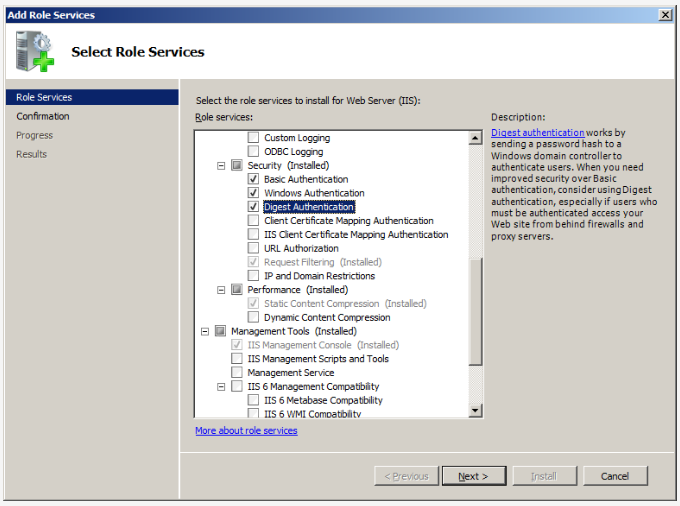
Activate the authentication models in Web Server (IIS):



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Client - Requirements

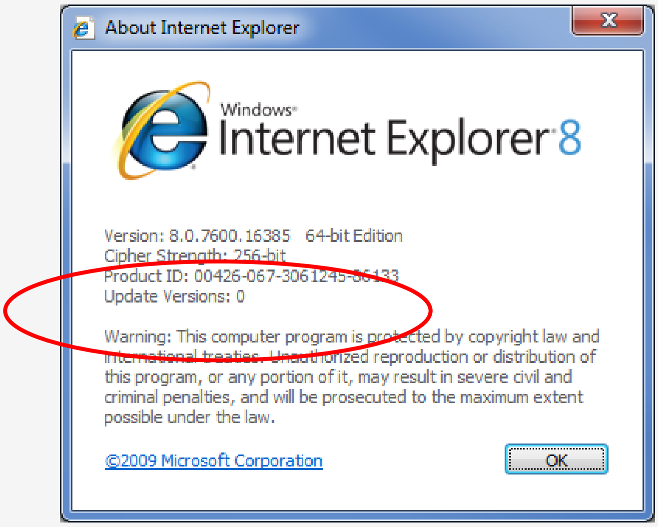
Browsers

Business Analyze have been tested on the following browser versions:

- Google Chrome 8.0 (Recommended!)
- Mozilla Firefox 3.6
- Microsoft Internet Explorer 8.0 / 9.0
- Opera 10.x/11.x
- Safari 5.0

If you are using Microsoft Internet Explorer we recommend using Windows Update (http://windowsupdate.microsoft.com) to update your system to the latest version. Internet Explorer 6.0/7.0 is not supported any more.

HOW TO	On the client: Start Microsoft Internet Explorer. Go to *Help -> About Internet Explorer*. See the dialog that appears:



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Database – Microsoft SQL Server

The Business Analyze Framework database requires *Microsoft SQL Server 2005 or later*. The *Microsoft SQL Server 2005* instance you install onto must be running in *Mixed mode, Windows and SQL Server authentication* mode. During the installation of the Business Analyze a separate login may be created. This login is used by the application to access the system database.

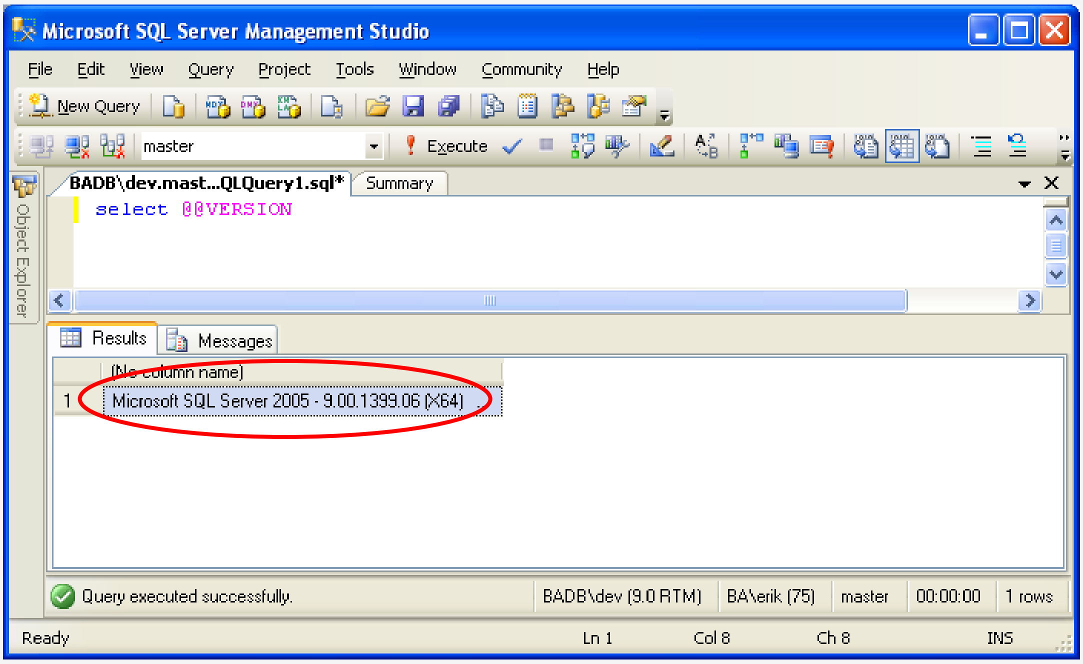
NOTE	The Business Analyze will not run on a *Microsoft SQL Server instance* running in *Windows authentication* only mode.

TIP	Before running the Business Analyze installation make sure you have the username and password of the System Administrator user (SA user), or a user with similar administrative rights on your *Microsoft SQL Server instance.* You will be asked to provide credentials during the installation.

It is always a good idea to update your database software with the latest available patches or service packs. They can be downloaded from Microsoft at http://msdn.microsoft.com/sql/

HOW TO

Connect to the database server with a SQL client tool and execute the command below:



Business Analyze setup will create all databases and logins needed for the application to run.

When you configure logins in Data Central you should be aware of problems regarding “Default login language”.

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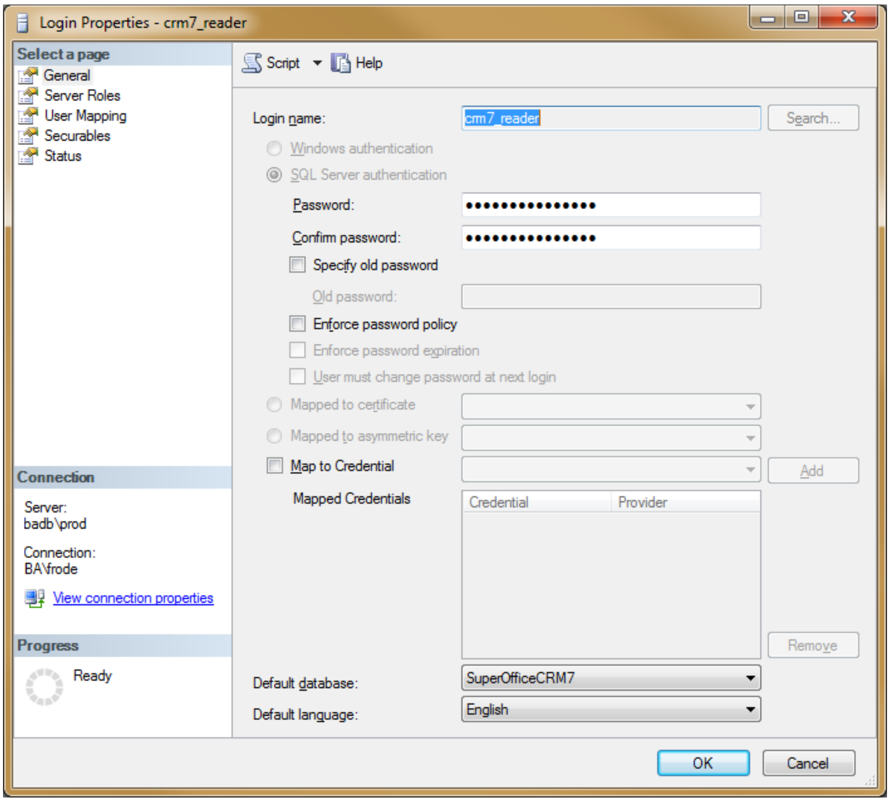
Login should have “Default language” set to English to prevent errors in querying the database. This is because Data Central uses in some scenario date functions in the database.

Example for Ms SQL Server 2008 – login properties:

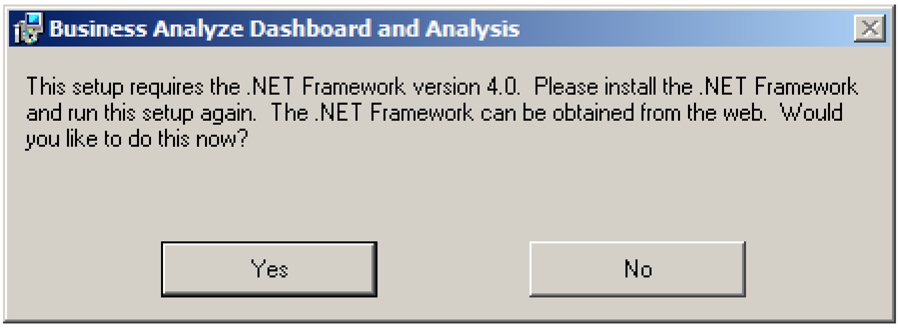


Common preparation for all operating system – Ms Net Framework

The Business Analyze application is based on the Microsoft.NET Framework 4.0.

Setup will check if this is installed in the server computer. If not, you can download it from here http://go.microsoft.com/fwlink/?LinkID=186913 .

If you have not installed the .Net 4.0 framework this dialog will appear when you start the setup.



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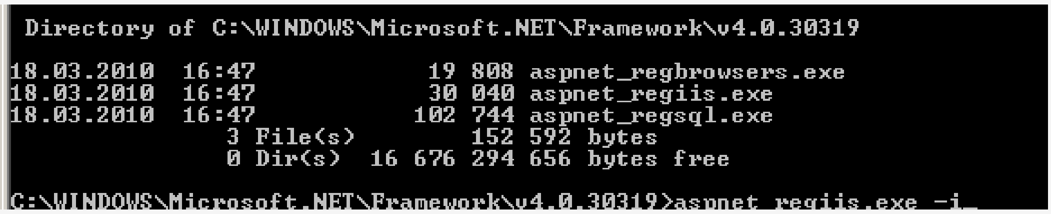
If you installed the .Net framework before you installed the Internet Information Services then you need to activate the ASP.NET.

HOW TO	Click Start -> Run -> cmd.exe -> cd "C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319" -> aspnet_regiis.exe -i



```
 Directory of C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319

18.03.2010  16:47            19 808 aspnet_regbrowsers.exe
18.03.2010  16:47            30 040 aspnet_regiis.exe
18.03.2010  16:47           102 744 aspnet_regsql.exe
               3 File(s)        152 592 bytes
               0 Dir(s)  16 676 294 656 bytes free

C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319>aspnet_regiis.exe -i_
```

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Quick Checklist before installation

Check list

Gather information required for the installation:

License files	• Component licenses (Business Analyze Framework and Business Analyze Analysis are required for licensed editions) • Optional: .lic file for licensed editions. This is for older version 3.x packages using the Reports module.
Logins	Logins to the database(s) with full administrative rights. The setup procedure needs to create databases, logins, tables, other objects. If any of the required privileges are absent the installation will be corrupted, incomplete and is likely to fail.
Connection data for external data bases (CRM or ERP)	• Server name/IP address • Name of instance • Name of database • Login with admin-rights / password • Schema/object owner • SQL Server version • OS version • Does the server comply with hardware requirements for Business Analyze?
Connection data for Business Analyze database	• Server name/IP address • Name of instance • Name of database • Login with admin-rights / password • Schema/object owner • SQL Server version • OS version • Does the server comply with hardware requirements for Business Analyze?
Web-server	• Windows login with administrator rights • Server name/IP address • OS version

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	• Is any other production software installed on the server – which? • Is Microsoft Sharepoint installed in same server? Check issue with support. • Has the server been rebooted since last patches from Microsoft? • Does the server have any other roles or is it a dedicated web-server? • Does the server comply with hardware requirements for Business Analyze?
Security policy	• Single sign-on is recommended.

Installing the software

Requirements for running the setup wizard

The following services must be installed, configured and running on the server before the setup can function:

- Coordinated transaction service
- World Wide Web Publishing service
- Remote Procedure Call (RPC)
- Security Accounts Manager

It is of vital importance, that the security context that these services run under, are set up correctly according to the security policy of the system. If these settings deviate from the default settings it may cause the web-server to fail and/or behave in a strange manner and Business Analyze may not work and/or be possible to install.

The windows user that you use for running the setup should be a local administrator or a domain administrator.

Please verify that this is OK before proceeding.

Upgrade scenario

When upgrading from v 3.x or later you should first make a backup (copy), then you can uninstall and start a new installation.

When upgrading from a version prior to 2.6 you will need assistance from a Business Analyze certified consultant.

If you're going to upgrade you must install to the same path as the earlier version was installed to else you need to move the files that is left back when uninstalled.

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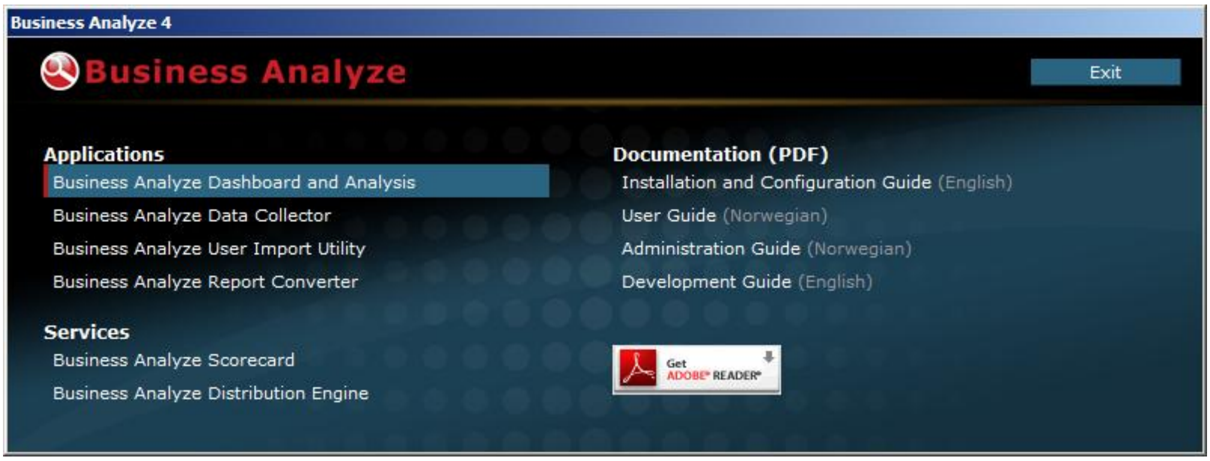
Setup step through - Inserting the CD/start screen

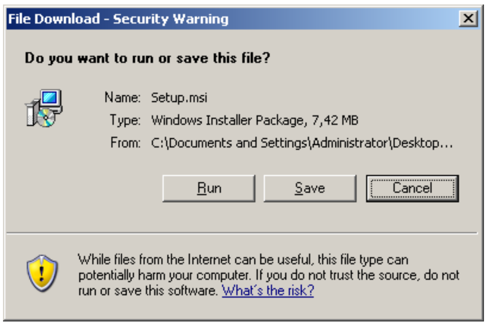
When you insert the Business Analyze CD a splash screen should automatically open. On some systems the auto play feature may be turned off. If it does not open automatically, open Windows Explorer and double-click the file *setup_x86.hta* from the root of the installation CD.



Click “Business Analyze Dashboard and Analysis” to start installing the Business Analyze application. Before starting the installation, ensure that your Windows user context have sufficient permissions to install software on the target system.

Installation warnings

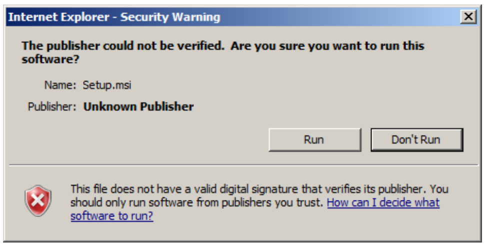
When you start the installation a popup dialog in Internet Explorer may occur. This is a warning that you are starting active content from within Internet Explorer.



The reason is that the start screen is implemented as a HTML application.

You will get the question if you want to run or save the file.

→ Select “Run” to start the installation.



You may also get a warning saying that the publisher of the software is unknown.

→ Select “Run”.

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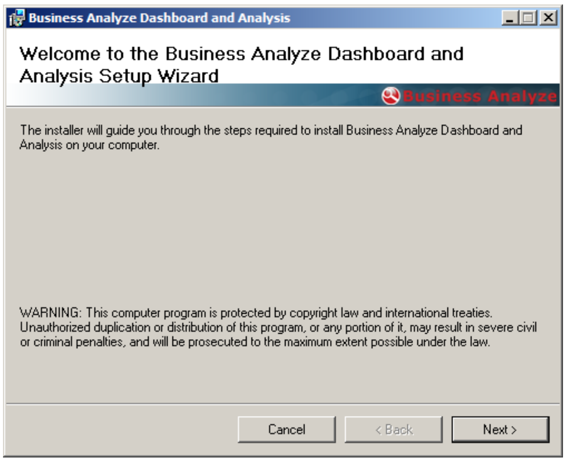
First page in the installation process

The first page you see in the installation is a standard welcome page.

→ Press “Next”.

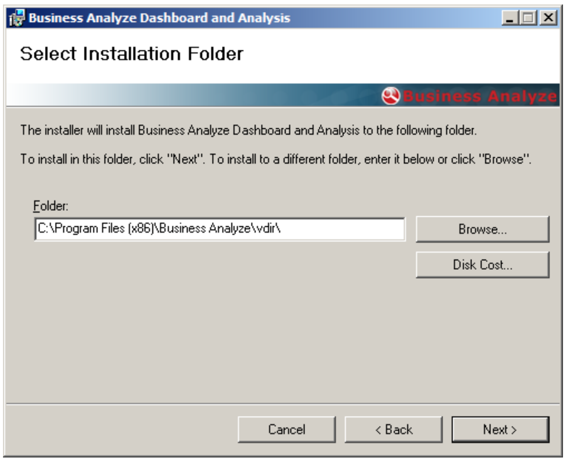


Select installation folder

Enter the path to the folder where you want the Business Analyze application to be installed, or click the *Browse* button to select the folder of your choice.

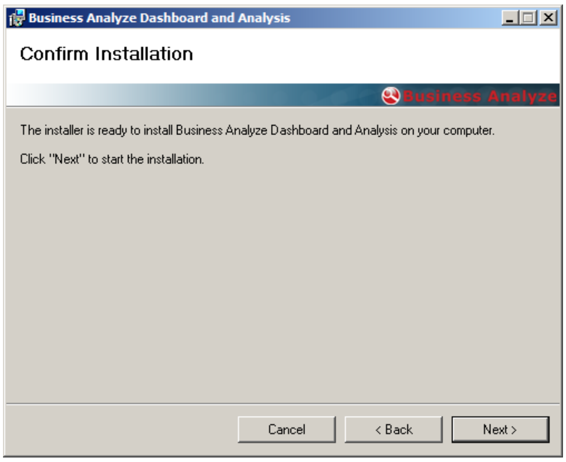
→ Click *Next* to continue.

The Business Analyze application files will now be copied to the selected directory.



Confirm the installation

→ Click “Next”.



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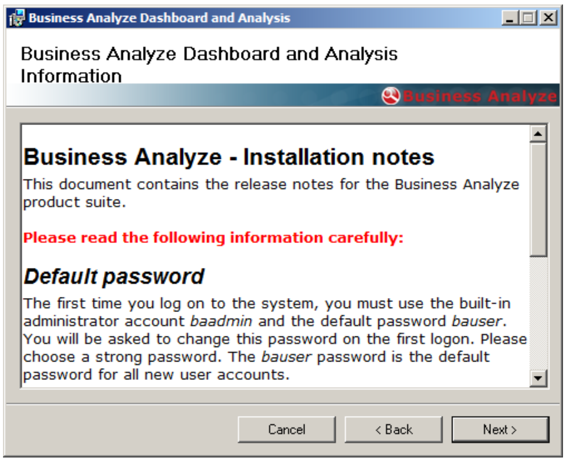
Read the installation notes

Before you go on, carefully read the latest installation notes. This document contains important information that you must understand in order to have a successful installation experience.

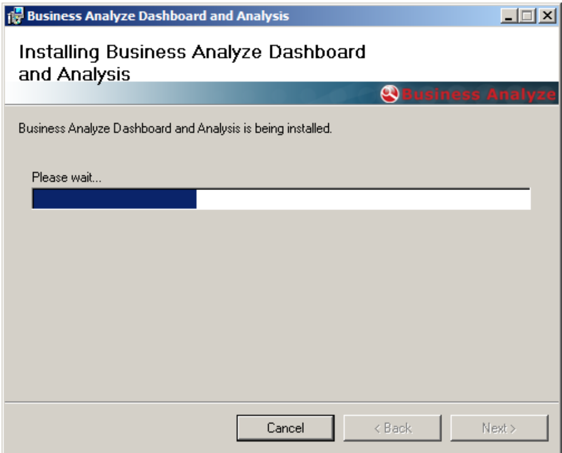
→ Click “Next” when you have read the installation notes.



Running the installation

Wait while the setup program installs the application.

This may take a few minutes.

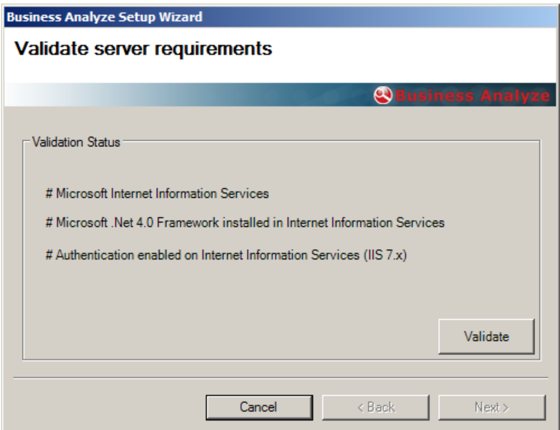


Server Validation

Before going on with configuration the application we need to validate that the server is correct installed.

We validate if the Application Server is ok. Web Server (IIS) is installed. .Net Framework installed and activated in Web Server.

On IIS 7.0 we also validate if authentication is activated.



→ Click “Validate” and follow the guidelines. If all is ok Click “Next”.
If validation failed then you can check if all is installed correct according to the prerequisites section and add missed components. Click on “Validate” again.

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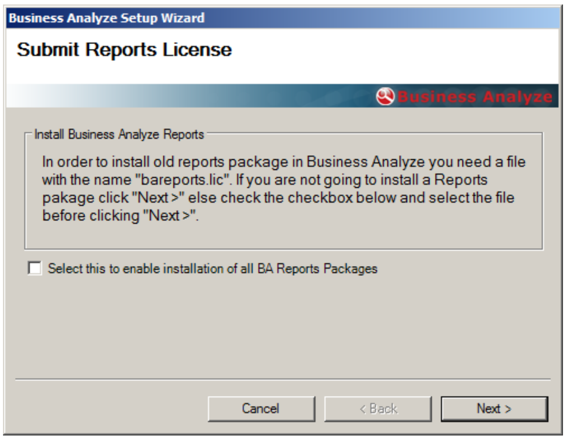
Installing old reports packages (Reports)

If you want to install an old reports package, you must provide a license file by check the checkbox and clicking on the “Browse”-button and select the file. In most cases, the name of the license file ends with *.lic*. When the file is selected;



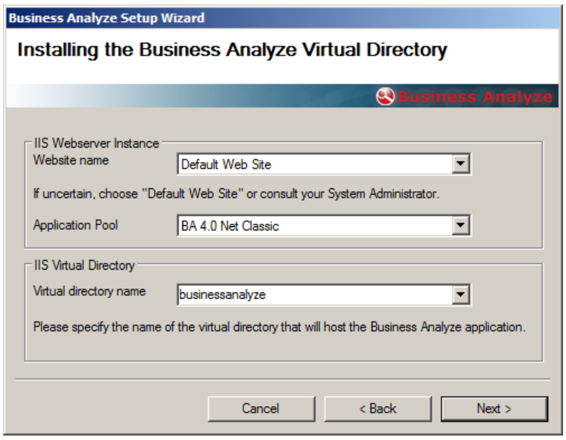
→ Click *continue*.

If you do not want to provide a license file for this installation, press *“Next”.*

Packages based on the new Analysis platform do not use this option. This is only for compatibility with older version of Business Analyze.

Setting virtual directory

Select a website and a virtual directory. This is the address to the Business Analyze application.



The list *IIS Web server Instance* contains the existing websites on your server.

→ Choose the preferred website.

You can also select which application pool you want the virtual server to be created in. Default Business Analyze creates its own application pool during the setup.

→ Choose the preferred Application Pool.

The list *IIS Virtual Directory* contains the existing virtual directories on the server instance you selected previously. Select one of the existing virtual directories to re-use it for this installation.

If you wish to create a new virtual directory for this installation, type the desired name.

→ Choose or create the virtual directory

→ Click Next.

TIP	If you set the virtual directory name to *businessanalyze*, the URL used when accessing the Business Analyze application will be: *http://<specified website>/businessanalyze*

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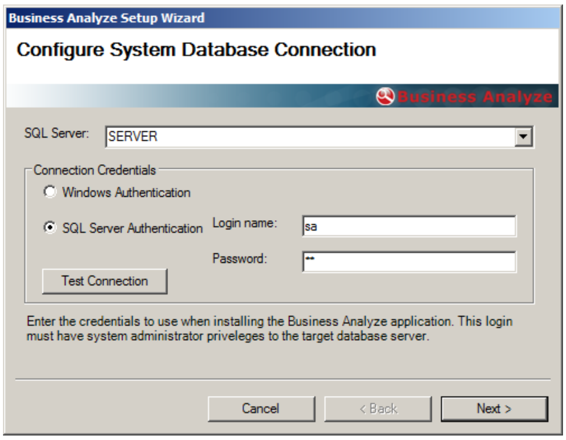
Connect to the database server

This dialog sets up a connection to the server that will be hosting the Business Analyze database. This must be a Microsoft SQL Server. See own section which describes the requirements for SQL Server.



Expand the *SQL Server* list to see the existing servers on your local network. If the server you desire isn't in the list, simply type the name or IP-address.

→ Select or type the server name

Select Authentication method, and provide credentials if required.

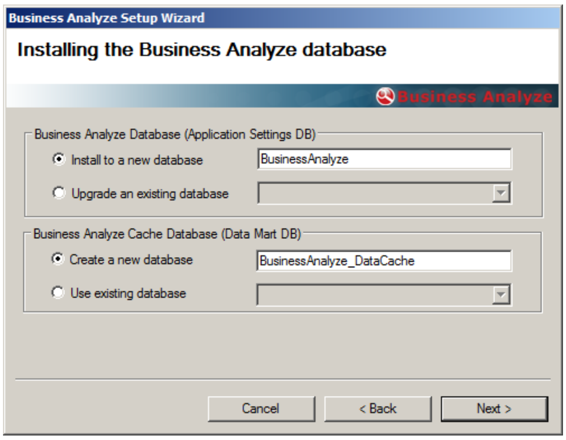
Click "Next".

TIP	Verify that the connection works by clicking the *Test Connection* button.

Installing the Business Analyze system database and cache database

The database you specify in this dialog will be the system database for the Business Analyze application.

If this is a **new installation** select "Install to a new database".



→ Type the desired name for the system database.

→ Type the desired name for the cache database.

→ Click "Next"

The system database will be created and populated with initial values.

If you want to **upgrade an existing** database, select "*Upgrade an existing database*". Select the existing Business Analyze system database from the dropdown list.

You can also select an existing database to use for cache.

Click "Next" and the Business Analyze database and tables will be upgraded to the latest version. ***Please be patient, database installation may take several minutes.***

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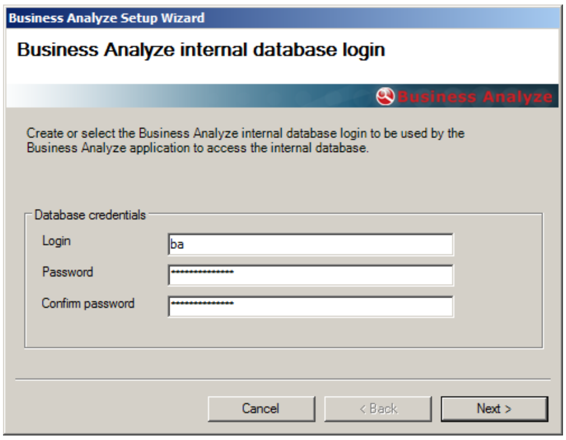
Database login

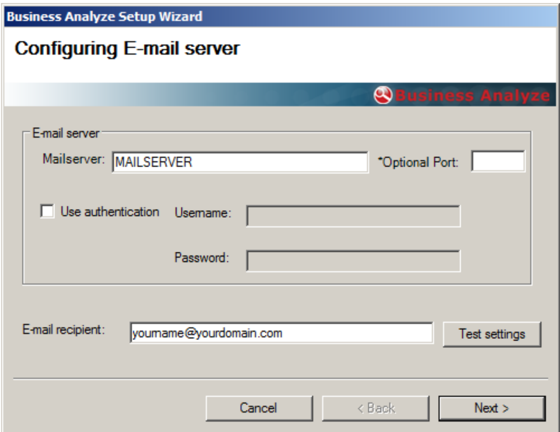


The Business Analyze application needs to connect to the database you just installed. A SQL Server login will be needed for this purpose, you can use an existing database login, or create a new. This login will be used by the Business Analyze application when reading, writing or updating data in its internal system database and cache database.

To **use an existing** login, select the login name from the Username dropdown list, and type the password for this login in the Password field. Click *"Next"* to check the credentials and use this login.

To **create a new** login, enter the username in the *Username* field, enter the desired password in the *Password* field. Confirm the password by entering it again in the *Confirm password* field. Click *Continue* and the database login will be created on your database server.

E-mail server settings



This dialog allows the user to specify connection settings used by the Business Analyze system for sending e-mails.

→ Enter the host name or IP address to your mail server.

→ If your mail server requires you to connect to a specific port, enter it in the "Optional Port" field.

If your mail server requires authentication, check the "*Use authentication"* checkbox and enter the credentials.
→ Click *Continue*.

TIP	To test the e-mail configuration, type a valid e-mail address in the *E-mail* recipient field, and click *Test connection*.

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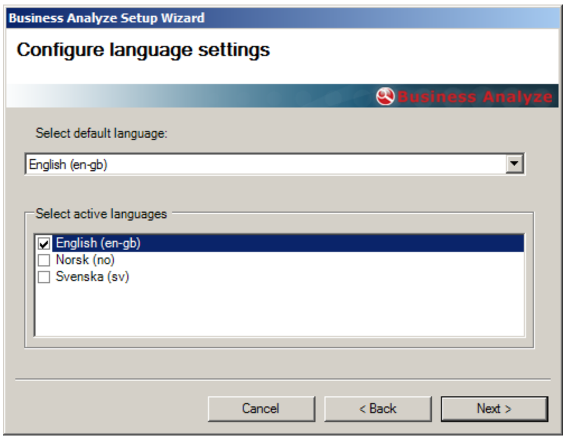
Language settings

This dialog enables you to configure the language settings.

→ Select the default language for the user interface in the top box.

→ Select the active languages for this installation in the *Select active languages* list.

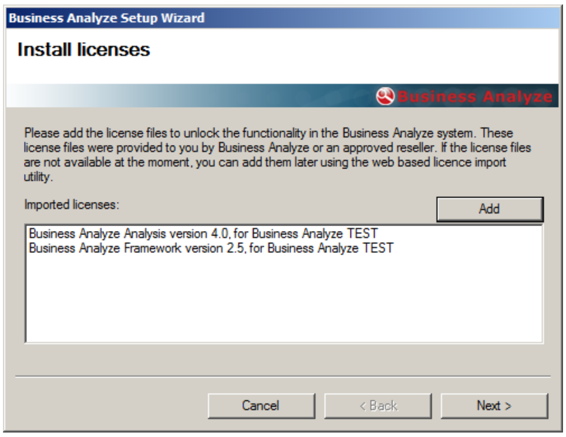
→ Click *Next*



Licenses

→ Click the Add button and select your license files.

→ Click *Next*

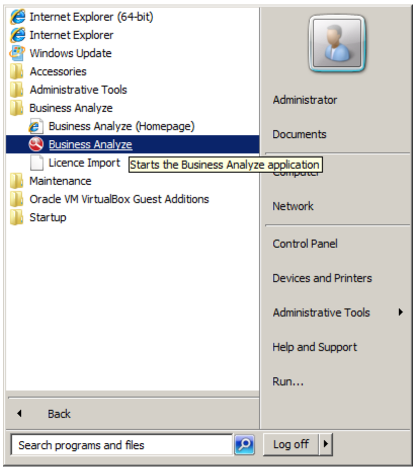


Installing the files

A dialog will show the installation process.

Installation finished!

Access the application from the Start Menu -> Business Analyze -> Business Analyze ☺



Optional – Old Report Packages Configuration

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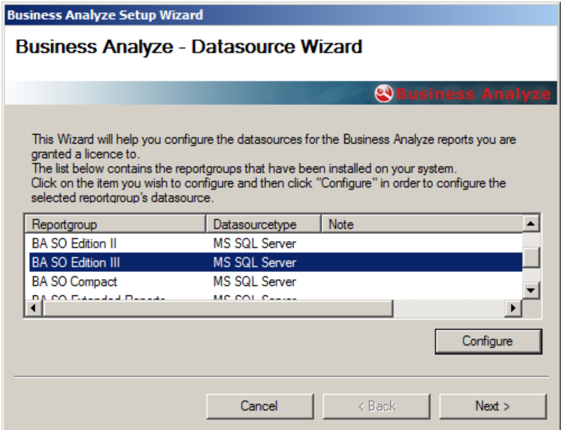
Data source for the licensed editions

→ Select an edition (report group)

→ Click *Configure* to go to the data source dialog.



NOTE	If two or more report groups use the same data source, only create it once. Attempting to create duplicate data sources will cause an exception.

→ Select or enter the SQL Server containing the database you want to connect to.

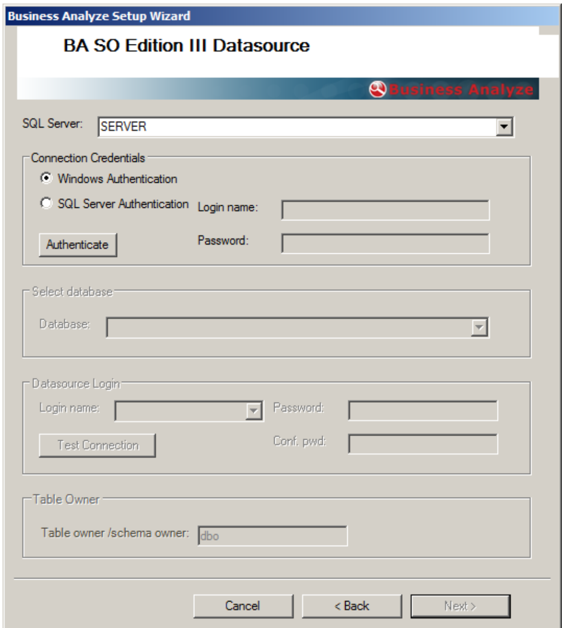
→ Choose an authentication method and enter credentials if required.

→ Select the source database from the list.

→ Enter the credentials that Business Analyze will use when connecting to this data source.

If the login exists it will be used. Otherwise it will be created.

Note! Remember that Sql Server 2005/2008 and newer usually have certain requirements for the password used when creating new logins.



For Sql Server 2005:

1) The password does not contain all or part of the account name of the user. Part of an account name is defined as three or more consecutive alphanumeric characters delimited on both ends by white space such as space, tab, and return, or any of the following characters: comma (,), period (.), hyphen (-), underscore (_), or number sign (#).

2) The password is at least eight characters long.

3) The password contains characters from three of the following four categories:

* Latin uppercase letters (A through Z)

* Latin lowercase letters (a through z)

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* Base 10 digits (0 through 9)

* Non-alphanumeric characters such as: exclamation point (!), dollar sign ($), number sign (#), or percent (%).

Complete article:

http://msdn.microsoft.com/en-us/library/ms161959.aspx

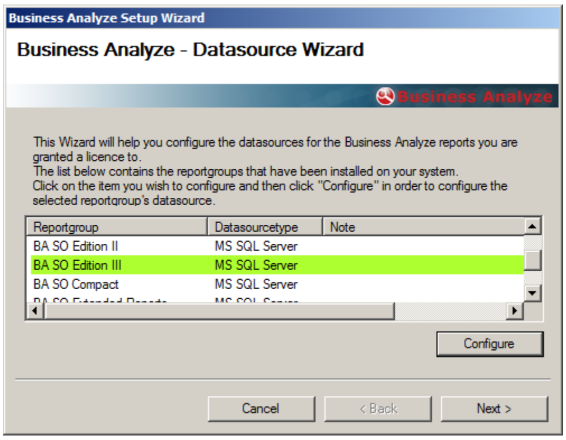
TIP	Test the data source by clicking the *Test Connection* button. This will only work for logins that already exist on the server.

→ Click *Next*

This will bring you back to the previous dialog.

Once the data source is configured the row is marked with a green background color.

→ Click *Next*



Now you need to add platform licenses. Go to licence section for more information.

SuperOffice Edition and ERP Edition requires licenses for **Business Analyze Reports** and **Business Analyze Framework**

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Importing licenses

To import licenses manually, click *Start* -> *Business Analyze* -> *Import License.* This will start the Business Analyze License Import Utility.

Alternatively, type the following address in Internet Explorer:

http://localhost/<virtualdir>/licimport.aspx

Where <*virtualdir*> is the name you gave the Business Analyze virtual directory during the installation.

Use *baadmin* as username and *bauser* as password when logging on the first time. On the first login, you must set a new password. Choose a strong password for the baadmin (Business Analyze Administrator) account.

Two steps are performed for each of the component licenses shipped with the product:

1) Select a license file.
Click the *Browse* button and browse to find the Business Analyze license file that was shipped with your product or received by e-mail. Each of the license files contains a two-letter prefix which identifies the module it belongs to. In order to make your solution run you will have to minimum import the Framework license file prefixed with *fw_*.

Click *Upload* to upload the license file to the server.

2) Confirmation.
When the license import utility has successfully updated the Business Analyze database with the uploaded license data, a confirmation screen will appear on the screen. This screen shows information about the license, including the name of the licensed component, name of the license holder, and license version. Click *Import License* to import the more licenses.

NOTE	You need a license for every Business Analyze component you wish to use.

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Assigning licenses to users

When you have registered your users, one of the administrative tasks to do is to assign component licenses to the users. This way you can control who gets access to the different components.

Start the Business Analyze application: Click *Start -> All Programs -> Business Analyze -> Business Analyze.*

Log on with an administrator account (*baadmin* is the built-in administrator account).

Once logged on, click the icon in the top-right corner of the screen – this will take you to the System Administration module.

On the left side of the screen is the System Administration Menu.

Click *Licenses* and *Component*. From this window you can control which users have access to a component. Select the component you wish to administrate licenses for and click *Get licensees.*

Two lists will appear: one containing *Users* and one containing *Licensees*. *A licensee is* a user that is assigned a license to the chosen component. Assign a new license to a user by selecting the user from the *Users* list, then click the -> button to move it to the *Licensees* list, and click *Register*. You can assign multiple users at the same time.

Repeat the steps mentioned above for each of the Business Analyze components/modules.

NOTE	All users must at least be granted a license to the Business Analyze Framework module. Before you can assign license to a user, a user must be created.

The Business Analyze User Import utility

The Business Analyze User Import utility allows the user to import users from a third-party application into the Business Analyze database. The utility supports two modes, *SuperOffice* and *Advanced*. The first, *SuperOffice,* allows the user to import users from SuperOffice, and the second, *Advanced*, allows the user to import users using a view or a table that resides in the Business Analyze database.

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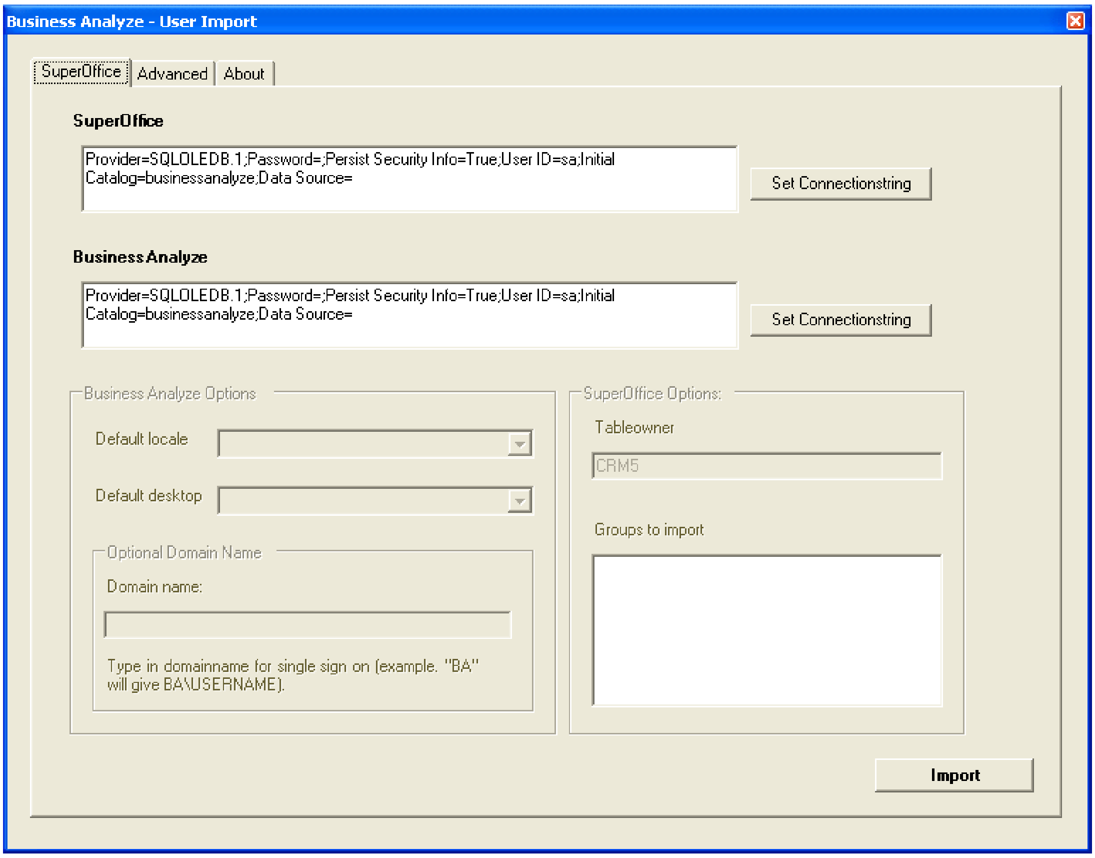
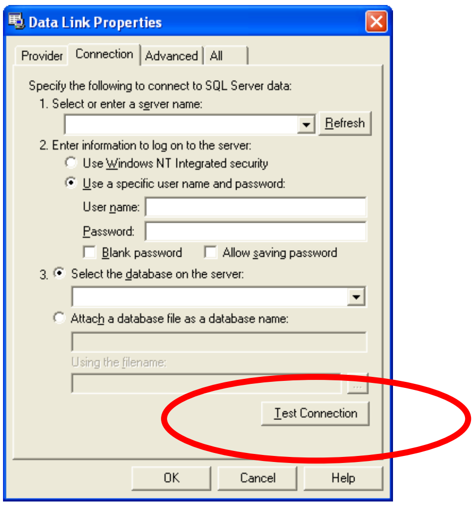
Import type – SuperOffice



In order to make the *SuperOffice* import type operate, you will have to set up a database connection to the SuperOffice database and the Business Analyze database.

1. Click the *Set Connectionstring* button next to the *SuperOffice* text field. (The text field displays a prototype of the connection string being used when connecting to the data source.) This will display the Data Link Properties dialog which allows you to specify the type of data you wish to connect to. Select *Microsoft Ole DB Provider for SQL Server* If you are connecting to a Microsoft SQL Server 2000 database server or *SQL Native Client* if you are connecting to a Microsoft SQL Server 2005 database server.



On the second page of the *Data Link Properties* dialog, select the name or IP-address of the server you wish to connect to – that being the one hosting the SuperOffice database.

NOTE: If you choose the *Use a specific user name and password* authentication option, **make sure the *Allow saving password* checkbox is checked**.

Select the SuperOffice database, click *Test Connection* to verify that you are able to connect to the specified datasource and then click *OK*.

If the group doesn't exist, you will be prompted if you want the group to be created.

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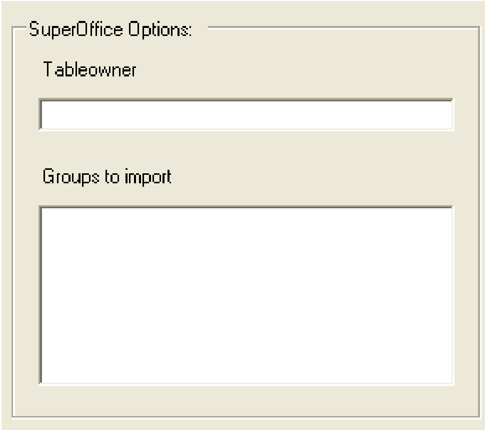
If you run out of licenses during the import, some users will not be granted necessary licenses and you will have to perform this task manually later.



2. Click the *Set Connectionstring* button next to the Business Analyze textfield in order to configure the connection being used when connecting to the Business Analyze database. Repeat the steps described earlier, but now select the server hosting the Business Analyze database and specify the credentials used to connect to this database. (This will be the Business Analyze login you created during the setup.)

3. Under the *Business Analyze Options* optionsgroup, select the desktop that will be assigned to the imported users and the locale that will be the default locale/language that will be set for all the imported users.

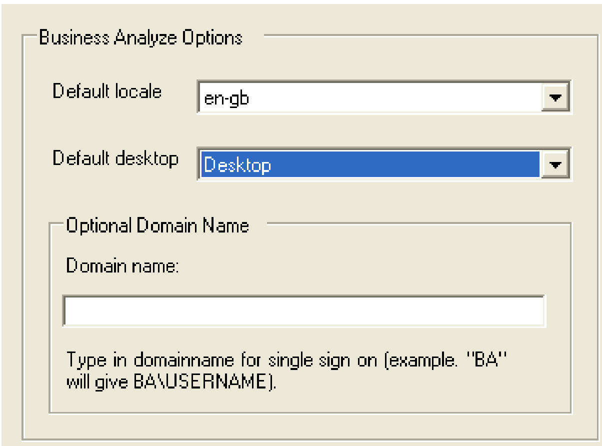
   Optional: If you are using Windows authentication the imported users' username will have to be prefixed with the domainname. Type in the name of your domain in the *Domain name* textfield.

4. In the *SuperOffice Options* optionsgroup, specify the *Tableowner* and the *Groups to import*.

   The *Tableowner* textfield is being automatically populated with the table-/objectowner for the specified SuperOffice database.

   The *Groups to import* list is populated with the SuperOffice groups. Choose which groups to import users from by selecting one or more groups.

5. Click *Import* in order to start the user import. During this session you will be asked if you want to create the groups that you have chosen to import in the Business Analyze database. We suggest you say *Yes* to this. Creating the similar groups in the Business Analyze database means that it is easier to recognized the function for each user.



6. When the import routine has finished, a summary will displayed with data for each user imported, the number of users imported etc. The same information will also be available in the System Log under the Business Analyze Administration and in a separate logfile. The logfile is

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located in the application's directory under the *Logs* folder and named with the current date and time, e.g.: 20060608_1333.log.

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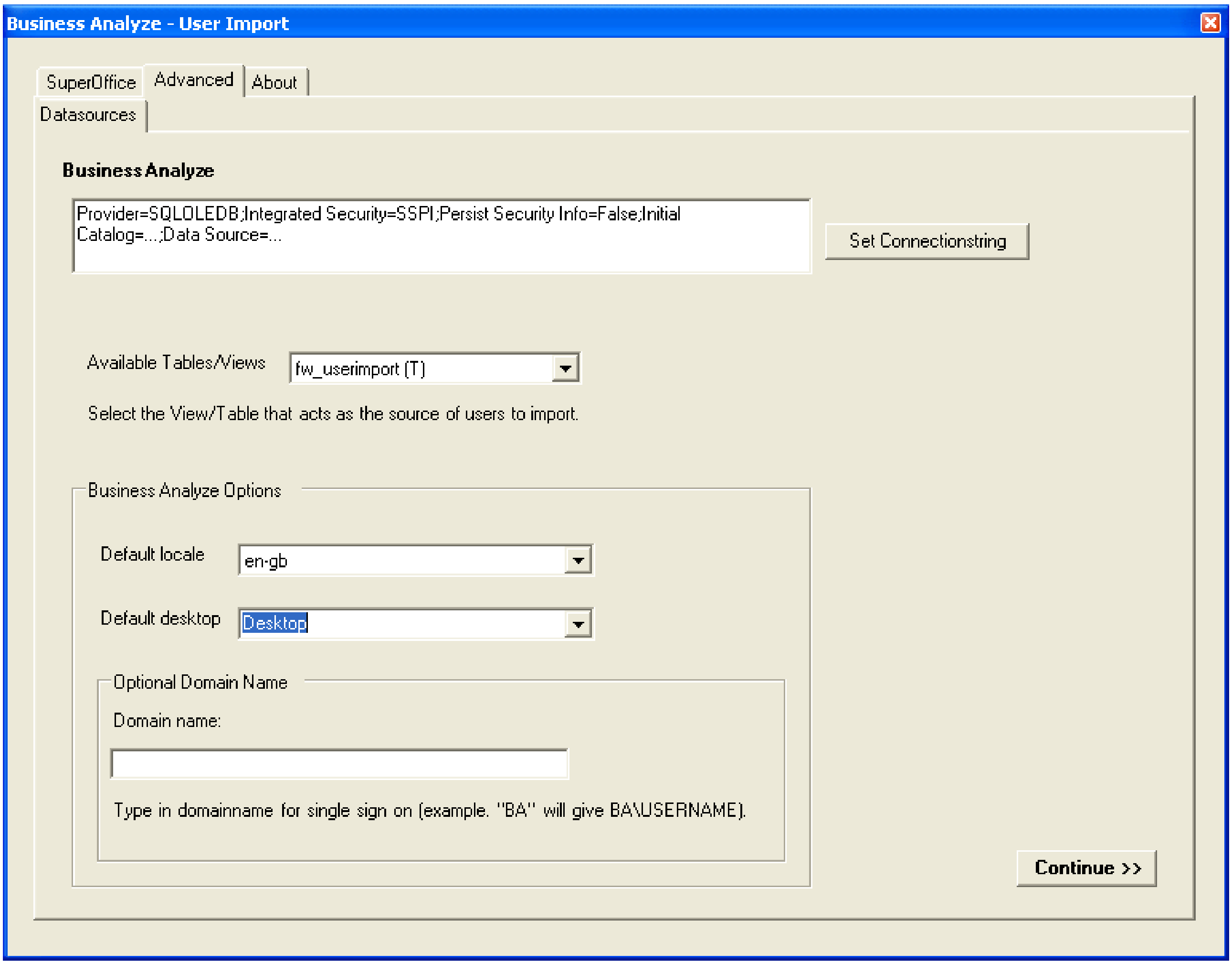
Importtype – Advanced



The *Advanced* import type allows the user to import users from a 3rd party application using a table or a view that resides in the Business Analyze database. If you choose to use the provided table *FW_USERIMPORT,* the table needs to be populated with values from the 3rd party application before running the Business Analyze User Import utility.

Note: When importing users using the *Advanced* import method, the data is verified against a schema based on the specifications on the following page. This is done to avoid corrupted data.

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For greater flexibility you may want to create a view instead based on the following specifications:

Column	Type	Description
id	PK, INT, NOT NULL	Primary Key column
username	NVARCHAR(80), NOT NULL	User-/login name for the user
fullname	NVARCHAR(255), NOT NULL	User's full name
email	NVARCHAR(255), NOT NULL	User's e-mail address
groupname	NVARCHAR(80), NOT NULL	Name of the user's primary group. If it does not exist in Business Analyze, you will be asked if you want it to be created during the import.
locale	NVARCHAR(10), NOT NULL	User's locale according to the installed locale in Business Analyze
orgunit	INT, NULL	The ID of the Organizational Unit the user should be related to. Only relevant if you plan to use your users with Business Analyze Scorecards.
ud1	NVARCHAR(255), NULL	Userdefined field 1, used to apply additional data.
ud2	NVARCHAR(255), NULL	Userdefined field 2, used to apply additional data.
ud3	NVARCHAR(255), NULL	Userdefined field 3, used to apply additional data.
active	INT, NOT NULL	Used to specify whether the user should be activated immediately or not. 1 = User is active 0 = User is inactive

1. Establish a connection to the Business Analyze database by clicking the *Set Connectionstring* button next to the *Business Analyze* textfield. This will display the *Data Link Properties* dialog. (See the Importtype – SuperOffice chapter on how to use this dialog.)

2. Once the connection is established, the *Available tables/views* list will be populated with available tables and views in the Business Analyze database. Choose the table/view you wish to import users from by selecting an element from the list.

3. In the *Business Analyze Options* options group, select the desktop that will serve as the default desktop for the users being imported and the default locale that will be set for each of the imported users.

   Optional: If you are using Windows authentication the imported users' username will have to be prefixed with the domain name. Type the name of your domain in the *Domain name* text field.

4. Click the *Continue >>* button to continue with the import. This will display and activate a new tab *Data* that will give you a preview of the data being imported.

   Note: Since this is a preview only some of the users to import will be displayed.

5. Click *Import* to import the users to the Business Analyze database.

6. When the import routine has finished, a summary will displayed with data for each user imported, the number of users imported etc. The same information will also be available in the System Log under the Business Analyze Administration and in a separate logfile. The logfile is located in the application's directory under the *Logs* folder and named with the current date and time, e.g.: 20060608_1333.log.

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Controlling Session Timeout

How to control session timeout is described in detail below.

Edit web.config

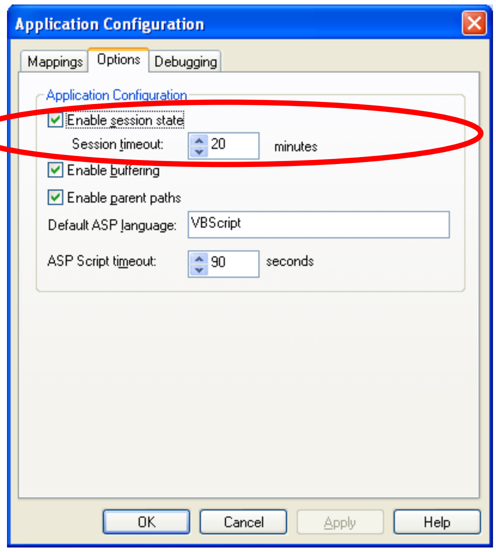
To select this method edit the required lines in the **web.config** as shown below:

Locate the line starting with **<sessionState ... timeout="20" ... />**

Change the timeout setting to best suit your needs. The unit for the setting is minutes of inactivity. The three dots on the same line represent other settings and are not relevant in this setting.

IIS Settings

The Budget, module included in SuperOffice Edition 3, is not affected by the settings in web.config. Alter the settings in the IIS management application to change its timeout. Go to Administrative tools -> Internet Information Services -> Right click the web-site or virtual directory and select Properties -> Click the Configuration button -> Select the Options tab.



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Selecting an IIS authentication method

Standard authentication (default)

This method is default when you install the product. The user must always enter his username and password in order to gain access. The session timeout setting controls the duration of inactivity before you need to reenter your username and password.

Edit web.config

To select this method edit the required lines in the **web.config** as shown below:

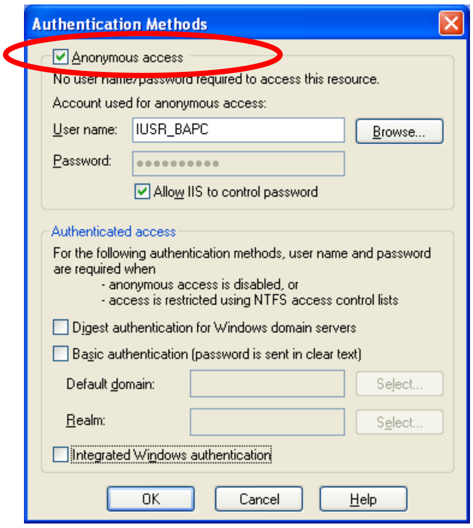
<add key="fw_singlesignon" value="false"/>

<authentication mode="Forms">

This file is case sensitive so it's important the settings are exactly as shown.

Edit IIS settings

Enable anonymous access as shown.



Windows authentication

It's important to realize that the user must be authenticated in a windows domain and have a corresponding user name in Business Analyze. Create your own user and grant yourself administrative privileges before enabling this authentication method.

Edit web.config

To select this method edit the required lines in the **web.config** as shown below:

<add key="fw_singlesignon" value="true"/>

<authentication mode="Windows">

This file is case-sensitive so it's important the settings are exactly as shown.

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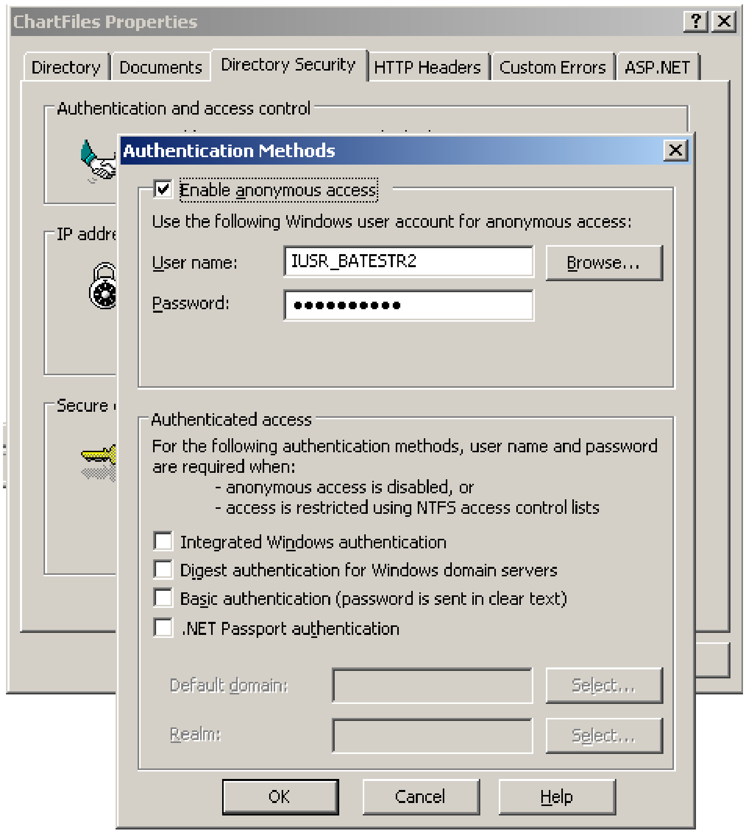
Access on Common and Chartfiles folders

If you experience problems with charts not being rendered correctly in your reports on the dashboard or in the distributions you are sending out, there are probably something wrong with the access rights on some folders in the virtual directory.

Please make sure anonymous access is enabled on the following directories in IIS:

/virtualpath/common

/virtualpath/chartfiles



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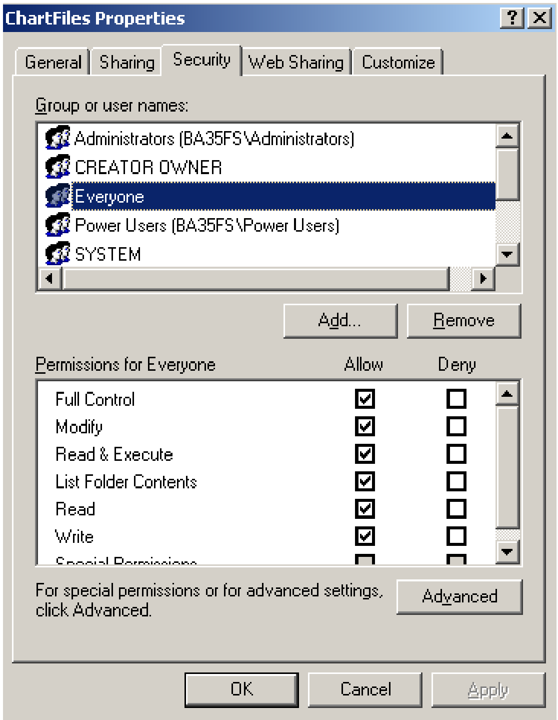
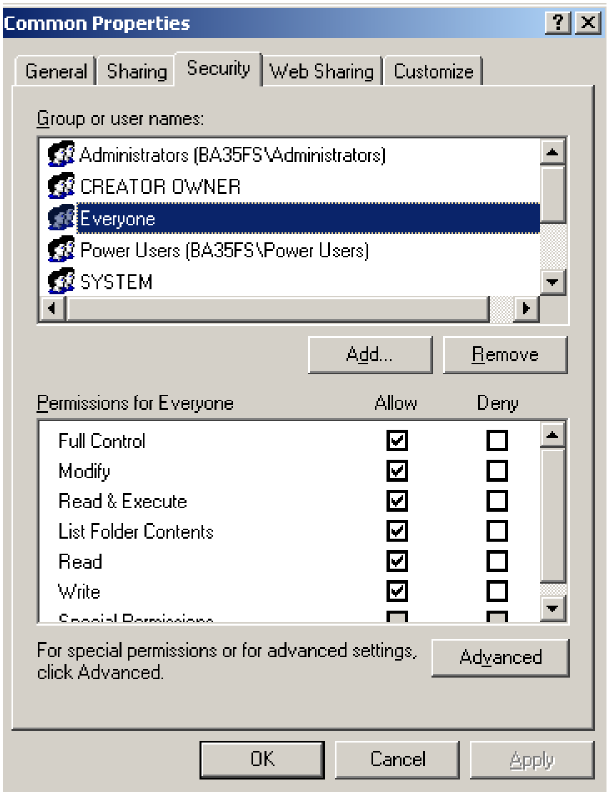
You should also check the NTFS file access too.

→Give full access for Everyone to the ChartFiles folder:



→Give full access for Everyone to the Common folder:



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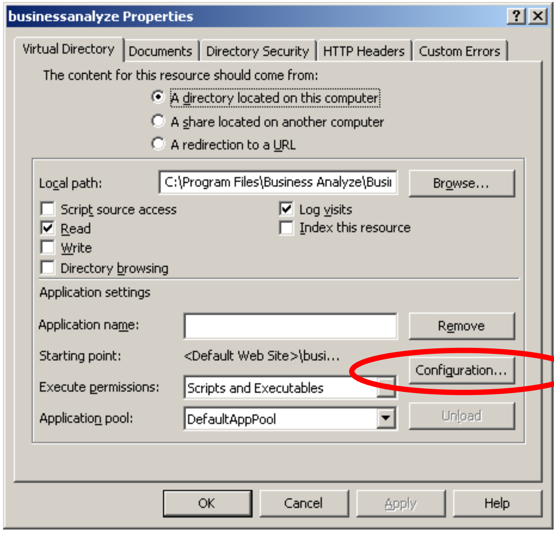
Set session timeout in IIS

You may also need to alter this setting in IIS. See below:

→ Go to IIS and navigate to the virtual directory for Business Analyze

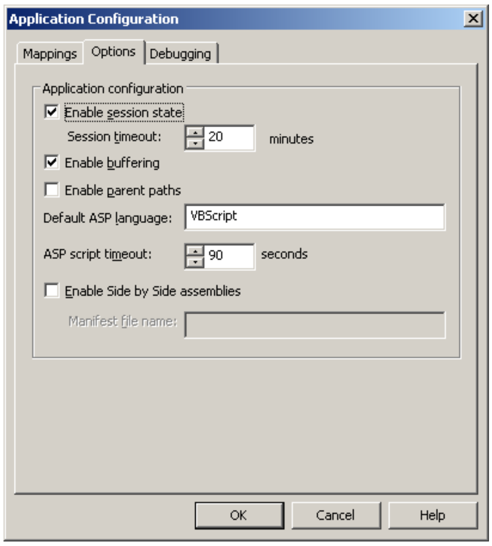
→ Right-click and select *Properties*

→ Click the *Configuration* button



→ Select the *Options* tab.

→ Enter the number of minutes you desire in the *Session Timeout* setting.



NOTE	If the web server is low on memory the situation will become worse if you increase this setting.

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Edit IIS settings

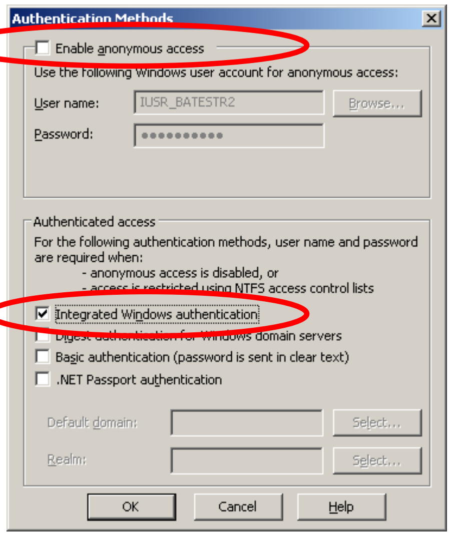
→ Go to IIS and navigate to the virtual directory for Business Analyze

→ Right click and select *Properties*

→ Select *Directory Security* tab

→ Click the *Edit* button under *Anonymous access* and directory control section

→ **Enable** Integrated Windows authentication and **disable** Anonymous access.



NOTE	When doing this, **do not apply** changes to the *common* and *charfiles* directories. They must still allow *anonymous access.* You should verify that they do before continuing.

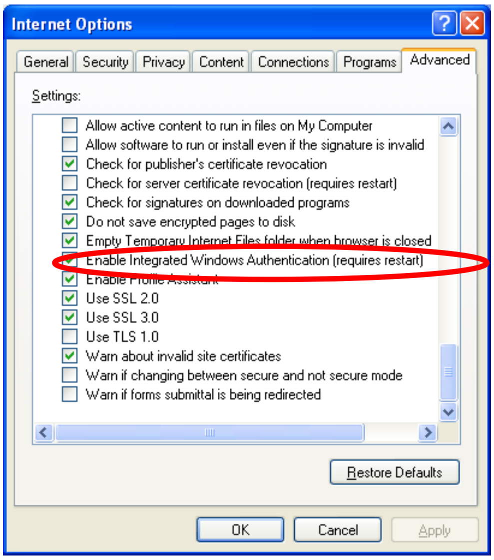
Edit Microsoft Internet Explorer settings

→ Go to the *Tools* menu and select *Internet Options*

→ Select the *Advanced Tab*

→ Check the *Enable Integrated Windows Authentication* option.

<u>Enabling this setting is required for windows authentication to work.</u>



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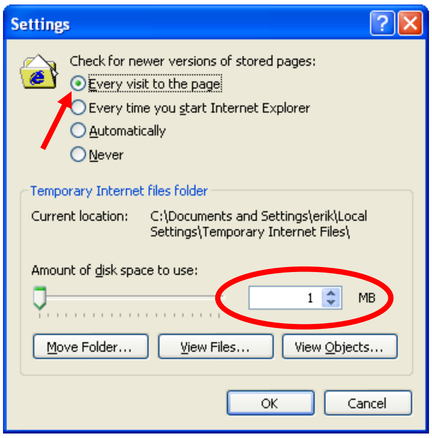
Recommended settings in Microsoft Internet Explorer

Turn off Caching

→ Go to the *Tools* menu -> *Internet Options*



→ Select the *General* Tab

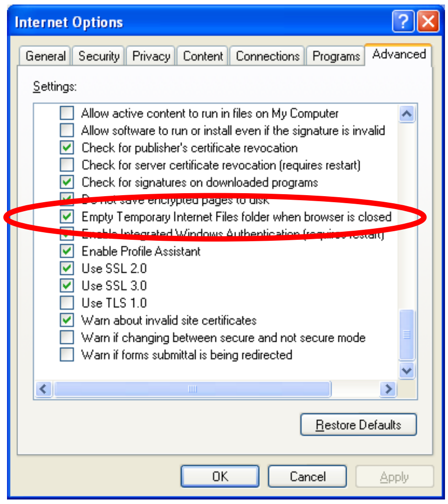
→ Press the *Settings* button (the dialog below is displayed)

These settings will prevent undesirable caching in the browser. These settings will also prevent the accumulation of files in your local file system.

For Microsoft Internet Explorer 7 the minimum amount of cache is 8 MB.

Delete temporary files on browser close

→ Go to the *Tools* menu -> *Internet Options*



→ Select the *Advanced* Tab

Enabling this setting will improve the performance of the local file system.

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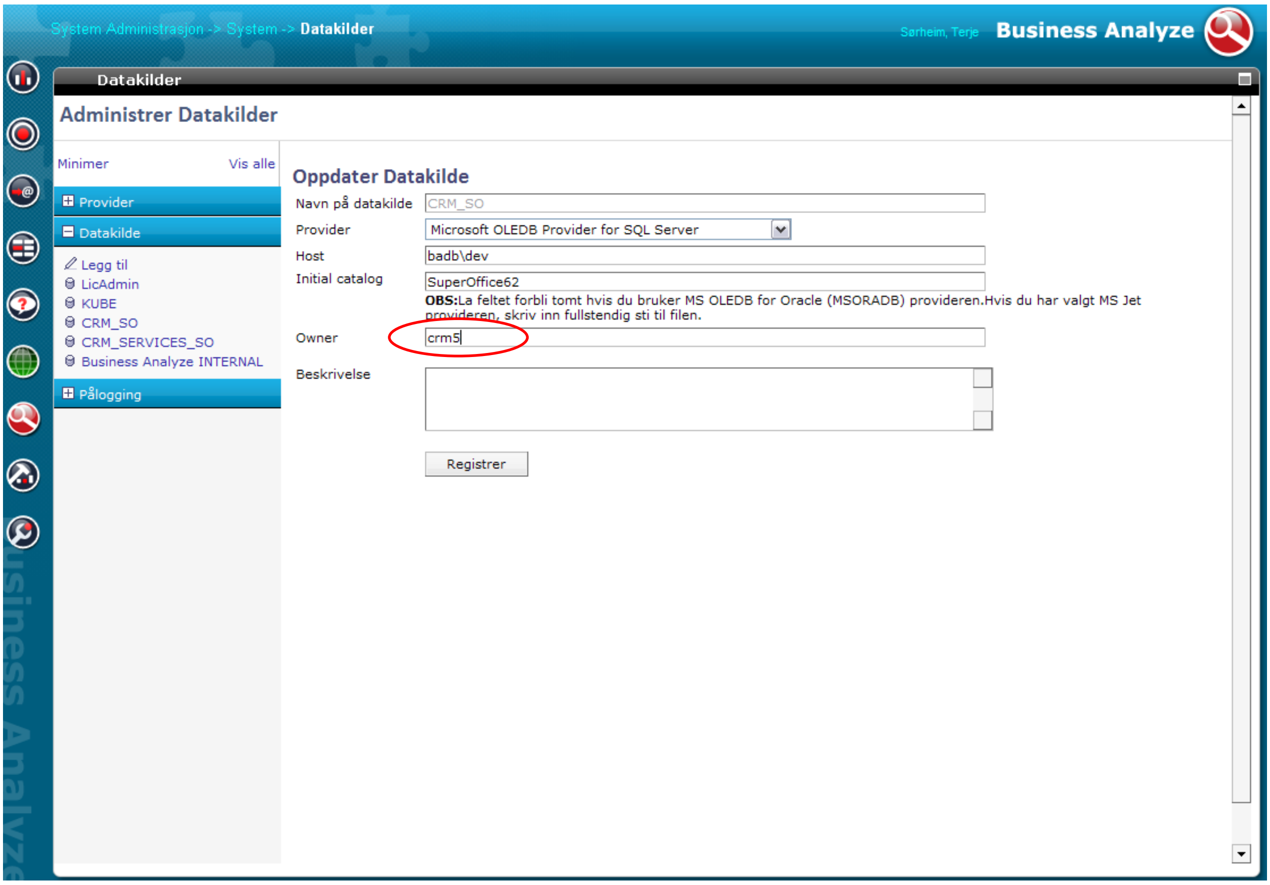
Business Analyze SuperOffice Edition

Verify the table owner property (for licensed editions)

When installing Business Analyze SuperOffice Edition, the tableowner in the SuperOffice database is usually “crm5”. If this is not your table owner, you may have to change it. On the System Administration menu navigate to System → Data Source. Select the desired data source and enter the proper owner.

NOTE	No reports or other components using the data source will function properly until this property is correct.



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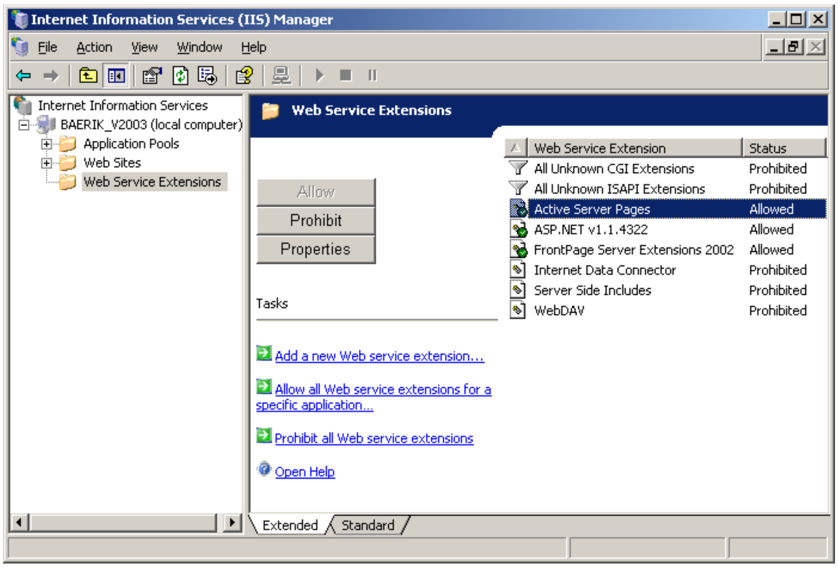
How to make the Business Analyze Budget module work on Windows 2003 Server (SuperOffice Edition)

1) Open up the Internet Information Services window (found under Administrative tools from the start menu, or by clicking *Start* -> *Run* and typing: *inetmgr*)

2) Select *Web Service Extensions* in the left menu.

3) Select *Active Server Pages* and click the Allow button.



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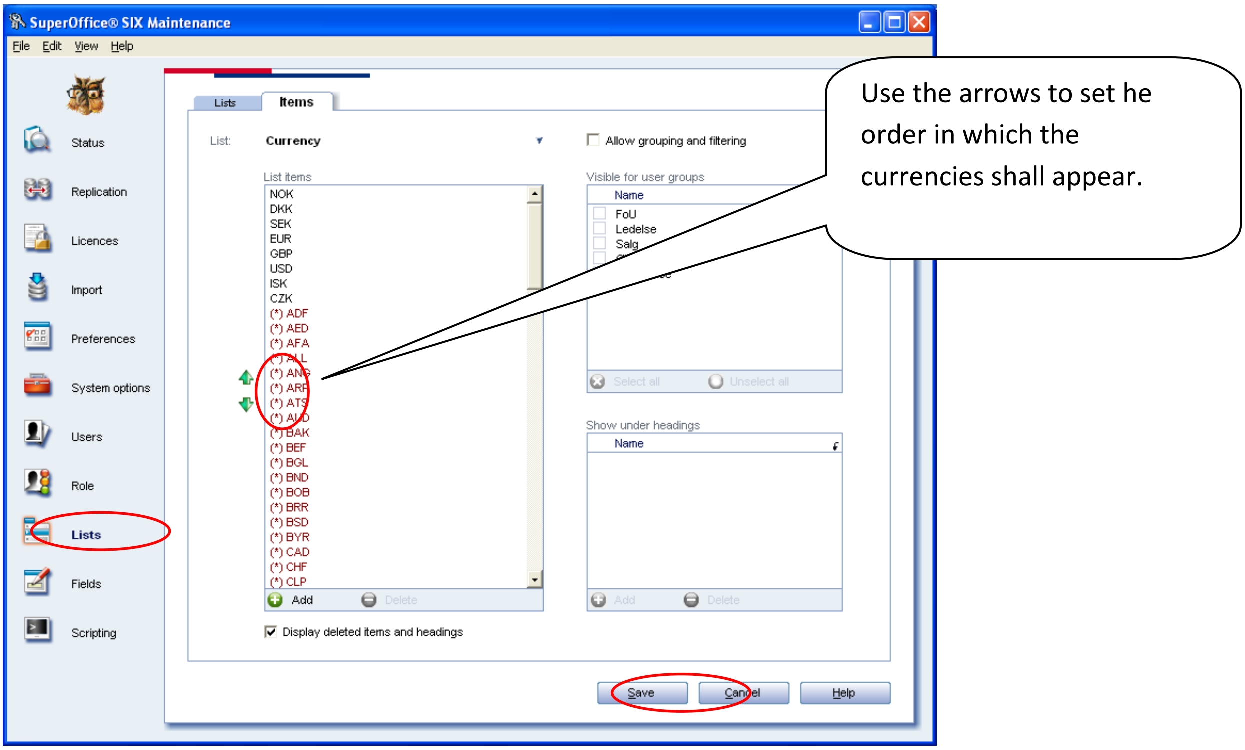
Currencies: what needs to be done in the SO admin client?

1. Disable any currencies that you won't be using
2. Set the preferred order in which you want them to appear
3. Verify that the rate and unit settings are correct for the active currencies

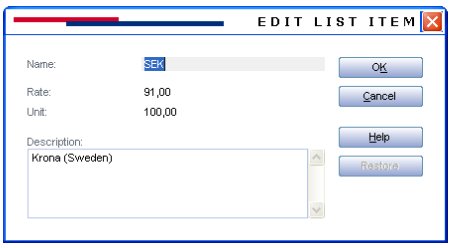
Setting the order and activating / deactivating the currencies

Start the SuperOffice admin client and press the Lists button and double currencies. It should look something like the screen shot below. Make the adjustments necessary and press the Save button.



Note: Please verify the rates of the currencies that are active are close to the actual rate of the currency.

Double-click each active currency to verify that the currencies have sensible settings for Rate and Unit. Example:



SQL Quick fix to deactivate rare currencies:

```
update crm5.currency

set deleted=1

where name not in ('NOK','SEK','DKK','USD','EUR','GBP')
```

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Business Analyze Internal Database Connection

During the installation a data source and login named *Business Analyze INTERNAL* was created in the Connection Manager (learn more on this from the Business Analyze User manual). The login and data source are used by Statistical reports in system administration and the Scorecard module.

If you want to move the Business Analyze system database to another server, change the name of the database, or alter login credentials, this data source and/or login must be updated.

NOTE	If the Business Analyze system database is moved or authentication is altered, you must update the connection string in *web.config* as well.

Uninstall

Uninstalling Business Analyze is a two-step procedure. The first step is automatic and the second step is manual.

Manual uninstall

The manual part of the uninstall procedure removes the IIS virtual directory, the Business Analyze database and (optionally) the database login.

Perform the steps in the following order:

1. The automatic part removes all the application and configuration files from the server. Use the Add/Remove Programs applet in the Microsoft Windows® Control Panel to remove the program automatically
2. Remove the virtual directory created under IIS
3. Delete the application files
4. Delete database and database login for the Business Analyze application.

Remove virtual directory

To remove the virtual directory created under IIS, do the following:

Start the Internet Information Server Management Console by clicking

Start -> Settings -> Control Panel ->Administrative Tools -> Internet Services Manager.

Browse to the correct virtual folder under *Default Web Site, Right-click* and choose *Delete*.

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Delete application files

NOTE: you only need to do this step if you did not perform the automatic uninstall procedure in section 4.1.

Click Start -> Settings -> Control Panel -> Add/Remove Programs

Browse through the list and locate Business Analyze click *Remove,* this will remove the application files from your computer.

Delete database and database login

In order to delete the Business Analyze database and database login, start Microsoft SQL Server Enterprise Manager (Microsoft SQL Server 2000) or Microsoft SQL Server Management Studio (Microsoft SQL Server 2005).

Choose the correct SQL server and browse to the Business Analyze database.

Right-click and choose *Delete* from the appearing menu, this will delete the database.

How to	To delete the database login, from the context-menu of the previously selected SQL server, click Security -> Logins. Right-click on the login you want to delete and choose Delete from the appearing menu. NOTE: only do this if you created a new login during installation of Business Analyze. If you delete a login that is used by other applications, it will cause the affected applications to fail.

Remove objects in the Business Analyze database

Visit Business Analyze Online Services to download a SQL script that will remove installed Business Analyze object from the database:
http://services.businessanalyze.com/baservices/repository/SQL/uninstall_BA_objects.txt

Remove objects in the SuperOffice database

Several objects are created in the SuperOffice database. Object types include tables, views, procedures and functions. However they can easily be identified by their names:

Objects installed with SuperOffice Editions are all prefixed with **ba_**

Objects installed with Input module are all prefixed with **ba_im**

Objects installed with KAM module are all prefixed with **ba_kam**

Removing objects in ERP database

Several objects are created in the database. Object types include tables, views, procedures and functions. However they can easily be identified by their names:

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Objects installed with ERP Edition are all prefixed with **BAERP_**

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Business Analyze Distribution Engine

General

The *Business Analyze Distribution Engine Service* must be installed on the same server as Business Analyze web application. Therefore technical requirements are the same. The Distribution Engine send out reports from the old Report module.

Configuration

The *BA.DistributionEngine.Service.Exe.config* file controls the behavior of the *Business Analyze Distribution Engine Service*. The settings in this file are read by the service when it starts. Any changes to the file will not be made effective until the service is restarted. The file is a regular XML file and may be edited with a simple text editor like notepad or any XML editor.

Once the service has been installed and configured it is ready to run. By default the service is set to be started manually. If you plan to use the features of the Business Analyze Distribution Engine module, configure the service to start automatically. This will start the service automatically if the server, for some reason, is rebooted.

To use Business Analyze Distribution Engine you need to do the following steps:

Single Sign On

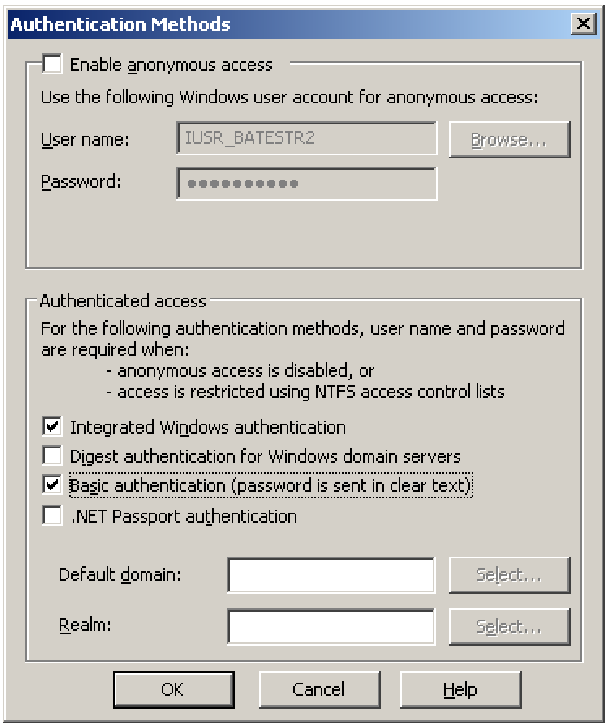
Set Business Analyze to run in Single Sign On mode (windows authentication). See *Windows authentication* (page 36).

IIS changes

In IIS you must turn on *Integrated Windows authentication* and *Basic Authentication.*

Important! Do not apply these settings to the *common* and *chart files* directories. They still need *anonymous access* enabled. Please verify that they do before continuing.

Basic Authentication should only be turned on for the **Reports** folder.



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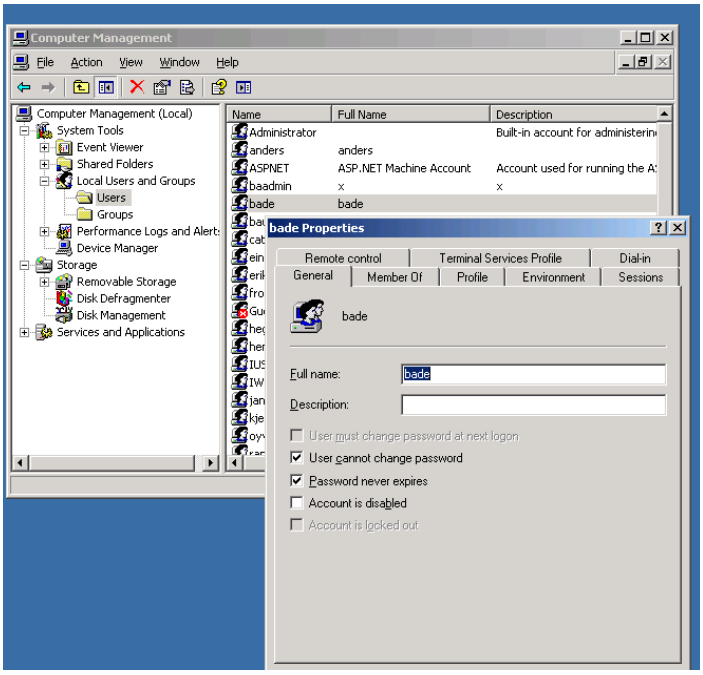
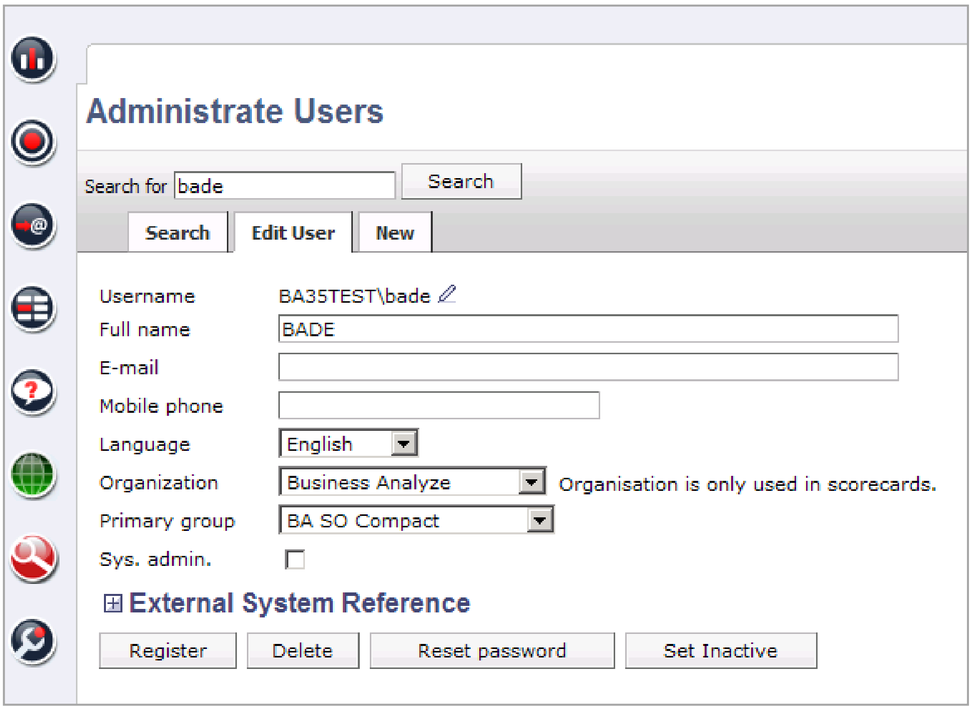
Windows user

Create a windows user (or use an existing one) that will be used by the Distribution Engine Service to access the Business Analyze application. This can be one dedicated user in the domain or a local user if the Business Analyze server is not in a domain.



Business Analyze user

After the user is added to the Windows domain / local computer, a corresponding user in Business Analyze must be created.



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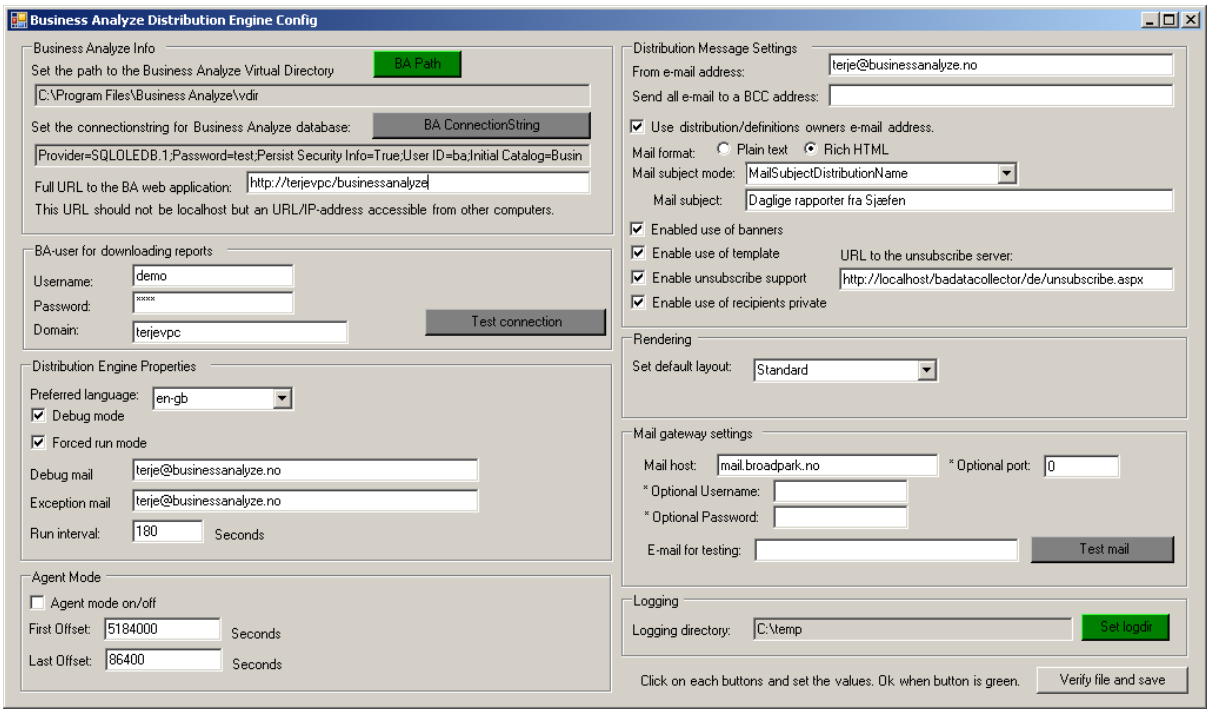
Configure Distribution Engine Service

Then you can run the configuration utility for the Distribution Engine Service. This application is found in the folder you installed the service.



Business Analyze info

→Click "BA path" to select the path to the Business Analyze virtual directory.

→Click "BA ConnectionString" to select the path to the Business Analyze database.

→In the text field, enter the full URL to your Business Analyze virtual directory.
Important! This must be the exact URL, so use computer name or IP address (i.e. http://myserver/businessanalyze).

BA user for downloading reports

The distribution engine needs a user that has access to read the Business Analyze reports. This windows user must also be a user in the Business Analyze application. Business Analyze must also run in single sing on mode (see *Windows authentication* page 36)

Distribution engine properties

Preferred language: This is the language the reports will use when sent out to the resipients.

Debug mode: Check this if you want the Distribution to work in debug mode. In this mode the distributions will only be sent to the *debug mail* address.

Forced run mode: Check this if you want to force the Distribution Engine to run all active distributions when the windows service is started/restarted, regardless of what start date and time

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of day that are set on the distribution. When all distributions are sent, the service stop sending until the service is restarted.

Run interval: Seconds between each run.

Agent mode

Click the checkbox to turn the agent mode on or off.

If agent mode is on, the date period the reports use is set to 1.1 in the current year and the end date is set to the current date (date of the first execution). The next time the distribution is run, the date period from each definition (users own settings) is used to generate the reports.

Use First offset and Last offset to set the start and end date of the 1st e-mail.

Distribution Message Settings

From e-mail address: This is the e-mail address the messages will appear to come from.

Send all e-mails to a BCC address: If this is set, all e-mails sent will also be sent to this address.

Use distribution/definitions owners e-mail address: Check this if you want the sender of the e-mails to be the owner of the distribution/definitions, and not the global one set above.

Mail format: Select which format the e-mail shall use. Plain text messages will not contain images, formatted text and links.

Mail subject mode: Select whether the e-mail subject field shall display the distributions name or the text entered in the *mail subject* field below, or a combination of both.

Mail subject: This message will be the subject all e-mails.

Enable use of banner: Check this if you want to use image banners in the distributions.

Enable use of template: Check this if you want to use another than the standard template for you e-mails.

Enable unsubscribe support: Check this if you want the recipients to be able to unsubscribe to the messages sent out by the distribution engine.

URL to the unsubscribe server: URL to the *Business Analyze Data collector* application.

Enable use of recipients private:

- True – the *from* address displayed is the e-mail to the person added the recipient.
- False – the *from* address displayed is the e-mail to owner of the distribution (system administrator)

Rendering

Set default layout: Select which Business Analyze layout the reports shall use to format the e-mail (color of text, tables etc). You might want to use the same layout as you do in your Business Analyze application.

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Mail gateway settings
Enter the name of your e-mail host. If you want to or have to use a specific user, you can also fill out the optional fields. To test the connection, enter an e-mail in the text field and click the button.

Logging
Select a windows directory you want the Distribution engine to store all logged files.

Click *Verify and save* and save and exit the application.

See *Appendix D: Distribution Engine Service Configuration* for more details about the keys in the configuration file.

Start the service
Now you can start the *BA Distribution Engine Service*.

Create distributions
Now you can log on to Business Analyze and create distributions.

Tips	If you want to test the distributions you have created, set the *Distribution Engine Service* to run in *Debug mode* and *Forced run mode*. Apply your e-mail as *Debug mail*. (Use the configuration utility show in step 5 to achieve this). Whenever you restart the *BA Distribution Engine Service*, all active distributions will be ran and sent to, and only to, the debug mail address. Turn off *Debug mode* and *Forced run mode* and **restart the service** to set it back to normal mode.

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Business Analyze Self Management module

Business Analyze Self Management is an automatic reporting tool for collecting verbal commenting of existing reports. For example by this tool you can automatically send out a set of sales reports to your sales team and ask them to report status for each of these reports.

Requirements

1) Business Analyze Distribution Engine Service must be installed and configured.
2) You need a user license with access to framework and reports licenses.
3) All users that are to receive reports for comments need a user license.
4) You need a license for the Self Management module.

Important setup tasks

You need to set up the distribution engine as specified in the section for installation the Distribution Engine.

To ensure the users get access to the commented reports it is important to be aware of:

URL to BA web should not be typed with localhost. Here you should use a FULL URL accessible from other computers.

Example:

http://MYSERVER/businessanalyze

MYSERVER = full public dns address if it should be accessible from Internet or only the name of the server if it should only be accessible within your network. You can also use IP-address.

It is important to change the path in Business Analyze web application to

Edit web.config

Edit the required lines in the **web.config** as shown below:

```
<add key="fw_vfullroot" value="http://MYSERVER/businessanalyze"/>
```

Known configuration pitfalls

Access to the *chartfiles* and *common* folders is wrong. This result in charts not being rendered in reports sent out to the recipients, nor will they be rendered when the reports are displayed in Business Analyze. See the IIS section above on how to set this correct.

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Business Analyze Scorecards Service

General

The *Business Analyze Scorecards Service* may be installed on any server that has access to the Business Analyze database.

Software requirements:

- Windows 2003 Server or newer.

- Microsoft .NET Framework v3.5 with SP1

- Ole Db driver for the databases it is expected to communicate with (MDAC 2.8 or later is recommended).

Configuration

The *BA.Scorecards.Service.Exe.config* file controls the behavior of the *Business Analyze Scorecards Service*. The settings in this file are read by service when it starts. Any changes made to the file will not be made effective until service is restarted. The file is a regular XML file and may be edited with a simple text editor like notepad or any XML editor.

(See

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Appendix B: Scorecards configuration for more details)

NOTE	Any errors or problems detected by the *Business Analyze Scorecards Service* will be written to the Business Analyze systemlog. The log is available in the System Administration.

TIP	The *connectionstring* key must be set to point to the Business Analyze database. Copy the *fw_connectionstring* key from the *web.config* file in the Business Analyze application folder.

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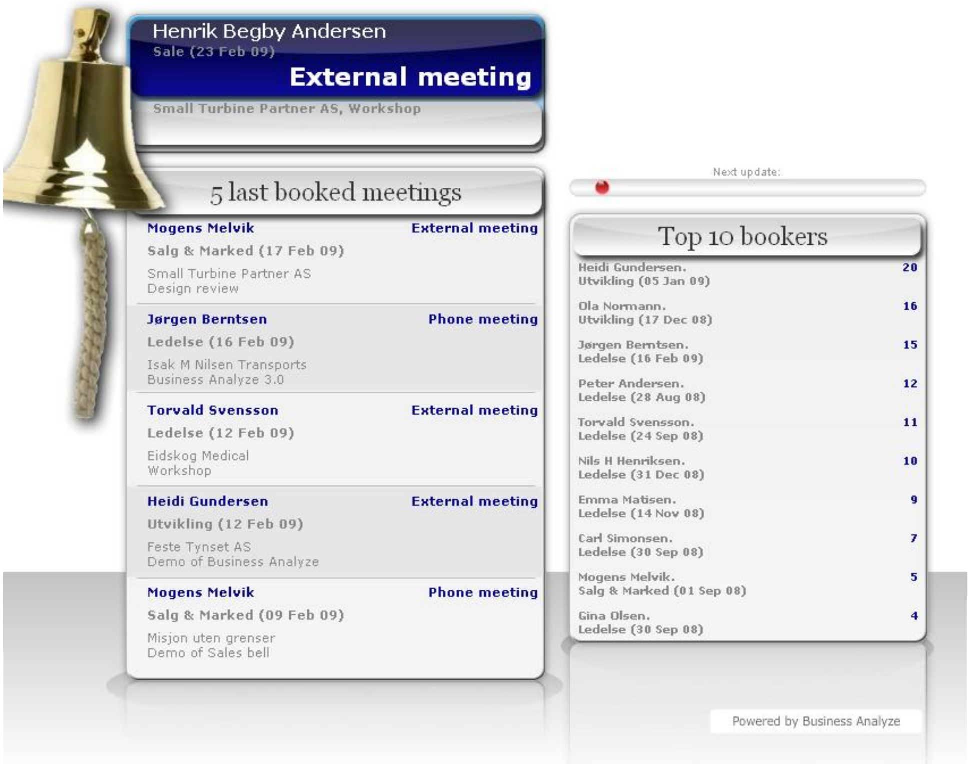
Business Analyze Sales bell and Activity bell



General

Business Analyze Sales Bell is an activator to motivate sales person to sell more. It visualizes the ongoing sales activities and replaces the manual sales bell in the organization. By setting this up on big screens or every locale computer all can get noticed about what's happening in sales. The bell can also display activities such as booked meetings.

Requirements

Client

Browser: Internet Explorer 6.0 or better/Mozilla/Opera/Safari with Adobe Flash player support (This is automatically installed if connected to the Internet).

Server

Business Analyze 3.0 Hotfix 6 or Business Analyze 3.5 or higher

Also see the requirements for Business Analyze application.

Predefined Sales Bell for SuperOffice CRM

This is included in Business Analyze Hotfix 6 and is the default startup bell.

It requires Microsoft SQL Server 2000 or better.

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If other database than SuperOffice CRM is used, Business Analyze need to customize the queries.

Sales Bell could also be customized to work with other databases / software's. See the development chapter for more information.

Licences

1) You will need licenses to Business Analyze Framework for all users that should have access to the bell.
2) A license for Business Analyze Sales Bell server.

Installation

Install Business Analyze 3.0 Hotfix 6 by following the installation guide.

1. Add licenses.
2. Configure the data source for CRM_SO.

After the installation you will get access to the Sales Bell by the following URL on the server:

http://localhost/businessanalyze/common/flash/salesclock.aspx

Access from other clients:

http://SERVER/BAPATH/common/flash/salesclock.aspx

Where SERVER is your server address (name or IP) and where BAPATH is the virtual directory for Business Analyze (default is businessanalyze).

Configuration

The default Sales Bell configuration file is placed in the following directory:

C:\Program Files\Business Analyze\vdir\Common\XML\flash\salesclock.xml

Customized configuration for a customer

To change settings in the configuration file, best practice is to copy this to the custom folder of the BA-application. This folder is not upgraded when new versions is installed. Place the copy here:

Example:

%bapath%\custom\salesclock\ newsalesclock.xml

%bapth% - replace with your path. Normal C:\Program Files\Business Analyze\vdir

The new URL for using this configuration is:

http://localhost/businessanalyze/common/flash/salesclock.aspx?xmlfile=newsalesclock.xml

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Customization of sound (MP3)

It is possible to change the sound for the bell. If you want it to play a melody or some other sort of sounds. You can copy the selected MP3 file into the custom folder.

<u>Example:</u>

%bapath%\custom\salesclock\ FILENAME.mp3

%bapath% - replace with your path. Normal C:\Program Files\Business Analyze\vdir

FILENAME – your new sound file.

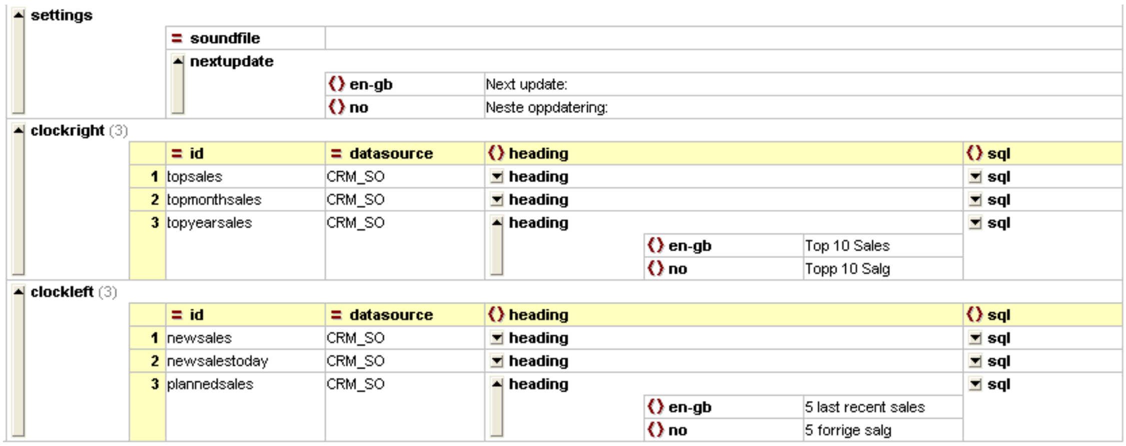
The new URL for using this configuration is with melody.mp3:

http://localhost/businessanalyze/common/flash/salesclock.aspx?xmlfile=newsalesclock.xml&soundfile=melody.mp3

Customization of dataset(query) for left and right list

It is possible to rewrite the query or add new query section in the file.

<u>Example of customized file:</u>



Startup parameters for this customized file is:

Parameter name	Value	Description
Cleft	Id from the clockleft section from the XML file.	Examples: - Newsales - Newsalestoday - plannedsales
Cright	Id from the clockright section from the XML file.	Examples: - Topsales - Topmonthsales - topyearsales
Xmlfile	Filename from custom folder.	Example: - newsalesclock.xml
soundfile	Filename from custom folder.	Example: - melody.mp3

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Example of custom xmlfile, sound and query section:

http://localhost/businessanalyze/common/flash/salesclock.aspx?cleft=newsalestoday&cright=topmonthsales&xmlfile=newsalesclock.xml&soundfile=melody.mp3

Configuration of Sales Bell in Business Analyze grid / tab

Adding the Sales Bell to a grid

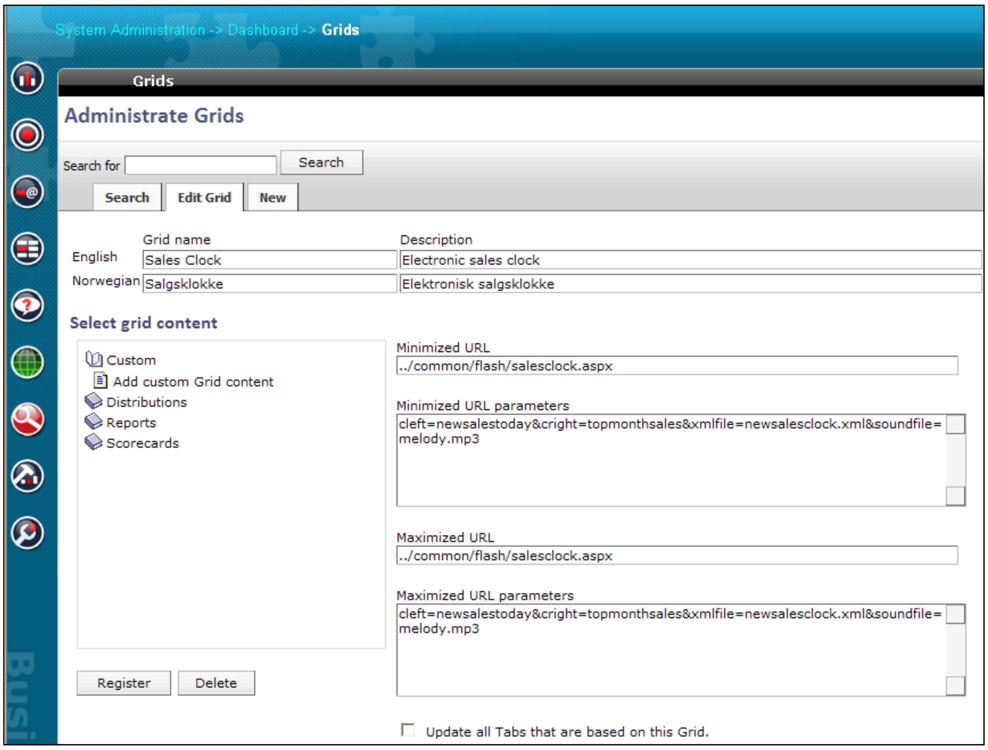
When you create the Sales Bell or Activity Bell grid then it is possible to reuse the grid on several tabs.

→Click on the "Custom" grid content and select "Add custom Grid".

→ for **Sales Bell:** Write this in the Minimized URL text field:
http://BASERVER/businessanalyze/common/flash/salesclock.aspx

→for **Activity Bell**: Write this in the Minimized URL text field:
http://BASERVER/busienssanalyze/common/flash/salesclock.aspx

And this in the Minimized URL parameters text field:
?cright=topactivity&cleft=newactivity



Parameters must be typed in "minimized/maximized URL parameters".

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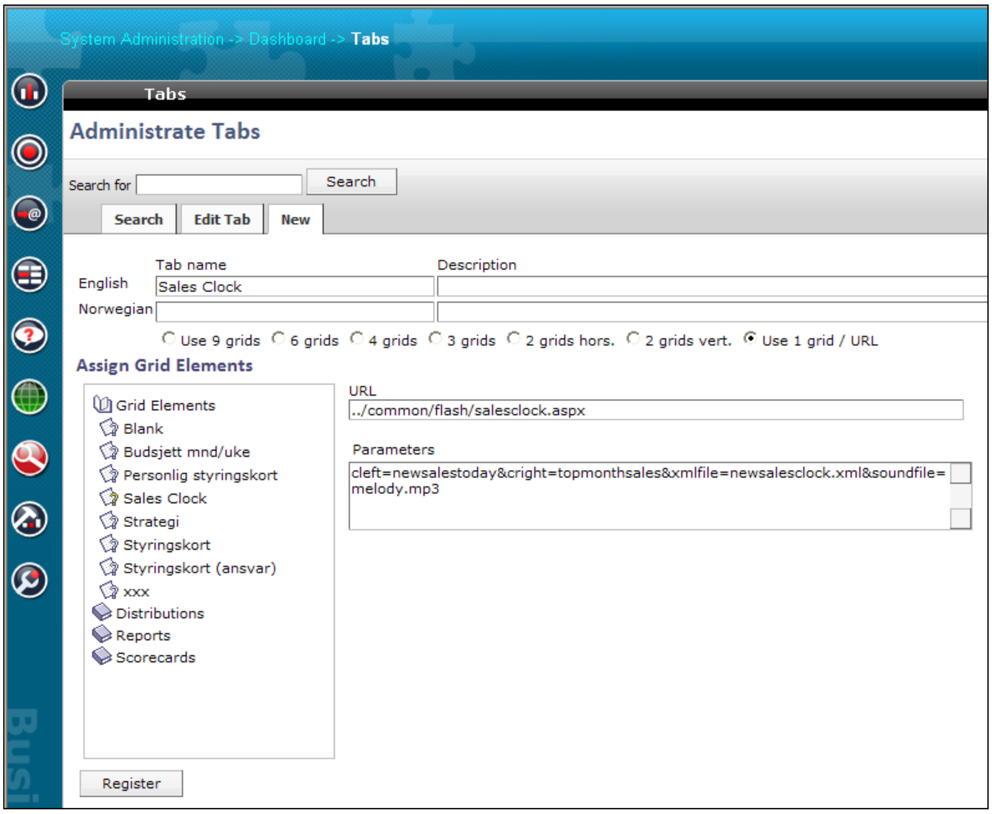
Adding the Sales Bell to a tab

Best practice is to create a grid before you add it to a tab. Then it will be possible to use the grid you created for the Sales Bell or the Activity Bell as a template for setting up a tab. You will get the setting which is defined for the grid copied to the tab.



If you want to create one grid which use the whole screen available in Business Analyze, do this:

1. Select “Use 1 grid/URL”
2. Select the Sales Bell or Activity Bell you created from the grid elements.
3. Register

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Setup Sales Bell by using the “Active Desktop”

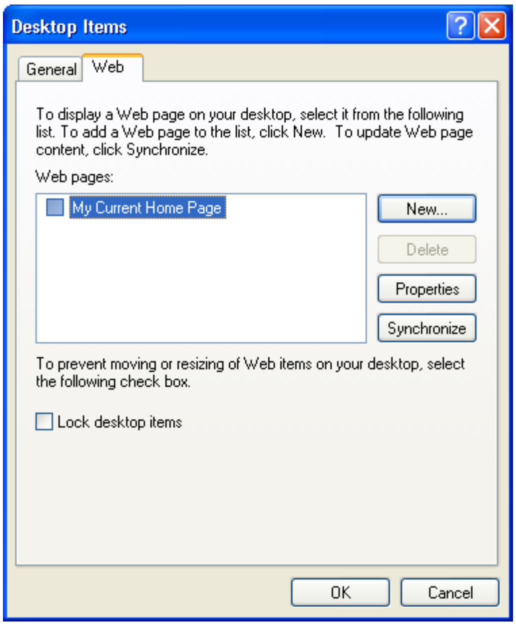
To enable it on every screen you need to create a HTML file which points to your solution since Active Desktop only support HTML-pages.

→Create the file clock.html, and add this text/code:

```
<html>
<frameset cols="100%">
  <frame src="http://SERVER/DIRECTORY/common/flash/salesclock.aspx" width="1024"
height="768" border="0" />
</frameset>
</html>
```

→Place the file on a network share where all users have access.

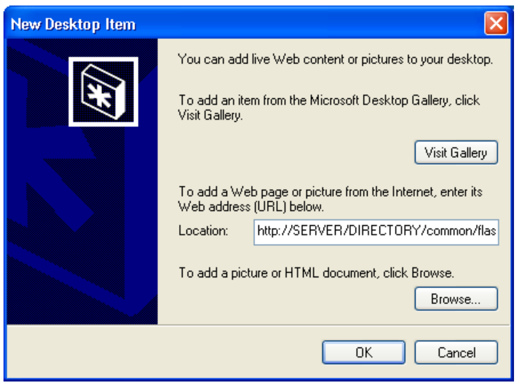
→Right click on your desktop and select “Properties”. Then go to the tab “Desktop” and select customize desktop.



→Click on “New”.

Type in the address/URL to the clock.html file you just created and click OK.

→Click OK and the active desktop will start to synchronize.



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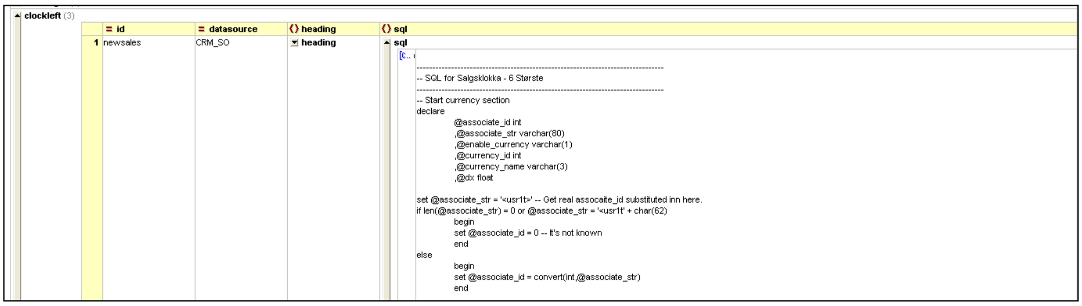
Development

You can create your own SQL-queries and you can change the way the existing works.



SuperOffice CRM customization

Customization of query to support user defined fields:

<usr1t> = associate_id in SuperOffice CRM for the active user

<usr2t> = group_id in SuperOffice CRM for the active user

<usr3t> = person_id in SuperOffice CRM for the active user

When you want to use this we recommend you to import all users which are going to use the Sales Bell by using the BA User Import. Then this user defined fields will automatically be correct for users in BA.

We also recommend to establish single sign on per default else the user need to logon to see the Sales Bell.

If you want create a grid based on the users group you can do like this:

1. Create a new query line for each bell (right and left)
2. Customize SQL to only support users primary group in CRM:
   Add this to the *where* statement of the query

   and g.usergroup_id <usr2t>

Example:

```
            join crm5.usergroup g with (nolock) on g.usergroup_id=a.group_idx
where
    s.saledate between datediff(s,@u,@startdate) and datediff(s,@u,@enddate)
    and s.status=2
    and g.usergroup_id <usr2t>
order by
    s.saledate desc
]]></sql>
```

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In this example only sales from the user's primary group in SO will be displayed.

Currently not supported

We do not support parameters as from a normal Reports (example grp=11&asc=222). This is planned to be implemented in a future release of Business Analyze. Date is not set.

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Business Analyze Data Collector

General

The Business Analyze Data Collector is the application that accepts the data being sent by a user when receiving measure values by e-mail is selected in the *Business Analyze Scorecards* module or when a user unsubscribe from a Distribution.

Configuration

After the installation procedure has completed, you will have to make some manual adjustments in order to make the application run correctly.

See *Appendix C: Data Collector Configuration* for more information.

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Hardware recommendation

Web server

< 20 Users		> 20 Users	
CPU	1 x Intel Xeon or 1 x AMD Opteron (min. 4 cores total)	CPU	2 x Intel Xeon or 2 x AMD Opteron (min. 8 cores total)
Memory	16 GB RAM	Memory	16+ GB RAM
Disk OS/Softw.	2 x 100GB (Raid 1)	Disk OS/Softw.	2 x 100GB (Raid 1)
Disk DB – Data	-	Disk DB – Data	-
Disk DB – Log	-	Disk DB - Log	-

Database server

For Business Analyze and Customer's database

< 20 Users		> 20 Users	
CPU	1 x Intel Xeon or 1 x AMD Opteron (min. 4 cores total)	CPU	2 x Intel Xeon or 2 x AMD Opteron (min. 8 cores total)
Memory	16+ GB RAM	Memory	32 GB RAM
Disk OS/Softw.	2 x 100 GB Raid 1	Disk OS/Softw.	2 x 100GB Raid 1
Disk DB – Data	3 x 100 GB Raid 5	Disk DB – Data	3 x 100 GB Raid 5 or 4 x 100 GB Raid 10
Disk DB – Log*	2 x 100 GB Raid 1	Disk DB – Log*	4 x 100 GB Raid 10

Web server & database server running on same computer

< 20 Users		> 20 Users
CPU	2 x Intel Xeon or 2 x AMD Opteron (min. 8 cores total)	Not recommended
Memory	16+ GB RAM	
Disk OS/Softw.	2 x 100GB Raid 1	
Disk DB – Data	3 x 100 GB Raid 5 or 4 x 100 GB Raid 10	
Disk DB – Log*	4 x 100 GB Raid 10	

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Database server

The desired specs of the database server will greatly depend on the load of the customer's production database and the amount of data it contains. The general rule is "The more RAM, the better the response times". The use of SSD disks and/or cacheing RAID controllers will also have a very positive effect on performance.

*** RAID 5 and DB Log**

Never use Raid 5 for database log files. This will severely reduce database performance since write operations are slow on Raid 5, and the database log is continuously written to.

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Appendix A: Framework configuration

All configuration variables in the application's *web.config* configuration file that are prefixed with *fw_* are related to the Business Analyze Framework and described in the table below.

ConnectionStrings

Key name	Key type	Legal values	Description
BusinessAnalyzeConnectionString	String	SQL conn. string	SQL Native Client connection string to the BA system database.
BusinessAnalyzeDataMartConnectionString	String	SQL conn. string	SQL Native Client connection string to the BA cache database.

AppSettings

Key name	Key type	Legal values	Description
ba_version	String	Version string	Set the version of the BA app.
fw_debug	Boolean	True | False	Turns on or off Debug Mode for the Business Analyze application.
fw_singlesignon	Boolean	True | False	Turns on or off Single Sign-On for the Business Analyze application. See separate chapter "Selecting an authentication method"
fw_vadmin	String	Virtual path	Virtual path to the Business Analyze administration module.
fw_markerlinecolor	String	HEX encoded RGB color value or named color	Color of the highlighting used when the user moves the cursor over a row. Example: To define the highlighting as black, use "#000000" (hex encoding) or "Black" (named color).
fw_destinationdirectory	String	Physical path	The physical path to the directory where uploaded files is stored.
fw_xslfilesdirectory	String	Physical path	Physical path to the directory containing the Business Analyze XSL files.
fw_layoutsdirectory	String	Physical path	The physical path to the Layouts directory. This directory contains layout and style definitions for the Business Analyze application.
fw_rdfdirectory	String	Physical path	Physical path to the directory containing the Business Analyze RDF-files. Report Definition Files (RDF) defines reports.
fw_rdfxsd_directory	String	Physical path	Physical path to the directory containing the Business Analyze RDF

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			XSD Schemas.
fw_admmenudir	String	Physical path	The physical path to the administration menu directory.
fw_chartfilesdirectory	String	Physical path	The physical path to the *Chartfiles* directory. This directory contains chart images generated by the Business Analyze Reports module.
fw_xmlfilesdirectory	String	Physical path	Physical path to the directory containing the XML files used by the Business Analyze application.
fw_errormessagesfile	String	Physical path	The physical path to the Error Messages file. This file contains error messages displayed by the Business Analyze application.
fw_vlayouts	String	Virtual path	Virtual path to the Layouts directory.
fw_vscripts	String	Virtual path	Virtual path to the Business Analyze Scripts directory.
fw_vfoldermenu	String	Virtual path	Virtual path to the Folder Menu.
fw_languagefile	String	Physical path	The physical path to the language file. This file contains localized UI strings used by the Business Analyze application.
fw_vadminmenu	String	Virtual path	Virtual path to the administration menu.
fw_vcharts	String	Virtual path	Virtual path to the Chart files directory.
fw_vfullroot	String	Virtual path	This is the full path to the Business Analyze application root. Example: http://localhost/businessanalyze
fw_vroot	String	Virtual path	Virtual path to the Business Analyze application root.
fw_vhelp	String	Virtual path	Virtual path to the Business Analyze help documentation.
fw_vhelpdirectory	String	Physical path	Physical path to the Business Analyze help documentation.
fw_connectionstring	String	ADO Connection string	Specifies the connection string for connecting to the Business Analyze database.
fw_preferredlanguage	String	"no" | "en-gb"	Language code for the preferred UI language for the Business Analyze application.
dc_datamart_collation	String	String	Collation used by the datamart.

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System.net/mailSettings

Key name	Key type	Legal values	Description
host	String	DNS name | IP address	DNS name or IP address of the SMTP server to use for sending e-mail from the system.
username	String		Optional: Defines the username to use when connecting to a mail server that requires authentication.
password	String		Optional: Defines the password to use when connecting to a mail server that requires authentication.
port	String		Optional port if used.

Appendix B: Scorecards configuration

All configuration variables in the application's *web.config* configuration file that are prefixed with *sc_* are related to the Business Analyze Scorecard module and described in the table below.

Key name	Key type	Legal values	Description
sc_datecolumn	String	"dov" | "created"	**Defines the column to use for report date values in the Business Analyze Scorecards module.**
sc_debug	Boolean	True | False	**Defines the Debug Mode setting for the Business Analyze Scorecards module.**
sc_defaultperiod	String	Valid values for this setting may be found in the "timesheet.xml" file.	**Defines the default period setting for the Business Analyze Scorecards module.**
sc_mode	**String**	**"standard" | "extended"**	**Defines the mode (standard or extended) for the Business Analyze Scorecards module.**

Configuration of pre aggregation functions

Background

Business Analyze 3.5 Scorecards reporting is based on several tables containing pre aggregated data in the time dimension.

The data are still stored in a normalized fashion in the original table sc_target. In order to see the data in the reports, a t-sql job must be run to populate the sc_Target[Frequency] tables. This job must be configured to run on the sql-server to populate data from manually collected data or data collected by email.

The job is automatically executed after every import job in scorecards (SQL-Auto).

Configuration of SQL Server job for SQL Server 2005

The aggregation of the numbers in sc_target is achieved using a stored procedure called sc_TargetAggregate.

This procedure takes one input parameter: @lastrun (int)

@lastrun = 0 Aggregates all data.

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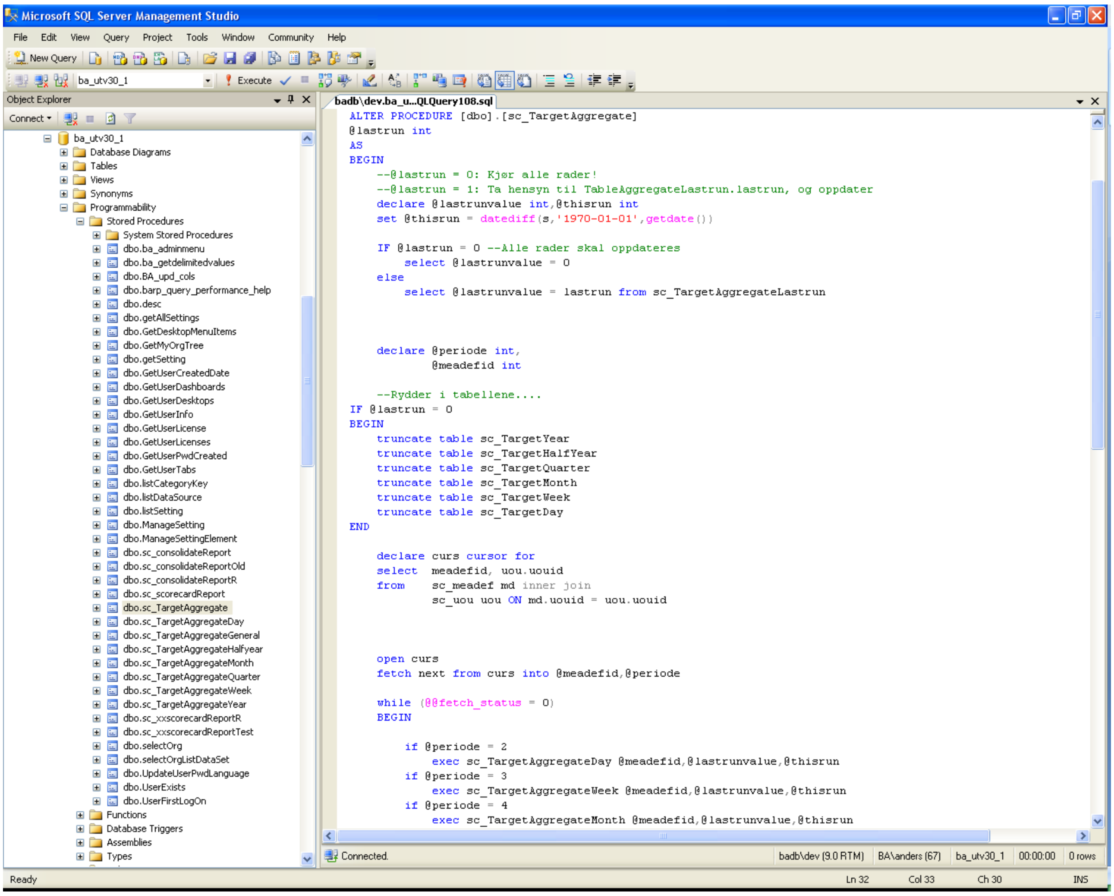
@lastrun = 1 Aggregates all new data.



We recommend setting up 2 types of jobs, depending on the precision required:

- Complete aggregation every night
- Incremental aggregation on a timely basis as needed.

Use the methods described here to set up these jobs:

1) Start MS SQL Server Management Studio and connect to the Business Analyze database.

2) Expand the node 'SQL Server Agent' and choose 'New job...' from right click menu on the 'Jobs'-node.

3) Fill in desired name and description on the 'General' – dialog.

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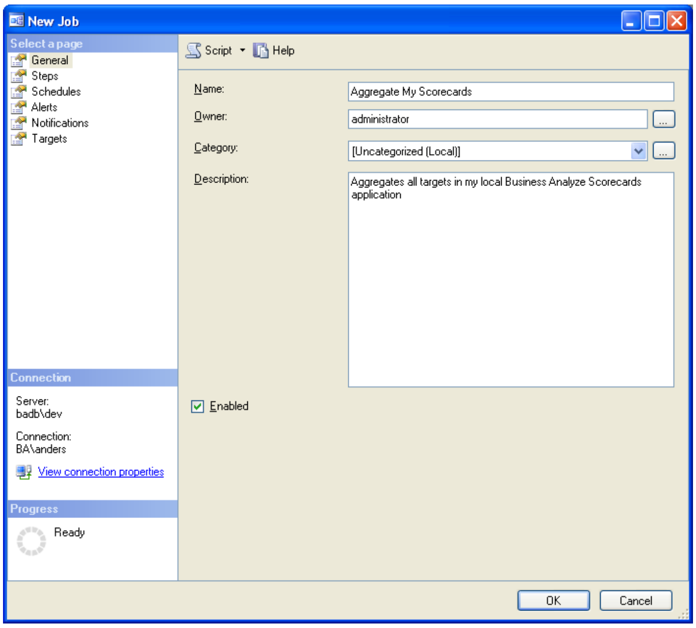
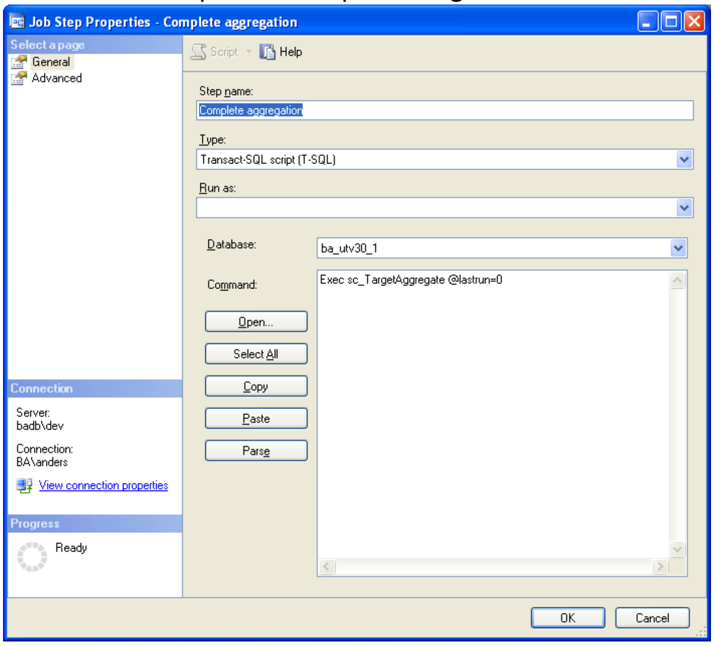


4) Create a new step in the 'Steps'- dialog:



5) Enter name of job to be run and the command itself. F.ex.

Complete aggregation	Exec sc_TargetAggregate @lastrun=0
Incremental aggregation	Exec sc_TargetAggregate @lastrun=1

Click 'OK' to save setting in this step.

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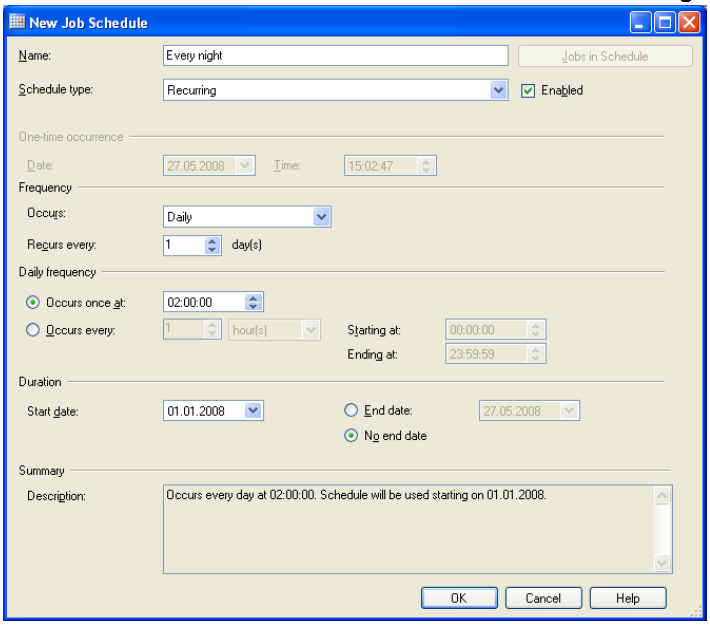
6) Create a new Job schedule in the New Job Scedule - dialog:



If you want to run it every night select daily and set the time where the least amount of load is expected on the server. Click 'OK' to save settings.

You have now configured a job to aggregate all your data for your scorecards every night.

Create a new job that run more often and does an incremental aggregation in order to achieve more accurate and timely data in the scorecard reports.

To ensure that the jobs are actually executed correctly, add a warning that sends an email to an appropriate address if anything fails.

Scorecards Service Configuration

Configuration keys specific for the Business Analyze Scorecards Service is described in the table below.

Key name	Key type	Legal values	Description
fw_languagefile	String	Physical path	**The physical path to the language file. This file contains localized UI strings used by the Business Analyze application.**
fw_connectionstring	String	ADO Connection string	**Specifies the connection string for connecting to the Business Analyze database.**
fw_debug	Boolean	True | False	**Turns on or off Debug Mode for the Business**

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			Analyze application.
sc_sql_active	Boolean	True | False	**Turns on or off sql-import in the scorecard service.**
sc_dc_active	Boolean	True | False	**Turns on or off the DataCollector service .**
sc_dc_due_active	Boolean	True | False	**Turns on or off the DataCollector Warning.**
sc_debug	Boolean	True | False	**Turns on or off Debug Mode for the Business Analyze Scorecards Service.**
sc_connectionstring	String	ADO Connection string	**Defines the connection string used when the Business Analyze Scorecards Service communicates with the Business Analyze database.**
sc_system_db_reconnect_interval	Integer	Number of seconds	**Defines the database reconnect interval setting for the Business Analyze Scorecards Service.**
sc_sleep	Integer	Number of seconds	
sc_pause	Integer	Number of seconds	
sc_scorecard_user	String		**Defines the username for the Business Analyze Scorecards Service daemon-user, used when communicating with the Business Analyze database.**
sc_sql_period	**Integer**		**Define when it should sample. 0 is today, 1 is after today..**

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Appendix C: Data Collector Configuration

To configure the Data Collector you can, in addition to edit the *web.config*-file, use the configuration application found in the directory you installed the Data Collector.

Configuration application

You can find this application on the Start menu on the server Business Analyze is installed.

IIS Webserver Instance

Website name: Select website.

Application Pool: Select the application pool where the Business Analyze virtual directory is in.

IIS Virtual Directory

Virtual Directory name: Select the virtual directory for Business Analyze Data collector.
Do not change this unless you are upgrading to a newer version of data collector.

Configuration file – web.config

All configuration variables in the application's *web.config* configuration file that are prefixed with dc_ are related to the Business Analyze Data Collector and described in the table below.

Key name	Key type	Legal values	Description
fw_languagefile	String	Physical path	**The physical path to the language file. This file contains localized UI strings used by the Business Analyze application.**
fw_connectionstring	String	ADO Connection string	**Specifies the connection string for connecting to the Business Analyze database.**
fw_debug	Boolean	True | False	**Turns on or off Debug Mode for the Business Analyze application.**
dc_debug	Boolean	True | False	***True*, the application is running in debug mode, *False*, the application is not running in debug mode.**
dc_mailfrom	String	Valid e-mail address	**Exposes the value that will be used in the "from" field of the e-mails sent by the Business Analyze Data Collector module.**
dc_mailsubject	String		**Exposes the value that will be used in the "subject" field of the e-mail sent by the Business Analyze Data Collector module.**
dc_preferredlayoutname	String	Name of a valid Business Analyze layout folder.	**Exposes the name of the preferred layout used by the Business Analyze Data Collector module.**

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dc_replacenan	Boolean	True | False	**If *True*, fields with no values are filled with the value specified by the *dc_replacenanvalue* key.**
dc_replacenanvalue	Integer		**The value that will replace a *NAN*-value in the e-mail fields.**
dc_vlayoutdir	String	Virtual path	**Exposes the virtual path to the folder containing the layouts used by the Business Analyze Data Collector module.**
dc_xslfilesdir	String	Absolute path	**Exposes the absolute path to the XSL-files used by the Business Analyze Data Collector module.**
dc_mailserver	String	DNS name | IP address	**DNS name or IP address of the SMTP server to use for sending e-mail from the system.**
dc_mailserverauthentication	Boolean	True | False	**Defines if the mail server (as set in dc_mailserver) requires authentication.**
dc_mailserverusername	String		**Defines the username to use when connecting to a mail server that requires authentication.** Note**: This is only used if the dc_*mailserverauthentication* key is turned on.**
dc_mailserveruserpwd	**String**		**Defines the password to use when connecting to a mail server that requires authentication.** Note**: This is only used if the dc_*mailserverauthentication* key is turned on.**

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Appendix D: Distribution Engine Service Configuration

Configuration keys specific for the Business Analyze Distribution Engine Service is described in the table below. These settings can be set either by opening the *WebConfig-file* or starting the application *DistributionConfig*. Both can be found in the directory the Distribution Service is installed.

Configuration keys

Important: In the application you can set a user that is allowed to download reports before sending. This is a windows user, locally or domain. Business Analyze must be set to single sign-on and *Basic authentication* must be turned on in IIS.

Key name	Key type	Legal values	Description
de_preferredlanguage	String	"no" "en-gb"	**Sets the preferred language for the Business Analyze Distribution Engine Service.**
de_connectionstring	String	ADO Connection string	**Connection string used when the Business Analyze Distribution Engine Service communicates with the Business Analyze database.**
de_debug	Boolean	True | False	**Turns on or off Debug mode for the Business Analyze Distribution Engine Servicde.**
de_forcedrun	Boolean	True | False	**True - Service sends distributions immediately and then terminates.** **False - Service is running as normal.**
de_debugmail	String	Valid e-mail address	**When the service is running in Debug Mode, all e-mails are sent to this address.**
de_runinterval	Integer	Time in seconds	**Seconds it should pause between each running.**
de_agentmode	Boolean	True | False	**Turns on or off Agent Mode. In Agent Mode, the periodical value in the 1st e-mail sent by the Business Analyze Distribution Engine is set start at 01.01.YYYY and**

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			end at the current date. The 2nd email has the periodical value set to "last seven days". **Use *First offset* and *Last offset* to set the start and end date of the 1st e-mail.**
de_ownermail_as_sender	Boolean	True | False	**When true, the distribution owner's e-mail address is the sender of the e-mail.** **When false, the sender is set to the e-mail address specified by the de_from_mail config key.**
de_from_mail	String	Valid e-mail address	**E-mail address to be used as the sender of the e-mail.**
de_mailserver	String	DNS name | IP address	**The address of the SMTP server that the Business Analyze Distribution Engine Service will use for sending e-mails.**
de_mailserver_use_authentication	Boolean	True | False	**Indicates if the specified mailserver requires authentication.**
de_mailserver_username	String		**Specifies the username used for connecting to the mail server. (If it requires authentication.)**
de_mailserver_pwd	String		**Specifies the password used for connecting to the mail server. (If it requires authentication.)**
de_mailsubject	String		**The subject of the mail being sent from the Business Analyze Distribution Engine Service.**
de_mailsubject_overrides_distrname	Integer	0 | 1	**If 1 the value specified in the de_mailsubject key will appear as the subject of e-mails that are sent.** **If 0 the distribution name will appear as the subject.**
de_bannerenabled	Boolean	True | False	**Enables or disables e-mail banners.**
de_templateenabled	Boolean	True | False	**Enables or disables e-mail templates.**
de_unsubscribe_enabled	Boolean	True | False	**Turns on or off unsubscribe links in e-**

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			mails. **Note: Requires installation and configuration of the Business Analyze Data collector application.**
de_baurl	String	URL	**URL to the Business Analyze web application.**
de_reportapplication	String	URL	**URL to the Business Analyze Reports module. This is used for rendering distribution reports.**
de_unsubscribeserver	String	URL	**URL to the Business Analyze Data collector application.**
de_vchartfiles	String	Virtual path	**Virtual path to the Chartfiles directory. This directory contains chart images created during report generation.**
de_vlayouts	String	Virtual path	**Virtual path to the Layouts directory. This directory stores layout templates.**
de_vscripts	String	Virtual path	**Virtual path to the Scripts directory. This directory stores script files used in the Business Analyze User Interface.**
de_debugdir	String	Physical path	**Physical path to the debug output directory for the Business Analyze Distribution Engine Service.**
de_logdir	String	Physical path	**Physical path to the log files directory for the Business Analyze Distribution Engine Service.**
de_reportrenderdir	String	Physical path	**Physical path to the report rendering directory. Rendered reports will be stored here.**
de_chartfiles	String	Physical path	**Physical path to the Chartfiles directory. This directory contains chart images created during report generation.**
de_bannerdir	String	Physical path	**Physical path to the directory where the banner files will be stored.**

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de_templatedir	String	Physical path	**Physical path to the template directory. This directory contains e-mail templates.**
de_languagefile	String	Physical path	**Physical path to the locale.xml language file. This file contains localized UI strings.**
de_xmlfiles	String	Physical path	**Physical path to the XML directory.**
de_xsltfiles	String	Physical path	**Physical path to the XSL directory.**
de_layoutsdir	String	Physical path	**Physical path to the Layouts directory. This directory contains style and design information for the Business Analyze user interface**
de_renderformat	**Integer**	**0 | 1**	**If 0, reports are rendered as inline HTML in the e-mails being sent.** **If 1, reports are rendered as PDF-files and attached to the e-mails being sent.**

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Appendix E: Currency issues in SuperOffice

General

Business Analyze 2.7.x or higher supports currencies in SuperOffice. This enables the users to select the currency they wish the figures to be displayed in. Business Analyze will perform the calculations necessary to convert the figures from the source currency to the currency the user has according to the preferences in SuperOffice.

To make this determination Business Analyze needs to know which SuperOffice user corresponds to which user in Business Analyze. This linking is achieved by assigning the corresponding associate_id in the *usr1t* more-field in the user administration of Business

The system will try to use the SO preferences OwnCurrency or BaseCurrency first. If they aren't found, then the system setting "currency_default" will be used.

The system setting currency_preference determines which SuperOffice preference is used to determine the default currency.

Requirements

For this to work there are some requirements:

- More-fields must be populated with correct data
- Objects in the SuperOffice database must exist and have proper rights
- If you have users that don't have their own SuperOffice user then leave these fields blank. The access management system in SuperOffice edition will grant these users full access to the entire database.

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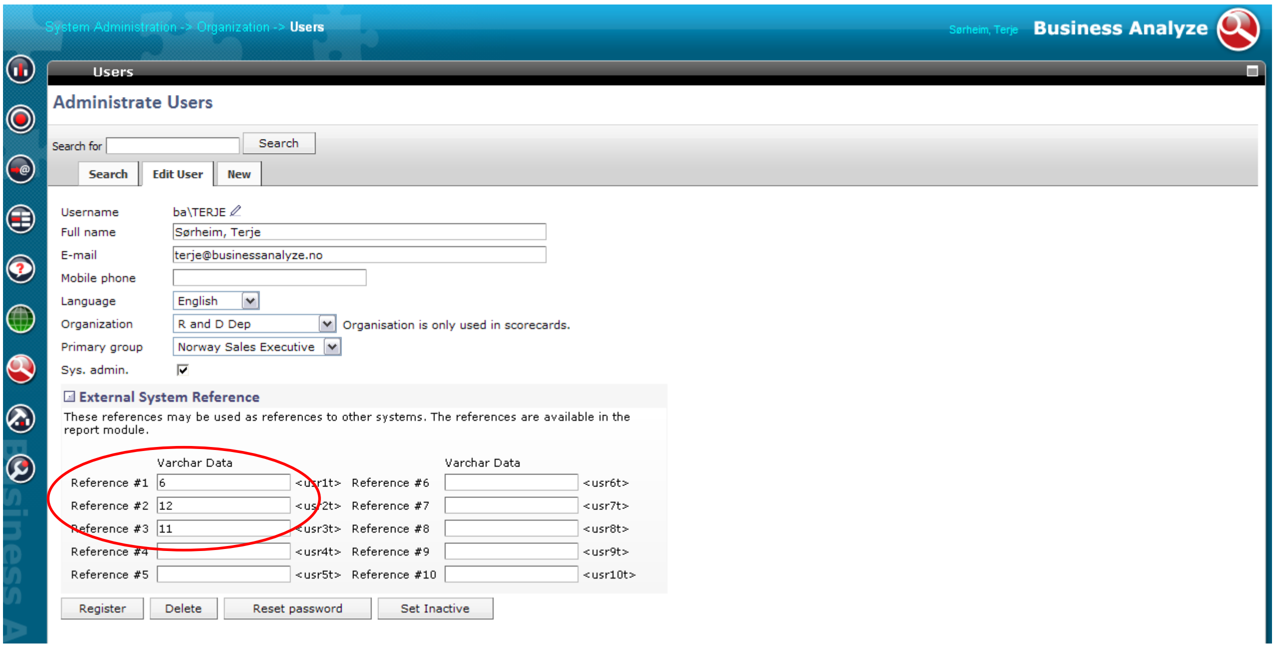

The following rights are required for the login that Business Analyze uses to gain access to the SuperOffice database:

Objects	SELECT	DELETE	UPDATE	EXECUTE
All tables in SuperOffice database	x			
ba_budget	x	x	x	
ba_cur_conv				x
ba_grp	x			
ba_asc	x			
ba_scale				x
ba_date				x
ba_preference				x
ba_leap_year				x
ba_p_main				x

Database mapping used in SuperOffice editioin:

SuperOffice database	Business Analyze database
associate.associate_id	fw_user.er1t
associate.group_idx	fw_user.er2t
person.person_id	fw_user.er3t

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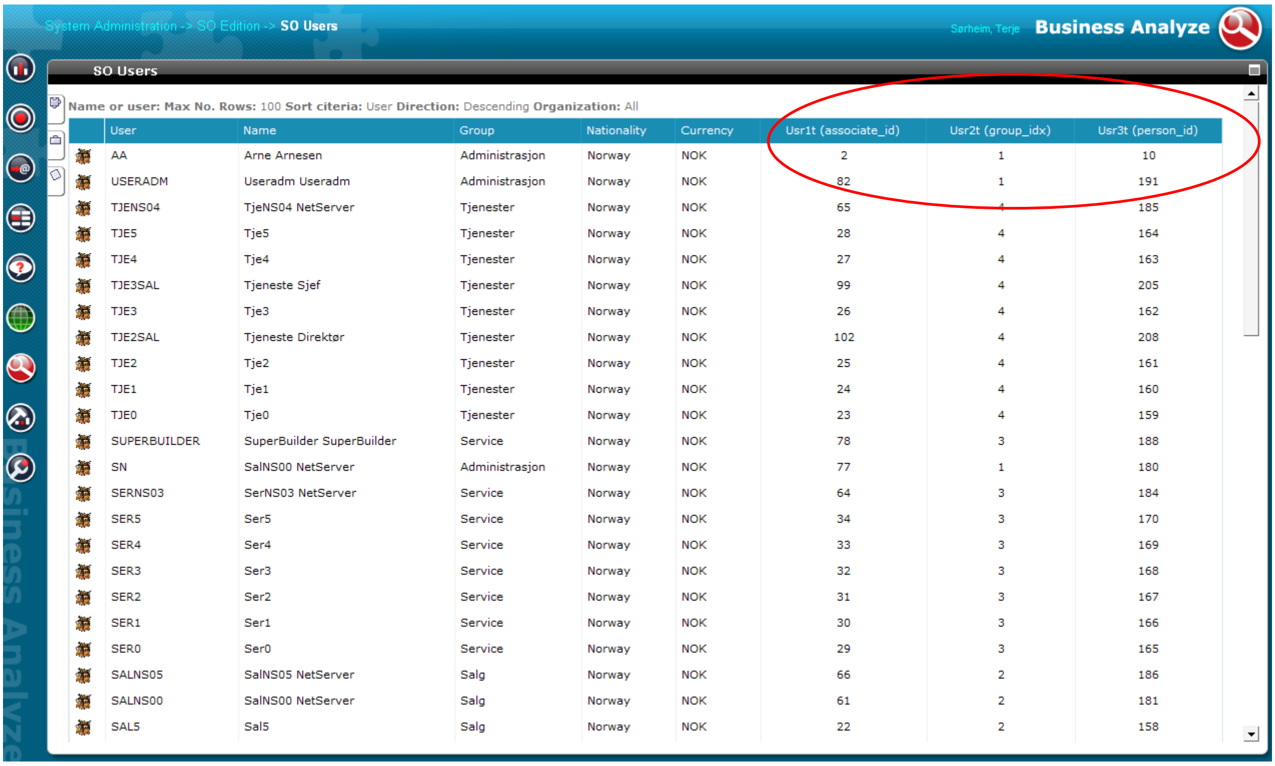
The User mapping report

This report has been added to make it easier to verify that the more-fields are populated with correct values. The easiest way of ensuring this, is to use the Business Analyze User Import utility. If you are adding users manually you may use this report to find the necessary IDs.

If you have a version of **Business Analyze SuperOffice Edition installed**, you will find the report here:

Go to the admin-menu: *SO Edition -> SO Users*



User	Name	Group	Nationality	Currency	Usr1t (associate_id)	Usr2t (group_idx)	Usr3t (person_id)
AA	Arne Arnesen	Administrasjon	Norway	NOK	2	1	10
USERADM	Useradm Useradm	Administrasjon	Norway	NOK	82	1	191
TJENS04	TjeNS04 NetServer	Tjenester	Norway	NOK	65	4	185
TJE5	Tje5	Tjenester	Norway	NOK	28	4	164
TJE4	Tje4	Tjenester	Norway	NOK	27	4	163
TJE3SAL	Tjeneste Sjef	Tjenester	Norway	NOK	99	4	205
TJE3	Tje3	Tjenester	Norway	NOK	26	4	162
TJE2SAL	Tjeneste Direktør	Tjenester	Norway	NOK	102	4	208
TJE2	Tje2	Tjenester	Norway	NOK	25	4	161
TJE1	Tje1	Tjenester	Norway	NOK	24	4	160
TJE0	Tje0	Tjenester	Norway	NOK	23	4	159
SUPERBUILDER	SuperBuilder SuperBuilder	Service	Norway	NOK	78	3	188
SN	SalNS00 NetServer	Administrasjon	Norway	NOK	77	1	180
SERNS03	SerNS03 NetServer	Service	Norway	NOK	64	3	184
SER5	Ser5	Service	Norway	NOK	34	3	170
SER4	Ser4	Service	Norway	NOK	33	3	169
SER3	Ser3	Service	Norway	NOK	32	3	168
SER2	Ser2	Service	Norway	NOK	31	3	167
SER1	Ser1	Service	Norway	NOK	30	3	166
SER0	Ser0	Service	Norway	NOK	29	3	165
SALNS05	SalNS05 NetServer	Salg	Norway	NOK	66	2	186
SALNS00	SalNS00 NetServer	Salg	Norway	NOK	61	2	181
SAL5	Sal5	Salg	Norway	NOK	22	2	158

If you have **Business Analyze 4.x** or newer and installed the **Analyze SuperOffice** package, you can find the report here:

Start the desktop named "Analyze SuperOffice System" and select the "SuperOffice users" tab. *Remember to grant yourself access to this desktop in order for it to appear in the main menu.*

User Name	Full Name	Primary Group	Country	AssociateId (usr1)	UsergroupId (usr2)	PersonId (usr3)
ROBERT	Robert Smith	Øst	Norge	3	8	8
SARAH	Sarah Johnson	Øst	Norge	9	8	146
BRIAN	Brian Williams	Sør	Norge	10	9	516
THOMAS	Thomas Jones	Sør	Norge	14	9	1 966
DONALD	Donald Brown	Nord	Norge	38	10	2 747
PAUL	Paul Davis	Sør	Norge	111	9	3 140
DANIEL	Daniel Miller	Sør	Norge	146	9	3 728
MARY	Mary Moore	Sør	Norge	149	9	4 431
LINDA	Linda Taylor	Sør	Norge	150	9	4 464
RONNY	Laura Martinez	Sør	Norge	161	9	5 087

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Appendix F: System settings

Analysis

actiontoolbar_elements

Enables the desired runtime actiontoolbar elments in a visualization element.

Possible values: Columns, Grouping, Duplicate Element, Parameters, ColumnFilter, Charts, Gauges, Visualization, Email

async_param_treshold_list

Defines the maximum number of options before a list parameter becomes an asyncronous list

Possible values: Freetext (INTEGER)

async_param_treshold_tree

Defines the maximum number of options before a tree/hierarchyal parameter becomes an asyncronous tree

Possible values: Freetext (INTEGER)

async_paramsearch_delay

Defines the idle time the dynamic dropdown list waits before executing the callback to filter dropdown list items.

Possible values: Freetext (INTEGER)

async_paramsearch_minchars

Defines the minimum number of characters the user has to provide to search a asyncronous dropdown list

Possible values: Freetext (INTEGER)

chart_axis_label_angle

Defines the label angle for labels in charts

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Possible values: Freetext (INTEGER)

chart_axis_label_length

Defines the maximum label length for a chart label

Possible values: Freetext (INTEGER)

chart_font_type

Defines the fonttype for charts

Possible values: Verdana, Tahoma, Arial

fiscalyear_start

Defines the start of year for fiscal years (mmyy)

Possible values: list of dates

max_pagesize

Defines is the maximum allowed pagesize for a visualization element. If pagesize in element is set to a value below 1 and above this setting, this pagesize is forced on the element

Possible values: Freetext (INTEGER)

Input Module

im_default_db

Defines the active database where the Input Module is installed. Data schemas users have access to in this database are linked up in the desktop IM menu

Possible values: list of data sources

im_make_dynamic_ddls

This setting turns searchable dropdown lists on / off.

This setting will only affect dropdown lists with more than 100 rows initially

Possible values: Enabled | Disabled

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Reports

async_parameterlist_delay

This setting defines the idle time the dynamic dropdown list waits before executing the callback to filter dropdown list items.

The setting is given in ms (milliseconds)

Possible values: Positive integer (free text)

async_parameterlist_minChars

This setting defines the minimum number of characters the user has to provide to search a async/dynamic dropdown list

Possible values: Positive integer (free text)

async_parameterlist_treshold

This setting defines the number of options threshold for sending entire list to client in a database parameter list when the parameter attribute asynchronous is unset.

If a database parameterlist has more options than this threshold the list will be rendered as a searchable input (as long as the RDF parameter attribute asynchronous is not set)

Possible values: Positive integer (free text)

Scorecard

add_training_to_competence

Enable user to add existing trainings to competence profile

Possible values: Yes | No

enable_competence

Enable training and competence system in scorecard.

Possible values: Yes | No

icon_template

Defines which set of icons to be used in the Scorecard reports

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Possible values: standard | faces| flags

initiative_enable_subtasks

Enable subtasks for an initative.

Possible values: Yes | No

initiative_fullaccess

Enable user to add/change all initiatives.

Possible values: Yes | No

measure_chart_size

Define the default chart size for the charts viewed in measure details.

Example (width * height):

500x350

Possible values: enter desired size (free text)

treemenu_fullaccess

Give users full access to all scorecards and consolidated scorecards.

Possible values: Yes | No

tremenu_department_access

Give users access to department he is a member of.

Possible values: Yes | No

System

central_services_path

Location where the central Business Analyze services are located

Possible values: list of data sources

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desktop_tabs_menu

Enable / disable tabs menu below breadcrumb when viewing dashboards

Possible values: list of data sources

ie_document_mode

Identifies which document mode Internet Explorer should use when rendering the Business Analyze desktop. This setting is required to downgrade IE9 to IE8 rendering since they do no longer support different rendering modes in iframes/objects.

Possible values: list of emulation modes

SuperOffice Edition

access_group

Select the groups that may be accessed. Users own group is always accessible.

Possible values: list of user groups in SuperOffice (multiple select)

IMPORTANT NOTE!
Use this setting to assign access privileges to users that do not have their own SuperOffice user. The rights granted here will stay the same independent of the access_mode setting.

access_mode

Adjust access mode based on groups.

PS! The privileges granted by access_group come in addition to privileges granted here.

Possible values:

0=Open, user can see everything

1=Restricted, user can see data belonging to his own groups

2=Tight, user can only see data from his primary group

3=Private, user can only see his own data

client_type

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Select wether to use windows client or web client for owl-link integration.

Possible values: Windows | Web

currency_default

This currency becomes the default if the preference selected prefereance in SO isnt defined.

Possible values: list of active currencies in SuperOffice

currency_preference

The default currency can be fetched from either the SuperOffice preference BaseCurrency or the OwnCurrency. National will give the user his national currency.

Possible values: OurCurrency | BaseCurrency | National

date_format

Select the prefered date format.

Possible values: list of date formats supporten in SQL Server

link_target

Force a target setting in the achor tag. Relevant only for Six.web.

Possible values: target (free text)

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max_rows_returned

The maximum number of rows returned by the query.

Possible values: threshold (free text)

relation_definition_id

The identificator of the relation type used as basis for KAM reports. The relation which describes which contact owns which contact.

Possible values: list of defined relationtypes in SuperOffice

string_inactive_element

Defines a suffix indicating that the element is no longer active in SuperOffice. It can be a person or a category amoung others.

Possible values: string (free text)

string_max_length

Some column can be quite large. Strings longer than this setting will not be truncated at the given setting.

Possible values: threshold (free text)

string_not_available

Defines a string that is displayed when the data for that column/row cannot be retreived from the database. F.ex. if a contact has no category.

Possible values: string (free text)

url_web

Url using SO protocol for web client.

Possible values: url with substitution tags (free text)

url_windows

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Url using SO protocol for windows client.

Possible values: string with substitution tags (free text)

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Appendix G: Installation and configuration BA KAM

This module consists of four reports (.srdf files) with multiple report levels. The reports make use of file reference drilldowns so all files must be scrambled (.srdf extention).

All users must have the three more-fields (usr1t-usr3t) matched with SO user to make the reports work.

We also strongly recomends that BA is configured to use the single sign on feature.

Post install tasks if installed with setup

If install a fresh Business Analyze installation or upgrade an existing application, this section describes the tasks you have to complete to make use of your BA KAM module.

ATTN! This section presupposes that you have completed the Business Analyze application setup with a reportlicense.lic file containing the BA KAM report group.

If you haven't done so, please install your BA KAM module by following the steps in the section *Manual installation* below.

After setup has completed all reports should exist in your Business Analyze installation and the only thing left to do is to set up the Business Analyze Input Module with the Budget sheet.

Make sure that the Business Analyze Input Module is installed in your SuperOffice database.
To do this go to the following Business Analyze menu path:
System Administration -> Budget/InputModule

Select the datasource "CRM_SO" at the top right.

Install/Upgrade InputModule in the database if you get a message that the Inputmodule is not present or outdated in this database before proceeding to the next step

To complet your BA KAM setup go to the following URL:
http://[servername]/[BAApplicationVDIR]/upgrading/configuration.aspx

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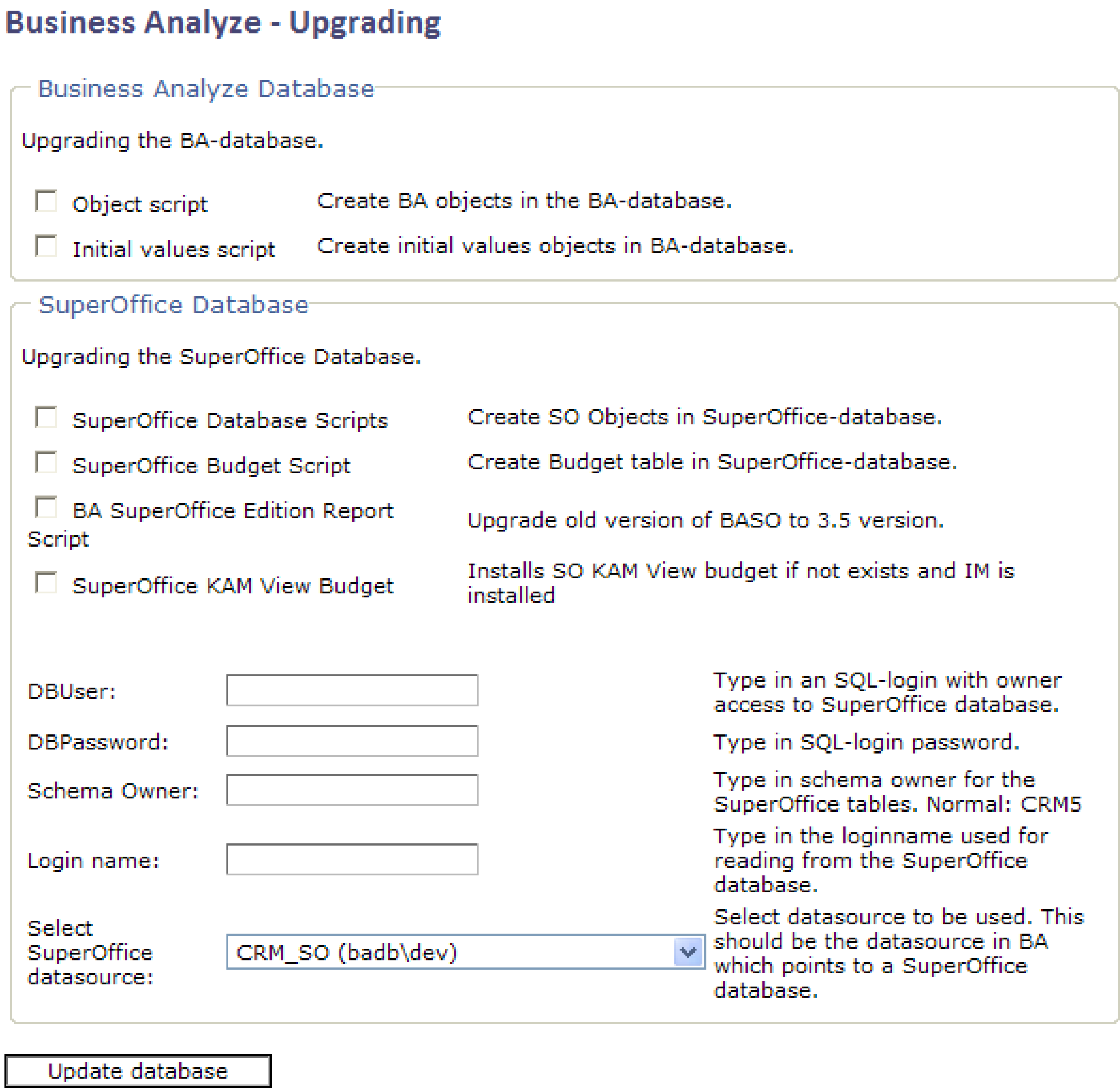
You should be presented with the following dialog:



Check the "SuperOffice KAM View Budget" checkbox and input DBUser, DBPassword, Schema Owner and Login name.

Make sure that your "CRM_SO" datasource is selected before you click the "Update database" button.

Manual installation

If you wish to install the BA KAM report group without upgrading or installing the Business Analyze application, this section should be completed.

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IM Configuration

Make sure the the IM installation is up to date by entering the SYSADMIN->Budget/Input Module page and setting datasource to CRM_SO.
Upgrade the database if required.

Database scripts

Run the script '1 Business Analyze INTERNAL.sql' with the BA datasource.

> This script creates the 'relation_definition_id' system setting with default value = 1
> This variable holds which relation type to be used in the KAM reports.

Run the script '2 CRM_SO.sql' with the SuperOffice datasource.

> This script creates all KAM db functions used in the reports.
> ATTN! REPLACE all '<owner>' tags with correct SO schema (crm5 is default)

Run the script '3 CRM_SO IM.sql' with the SuperOffice datasource.

> This script creates the budget data sheet to be used to store budget values in the KAM reports and updates the getBudget function with correct IM column IDs.
> ATTN! REPLACE all '<owner>' tags with correct SO schema (crm5 is default)

SRDF files

Copy all .srdf-files into the RDF rootfolder.
ATTN! The files has to be of type .srdf and must be located in the RDF rootfolder to make drilldowns from TOPLevel reports work!

Customer License

The KAM reports has its own report group license which has to be issued to the customer from the BA License manager.
New bareports.lic file has to be placed in the application root folder. The IIS has to be restarted (WorldWide Web Publ... service) for the changes to take effect.

Configuration of dashboard / SO Admin Client

The KAM10/20 reports are meant to be published in the BA Application. Create new grids in the BA Application to publish these reports.

We recommend setting the following parameters in grid-admin for the KAM10/20 reports:
periodical=year
ourAss=<usr1t>

We recommend setting the following parameters for linking the KAM11/21 reports into SuperOffice:
periodical=year
ourAss=<usr1t>
conSingle=<cid> --customer_id in SuperOffice

The parameter 'currency' can aslo be set if you want all users to see the numbers (KAM10/11) in the same currency. If this parameter is not set, the default parameter for the SO user is used.

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Appendix H: Old components need for 2.x functionality

MDAC

If the server is not running SQL-Server, it may be necessary to install *MDAC (Microsoft Data Access Components)*, version 2.8 or later. This component may be downloaded from the Microsoft web site at the following URL:

http://msdn2.microsoft.com/en-us/data/aa937730.aspx

TIP	Use this article from Microsoft to determine the version of MDAC on the web-server. http://support.microsoft.com/kb/301202

Microsoft DirectX

The Business Analyze Reports module requires *Microsoft DirectX 8.1* or later on the web-server. The *Business Analyze Reports* and *Business Analyze Scorecards* modules use the *Microsoft Office XP Web Components*, which depends on *Microsoft DirectX* to render the charts.

This is only required if you intend to use reports with graphs that were created prior to v. 3.0

The Microsoft DirectX component may be downloaded from the following URL:

http://msdn2.microsoft.com/en-us/xna/aa937788.aspx

NOTE	Make sure you install *Microsoft DirectX* before installing the *Microsoft Office XP Web Components* otherwise the *Business Analyze Reports* Charts will not work.
HOW TO	On the web-server. Go to *Start -> Run…* and execute *dxdiag*:

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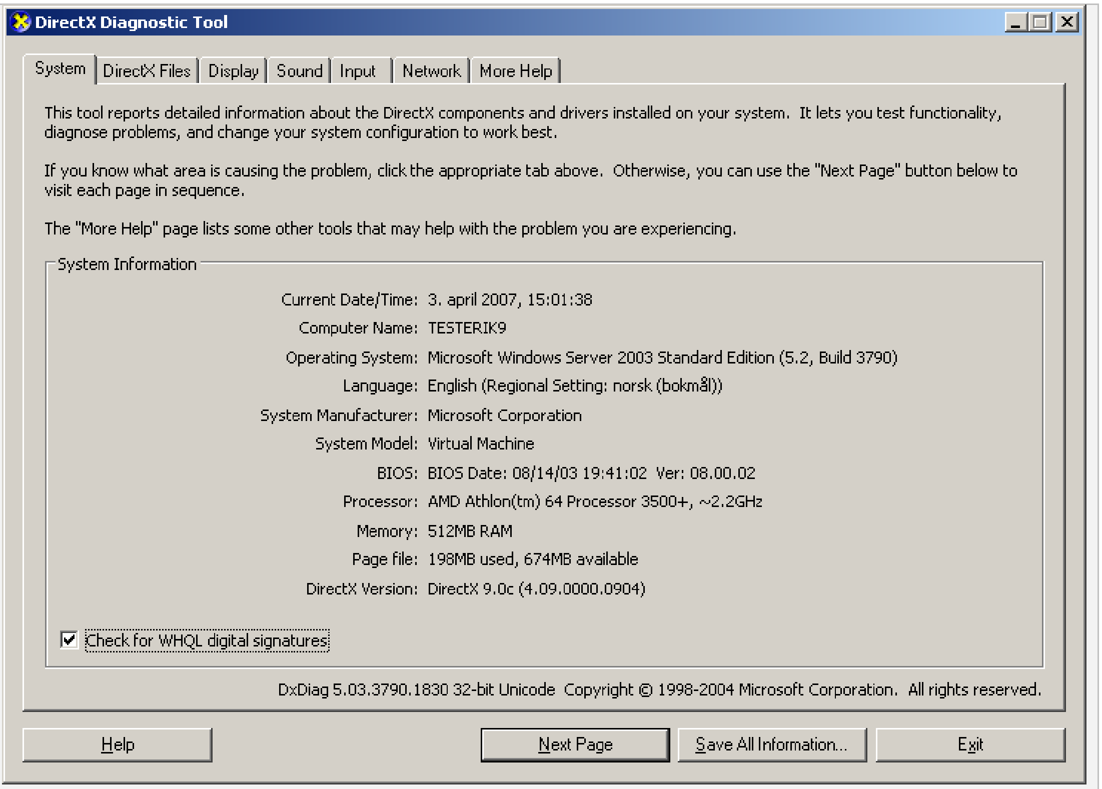

DirectX Diagnostic Tool
System
DirectX Files
Display
Sound
Input
Network
More Help
This tool reports detailed information about the DirectX components and drivers installed on your system. It lets you test functionality, diagnose problems, and change your system configuration to work best.
If you know what area is causing the problem, click the appropriate tab above. Otherwise, you can use the "Next Page" button below to visit each page in sequence.
The "More Help" page lists some other tools that may help with the problem you are experiencing.
System Information
Current Date/Time: 3. april 2007, 15:01:38
Computer Name: TESTERIK9
Operating System: Microsoft Windows Server 2003 Standard Edition (5.2, Build 3790)
Language: English (Regional Setting: norsk (bokmål))
System Manufacturer: Microsoft Corporation
System Model: Virtual Machine
BIOS: BIOS Date: 08/14/03 19:41:02 Ver: 08.00.02
Processor: AMD Athlon(tm) 64 Processor 3500+, ~2.2GHz
Memory: 512MB RAM
Page file: 198MB used, 674MB available
DirectX Version: DirectX 9.0c (4.09.0000.0904)
Check for WHQL digital signatures
DxDiag 5.03.3790.1830 32-bit Unicode Copyright © 1998-2004 Microsoft Corporation. All rights reserved.
Help
Next Page
Save All Information...
Exit

Microsoft Office XP Web Components

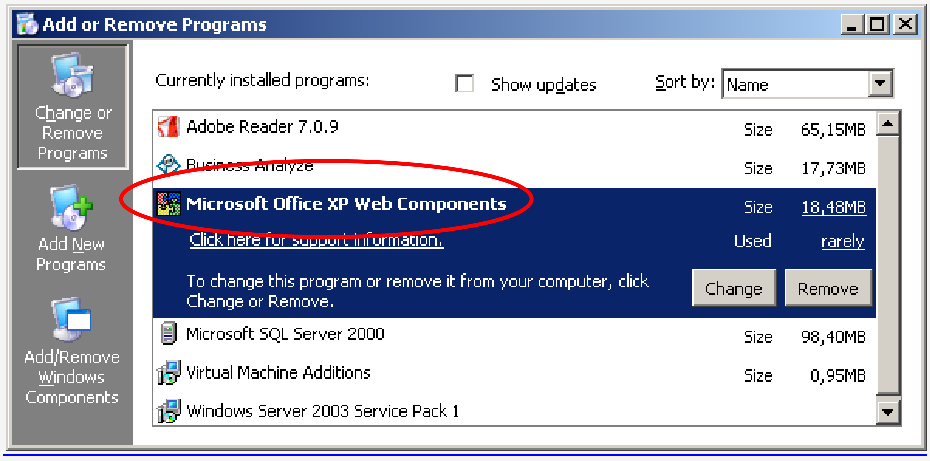
The *Business Analyze Reports* and *Business Analyze Scorecards* modules render charts for graphical data presentation to the end-user. Both of these components use the *Microsoft Office XP Web Components* to render the chart.

In order to make the modules work this component must be installed on your server.

The Office Web Components requires a valid license for *Microsoft Office XP.* You will be prompted for this license during the component installation.

This is only required if you intend to use reports with graphs that were created prior to v. 3.0

A copy of the *Microsoft Office XP Web Components* may be obtained from Microsoft by following the URL below: http://office.microsoft.com/downloads/2002/owc10.aspx

HOW TO	On the web-server: Go to Start -> Control panel-> Add /Remove Programs: 

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