Oracle® Retail XBR*i* Loss Prevention

Installation Guide

Release 10.8 with 10.8.1 Upgrade Instructions

E79581-06

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XBR^i Installation Guide Overview

This guide provides instructions for installing XBR^i Ingenium 10.8.1 at a customer site. It is divided into four main Installation parts, appendices for application and mobile configuration and troubleshooting

Part 1A Database Installation – Shows how to install Oracle databases for new XBR^i Retail and Grocery installations and upgrade Oracle or SQL databases for current XBR^i Retail and Grocery users upgrading to XBR^i.

Part 1B Database Installation – Shows how to install Oracle databases for new XBR^i Food and Beverage installations.

Part 2 I-Server Installation – Shows how to install the I-Server, which acts as middleman between database server and web server.   I-Server should be installed on a dedicated server.

Part 3 Web Server Installation – Shows how to install the web server, which hosts the XBR^i application. The Web server can be installed on a physical or virtual server.

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Appendix B: Mobile Configuration – Explains how to configure installations of XBR Ingenium mobile app for the iPad and Android tablet.

Troubleshooting – Identifies problems that could be encountered during and after the installation process and provides workaround steps.

Prerequisites

- Current XBR^i customers must be running XBR^i 10.7 before upgrading to XBR^i 10.8.
- Before installation, ensure that the Windows Control Panel – Region and Language Format is set to English (United States).

Have the following information on hand prior to beginning an installation:

- MicroStrategy License key
- The location of the servers the customer will use to host the application
- Database name, instance, and port number for the target server
- Installation CD ROM with database scripts and metadata
- Installation spreadsheet with database variables

! It is recommended to use database partitioning for optimum system usability.

Part 1A Database Installation – Retail & Grocery

Note: SQL server is supported for upgrades of existing SQL server installations only and Oracle database must be used for new installations.

There are two parts to XBR^i 10.8 Retail & Grocery database installation; creating the database instances and running the database scripts. After you create the database instances, run the database script for the appropriate database type. The three database installation types are:

New Oracle Installation

Upgrade Oracle

Upgrade SQL

New Oracle Database Installation (10g & 11g)

Before you Begin

! It is recommended to use database partitioning for optimum system usability.

- Have the installation CD Rom available with the database scripts and metadata.
- Make sure you have the installation questionnaire spreadsheet with the variables in PRO_SP_VARIABLES table completed and available. You will need this to enter ETL Database Variable settings.

Create the MicroStrategy application databases

These databases must be created before the I-Server or Web Server can be installed. Create a total of three database instances in the customer's database server for the application using the following naming conventions:

- APPMDXXX
- APPSTXXX
- APPHLXXX

Where

- APP = application file
- MD = two-letter code to identify the metadata database
- ST = two-letter code to identify the statistics database
- HL = two-letter code to identify the history list database
- XXX = This code is the three digit PTS customer code that will also be used as org code during the install.

These three MicroStrategy application databases will remain empty.

Create the XBR^{i} Ingenium 10.8 Oracle Data Warehouse Database

Create one database in the customer's database server for the Data Warehouse using the following naming conventions:

- DWRGXXX

Where

- DW = Data Warehouse
- RG = Retail & Grocery
- XXX = This code is the three digit PTS customer code that will also be used as org code during the install.

New Oracle Database Installation (Oracle 12c)

For Oracle 12c, you will first create a Container database named XBRI, then the same four databases described above will be created as Pluggable Databases and plugged into the Container database.

Methods to create the XBR^{i} Ingenium 10.8 Oracle databases

Create these four new Oracle Databases using the Database Configuration assistant, or ensure that a new instance and database has been created by the responsible DBA.

To create the XBR^{i} Ingenium 10.8 Standard Security in each of the 3 MicroStrategy databases:

1. Update the tnsnames.ora and listener.ora with new database information.

2. Create the Standard Tablespaces by opening a SQL Query window either through Toad, SQL Plus or other client interface tool, and attach to the newly created database.

   Open the database script ***Oracle_standard_tablespaces.sql*** from

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

   ☞ *The tablespace locations are set up by the Oracle DBA. You need to get the disk drive and directory where the Oracle data will be stored from the Oracle DBA.*

   Ensure the tablespace locations are correct, then copy and paste the script into the SQL query window, and execute it.

3. Open and execute the database script ***Oracle_standard_security_MSTR.sql*** from
   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

Run the Database Scripts

After creating database instances, execute the appropriate scripts against the data warehouse

To create the XBR^{i} Ingenium 10.8 Standard Tablespaces, Standard Security and database objects:

1. Log into the new instance with the “sys” account and password as sysdba.
2. Update the tnsnames.ora and listener.ora with new database information.

   Create the Standard Tablespaces by opening a SQL Query window either through Toad, SQL Plus or other client interface tool, and attach to the newly created database.

   Open the database script ***Oracle_standard_tablespaces.sql*** from

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

The tablespace locations are set up by the Oracle DBA. You need to get the disk drive and directory where the Oracle data will be stored from the Oracle DBA.

3. Ensure the tablespace locations are correct, then copy and paste the script into the SQL query window, and execute it.
4. Open the database script ***Oracle_standard_security.sql*** from
   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL
5. Locate the CREATE DATABASE LINK command at the end of the script and change MicroStrategy Metadata database name to be the TNS name of the metadata database name in your installation.
   Example:

```
CREATE PUBLIC DATABASE LINK "XBRI_MD_CLONE.HST"

CONNECT TO XBRADMIN

IDENTIFIED BY "XBRADMIN"

USING 'APPMDXXX';
```

Also provided in the tablespace script and initially commented out, is the addition of new parameters for implementing Transparent Data Encryption (TDE). It is highly recommended to use TDE for a secure data warehouse environment. It is also recommended that the security key used for encryption NOT be stored in the database, but in a secure wallet outside the database being encrypted. For information on encrypting your data warehouse database using TDE, copy and paste the following URL into your internet browser.

https://docs.oracle.com/database/122/ASOAG/configuring-transparent-data-encryption.htm#ASOAG10474

6. Copy the edited script into SQL Query window pointing to the Data Warehouse database. Execute the script to create the database roles and users.
7. Log out and log back in to the database as user XBRADMIN.

Open the database script ***build_database_objects.sql*** from:

CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

Copy the contents into the SQL Query window. Execute the script to create all the database objects tables, views, functions, stored procedures, triggers, and so on.

To load the metadata:

1. Load the XBR^{i} 10.8 system table metadata. Open the metadata archive from

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL\METADATA

2. Unzip the core metadata to a new or empty folder. The contents of the core metadata archive are the common formatted **.DAT** files, the format files **(.FMT, .CTL**) and two load command files, one for SQL Server and one for Oracle. We will use the Oracle Server version for this load **core_xbri_metadata_load_oracle.cmd**
3. Edit the command file core_xbri_metadata_load_mssql.cmd and set the database and file location variable to match the server and database you want to load

   Example:

   Set XBR_DATABASE=DW_RG_QA

   Set FILE_LOCATION=D:\Metadata \XBRi

   Set DATA_FILE_LOCATION=D:\Metadata\XBRi

   Set USER=XBRADMIN

   Set PW=XBRADMIN

4. Execute the command file by either clicking the file, or opening a command window and setting default to the **FILE_LOCATION** folder. This loads the metadata. There will be a log file for the deletion of rows from the target table *tablename*_DELETE.LOG and a log file for the load of the target table *tablename*_LOAD.LOG. At the end of the load, all the individual load log files are concatenated together so one log can be quickly scanned to see if there were any errors – *databasename*_LOAD_FULL.LOG
5. Execute the post new build cleanup script to convert sql server syntax in PRO_VIEW_SYNTAX and MD_LP_SMARTLINKS_FIELDS to Oracle.

   Open the database script ***post_new_build_80_cleanup.sql*** from:

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

   Copy contents into SQL Query window and execute the script for data warehouse database.

Post Database Installation Setup

Execute the Security Script

Open and execute the security script: Oracle_standard_security_APP_

MD.sql

The security scripts is on the release CD in the following location:

CD: \DATABASE_SCRIPTS\UPGRADE\ORACLE

To execute the security script:

Open **Oracle_standard_security_APP_MD.sql** and execute entire script in the query window attached to the APPMDXXX database.

Setting Start Time in the External Scheduler Table

The next step is to set the External Scheduler kick off time by passing the hour and minute as parameters to the SP_LP_SCHEDULE_SET_TIME procedure. The following procedure uses the start time: 11:45 pm.

To execute the SP_LP_SCHEDULE_SET_TIME procedure:

In the Query window, enter the following:

```
DECLARE
  PN_HOUR NUMBER;
  PN_MINUTE NUMBER;
BEGIN
  PN_HOUR := 23;
  PN_MINUTE := 45;
  XBRADMIN.SP_LP_SCHEDULE_SET_TIME ( PN_HOUR, PN_MINUTE );
  COMMIT;
END;
```

Master Fiscal and Calendar Date tables

The last step of the new database installation is to determine the Fiscal Date Calendar

format and date range to create for the master date tables. If the customer is a retail customer following the standard NRF Fiscal Calendar 4-5-4 monthly format, you don’t need to execute this step; the default fiscal calendar that was loaded with the core metadata has already been generated back several years from fiscal year 2005 to 2030.

If the customer needs a different date range or uses the fiscal 4-4-5 format, you must follow the next procedure to regenerate the data in the master date tables. The parameters in the example below will generate the date tables from fiscal 2006 to 2013 with weeks starting on Sunday.

To regenerate the date tables with a different date range than the fiscal 4-5-4 format:

Change the parameters as needed.

In the Query window, enter the following:

Example:

```
BEGIN

  XBRADMIN.SP_MST_UPD_DATE_454 (1,'29-JAN-2006',2006,2013,7);

  COMMIT;

END;

/
```

- The first parameter is the organization ID of the customer.
- The first parameter is the date for the first day of the Fiscal Year according to NRF standard 4-5-4 calendar. Years supported are from 2000 to 2031. A 4-5-4 fiscal calendar cannot be generated using an invalid fiscal year start date.
- The second parameter is the fiscal year to start the calendar
- The third parameter is the fiscal year to end the calendar
- The fourth parameter is the day of the week that starts the fiscal week. The default for the U.S. is Sunday, day seven, with Monday being day one.

If the company supports the non-NRF standard 4-4-5 fiscal calendar, then all the same parameters apply to the 4-4-5 procedure, you just need to change “_4-5-4” to “_4-4-5”

In the Query window, enter the following:

Example:

```
BEGIN

  XBRADMIN.SP_MST_UPD_DATE_445 (1,'29-JAN-2006',2006,2013,7);

  COMMIT;

END;

/
```

ETL Database Variable Settings

Check and set all database variables in PRO_SP_VARIABLES table according to the installation questionnaire spreadsheet that should have been already completed

The database variables are:

STORE_UNIQUE - determines if store numbers are unique across the organization

EMPLOYEE_COPY - determines if cashier number is copied to employee number

SALESPERSON_COPY - determines if cashier number is copied to salesperson number

EMPNUM_USE - determines if employee number is used or always NULL

SALESPERSONNUM_USED - determines if salesperson number is used or always NULL

SKU_STAGE_OVERRIDE - determines in the SKU update if values from staging should override TMP

CUST_STAGE_OVERRIDE - determines in the CUSTOMER update if values from staging should override TMP

CASHIER_SIZE - determines the maximum size of the customers column which will be the source for CASHIERNUM, EMPNUM, SALESPERSONNUM – this value is used in the calculation of the CASHIERID, EMPLOYEEID and SALESPERSONID column values. The max size allowable is 20 for CASHIERNUM, EMPNUM, SALESPERSONNUM and will control the sizing of all three of the ID columns.

Oracle Database Upgrade – 10.7 to 10.8

Before you begin

- Upgrade scripts are on the release CD in the following location:
  CD:\DATABASE_SCRIPTS\UPGRADE\ORACLE
- Ensure your database is currently at XBRi version 10.7 GA, this database upgrade assumes all previous upgrades have been completed up through XBRi 10.7 GA

Upgrade Oracle Database from XBR^i 10.7 to XBR^i 10.8

1. Run the following scripts in the order shown, "appl" before "data."
   xbr_appl_107_to_108_upgrade.sql

   xbr_data_107_to_108_upgrade.sql

2. Copy/Paste each entire script into a SQL Query window and execute.

SQL Database Upgrade – 10.7 to 10.8

Before you begin

- Upgrade scripts are on the release CD in the following location:

  CD: \DATABASE_SCRIPTS\UPGRADE\MSSQL

- Ensure your database is currently at XBRi version 10.7 GA, this database upgrade assumes all previous upgrades have been completed up through XBRi 10.7 GA

Upgrade SQL Server Database from XBR^i 10.7 to XBR^i 10.8

1. Run the following scripts in the order shown, “appl” before “data.”
   xbr_appl_107_to_108_upgrade.sql

   xbr_data_107_to_108_upgrade.sql

2. Copy/Paste each entire script into a SQL Query window and execute.

Part 1B Database Installation – Food & Beverage

Note: SQL server is supported for upgrades of existing SQL server installations only and Oracle database must be used for new installations.

There are two parts to XBR^i 10.8 Food & Beverage database installation; creating the database instances and running the database scripts. After you create the database instances, run the database script for the Oracle database.

New Oracle Database Installation (10g & 11g)

Before you Begin

> It is highly recommended to use Transparent Data Encryption (TDE) for a secure data warehouse environment. TDE is only available in Oracle 11g and above. It is also recommended that the security key used for encryption NOT be stored in the database, but in a secure wallet outside the database being encrypted. For information on encrypting your data warehouse database using TDE, copy and paste the following URL into your internet browser.
>
> It is recommended to use database partitioning for optimum system usability.

- Have the installation CD Rom available with the database scripts and metadata.
- Make sure you have the installation questionnaire spreadsheet with the variables in PRO_SP_VARIABLES table completed and available. You will need this to enter ETL Database Variable settings.

- • https://docs.oracle.com/database/122/ASOAG/configuring-transparent-data-encryption.htm#ASOAG10474

Create the MicroStrategy application databases

These databases must be created before the I-Server or Web Server can be installed. Create a total of three database instances in the customer's database server for the application using the following naming conventions:

- APPMDXXX
- APPSTXXX
- APPHLXXX

Where

- APP = application file
- MD = two-letter code to identify the metadata database
- ST = two-letter code to identify the statistics database
- HL = two-letter code to identify the history list database

- XXX = This code is the three digit PTS customer code that will also be used as org code during the install.

These three MicroStrategy application databases will remain empty.

Create the XBR^i Ingenium 10.8 Oracle Data Warehouse Database

Create one database in the customer's database server for the Data Warehouse using the following naming conventions:

- DWRGXXX

Where

- DW = Data Warehouse
- RG = Retail & Grocery
- XXX = This code is the three digit PTS customer code that will also be used as org code during the install.

New Oracle Database Installation (12c)

For Oracle 12c, you will first create a Container database named XBRI, then the same four databases described above will be created as Pluggable Databases and plugged into the Container database.

To create the XBR^i Ingenium 10.8 Standard Security in each of the 3 MicroStrategy databases:

1. Update the tnsnames.ora and listener.ora with new database information.

2. Create the Standard Tablespaces by opening a SQL Query window either through Toad, SQL Plus or other client interface tool, and attach to the newly created database.
3. Open the database script ***Oracle_standard_tablespaces.sql*** from

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

The tablespace locations are set up by the Oracle DBA. You need to get the disk drive and directory where the Oracle data will be stored from the Oracle DBA.

Also provided in the tablespace script and initially commented out, is the addition of new parameters for implementing Transparent Data Encryption (TDE). It is highly recommended to use TDE for a secure data warehouse environment. It is also recommended that the security key used for encryption NOT be stored in the database, but in a secure wallet outside the database being encrypted. For information on encrypting your data warehouse database using TDE, copy and paste the following URL into your internet browser.

https://docs.oracle.com/database/122/ASOAG/configuring-transparent-data-encryption.htm#ASOAG10474

Ensure the tablespace locations are correct, then copy and paste the script into the SQL query window, and execute it.

4. Open and execute the database script ***Oracle_standard_security_MSTR.sql*** from
   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

Creating the New XBR^i Ingenium 10.8 Oracle schema in the Food & Beverage Data Warehouse

Run the Database Scripts

After creating database instances, execute the appropriate scripts against the data warehouse.

To create the XBR^i Ingenium 10.8 Standard Tablespaces, Standard Security and database objects:

1. Create the Standard table spaces by opening a SQL Query window either through Toad, SQL Plus or other client interface tool, and attach to the Food & Beverage data Warehouse database.
2. Log into the new instance with the “sys” account and password as sysdba.
3. Open the database script ***Oracle_standard_tablespaces.sql*** from:

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

The tablespace locations are set up by the Oracle DBA. You need to get the disk drive and directory where the Oracle data will be stored from the Oracle DBA.

4. Ensure the table space locations are correct, then copy and paste the script into the SQL query window, and execute it.
5. Open the database script ***Oracle_standard_security.sql*** from
   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL
6. Copy the script into SQL Query window pointing to the Data Warehouse database. Ensure the database link create statement has the correct TNS name for the metadata database. Execute the script to create the database roles and users.
7. Now run the Mymicros standard security script to give XBR^i the read permissions to the underlying Mymicros data warehouse tables in the COREDB and LOCATION_ACTIVITY_DB schemas. Open the database script ***Oracle_Mymicros_security.sql*** from

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

8. Copy the script into SQL Query window pointing to the Data Warehouse database. Execute the script to grant access to the Mymicros data warehouse data. This script will need to be run from a user account with privileges.
9. Execute the pre new build database script: Open the database script ***pre_new_build_database.sql*** from

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

10. Now set up the public synonyms to the objects to which you just granted read permission. To do this, add two rows into the ADM_DATABASE_SETUP table, one row for each of the schemas you will be creating the synonyms against – COREDB and LOCATION_ACTIVITY_DB.

    Open the database script ***insert_adm_db_setup_MYMICROS_XBRi.sql*** from

    CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

    and change the database and server name to the database and server you are installing on, leaving the DATABASE_TENANT and DATABASE_LOCAL_REMOTE columns set to 'M' and 'L' respectively.

    For Food and Beverage installations, all databases will be treated as multi-tenant and local in the existing Mymicros database. There will no longer be a remote database option with database links for XBR^i 10.8.

11. Run the SP_PRO_DATABASE_SETUP procedure to define the synonyms on the Mymicros objects.
12. Log out and log back in to the Mymicros data warehouse database as user XBRI.
    Open the database script ***build_database_mmxbr.sql*** from:

    CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

    Copy the contents into the SQL Query window. Execute the script to create all the database objects tables, views, functions, stored procedures, triggers, and so on. If an error occurs while creating views, click ignore all, this is due to the synonyms not being created against the COREDB and LOCATION_ACTIVITY_DB objects yet, this will be completed after the metadata is loaded in the next step.

To load the metadata:

1. Load the XBR^i 10.8 system table metadata. Open the metadata archive from:

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL\METADATA

2. Unzip the core metadata to a new or empty folder. The contents of the core metadata archive are the common formatted **.DAT** files, the format .**FMT** files and two load command files, one for SQL Server and one for Oracle. We will use the Oracle Server version for this load **core_xbri_metadata_load_oracle.cmd**
3. Edit the command file core_xbri_metadata_load_mssql.cmd and set the database and file location variable to match the server and database you want to load.

   Example:

   Set XBR_DATABASE=MMP3

   Set FILE_LOCATION=D:\Metadata \XBRiFS

   Set DATA_FILE_LOCATION=D:\Metadata\XBRiFS

   Set USER=XBRI

```
Set PW=Xbri$Adm1n
```

4. Execute the command file by either clicking the file, or opening a command window and setting the default to the **FILE_LOCATION** folder. This loads the metadata. There will be a log file for the deletion of rows from the target table *tablename*_DELETE.LOG and a log file for the load of the target table *tablename*_LOAD.LOG. At the end of the load, all the individual load log files are concatenated together, so one log can be quickly scanned to see if there were any errors: *databasename*_LOAD_FULL.LOG

5. Execute the post new build cleanup script to set the IServer Database Type to Oracle as well as any other oracle specific modifications.

   Open the database script ***post_new_build_core_data_fix.sql*** from:

   CD:\DATABASE_SCRIPTS\ORACLE\NEW_INSTALL

   Copy contents into SQL Query window connected as XBRI and execute the script.

Post Database Installation Setup

Setting Start Time in the External Scheduler Table

The next step is to set the External Scheduler kick off time by passing the hour and minute as parameters to the SP_LP_SCHEDULE_SET_TIME procedure. The following procedure uses the start time: 11:45 pm.

To execute the SP_LP_SCHEDULE_SET_TIME procedure:

In the Query window, enter the following:

```
DECLARE
  PN_HOUR NUMBER;
  PN_MINUTE NUMBER;
BEGIN
  PN_HOUR := 23;
  PN_MINUTE := 45;
  XBRADMIN.SP_LP_SCHEDULE_SET_TIME ( PN_HOUR, PN_MINUTE );
  COMMIT;
END;
```

Master Fiscal and Calendar Date tables

The last step of the new database installation is to determine the Fiscal Date Calendar format and date range to create for the master date tables. If the customer is a retail customer following the standard

NRF Fiscal Calendar 4-5-4 monthly format, you don’t need to execute this step; the default fiscal calendar that was loaded with the core metadata has already been generated back seven years from the present to a fiscal year range of 2005 to 2030.

If the customer needs a different date range or uses the fiscal 4-4-5 format, you must follow the next procedure to regenerate the data in the master date tables. The parameters in the example below will generate the date tables from fiscal 2006 to 2014 with weeks starting on Sunday.

To regenerate the date tables with a different date range than the fiscal 4-5-4 format:

Change the parameters as needed.

In the Query window, enter the following:

Example:

```
BEGIN

  XBRI.SP_MST_UPD_DATE_454 (1,'29-JAN-2006',2006,2014,7);

  COMMIT;

END;

/
```

- The first parameter is the organization ID of the customer
- The second parameter is the date for the first day of the Fiscal Year according to NRF standard 4-5-4 calendar. Years supported are from 2000 to 2031. A 4-5-4 fiscal calendar cannot be generated using an invalid fiscal year start date.
- The third parameter is the fiscal year to start the calendar
- The fourth parameter is the fiscal year to end the calendar
- The fifth parameter is the day of the week that starts the fiscal week. The default for the U.S. is Sunday, day seven, with Monday being day one.

If the company supports the non-NRF standard 4-4-5 fiscal calendar, then all the same parameters apply to the 4-4-5 procedure, you just need to change “_4-5-4” to “_4-4-5”

In the Query window, enter the following:

Example:

```
BEGIN

  XBRI.SP_MST_UPD_DATE_445 (1234'29-JAN-2006',2006,2014,7);

  COMMIT;

END;
```

/

Oracle Database Upgrade – 10.7 to 10.8

Before you begin

- Upgrade scripts are on the release CD in the following location:
  CD:\DATABASE_SCRIPTS\UPGRADE\ORACLE

- Ensure your database is currently at XBRi version 10.7 GA, this database upgrade assumes all previous upgrades have been completed up through XBRi 10.7 GA

Upgrade Oracle Database from XBR*i* 10.7 to XBR*i* 10.8

1. Run the following scripts in the order shown, “appl” before “data.”
   xbr_appl_107_to_108_upgrade.sql

   xbr_data_107_to_108_upgrade.sql

2. Copy/Paste each entire script into a SQL Query window and execute.

SQL Database Upgrade – 10.7 to 10.8

Before you begin

- Upgrade scripts are on the release CD in the following location:

  CD: \DATABASE_SCRIPTS\UPGRADE\MSSQL

- Ensure your database is currently at XBRi version 10.7 GA, this database upgrade assumes all previous upgrades have been completed up through XBRi 10.7 GA

Upgrade SQL Server Database from XBR^i 10.7 to XBR^i 10.8

1. Run the following scripts in the order shown, "appl" before "data."
   xbr_appl_107_to_108_upgrade.sql

   xbr_data_107_to_108_upgrade.sql

2. Copy/Paste each entire script into a SQL Query window and execute.

Part 2 I-Server Installation

If Case management configuration is performed during a new installation it should be selected along with web server and XBR^{i} admin tools. The Case Management Configuration option should not be run "stand alone" subsequent to the XBR^{i} installation.

The first part of the XBR^{i} Install program installs the I-Server- which is the middleman between the previously installed database and the application web server. You will install the web server after the I-Server.

For performance reasons, Oracle Micros recommends installing the I-Server on a separate machine.

Prerequisites

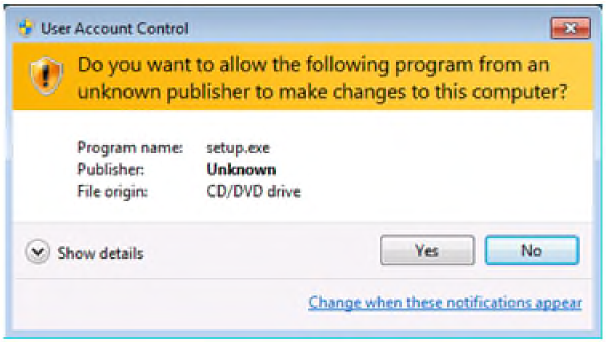
Before you begin, have the following information available:

- MicroStrategy License Key.
- A worksheet with the values to enter at the installation prompts. Most of these pertain to the servers at the client site and must be obtained from the customer.
- The XBR^{i} installation DVD from Oracle Micros

If you are installing directly from ISO, we recommend using software like Magic Disc^{TM} that automounts upon server reboot.

To run the I-Server Installation program:

1. Open the installation DVD on the I-Server where you will be doing the installation.
2. Double click on setup.exe.
3. Click **Yes** on the Windows User Account Control dialog.

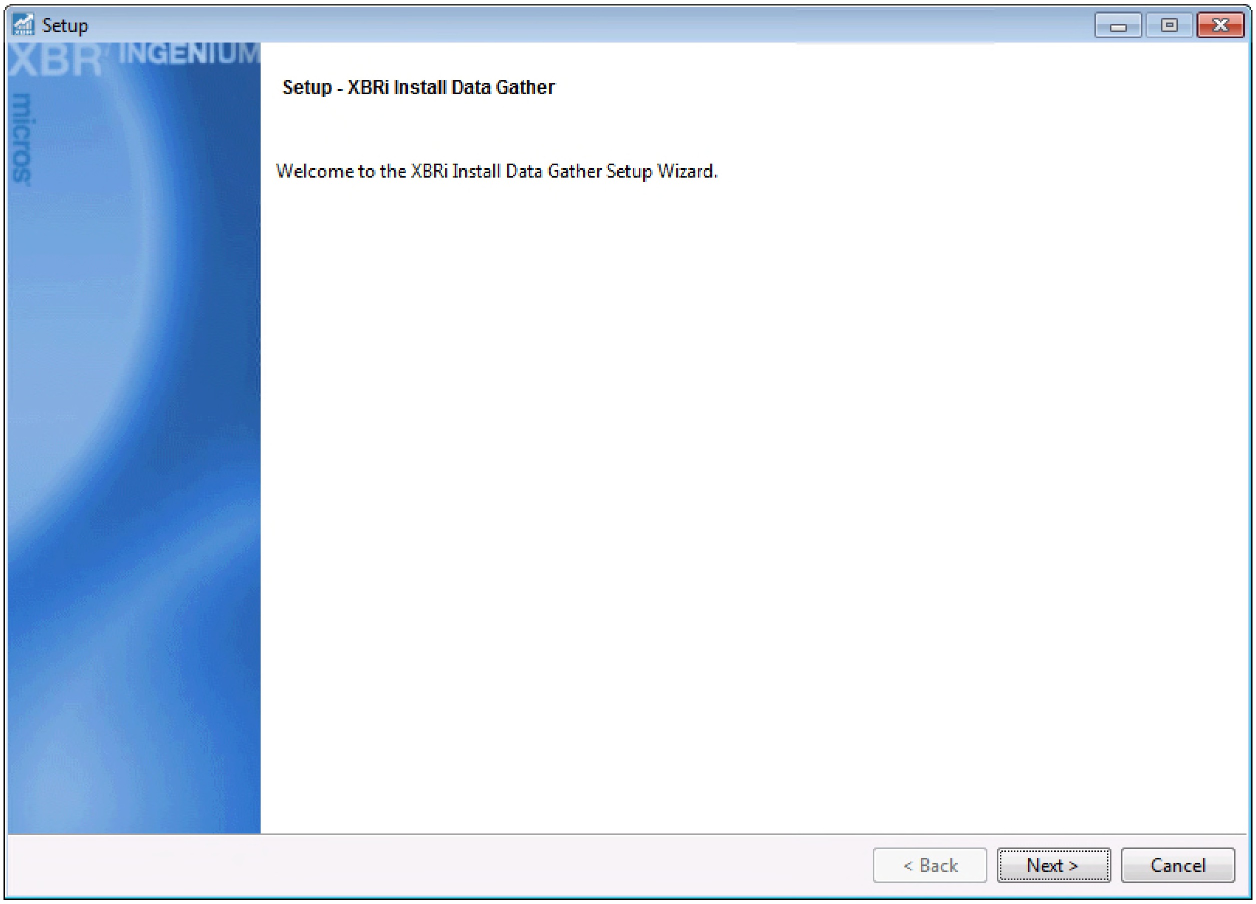


User Account Control

Do you want to allow the following program from an unknown publisher to make changes to this computer?

Program name: setup.exe
Publisher: **Unknown**
File origin: CD/DVD drive

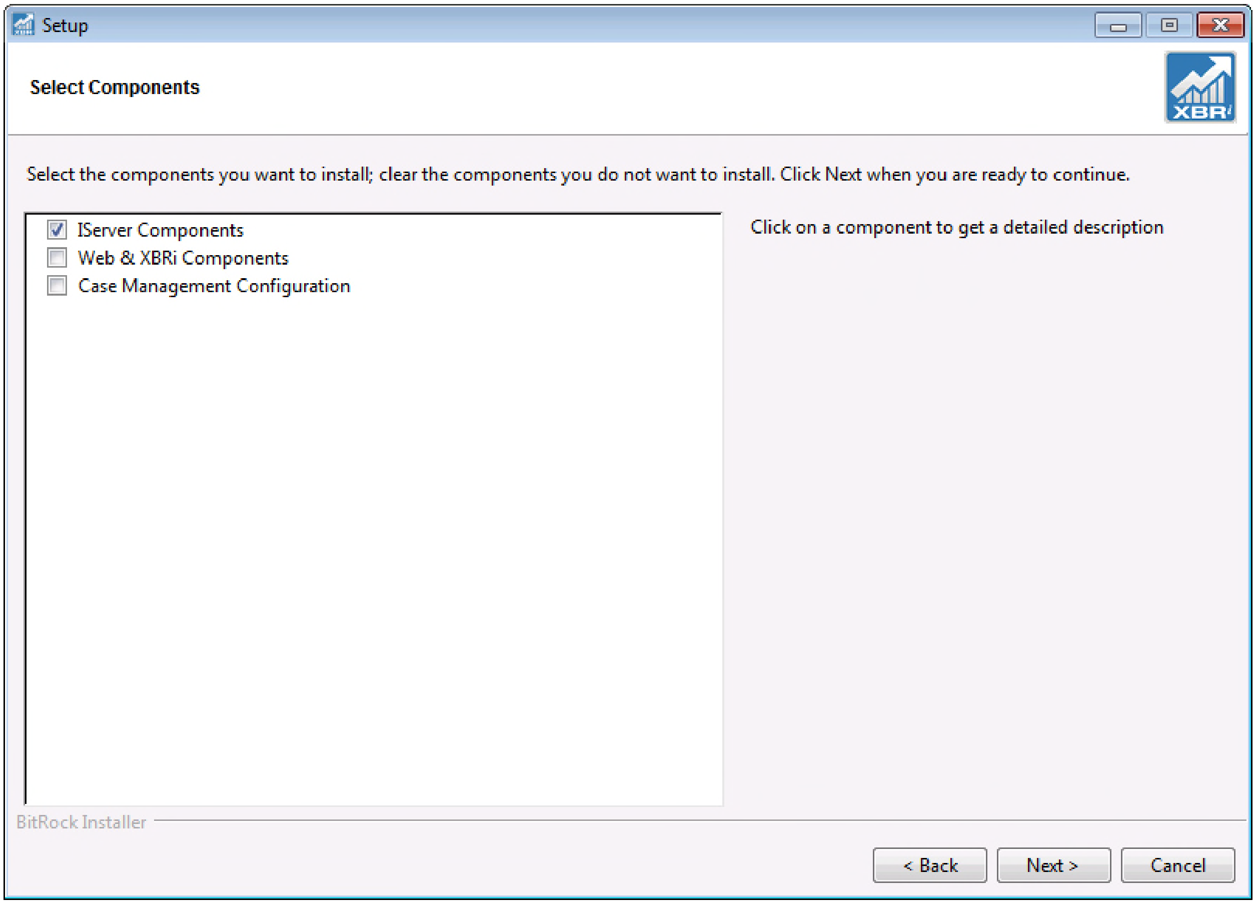
This displays the following screen:



Setup - XBRi Install Data Gather

Welcome to the XBRi Install Data Gather Setup Wizard.

Click **Next.**



Select Components

Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.

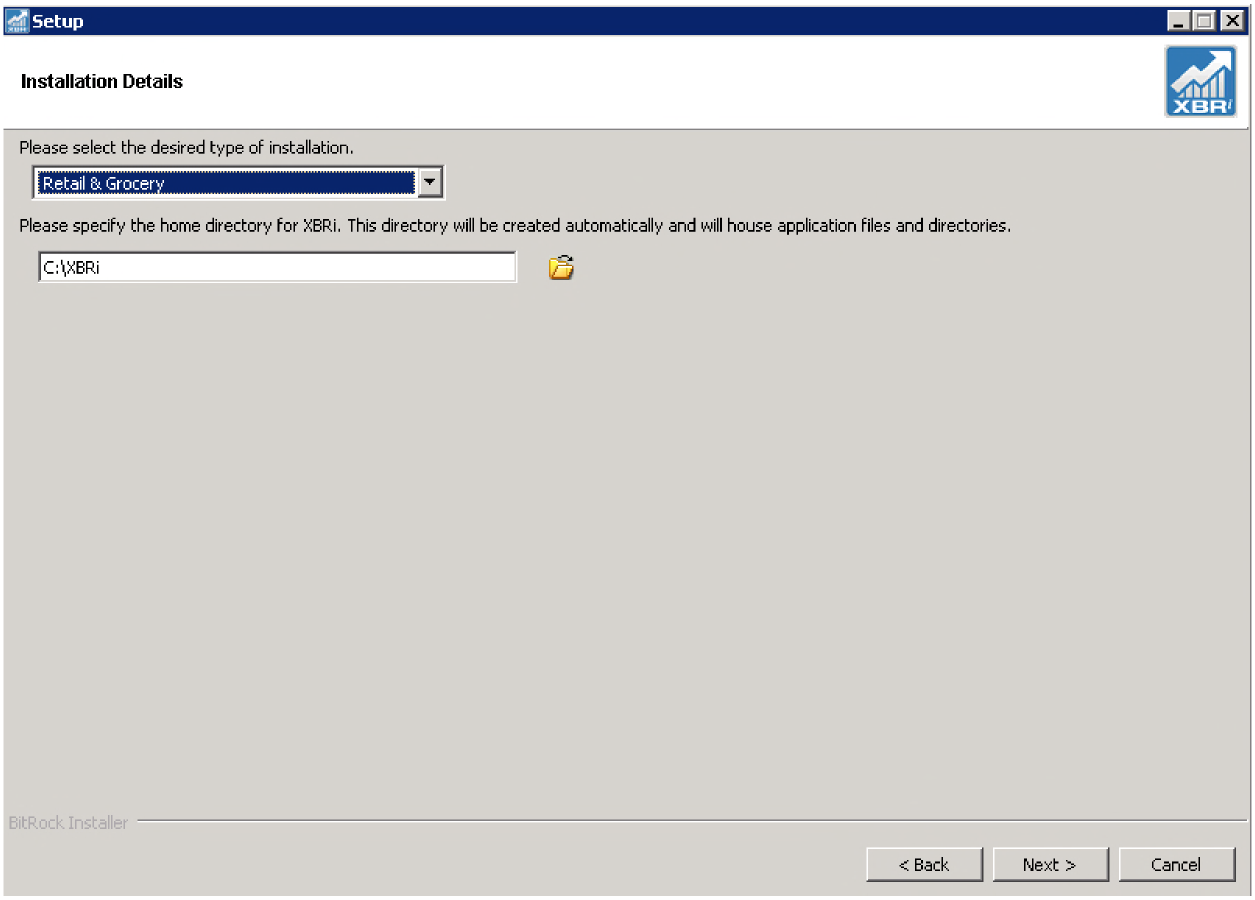
- ☑ IServer Components
- ☐ Web & XBRi Components
- ☐ Case Management Configuration

Click on a component to get a detailed description

Select the check box next to **IServer Components** and click **Next**.

*If you are installing IServer and Web & XBR^i Components on same server, also select the **Web & XBR^i Components** check box. It is not possible to complete the IServer installation and subsequently run setup to install Administration and Web on the same server. The instructions in this guide pertain to installation on two servers, which is the recommended configuration.*

.



Installation Details

Please select the desired type of installation.

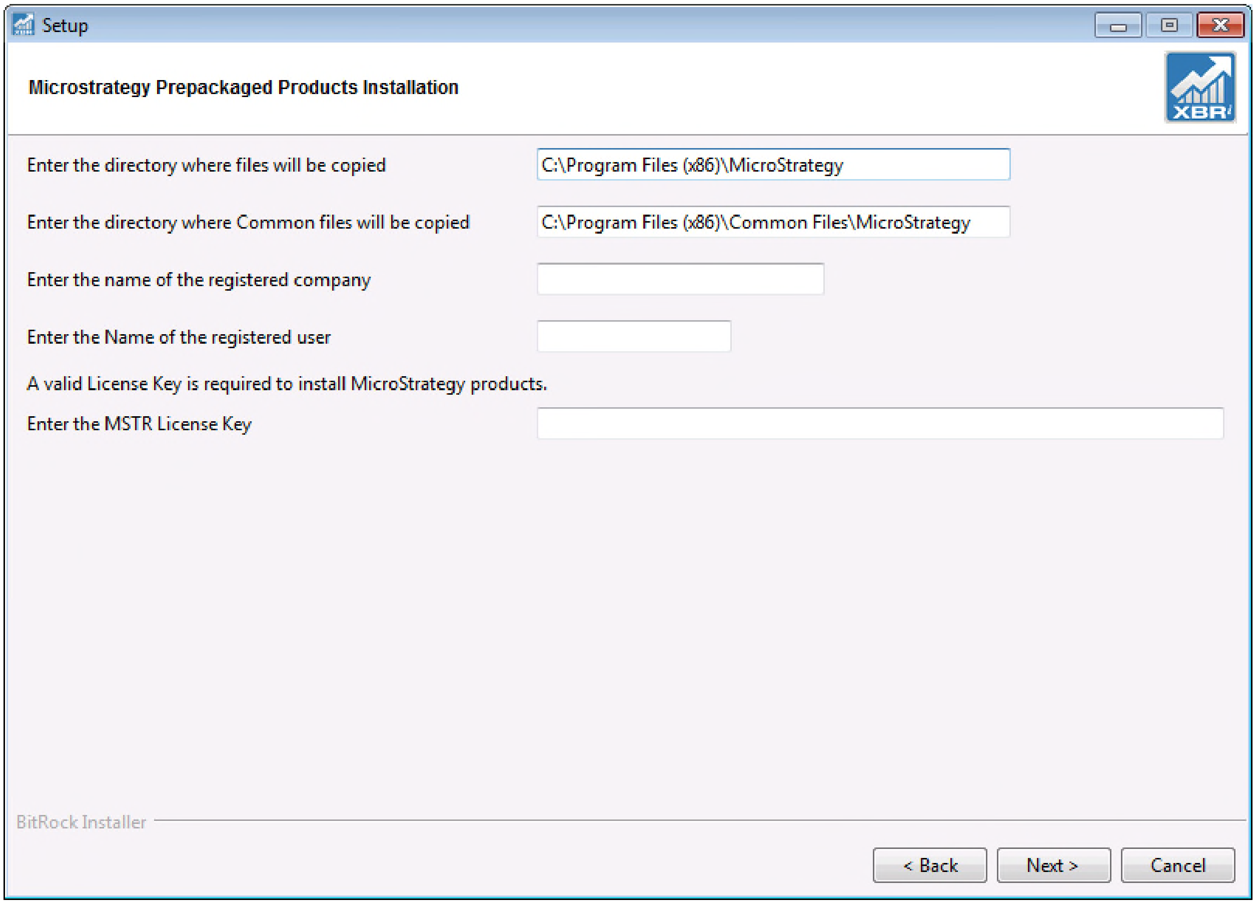
Retail & Grocery

Please specify the home directory for XBRi. This directory will be created automatically and will house application files and directories.

C:\XBRi

Select the type of installation: **Food & Beverage** or **Retail & Grocery** from the drop-down box.

Verify that the home directory is set correctly. This directory must exist. The XBR^{i} folder will be created here. Click **Next**.



Enter the directory where files will be copied C:\Program Files (x86)\MicroStrategy

Enter the directory where Common files will be copied C:\Program Files (x86)\Common Files\MicroStrategy

Enter the name of the registered company

Enter the Name of the registered user

A valid License Key is required to install MicroStrategy products.

Enter the MSTR License Key

Enter the required information at the prompts:

Check the path for **the directory where files will be copied** and change if necessary.

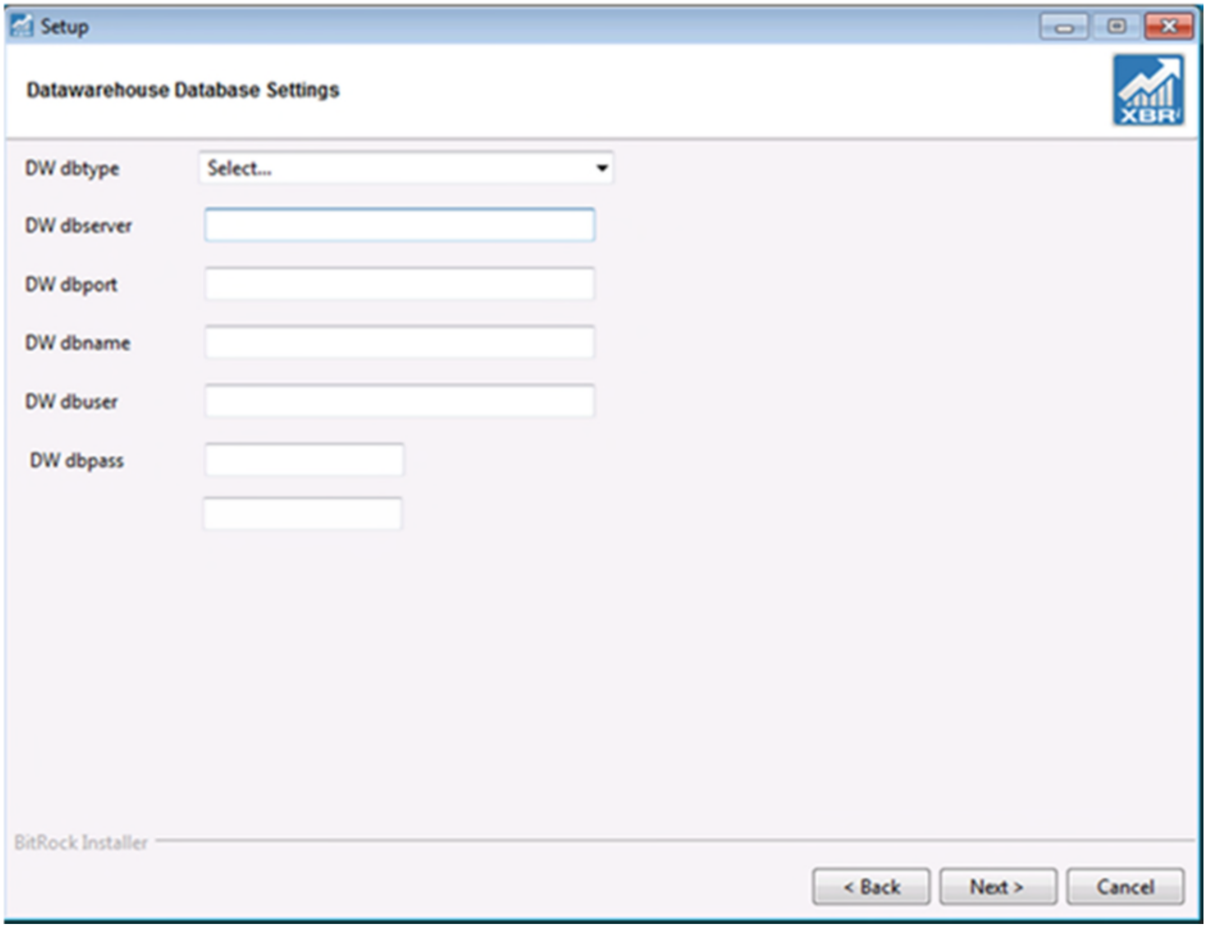
Check the path for **the directory where common files will be copied** and change if necessary.

Enter **the name of the registered company**. The customer can provide this information.

Enter the **Name of the registered user**. This is the User Name of the XBR^i Administrator.

Enter the **MicroStrategy License key** number.

When you are done, click **Next.**



Enter the settings for the **Data warehouse** Database. Database connection information that you enter will be carried forward to each of the three subsequent database settings pages.

The Database Administrator at the customer site can provide these values:

DW dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

DW dbserver – Enter the data warehouse database server name.

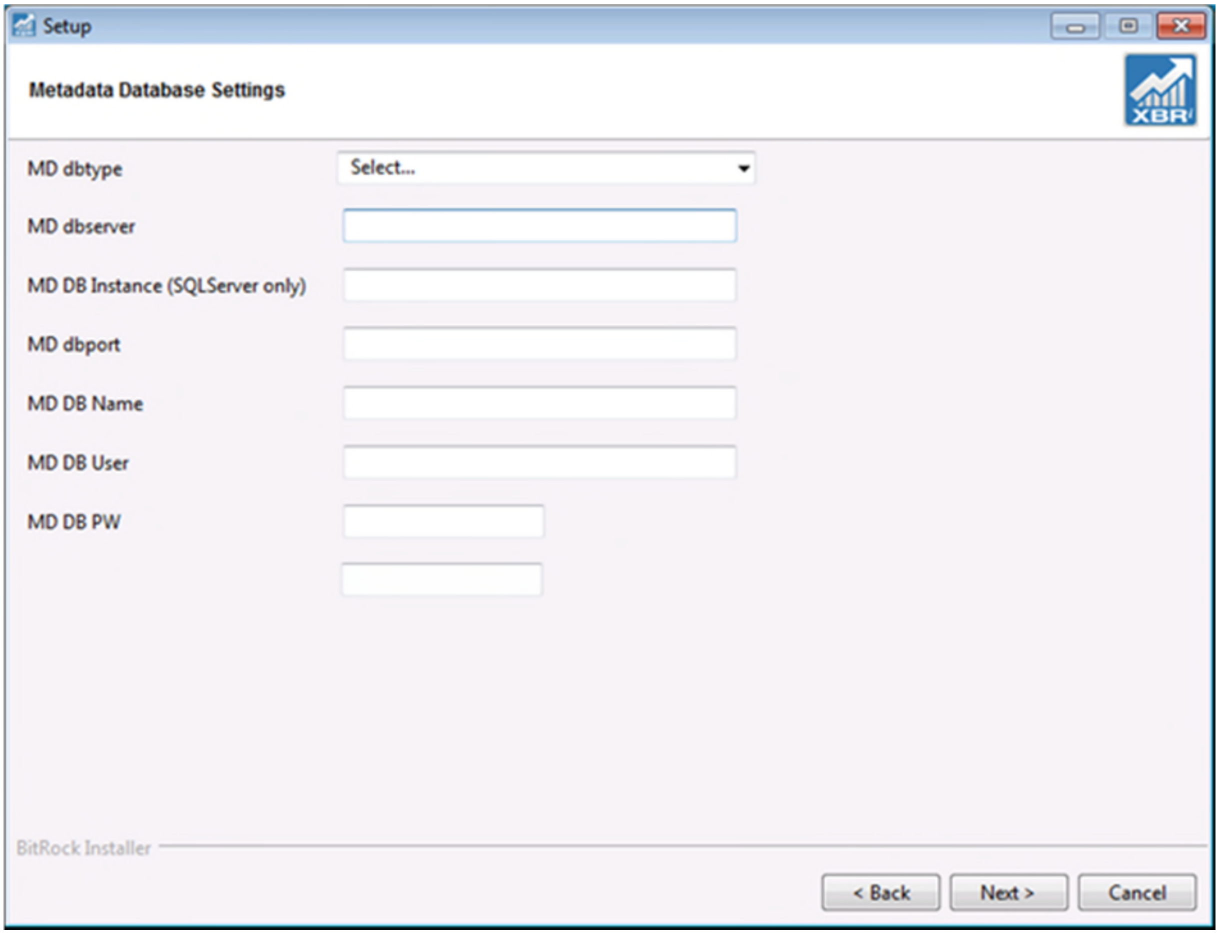
DW dbport – Enter the data warehouse database port number.

DW dbname – Enter the data warehouse database name

DW dbuser – Enter the datawarehouse database user name.

DW dbpass - Enter the db password in both boxes. This will be encrypted and saved during XBR^{i} configuration.

When you are done, click **Next**.



Enter the settings for the Metadata Database. The Database Administrator at the customer site can provide these values:

MD dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

MD dbserver – Enter the metadata database server name.

If MSSQL DW DB Instance – Enter the database instance if the database server is SQL.

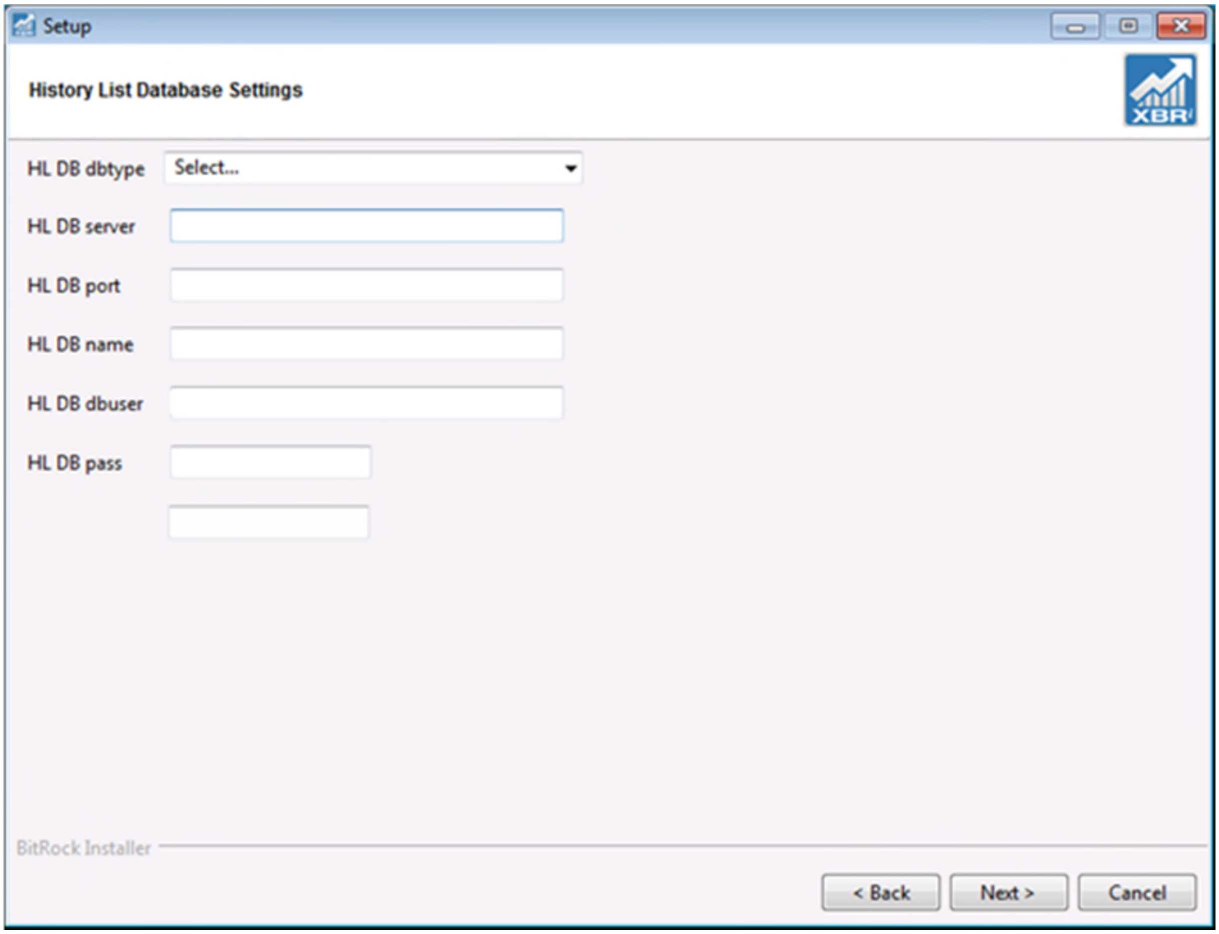
MD dbport – Enter the metadata database port number.

MD dbname – Enter the metadata database name.

MD dbuser – This displays the registered user name that was previously entered.

MD dbpass - This displays the password that was previously entered. This will be used when the metadata tables are created.

When you are done, click **Next**.



Enter the settings for the History List Database. The Database Administrator at the customer site can provide these values:

HL dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

HL dbserver – Enter the history list database server name.

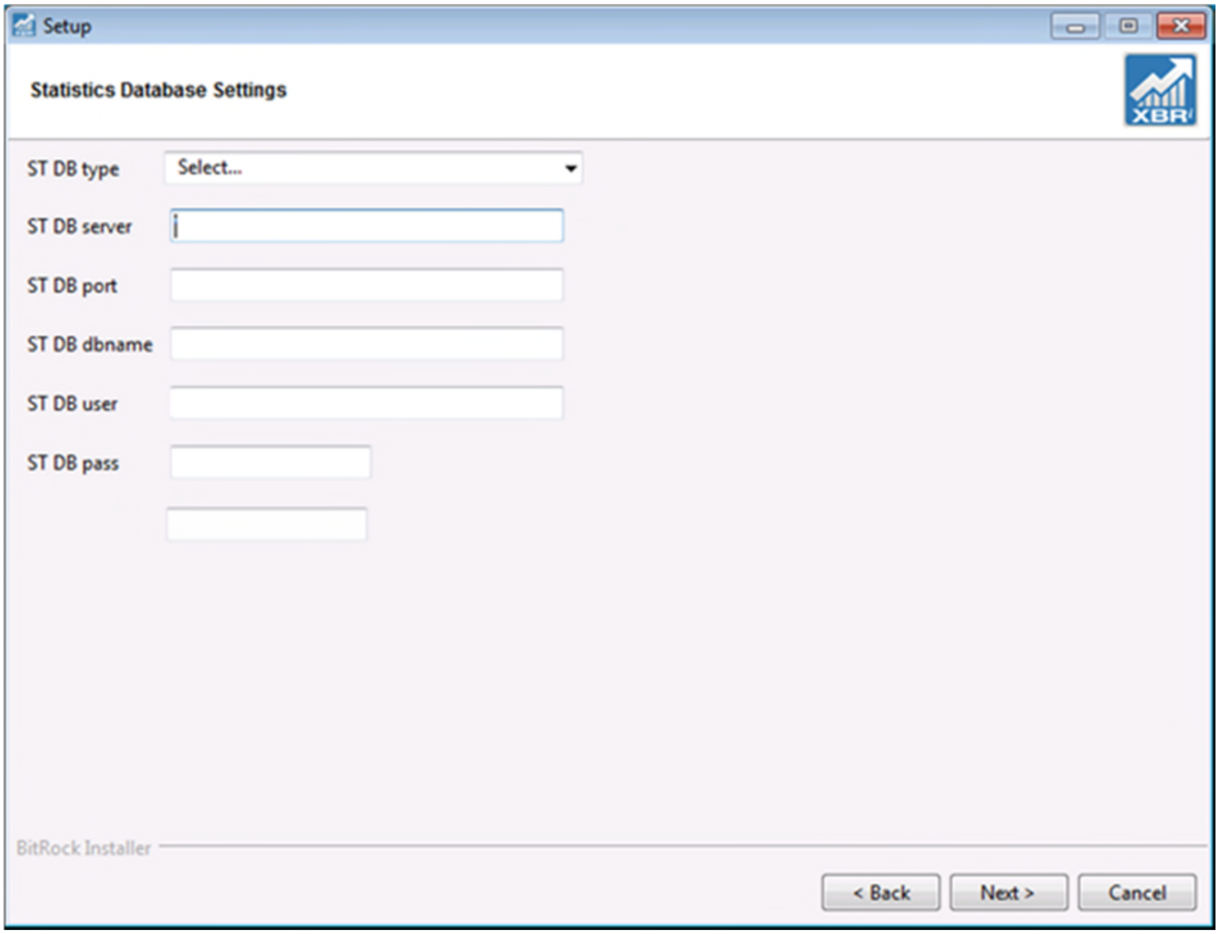
HL dbport – Enter the history list database port number.

HL dbname – Enter the history list database name.

HL dbuser – This displays the registered user name that was previously entered.

HL dbpass - This displays the password that was previously entered. This will be used when the metadata tables are created.

When you are done, click **Next**.



Enter the settings for the Statistics Database. The Database Administrator at the customer site can provide these values:

ST dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

ST dbserver – Enter the statistics database server name.

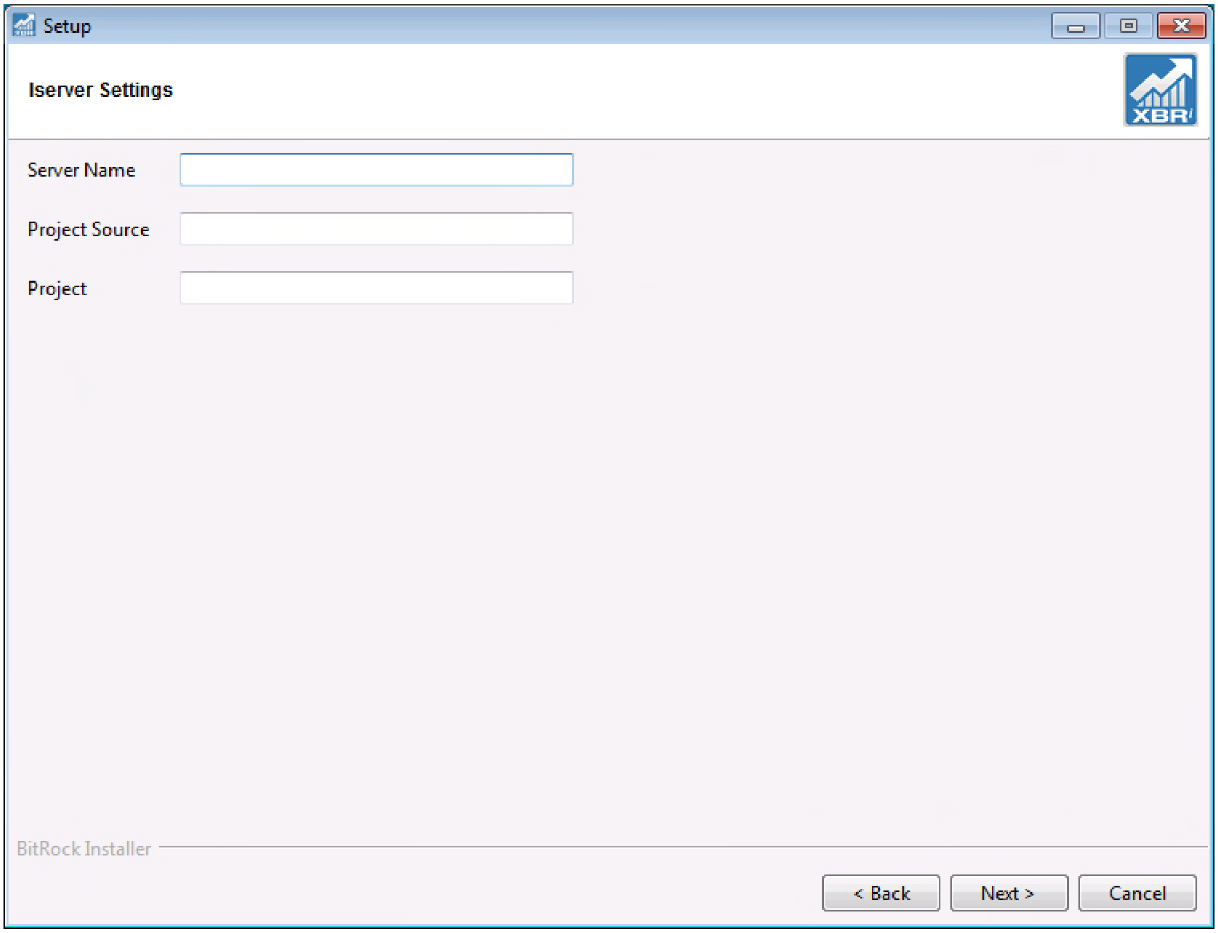
ST dbport – Enter the statistics database port number.

ST dbname – Enter the statistics database name.

ST dbuser – This displays the registered user name that was previously entered.

ST dbpass - This displays the password that was previously entered. This will be used when the metadata tables are created.

When you are done, click **Next**.



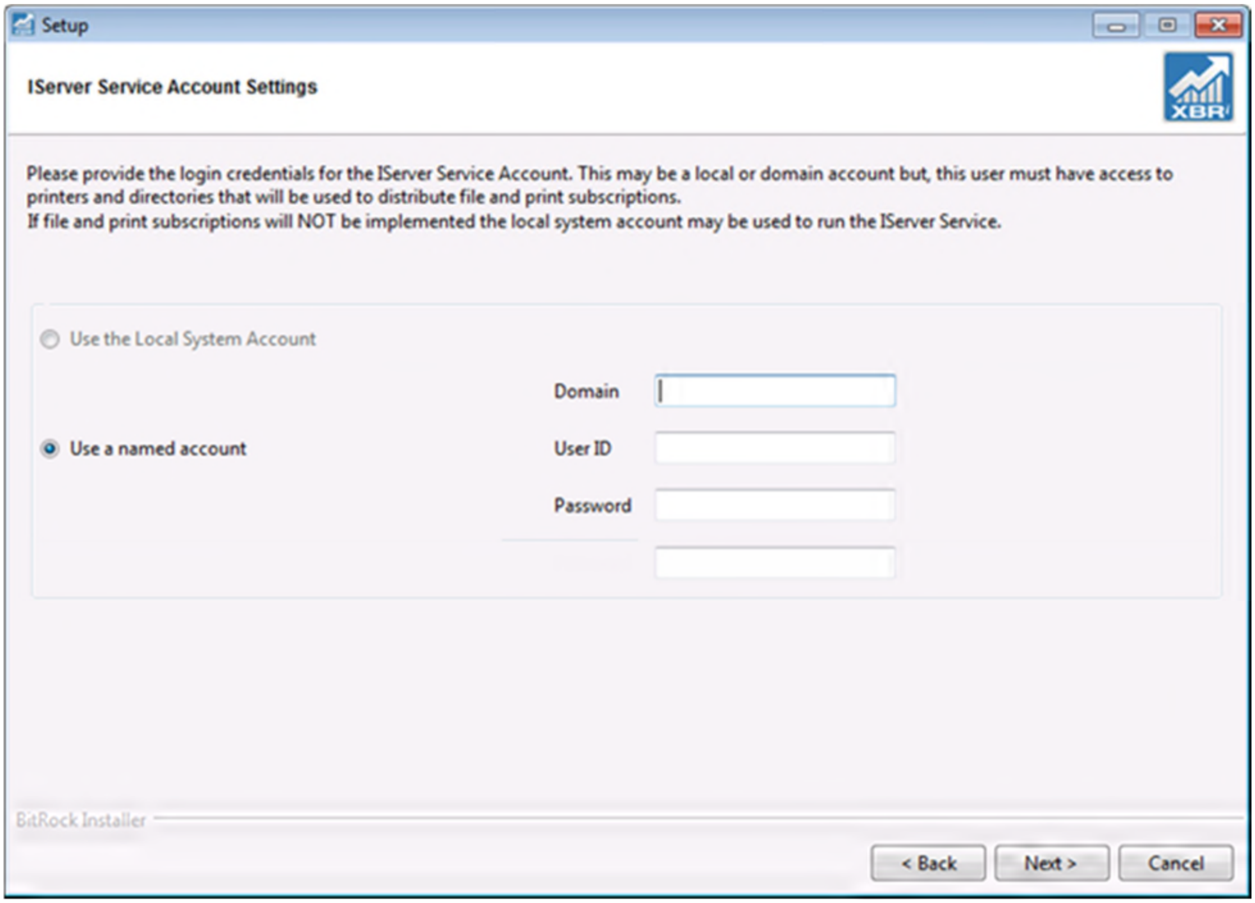
Enter the settings for the I-server.

Server Name – Enter the I-Server name. This can be provided by the Database Administrator or IT support at the customer site.

Project Source – Enter a descriptive name for the XBR^i project source, e.g., XBRi.

Project - Enter a descriptive name for the XBR^i project, e.g., DW_RG_DEV.

When you are done, click **Next**.



IServer Service Account Settings

Please provide the login credentials for the IServer Service Account. This may be a local or domain account but, this user must have access to printers and directories that will be used to distribute file and print subscriptions.
If file and print subscriptions will NOT be implemented the local system account may be used to run the IServer Service.

○ Use the Local System Account

● Use a named account

Domain

User ID

Password

Enter the settings for the I-server service account.

In order for file and print subscriptions to function correctly the IServer service should run using a domain account that has access to the printers and directories that will be used for report distribution.

If a named account is used the credentials will be validated before the installation continues.

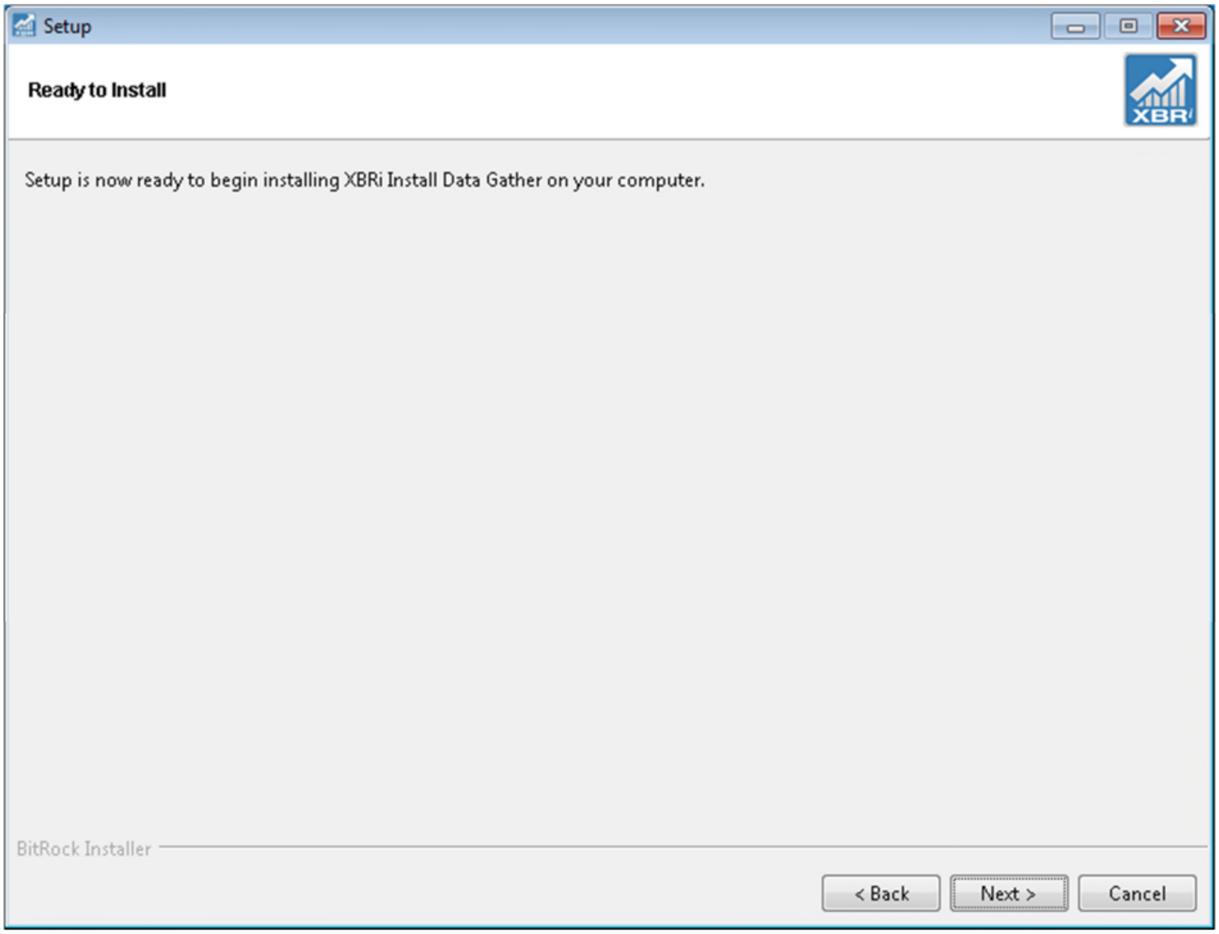
Domain – Enter the Domain of the service account. If local account, leave this box blank.

Login – The user account that will be used to run the IServer service.

Password – The password will be saved when creating the Windows service. If it is an expiring password it will require updating the windows service each time the password is changed. Enter it in both boxes.

If file and print subscriptions will not be used you may opt to use the local system account.

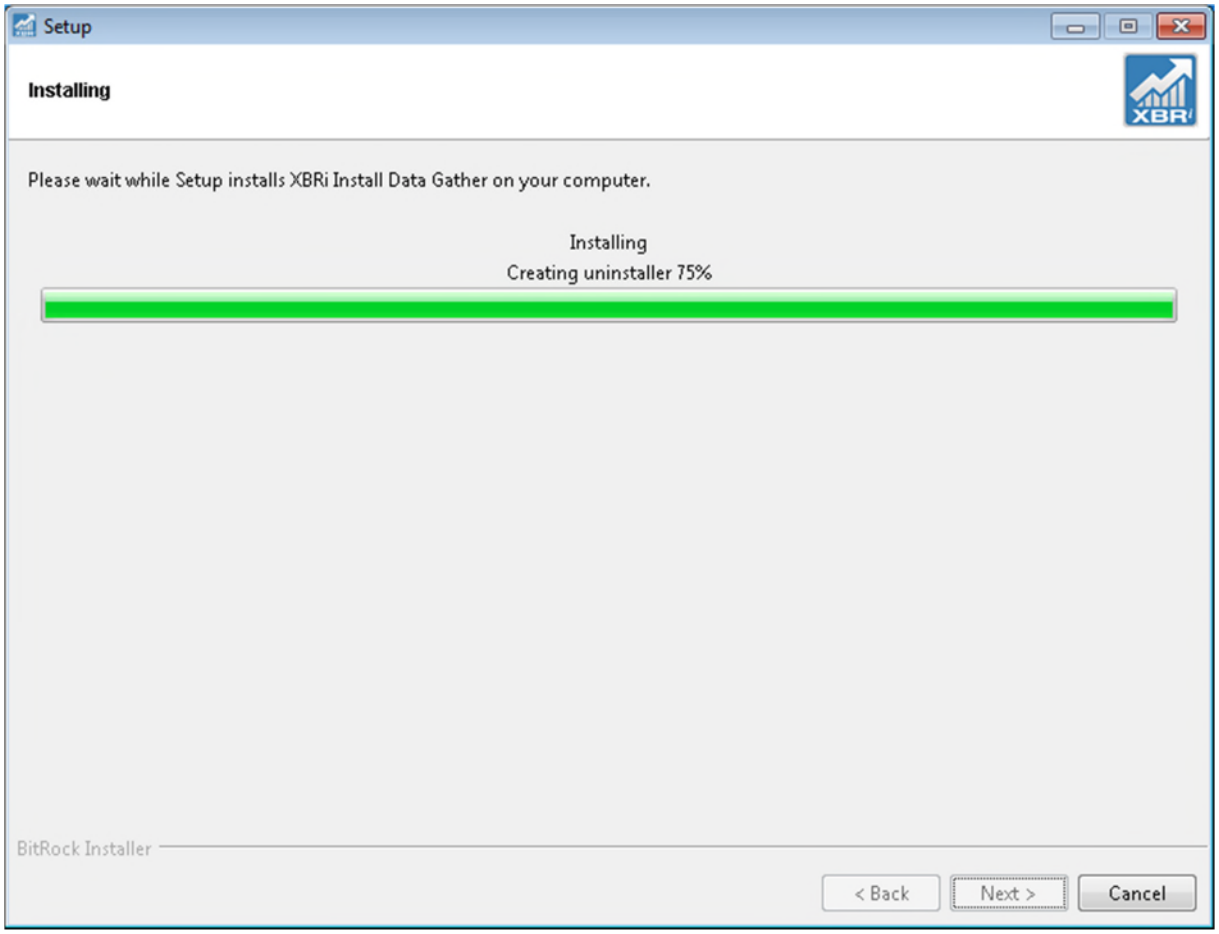
When you are done, click **Next**.



Ready to Install

Setup is now ready to begin installing XBRi Install Data Gather on your computer.

Click **Next**.



Setup

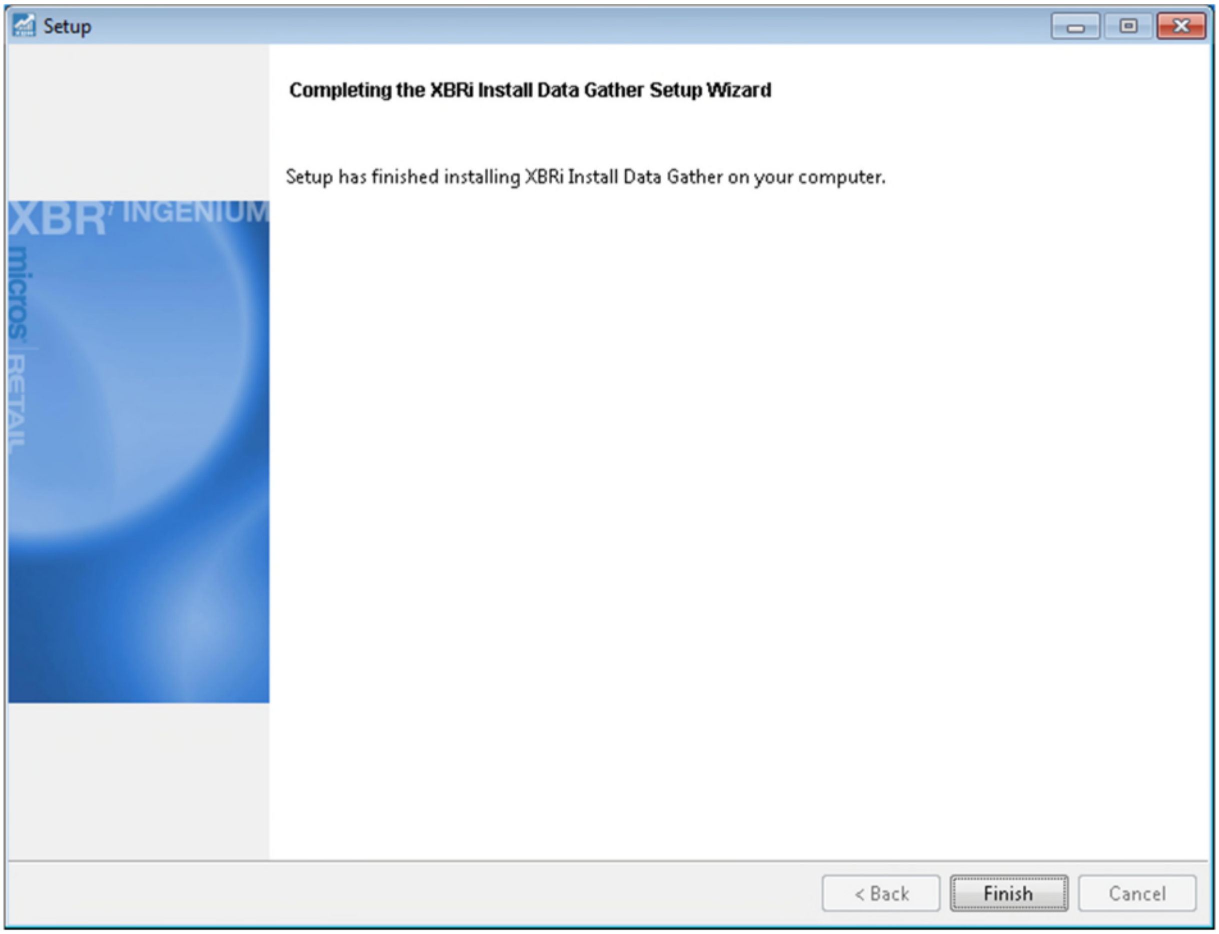
Installing

Please wait while Setup installs XBRi Install Data Gather on your computer.

Installing

Creating uninstaller 75%

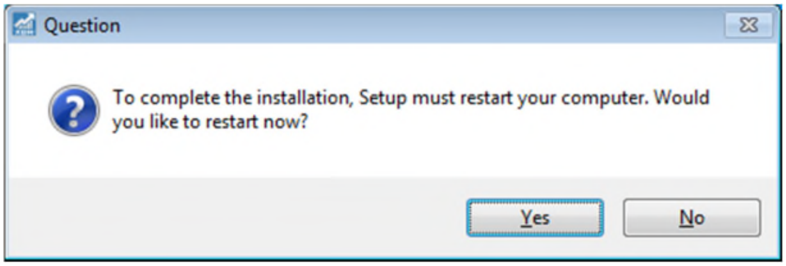
The installation progress status is displayed.



Completing the XBRi Install Data Gather Setup Wizard

Setup has finished installing XBRi Install Data Gather on your computer.

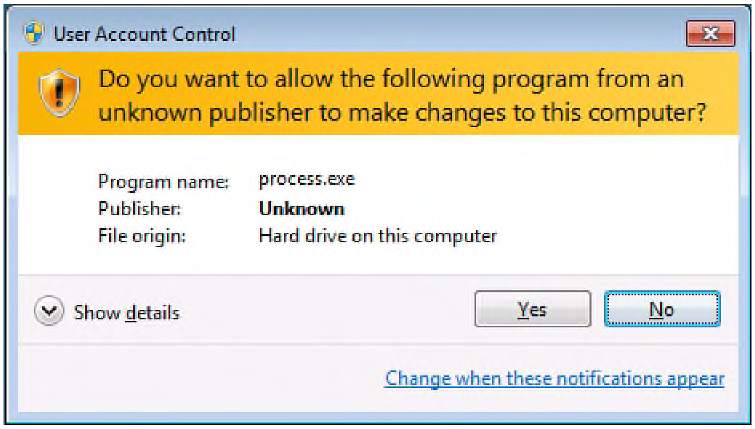
Click **Finish**. This displays the following prompt:



To complete the installation, Setup must restart your computer. Would you like to restart now?

Click **Yes** to finish the installation and restart the computer.

1. When your computer restarts, the install program will launch, and you will see the following screen:

   User Account Control

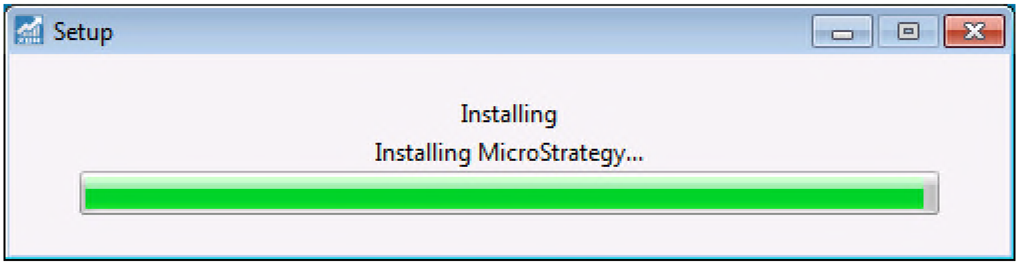
   Do you want to allow the following program from an unknown publisher to make changes to this computer?

   Program name: process.exe
   Publisher: **Unknown**
   File origin: Hard drive on this computer

   (This dialog may take some time to appear.)
2. Click Yes on the Windows User Account Control dialog.

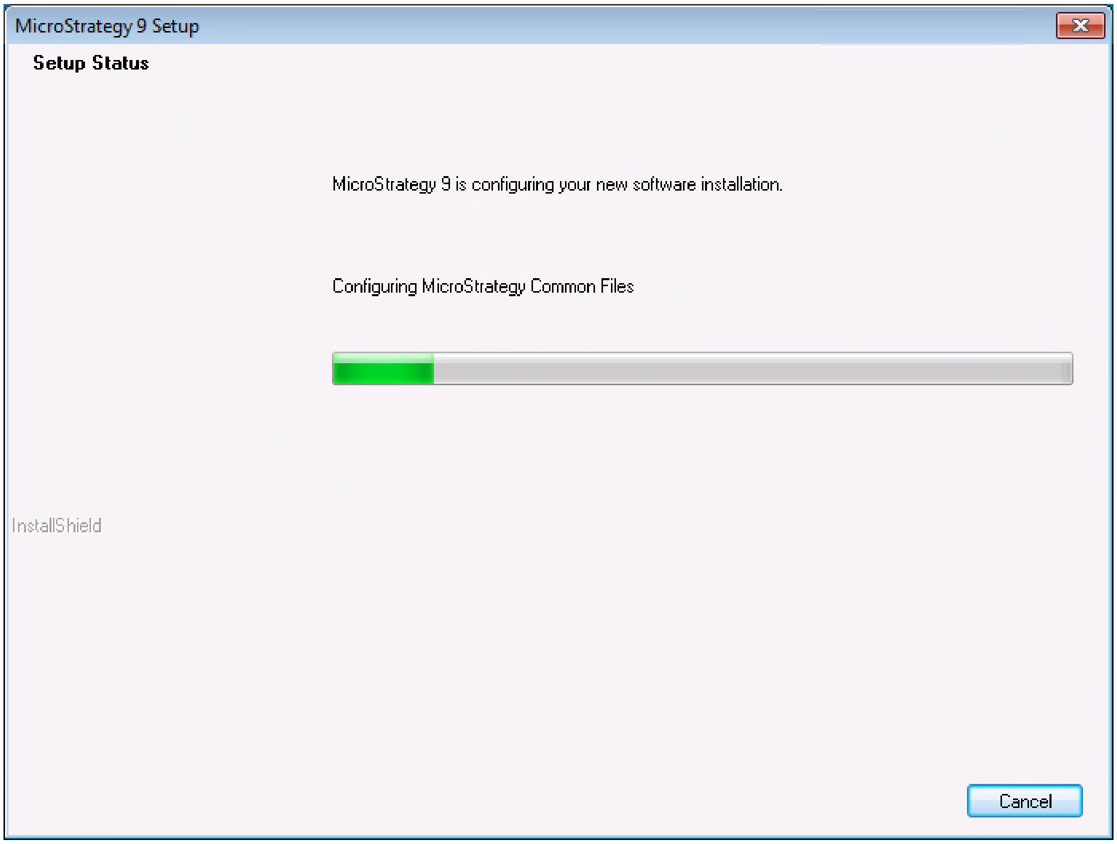
The installation will then begin using the answers you provided previously.

The install program will launch the MicroStrategy installation, which may take some time.



Setup

Installing
Installing MicroStrategy...



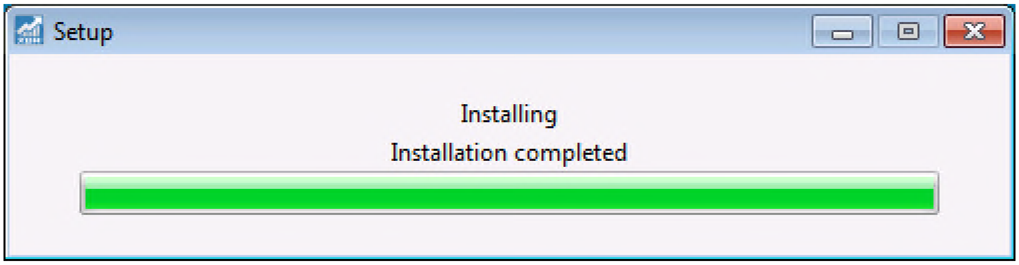
MicroStrategy 9 Setup

Setup Status

MicroStrategy 9 is configuring your new software installation.

Configuring MicroStrategy Common Files

Please wait as Setup finalizes the installation . . .

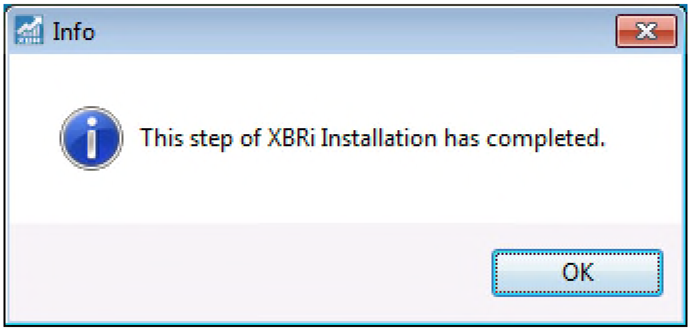


Setup

Installing

Installation completed

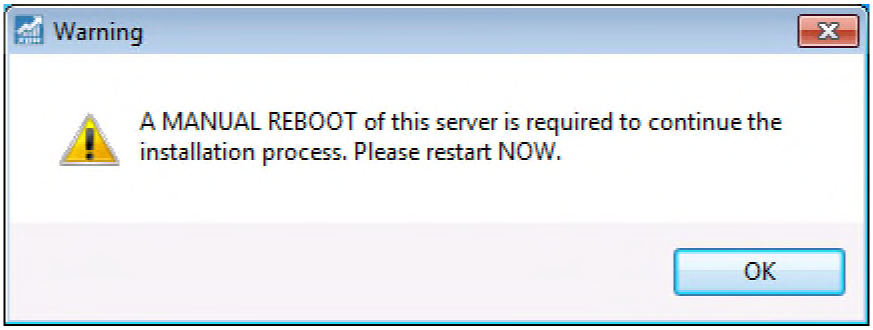
When the MicroStrategy installer has finished, you will see the following message:



Info

This step of XBRi Installation has completed.

After the MicroStrategy installation completes, you must reboot.

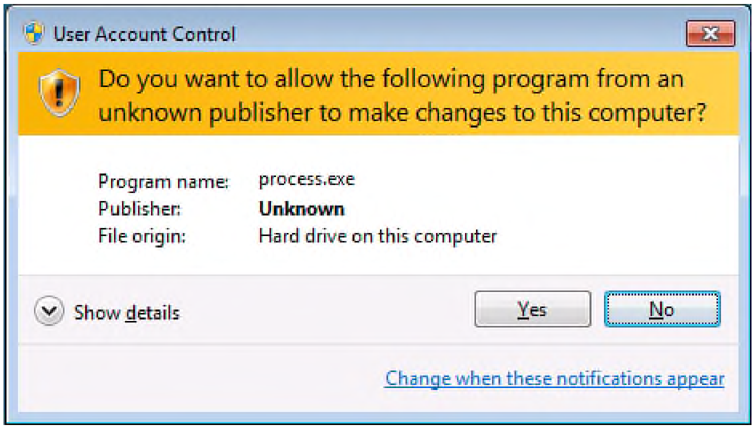


Warning

A MANUAL REBOOT of this server is required to continue the installation process. Please restart NOW.

Click **OK**, then manually restart the server.

When the server comes back up, the installation will resume.



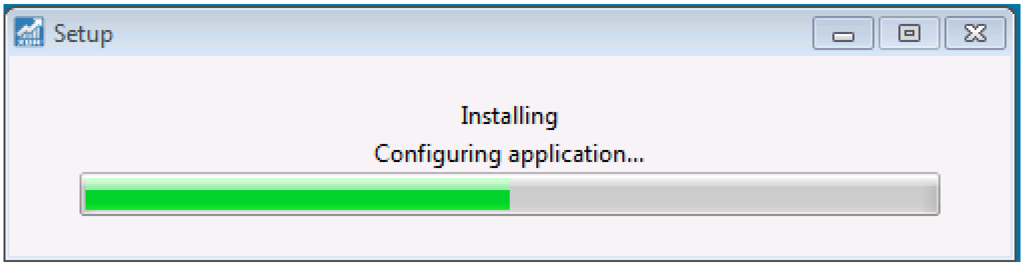
User Account Control

Do you want to allow the following program from an unknown publisher to make changes to this computer?

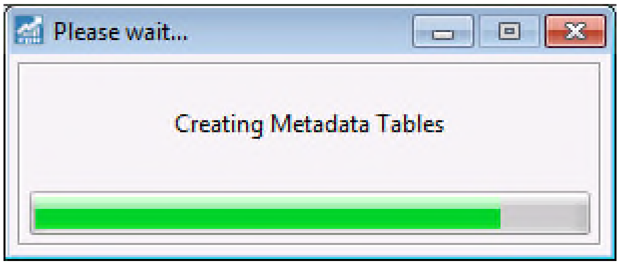
Program name: process.exe
Publisher: **Unknown**
File origin: Hard drive on this computer

It may take a several minutes for the Windows User Account Control dialog to appear. When it does, click **Yes**.

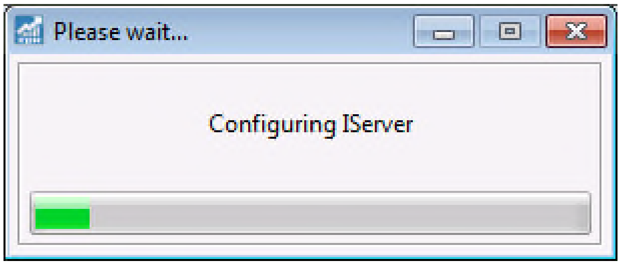
This step will create ODBC DSNs, MicroStrategy metadata tables, and the server definition for the IServer. You will see the following progress indicators as each action is executed:



Installing
Configuring application...



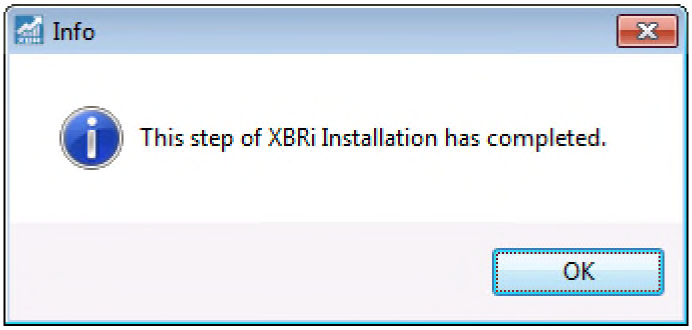
Creating Metadata Tables



Configuring IServer

Click **Next**.

This completes the IServer Installation. It is recommended to reboot the server at this point.



This step of XBRi Installation has completed.

The next step is to install the Web Server, optimally on its own physical or virtual machine.

Part 3 Web Server Installation

If Case management configuration is performed during a new installation it should be selected along with web server and XBR^i admin tools. The Case Management Configuration option should not be run "stand alone" subsequent to the XBR^i installation.

The second part of the XBR^i Install program installs the Web Server, which hosts the XBR^i application.

There are three steps to the Web Server Installation:

1. Running the XBR^i Install Data Gather and Setup XBR Install programs
2. Removing MicroStrategy objects
3. Running the XBR^i Install Program

For performance reasons, Oracle recommends installing the Web Server on a separate machine, which can be either physical or virtual.

Prerequisites

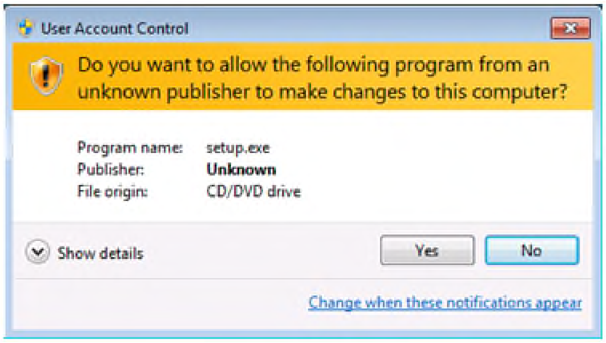
Before you begin, have the following information available:

- MicroStrategy License Key.
- A worksheet with the values to enter at the installation prompts. Most of these pertain to the servers at the client site and must be obtained from the customer.
- The XBR^i installation DVD from Oracle

Step 1 – Running the XBR^i Install Data Gather and Setup XBR Install programs

To run the XBR^i Install Data Gather and Setup XBR Install programs:

1. From the installation DVD on the I-Server where you will be doing the installation.
2. Double click on setup.exe.
3. Click **Yes** on the Windows User Account Control dialog.

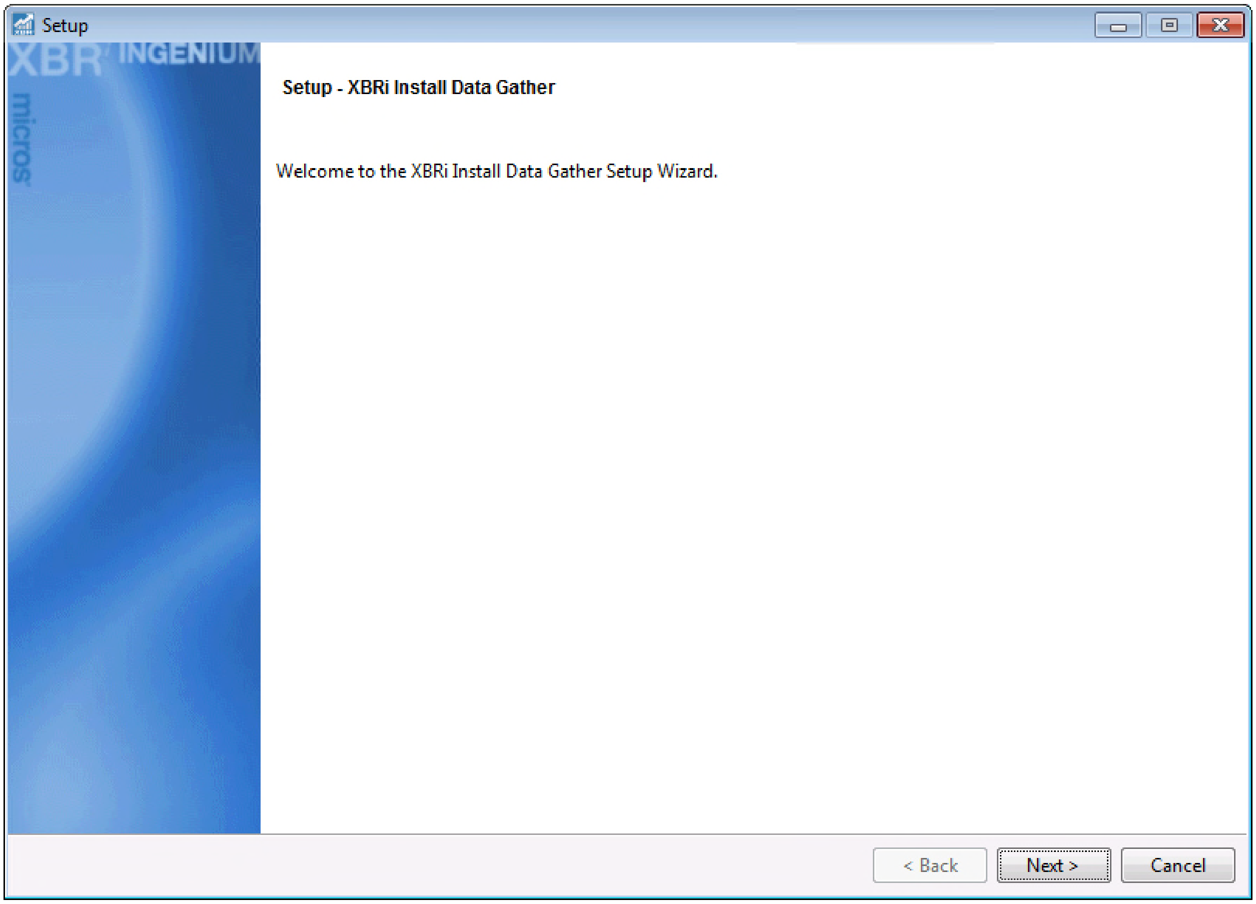


User Account Control

Do you want to allow the following program from an unknown publisher to make changes to this computer?

Program name: setup.exe
Publisher: **Unknown**
File origin: CD/DVD drive

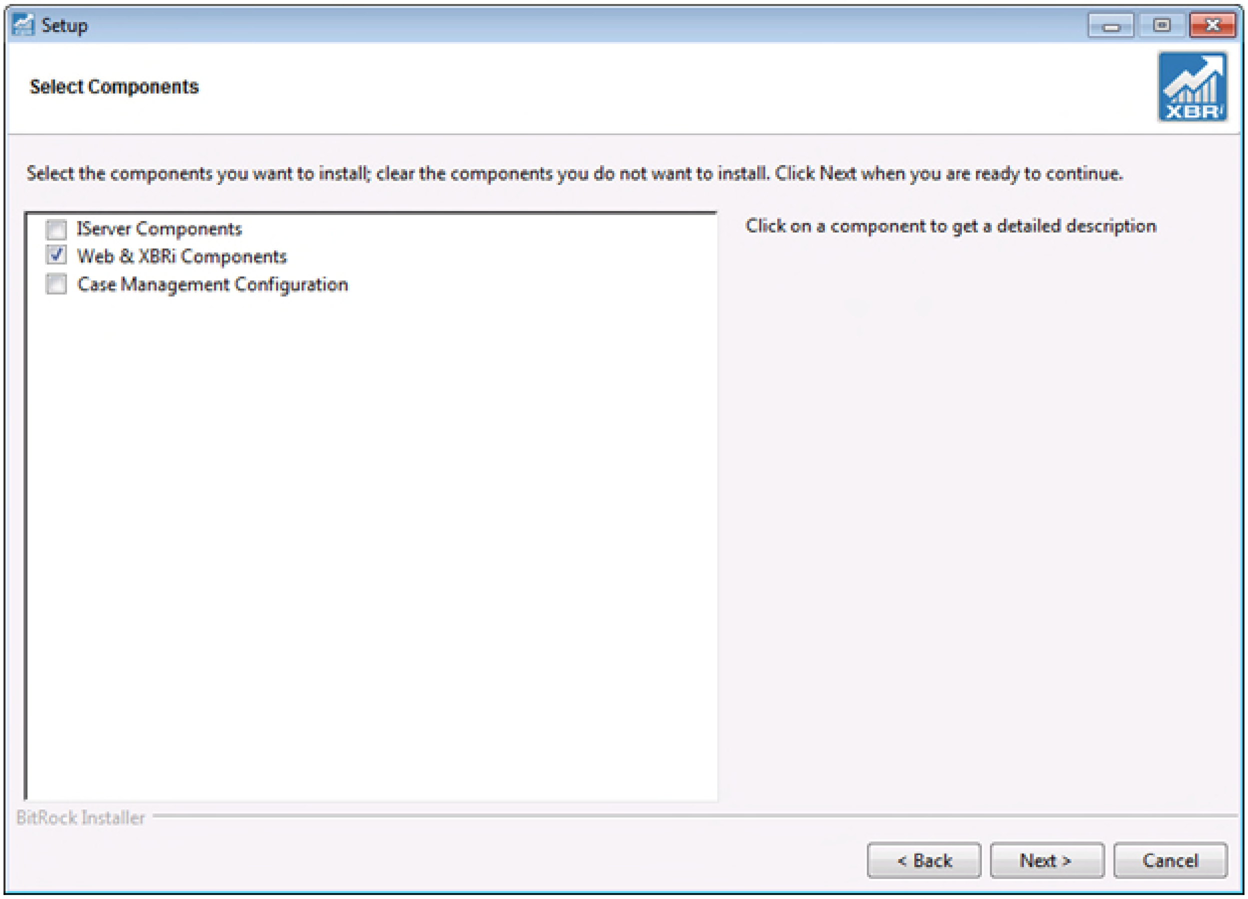
This displays the following screen:



Setup - XBRi Install Data Gather

Welcome to the XBRi Install Data Gather Setup Wizard.

Click **Next,** and follow the rest of the prompts in the installation program:



Select Components

Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.

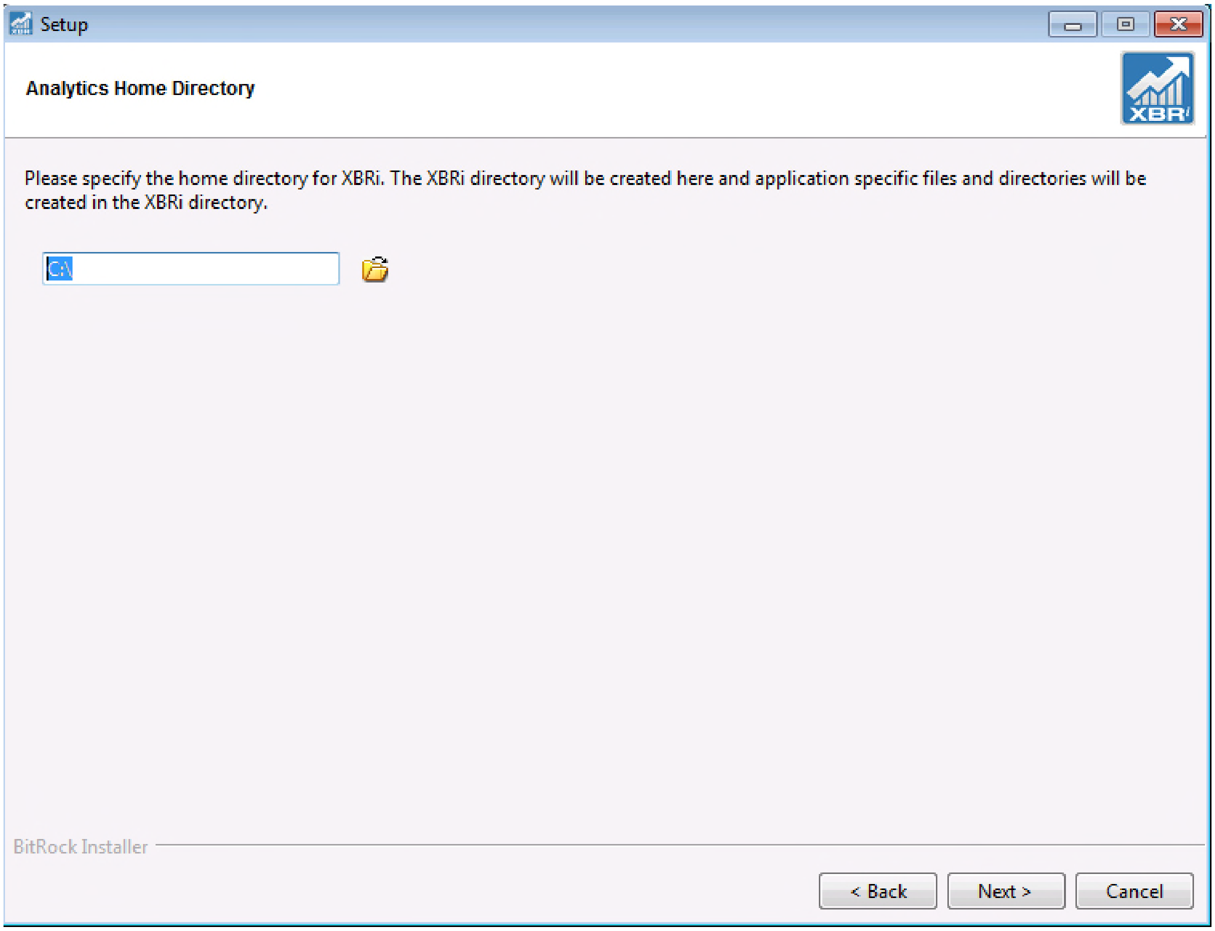
□ IServer Components
☑ Web & XBRi Components
□ Case Management Configuration

Click on a component to get a detailed description

Select the check box next to **Web and XBRi Components**.

If also setting up Case Management integration select the **Case Management Configuration** check box. This option must be selected and installed concurrently with the **Web and XBRi Components** .

When desired components are selected, click **Next**.

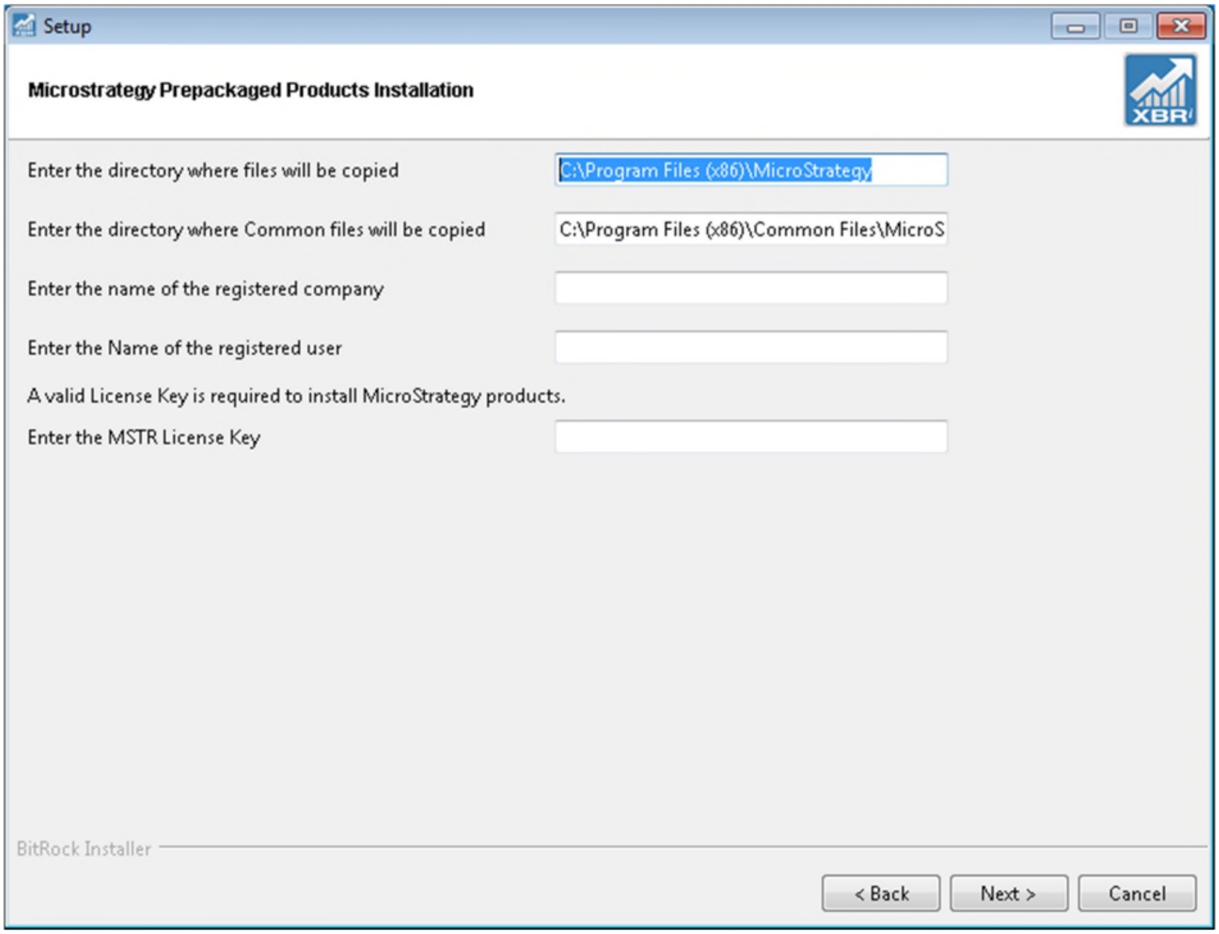


Analytics Home Directory

Please specify the home directory for XBRi. The XBRi directory will be created here and application specific files and directories will be created in the XBRi directory.

C:\

Verify that the home directory is OK, and click **Next**.



Microstrategy Prepackaged Products Installation

Enter the directory where files will be copied: C:\Program Files (x86)\MicroStrategy

Enter the directory where Common files will be copied: C:\Program Files (x86)\Common Files\MicroS

Enter the name of the registered company:

Enter the Name of the registered user:

A valid License Key is required to install MicroStrategy products.

Enter the MSTR License Key:

Enter the required information at the prompts:

Check the path for **the directory where files will be copied** and change if necessary.

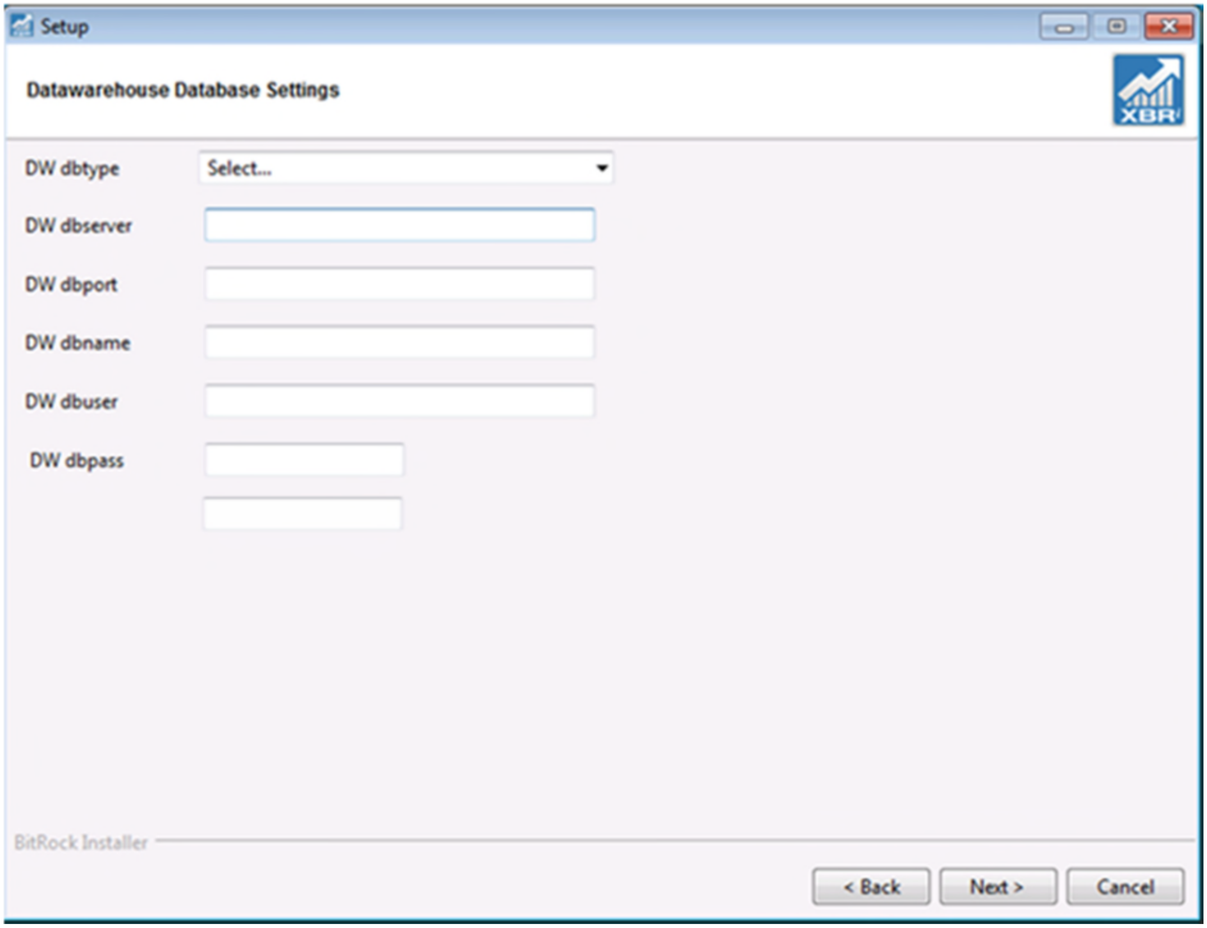
Check the path for **the directory where common files will be copied** and change if necessary.

Enter **the name of the registered company**. The customer can provide this information.

Enter the **Name of the registered user**. This is the User Name of the XBR^i Administrator.

Enter the **MicroStrategy License key** number.

When you are done, click **Next.**



Enter the settings for the Datawarehouse Database. The Database Administrator at the customer site can provide these values:

DW dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

DW dbserver – Enter the data warehouse database server name.

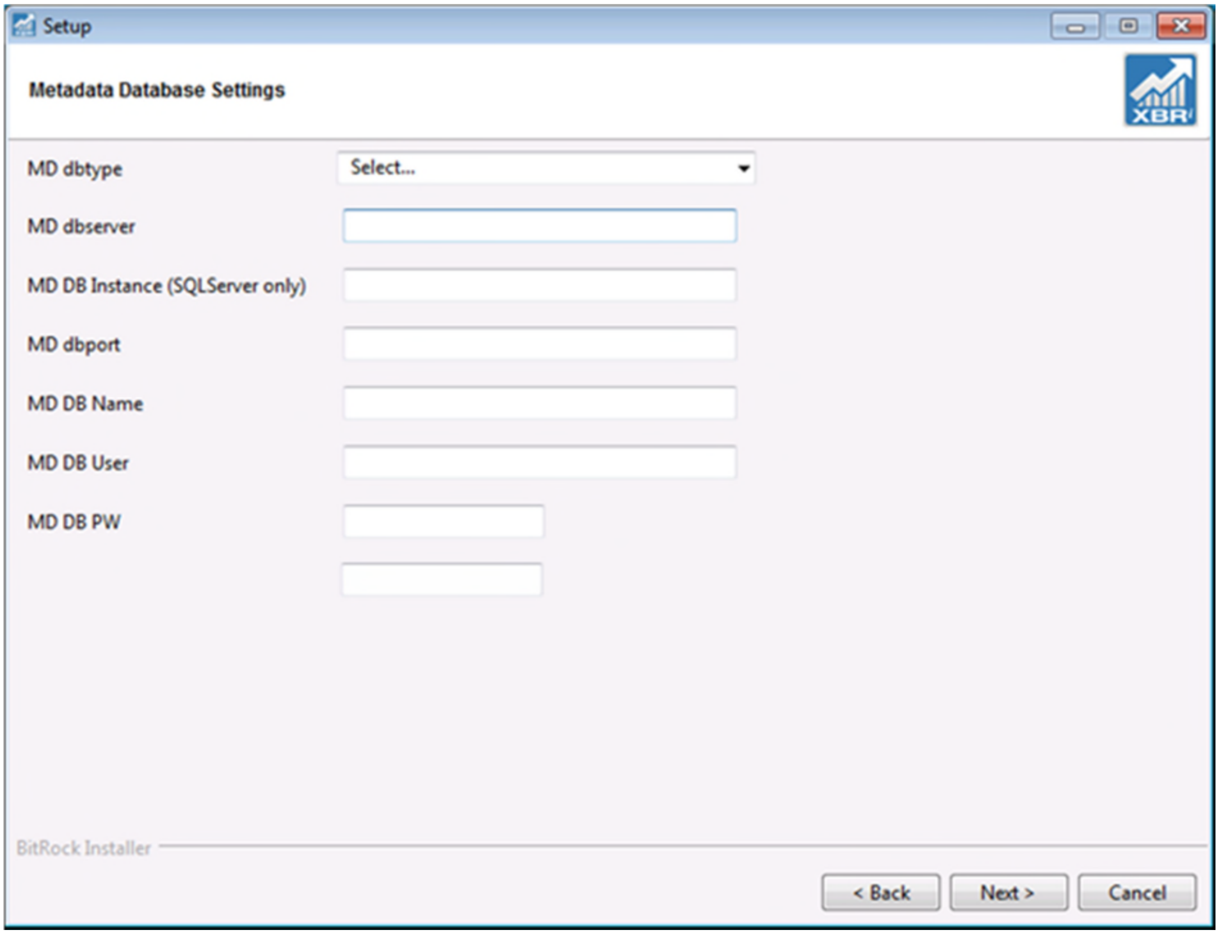
DW dbport – Enter the data warehouse database port number.

DW dbname – Enter the data warehouse database name

DW dbuser – Enter the datawarehouse database user name.

DW dbpass - Enter the db password in both boxes. This will be encrypted and saved during XBR^i configuration.

When you are done, click **Next**.



Enter the settings for the Metadata Database. The Database Administrator at the customer site can provide these values:

MD dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

MD dbserver – Enter the metadata database server name.

If MSSQL DW DB Instance – Enter the database instance if the database server is SQL.

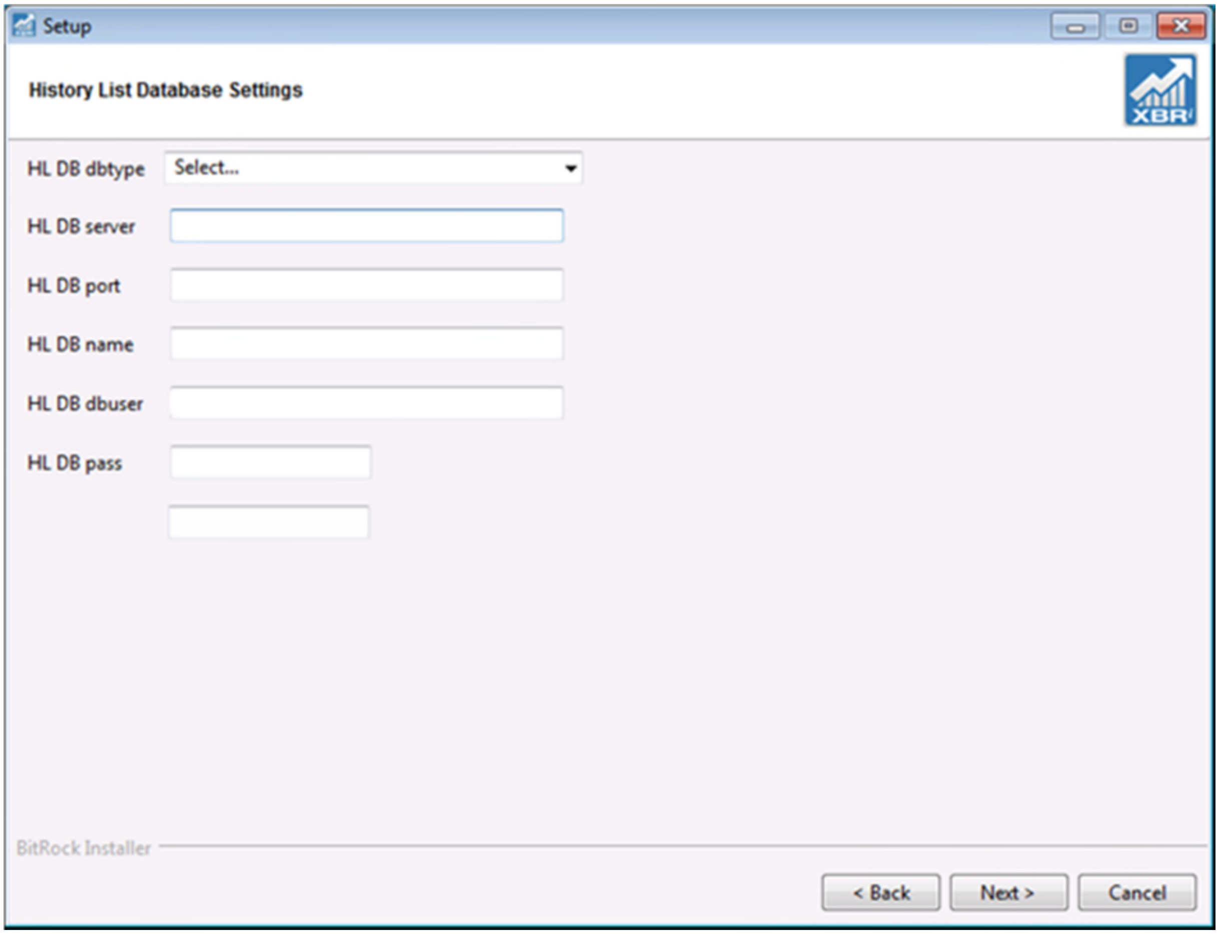
MD dbport – Enter the metadata database port number.

MD dbname – Enter the metadata database name.

MD DB user – This displays the registered user name that was previously entered.

MD DB PW - This displays the password that was previously entered. This will be used when the metadata tables are created.

When you are done, click **Next**.



Enter the settings for the History List Database. The Database Administrator at the customer site can provide these values:

HL DB dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

HL DB server – Enter the history list database server name.

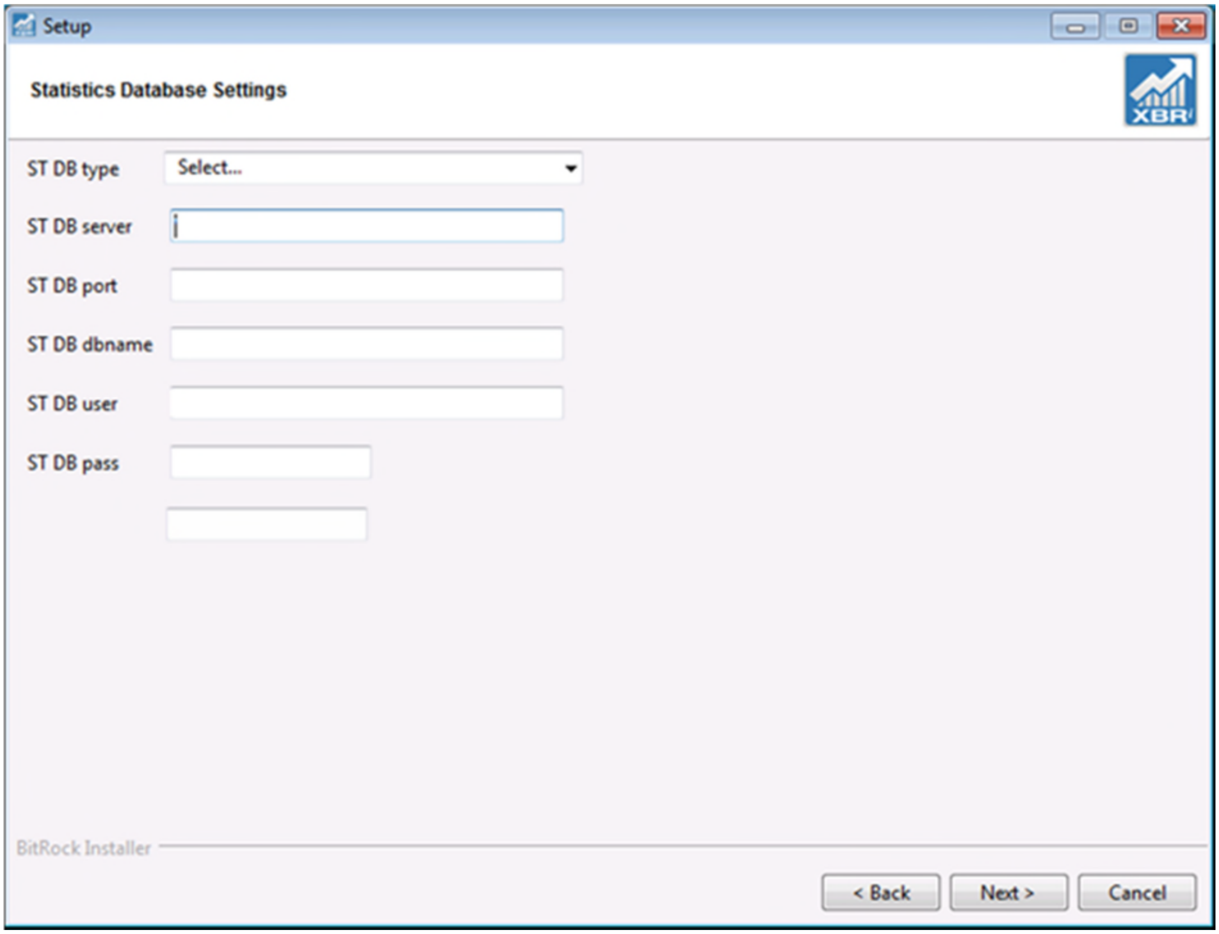
HL DB port – Enter the history list database port number.

HL DB name – Enter the history list database name.

HL DB dbuser – This displays the registered user name that was previously entered.

HL DB pass - This displays the password that was previously entered. This will be used when the metadata tables are created.

When you are done, click **Next**.



Setup

Statistics Database Settings

ST DB type: Select...

ST DB server:

ST DB port:

ST DB dbname:

ST DB user:

ST DB pass:

Enter the settings for the Statistics Database. The Database Administrator at the customer site can provide these values:

ST DB type – Select the type of database server from the drop-down list, Oracle or SQL.

ST DB server – Enter the statistics database server name.

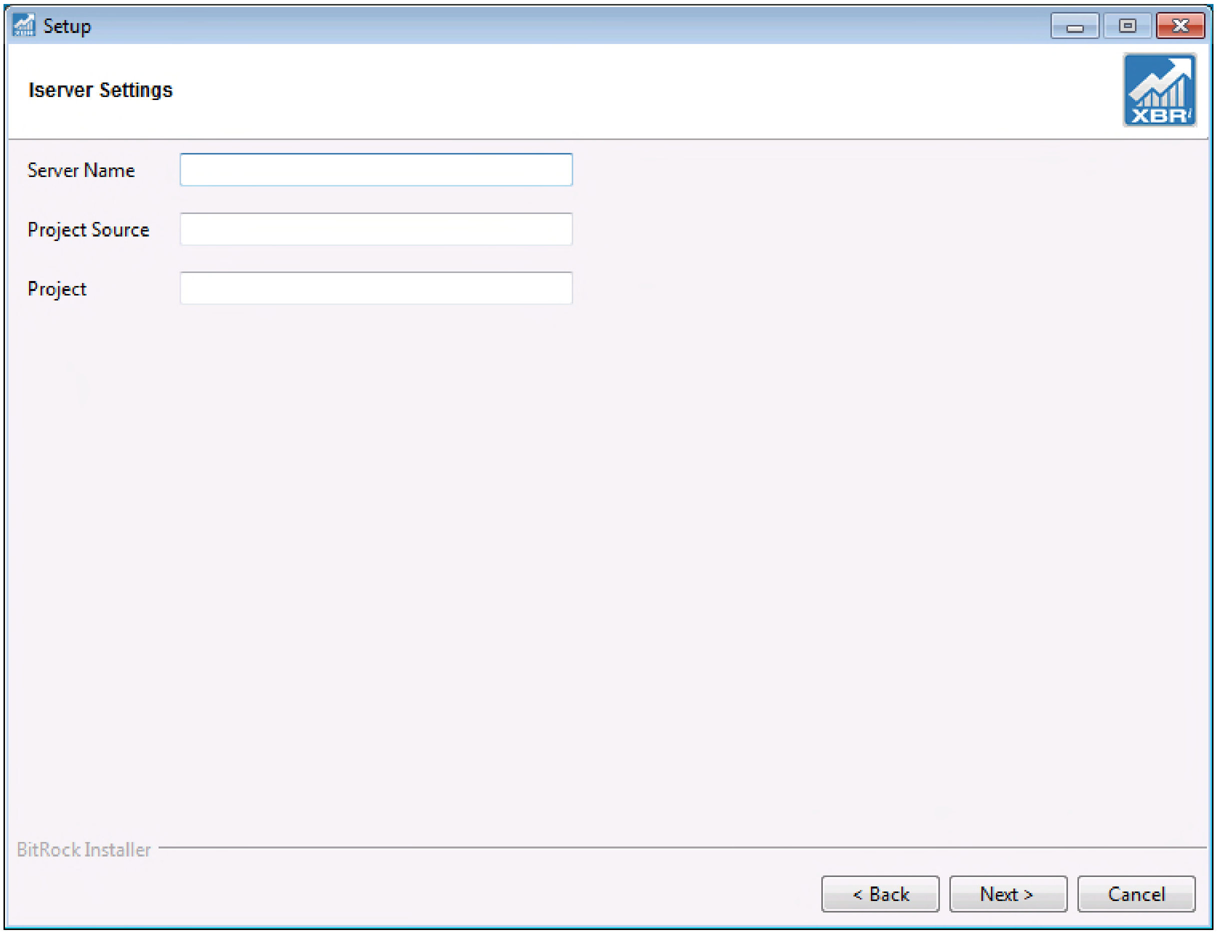
ST DB port – Enter the statistics database port number.

ST DB dbname – Enter the statistics database name.

ST DB user – This displays the registered user name that was previously entered.

ST DB pass - This displays the password that was previously entered. This will be used when the metadata tables are created.

When you are done, click **Next**.



Server Name

Project Source

Project

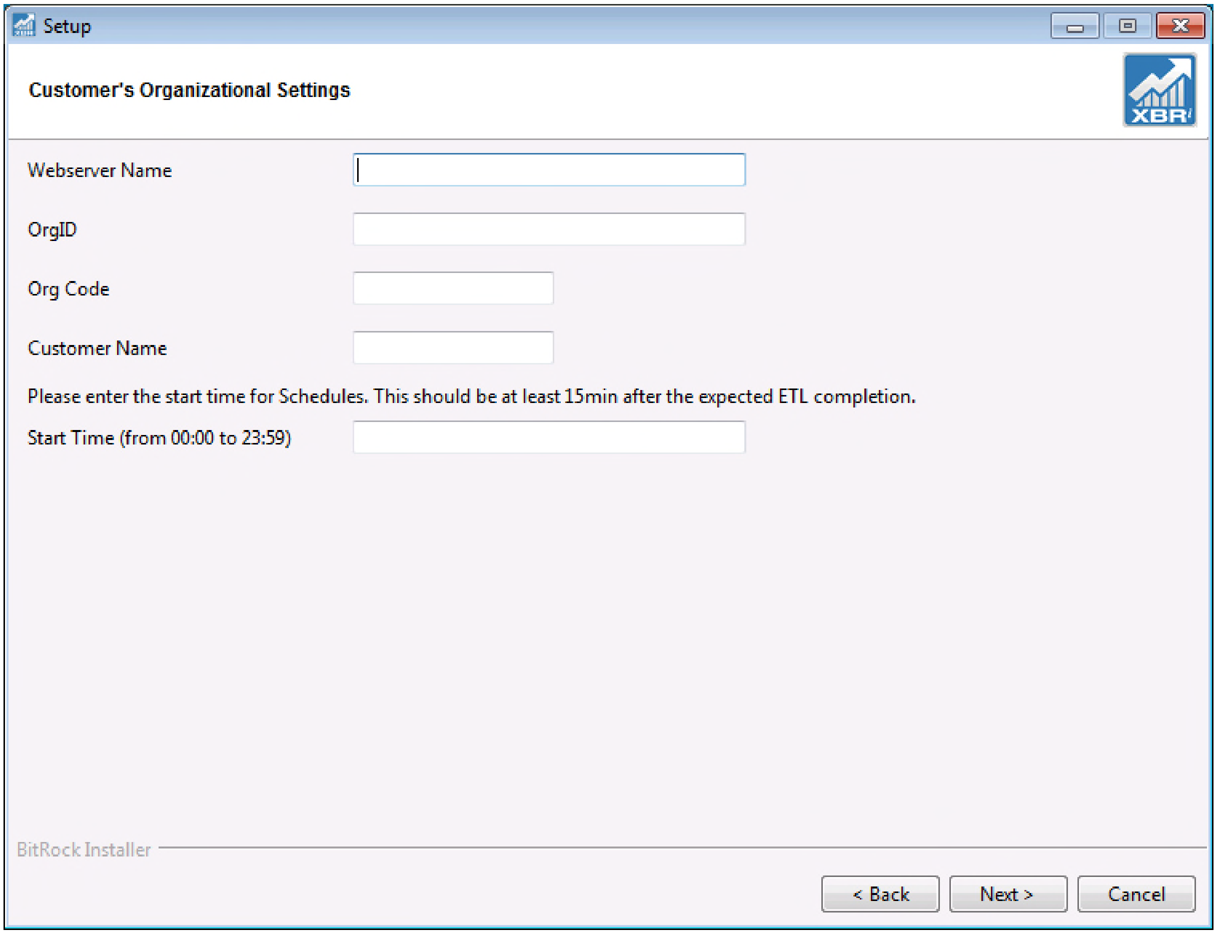
Enter the settings for the I-server.

Server Name – Enter the I-Server name. This is the same name specified in the I-Server installation.

Project Source – Enter a descriptive name for the XBR^i project source, e.g., XBRi.

Project - Enter a descriptive name for the XBR^i project, e.g., CORE_XBRi_10.

When you are done, click **Next**.


Setup
Customer's Organizational Settings
XBR^{i}
Webserver Name
OrgID
Org Code
Customer Name
Please enter the start time for Schedules. This should be at least 15min after the expected ETL completion.
Start Time (from 00:00 to 23:59)
BitRock Installer
< Back
Next >
Cancel

Enter the customer’s Organizational Settings:

Webserver Name – Enter the Web Server name. This is the name of the server where you are currently doing the install.

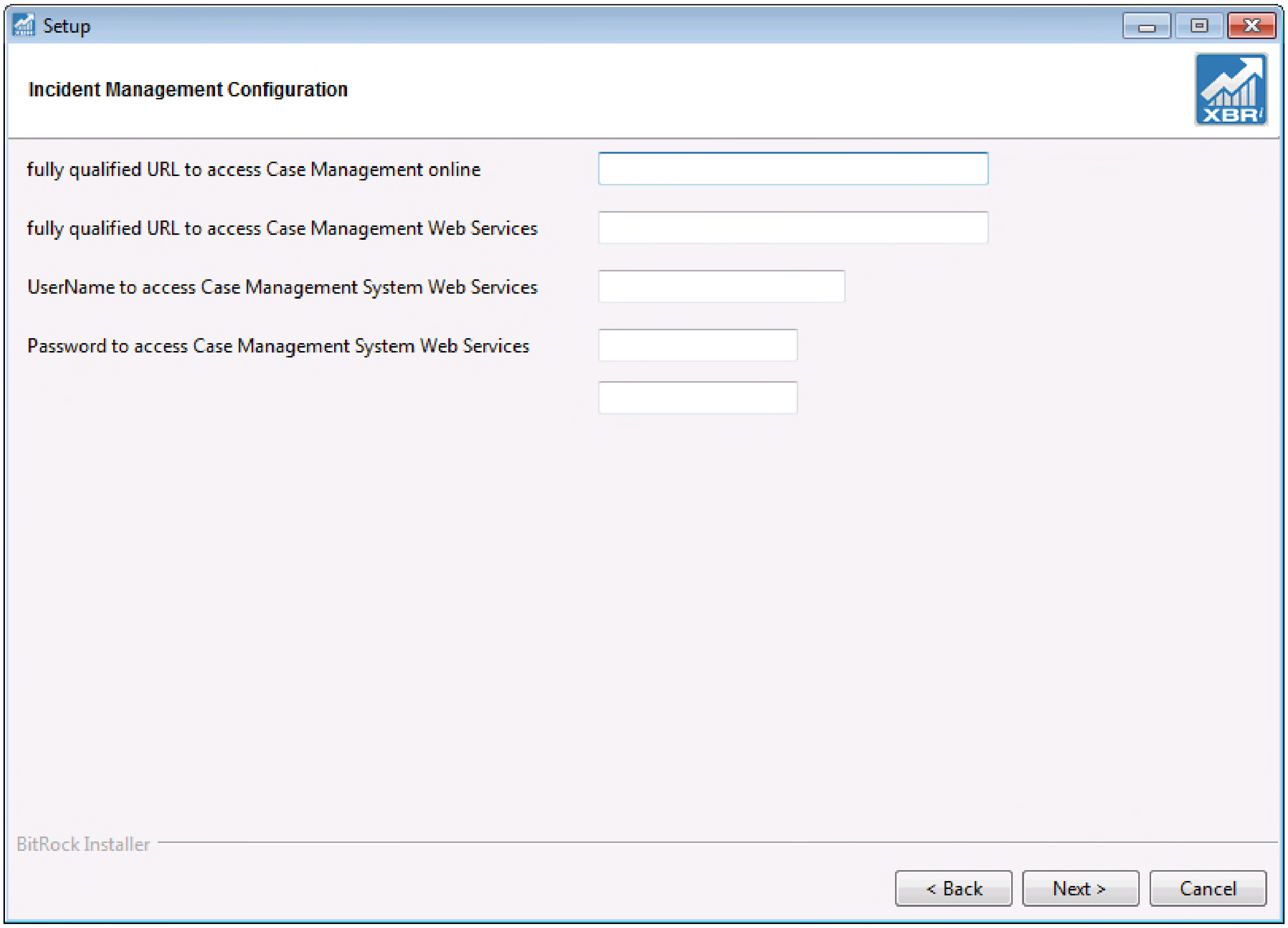
OrgID – The customer’s Organization ID. This is usually 1 for Retail & Grocery and will be the actual OrganizationID value from Mymicros for Food & Beverage.

Org Code – The code assigned to the customer by Oracle.

Customer Name – The name of the customer organization.

Start Time – Enter the start time for schedules in the format: 00:00 – 23:59. This should be at least 15 minutes after the expected ETL completion. If the hour is less than 10, you must include a leading zero (09:00).

When you are done, click **Next**.



Setup

Incident Management Configuration

fully qualified URL to access Case Management online

fully qualified URL to access Case Management Web Services

UserName to access Case Management System Web Services

Password to access Case Management System Web Services

Optional - Enter the Case Management Configuration Settings:

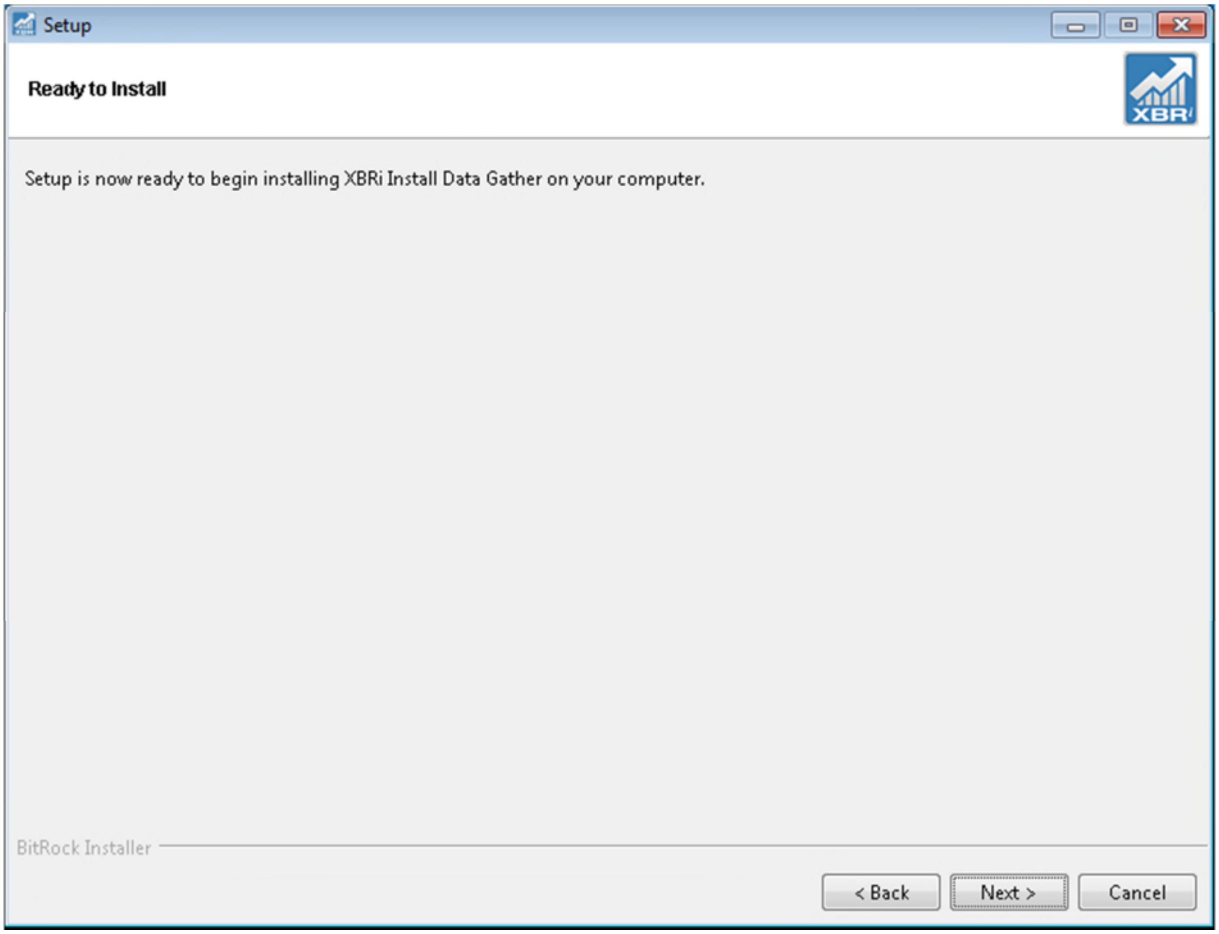
Enter the fully qualified URL to access Case Management online. example: *https://appserver1.lpguys.net/microstesting/lpms*

Enter the fully qualified URL to access Case Management Web Services endpoint. example: *https://appserver1.lpguys.net/microstesting/lpms/webservice/dataservice.asmx*

Enter the user name to access the Case Management System.

Enter the password to access the Case Management System.

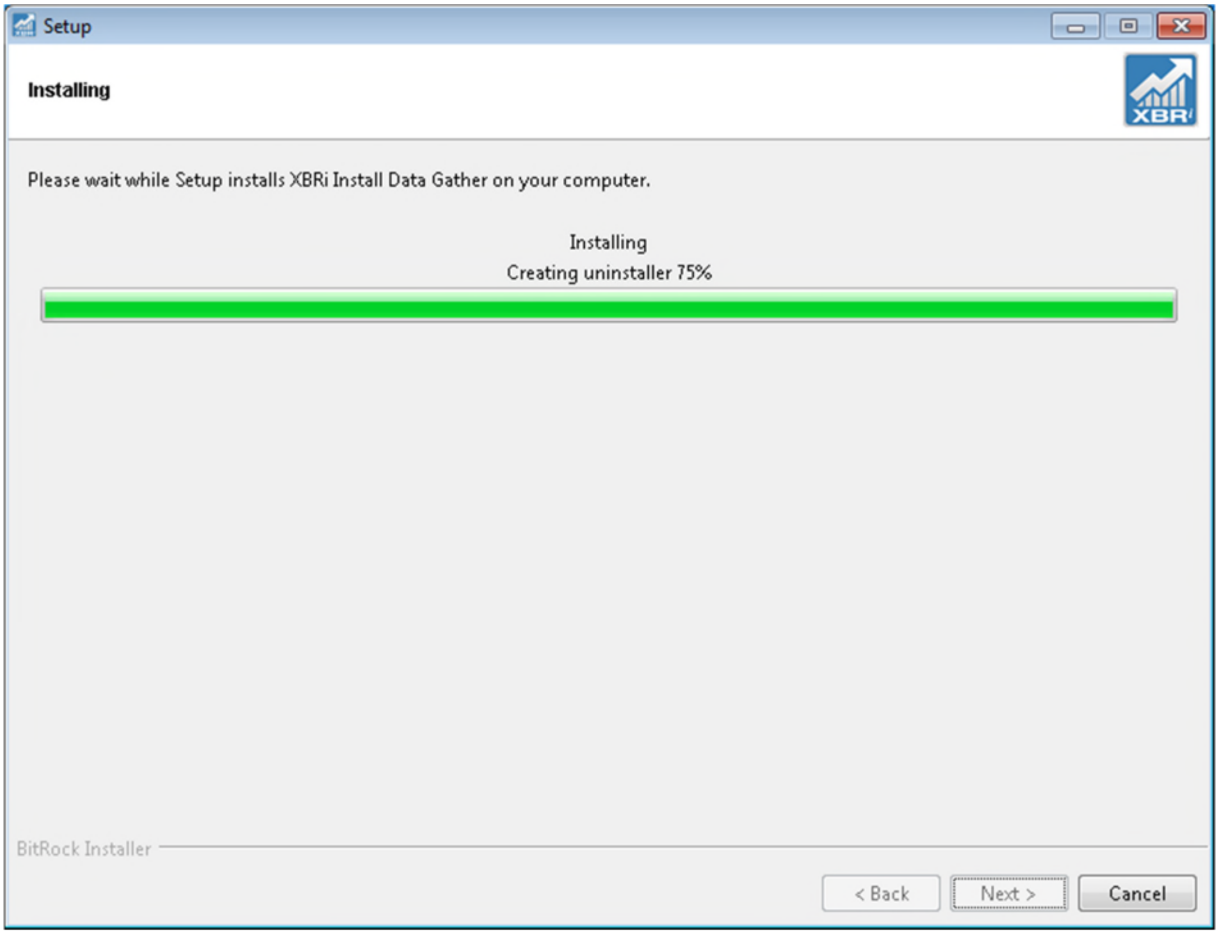
When you are done, click **Next**.



Ready to Install

Setup is now ready to begin installing XBRi Install Data Gather on your computer.

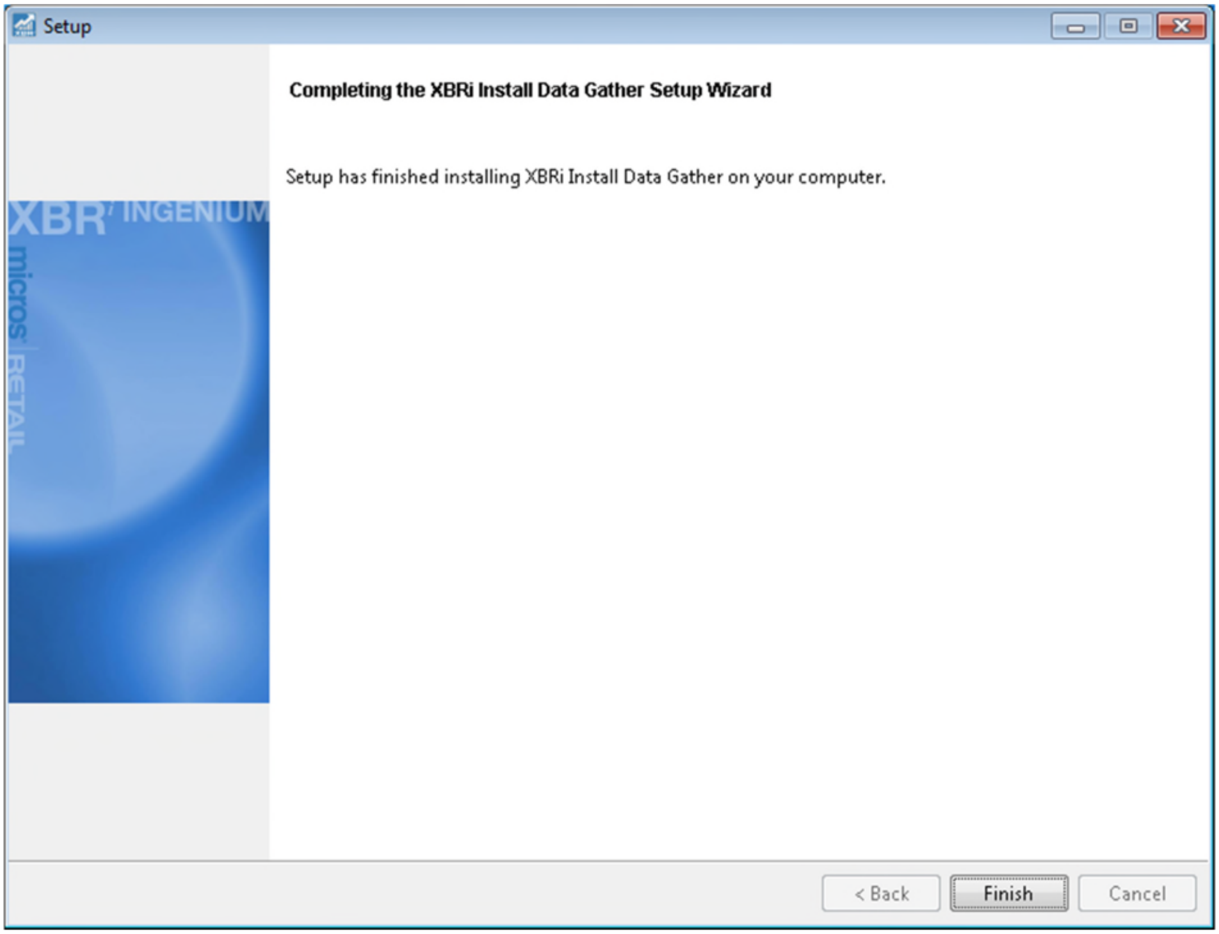
Click **Next**.



Please wait while Setup installs XBRi Install Data Gather on your computer.

Installing
Creating uninstaller 75%

The installation progress status is displayed.

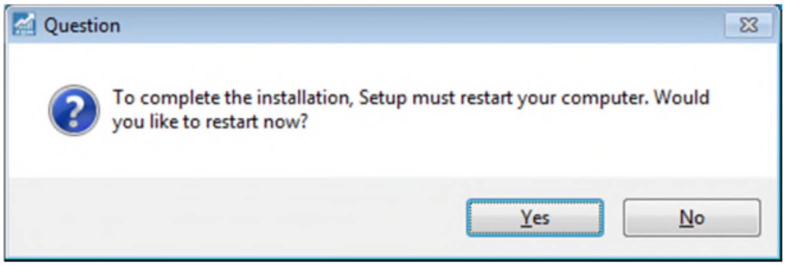


Setup

Completing the XBRi Install Data Gather Setup Wizard

Setup has finished installing XBRi Install Data Gather on your computer.

Click **Finish**. This displays the following prompt:

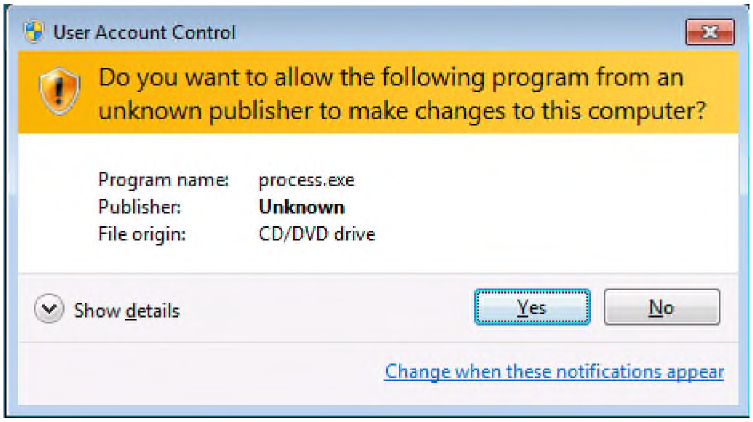


Question

To complete the installation, Setup must restart your computer. Would you like to restart now?

Click **Yes** to finish the installation of XBR^i Data Gather and restart the computer.

1. When the computer restarts, the install program will launch, and the following dialog will appear:



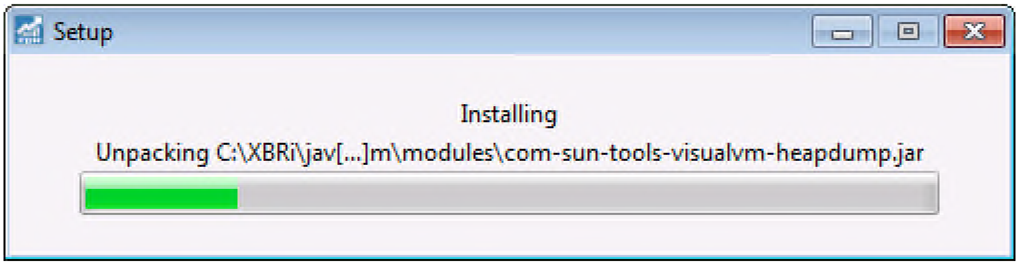
User Account Control

Do you want to allow the following program from an unknown publisher to make changes to this computer?

Program name: process.exe
Publisher: **Unknown**
File origin: CD/DVD drive

2. Click **Yes** on the Windows User Account Control dialog.

The installation will then begin using the answers provided previously. This step will install Java, and the MicroStrategy tools. The following progress indicators will be displayed:

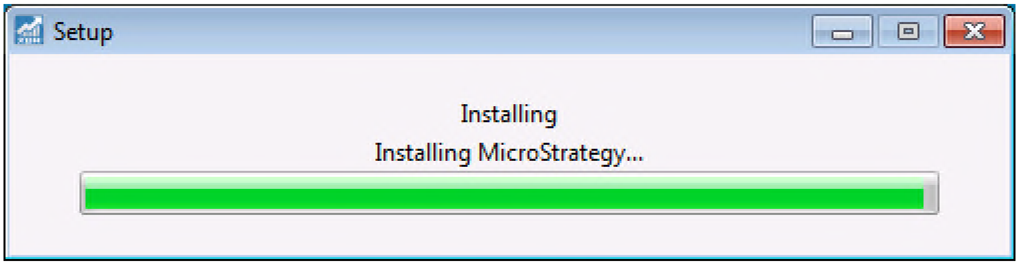


Setup

Installing

Unpacking C:\XBRi\jav[...]m\modules\com-sun-tools-visualvm-heapdump.jar

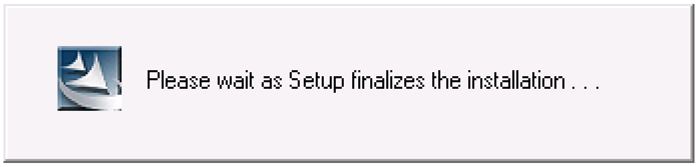
The install program will launch the MicroStrategy installation which may take some time.



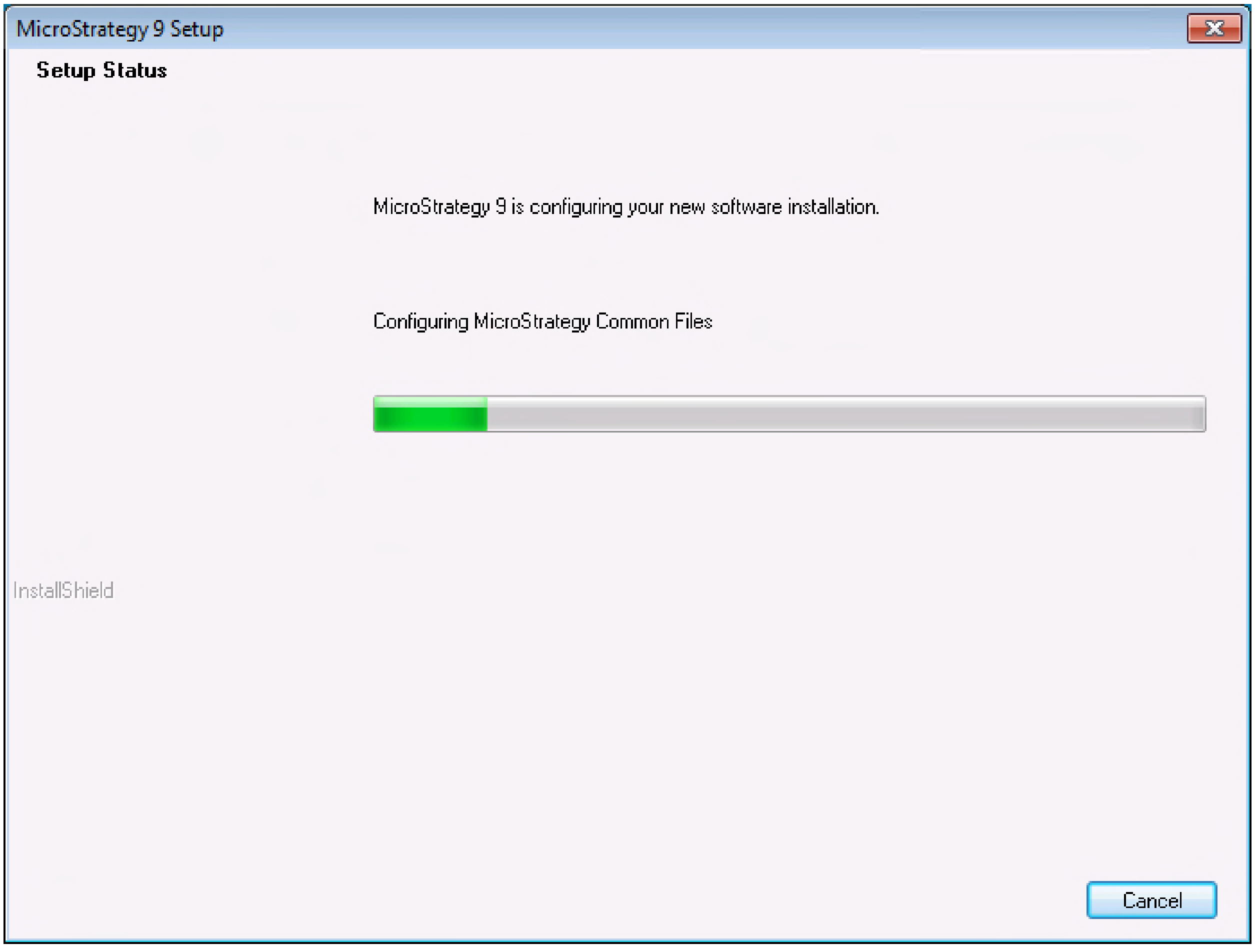
Setup

Installing

Installing MicroStrategy...



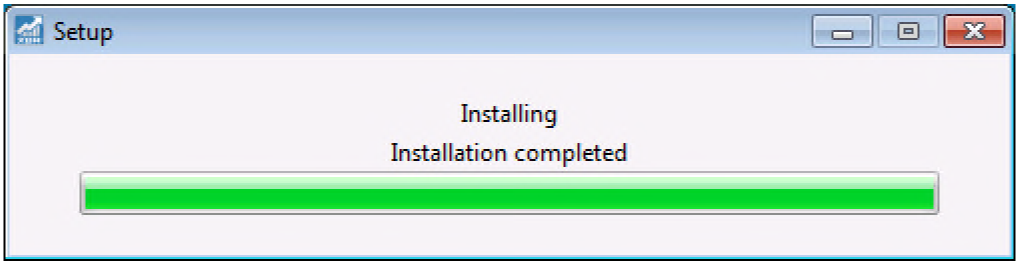
Please wait as Setup finalizes the installation . . .



MicroStrategy 9 is configuring your new software installation.

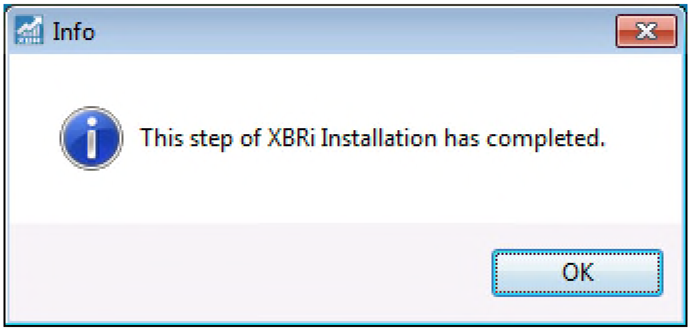
Configuring MicroStrategy Common Files

When the MicroStrategy installer has finished, the following messages will be displayed:



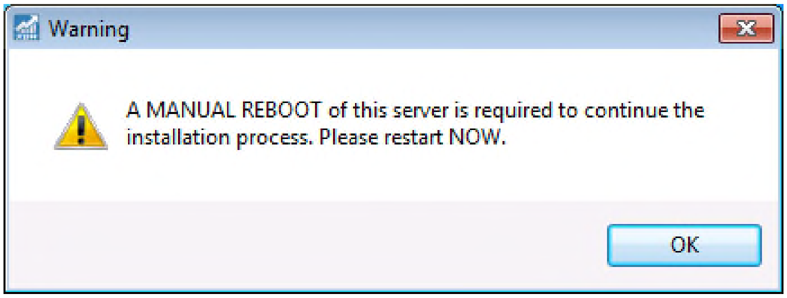
Installing

Installation completed



This step of XBRi Installation has completed.

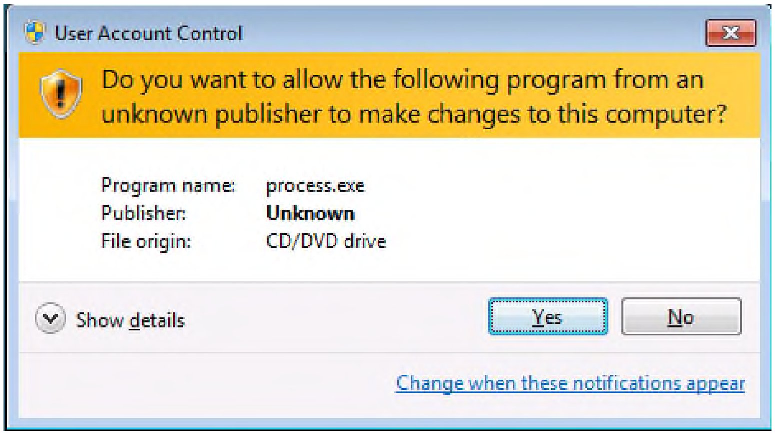
After the MicroStrategy installation completes, a reboot is required.


Warning

A MANUAL REBOOT of this server is required to continue the installation process. Please restart NOW.

Click **OK**, and then manually restart the server.

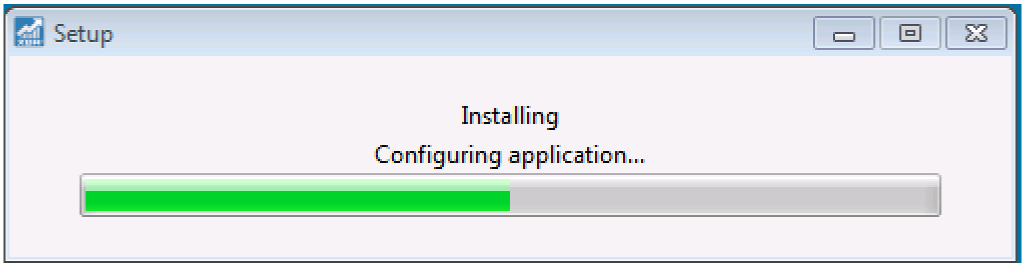
When the server comes back up, log in again and the installation will resume.
There will be a long pause and the screen may be blank while the MicroStrategy installation is continuing. Do not do anything until this phase completes.


User Account Control

Do you want to allow the following program from an unknown publisher to make changes to this computer?

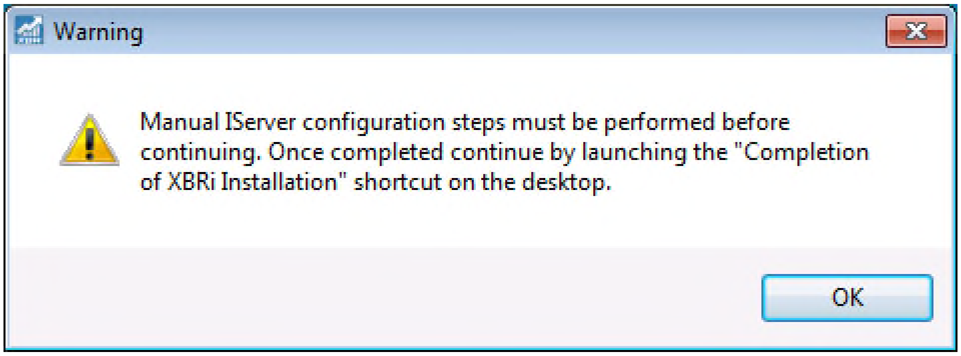
Program name: process.exe
Publisher: **Unknown**
File origin: CD/DVD drive

When the Windows User Account Control dialog appears click **Yes**. This step will create ODBC DSNs, configure the IServer, and create a project source for the IServer.


Setup

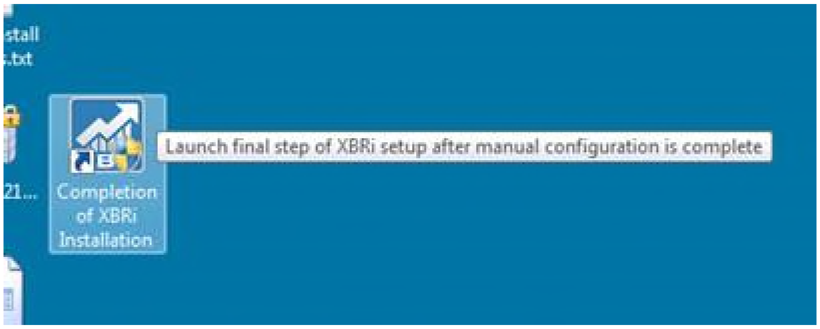
Installing
Configuring application...

When the step has completed, the following dialog is displayed:



Manual IServer configuration steps must be performed before continuing. Once completed continue by launching the "Completion of XBRi Installation" shortcut on the desktop.

The XBR^i install icon is now present on the desktop:



Launch final step of XBRi setup after manual configuration is complete

Do not run the XBR^i Install program until you have performed Step 2, Removing the MicroStrategy Objects.

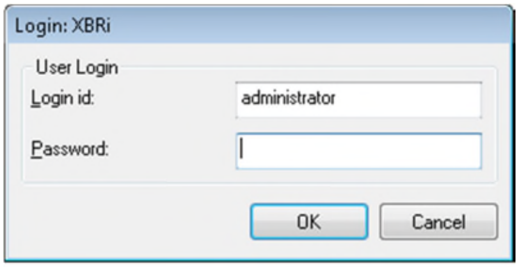
Step 2 – Manual Edit of User and Group Objects

Click the Windows Start menu and choose **All Programs -> MicroStrategy -> Desktop** from the program list.

When MicroStrategy Desktop starts, a Login prompt may be displayed. If so, click **Cancel.**

Right click on the XBR Project Source and click **Connect to Project Source**. The Login prompt will be displayed.

Enter Administrator in the **Login id** field and leave the password blank. Click **OK**.



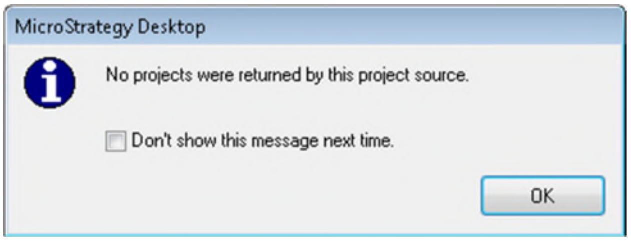
Login: XBRi

User Login

Login id: administrator

Password:

The following informational message is displayed. Click **OK**.

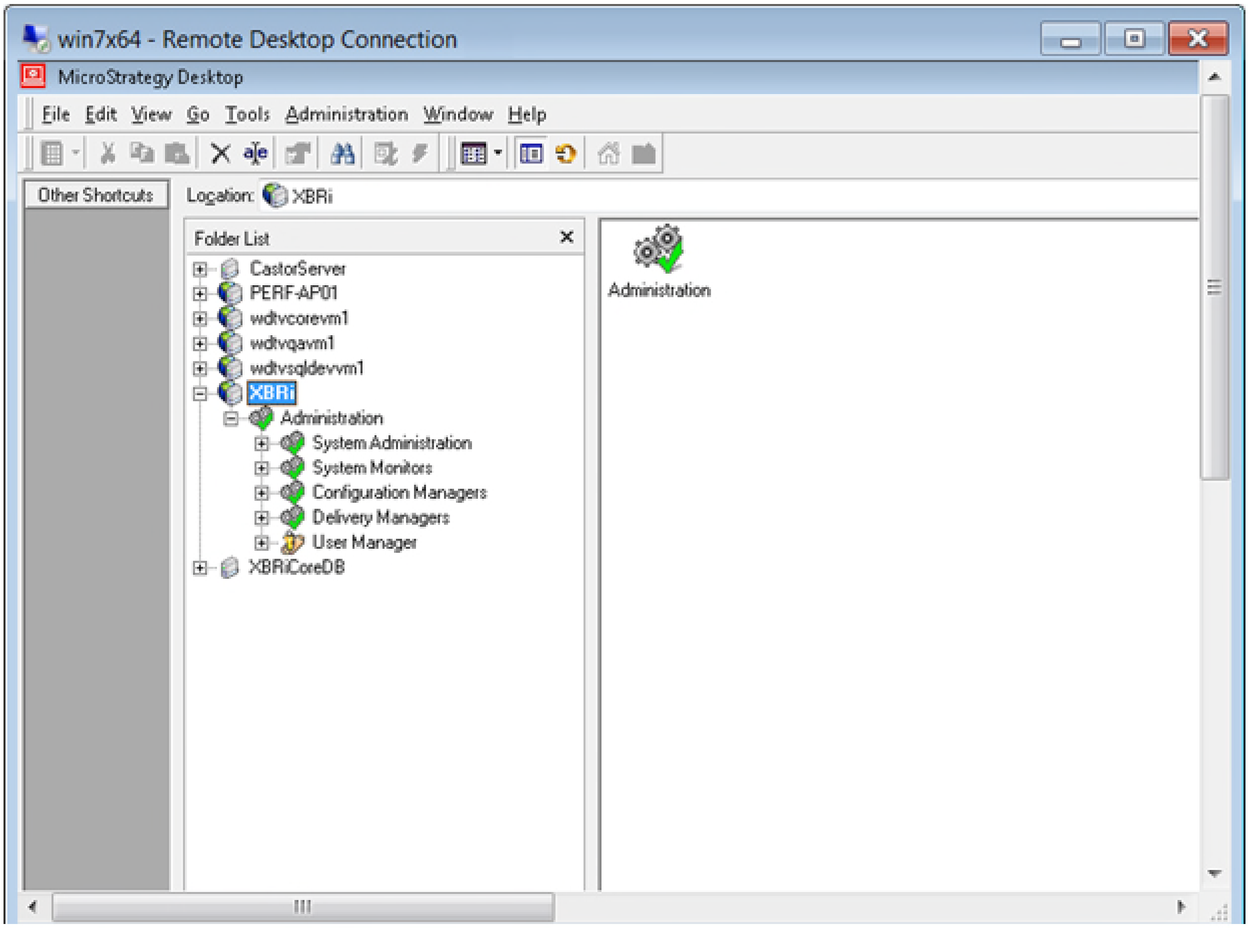


MicroStrategy Desktop

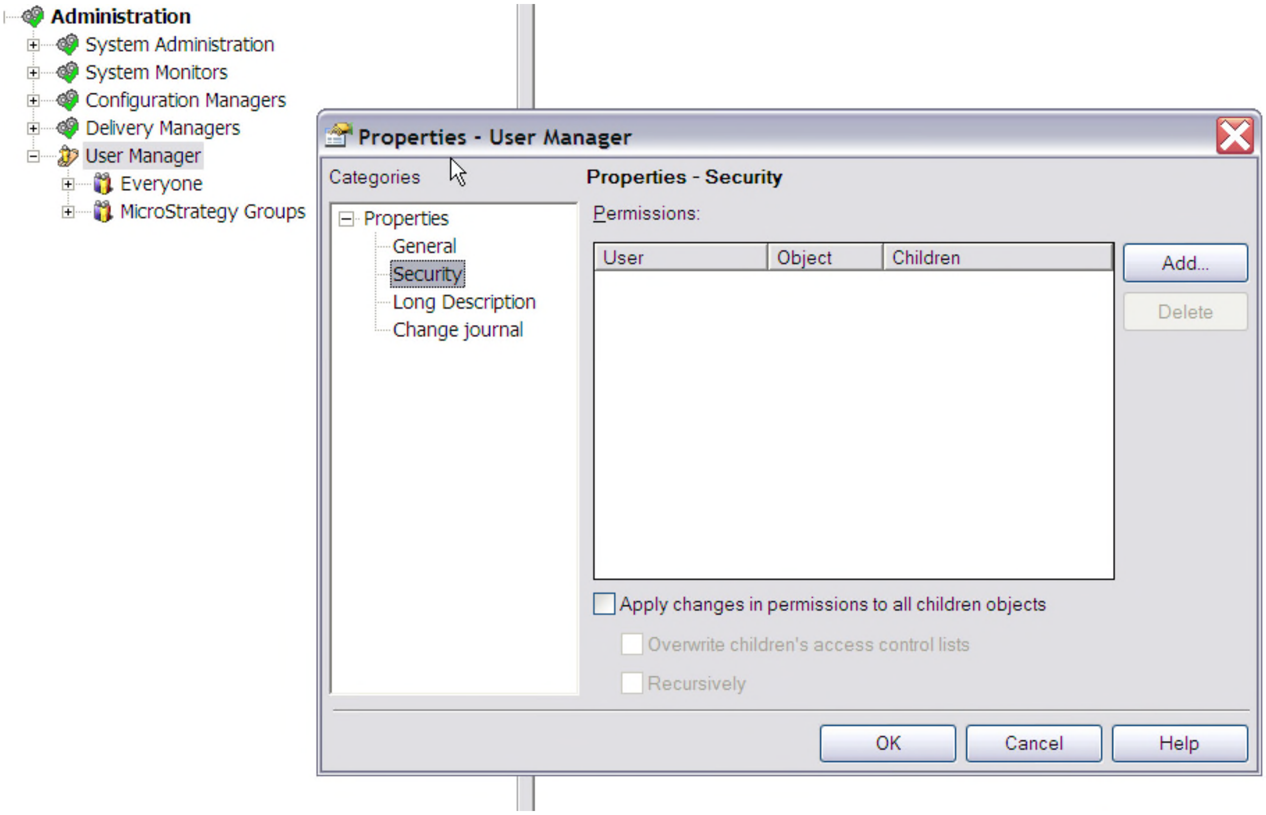
No projects were returned by this project source.

□ Don't show this message next time.

Expand the XBR^i folder and the Administration folder.



1. In the Administration folder, right click on **User Manager** and choose **Properties** from the context menu.
2. Select **Security** .
3. In the Properties: Security window, delete all ACL entries as shown below.
4. Click OK to accept changes.

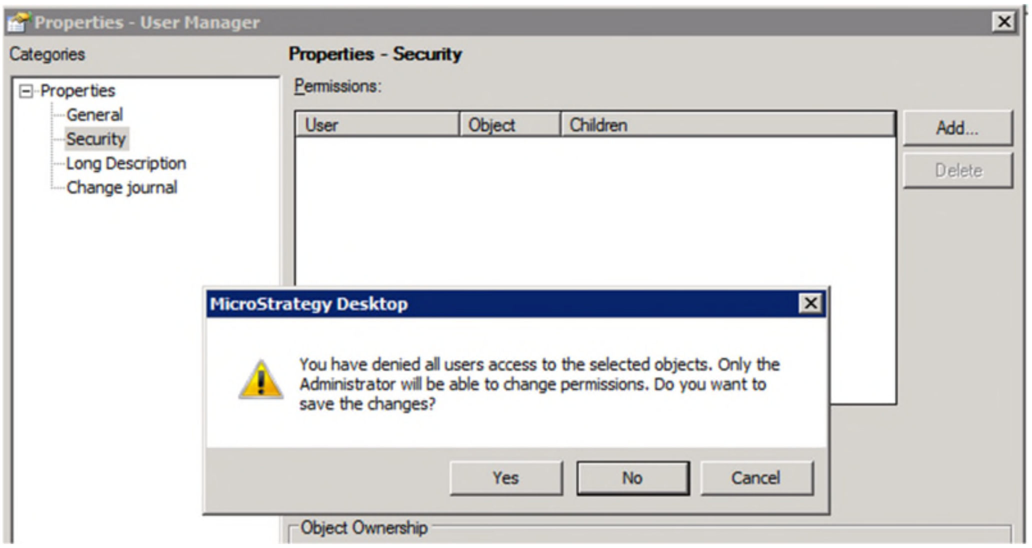


□ Apply changes in permissions to all children objects

□ Overwrite children's access control lists

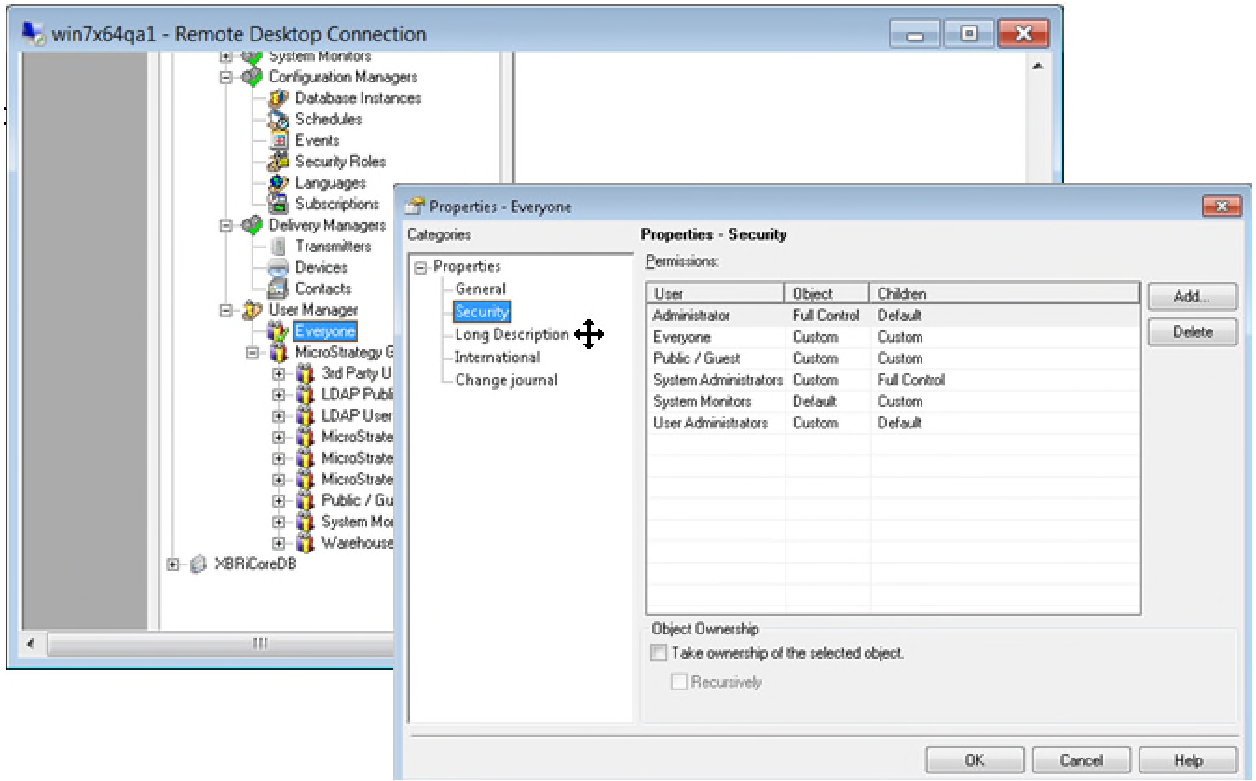
□ Recursively

5. Click **Yes** to save the changes.



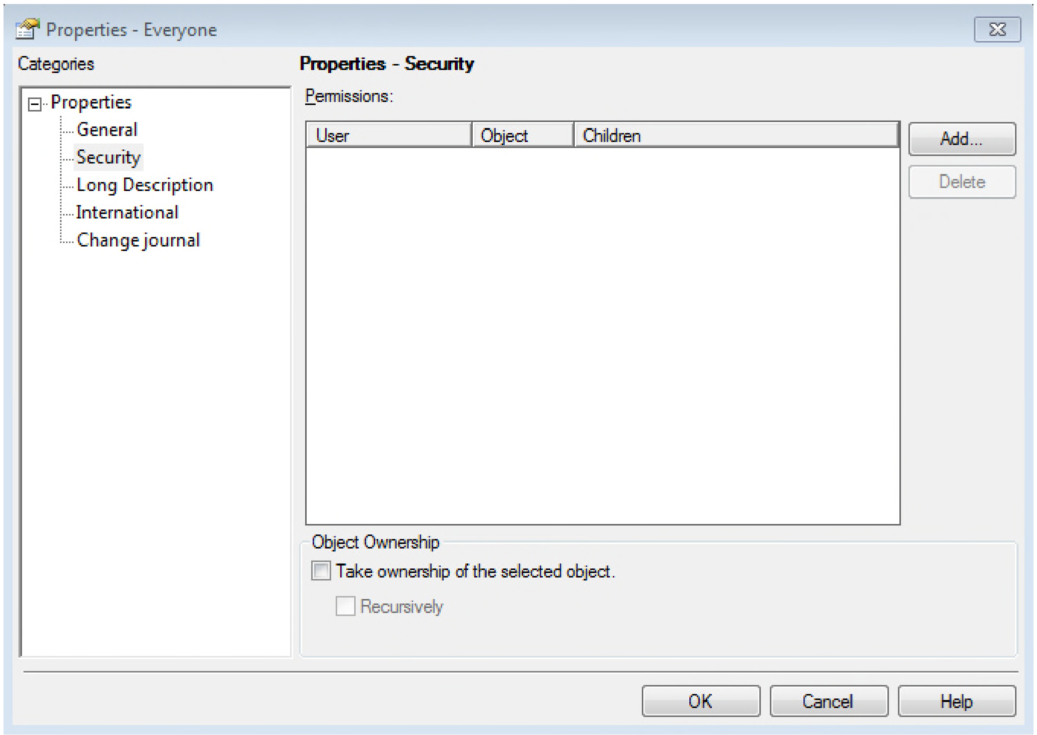
You have denied all users access to the selected objects. Only the Administrator will be able to change permissions. Do you want to save the changes?

Right-click the Everyone group under User Manager, and select **Properties**, then click **Security**.



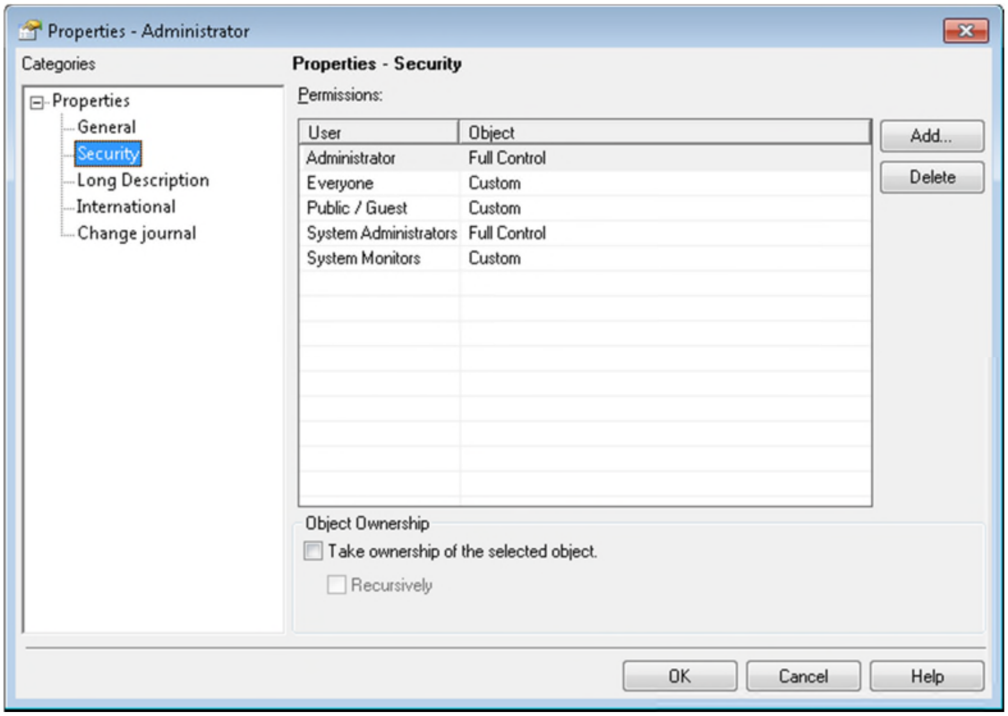
User	Object	Children
Administrator	Full Control	Default
Everyone	Custom	Custom
Public / Guest	Custom	Custom
System Administrators	Custom	Full Control
System Monitors	Default	Custom
User Administrators	Custom	Default

Delete all ACLs entries from the Everyone group.



After Deletion

Repeat the process for the Administrator user which will be found within the Everyone group.



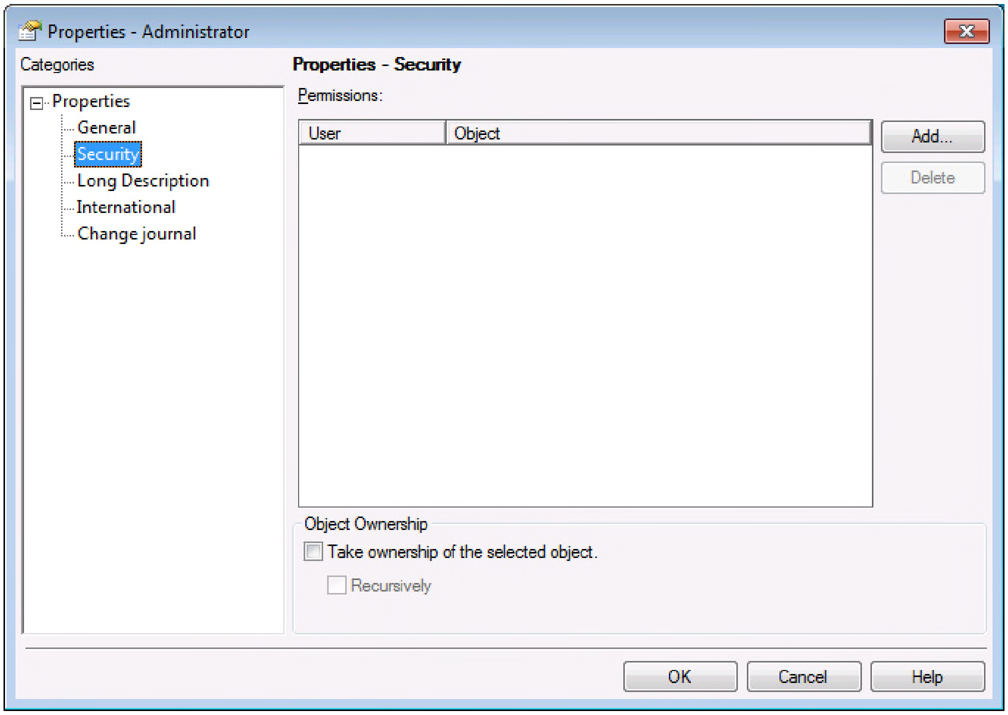
User	Object
Administrator	Full Control
Everyone	Custom
Public / Guest	Custom
System Administrators	Full Control
System Monitors	Custom

Object Ownership

□ Take ownership of the selected object.

□ Recursively

Delete all ACLs entries from the Administrator user.



Object Ownership

□ Take ownership of the selected object.

□ Recursively

After deletion

Right click on the XBR^i project source and click **Disconnect…** Then close MicroStrategy Desktop.

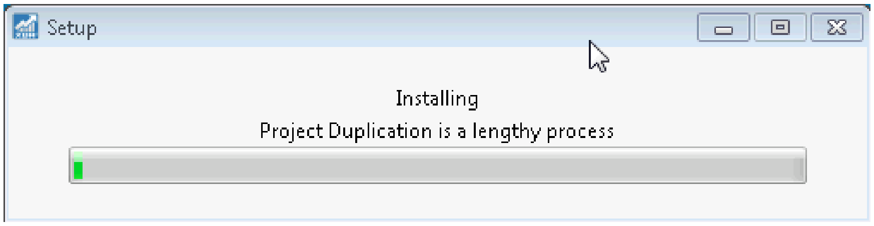
Step 3 – Running the XBR^i Install Program

Double click the XBR^i Install icon to launch the XBR^i Install program.

This step includes:

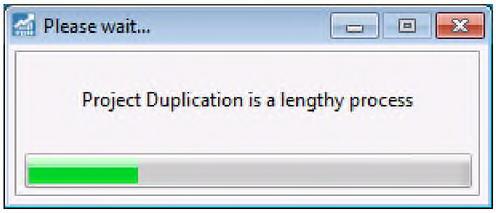
- duplication of the CORE XBR^i project to the customer project source
- application of object manager configuration packages
- execution of command manger scripts
- running database org intro and cloning procedures
- installation of webserver including creation of windows service
- installation of external scheduler including creation of windows service
- installation of date selection batch process and creation of windows scheduled task

The project duplication step may take over 20 minutes to complete.

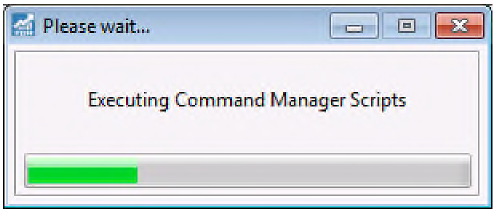


Installing
Project Duplication is a lengthy process

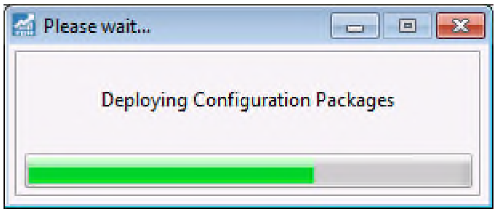
As each action is performed several progress indicators will be displayed, including the following:



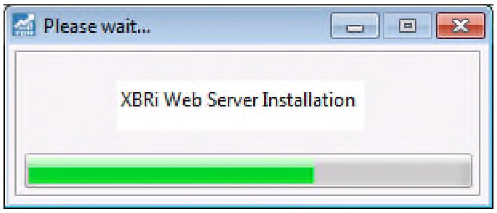
Project Duplication is a lengthy process



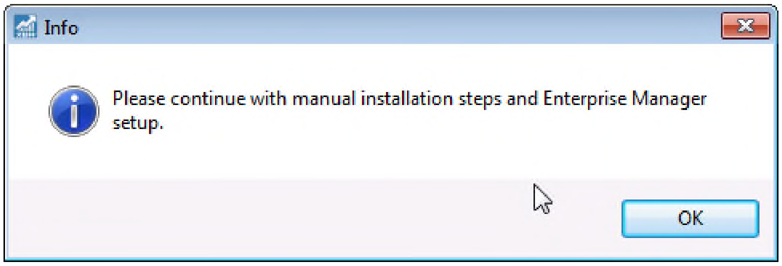
Executing Command Manager Scripts



Deploying Configuration Packages



XBRi Web Server Installation



Please continue with manual installation steps and Enterprise Manager setup.

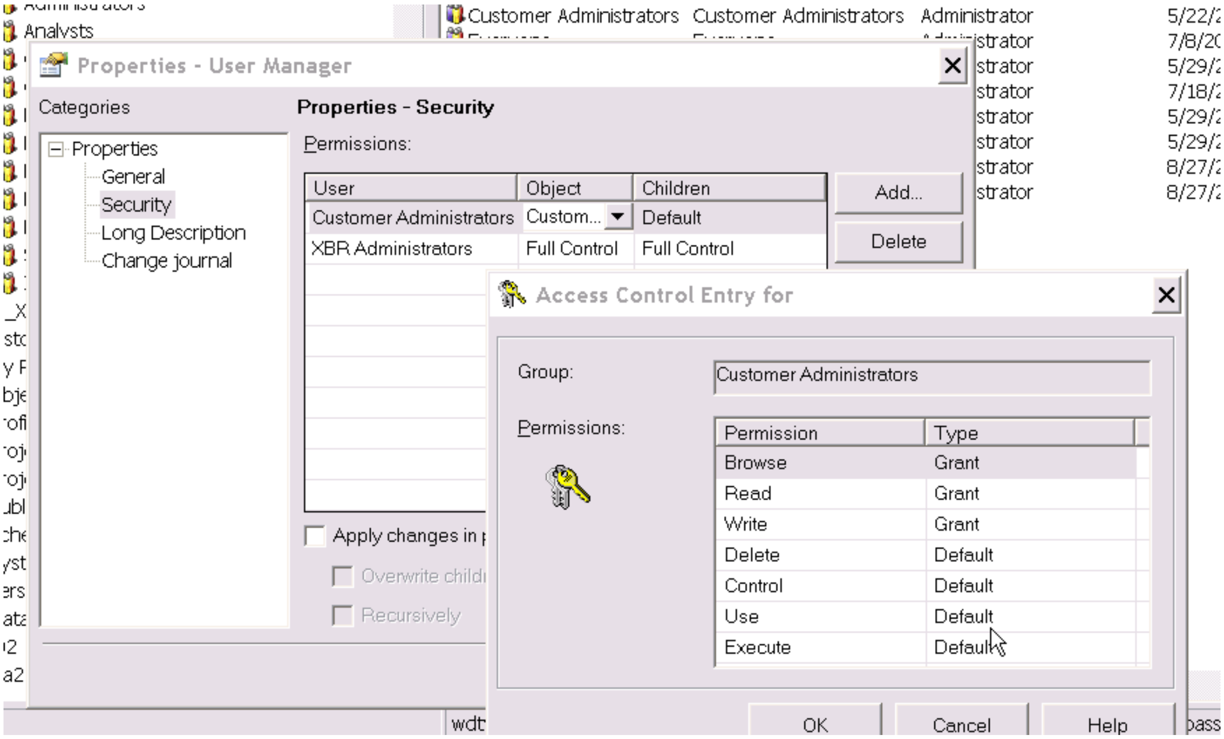
This completes the automated portion of the install.

Part 4 Manual Configuration Steps

After installing the database server, Iserver and web server, you must perform these manual steps to complete the installation.

Step 1: Configure the XBR^{i} Project (After Duplication)

1. Log in to MicroStrategy Desktop. Since the core project has been duplicated the Administrator account is now password protected, which is now **CoreAdmin12!**
2. Click on **XBR*i*** (project Source) and expand the **Administration** folder.
3. From the Administration folder, right click on **User Manager** and choose **Properties** from the context menu.
4. In the Properties: Security window, set the Access Control List (ACL) as in the screenshot below:



Properties - Security

Permissions:

User	Object	Children
Customer Administrators	Custom...	Default
XBR Administrators	Full Control	Full Control

Group: Customer Administrators

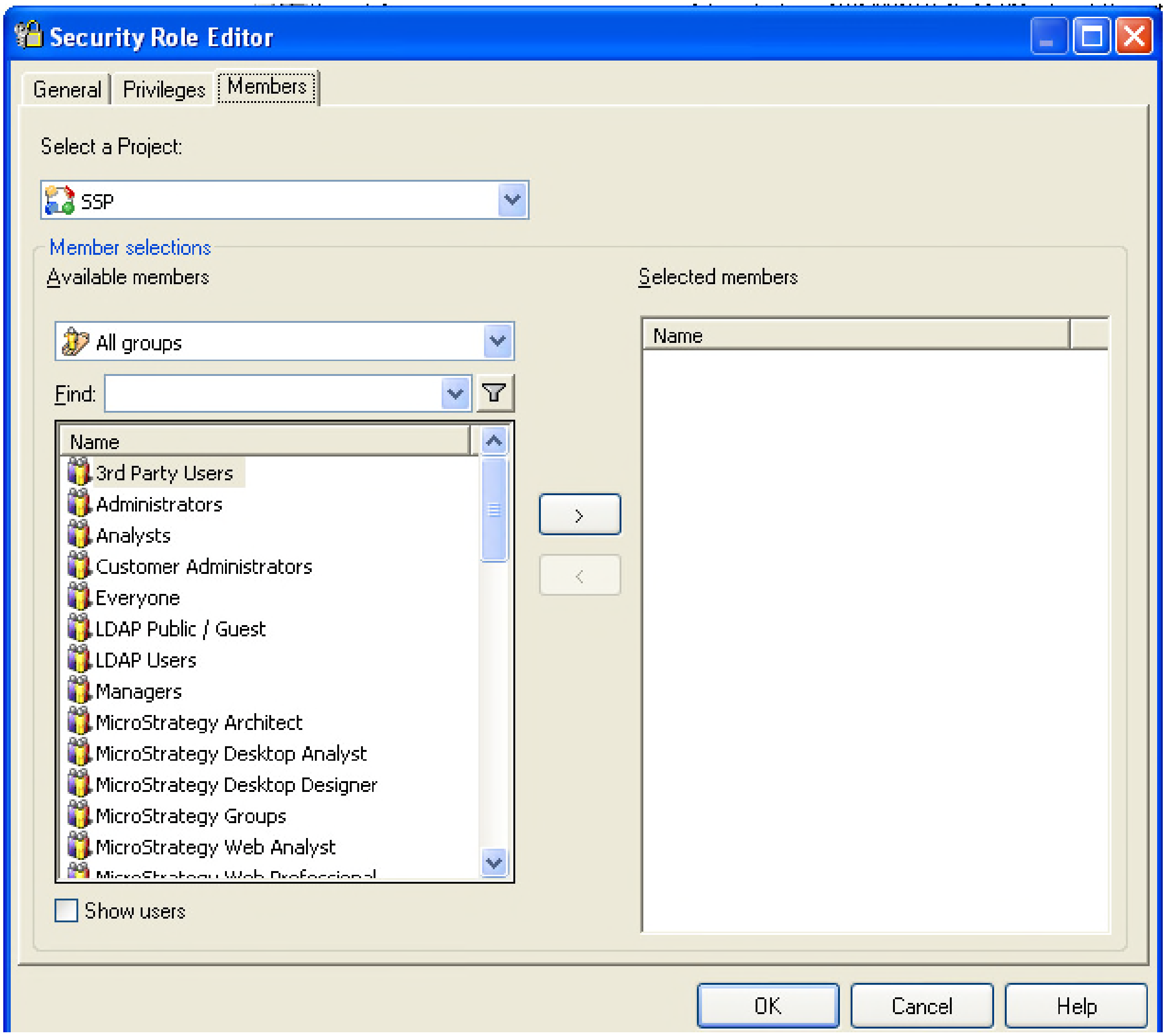
Permissions:

Permission	Type
Browse	Grant
Read	Grant
Write	Grant
Delete	Default
Control	Default
Use	Default
Execute	Default

5. Click the **OK** button.

Remove Everyone Group from Normal Users security role (if exists)

1. Navigate to Administration\Configuration managers\Security Roles.
2. Right-click Normal Users security role and select **Edit.**
3. Click on Members tab and remove Everyone from Selected members list so there are no members as in the screenshot below.



Select a Project: SSP

All groups

Find:

- 3rd Party Users
- Administrators
- Analysts
- Customer Administrators
- Everyone
- LDAP Public / Guest
- LDAP Users
- Managers
- MicroStrategy Architect
- MicroStrategy Desktop Analyst
- MicroStrategy Desktop Designer
- MicroStrategy Groups
- MicroStrategy Web Analyst
- MicroStrategy Web Professional

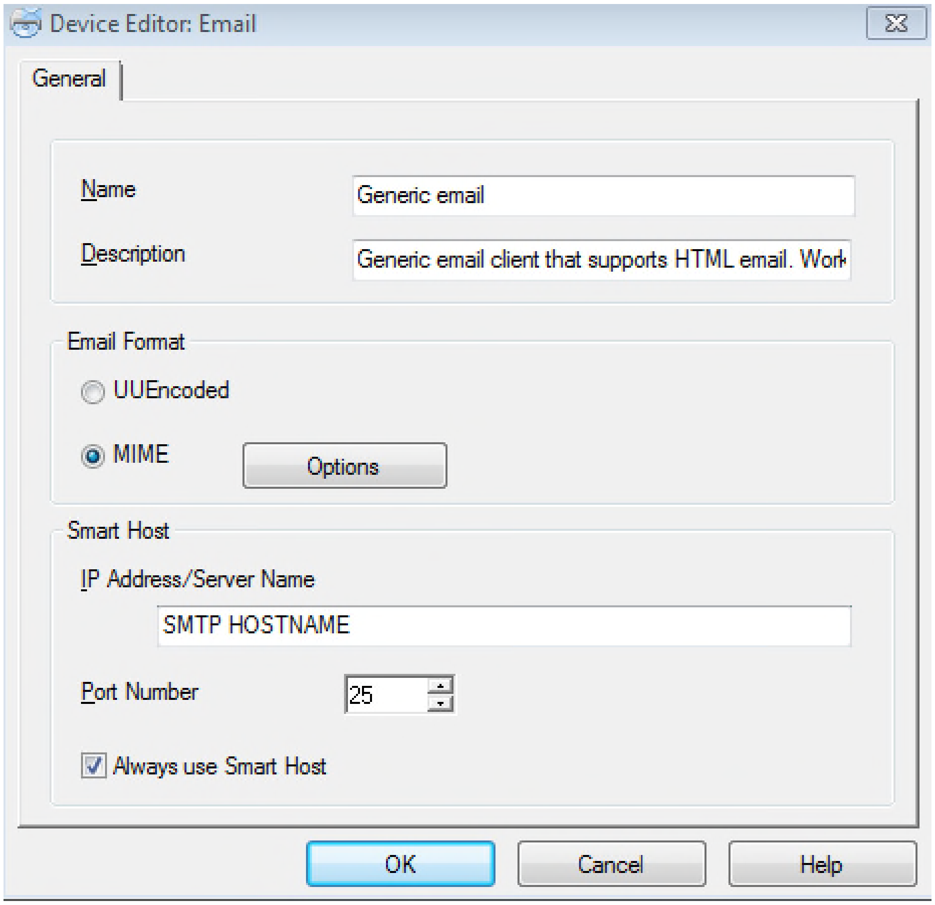
□ Show users

4. Click **OK**

Step 2: Configure the SMTP Server

*If the customer site uses a smart host email server, configure as in the following screenshot. Otherwise, leave the **IP Address/Server Name** box blank and do not check **Always use Smart Host**.*

1. Log in to MicroStrategy Desktop.
2. Click on **XBR^i** (project Source) and click on **Administration.**
3. Navigate to **Delivery Managers > Devices > Generic email**.



Name: Generic email

Description: Generic email client that supports HTML email. Work

Email Format

○ UUEncoded

● MIME

Smart Host

IP Address/Server Name: SMTP HOSTNAME

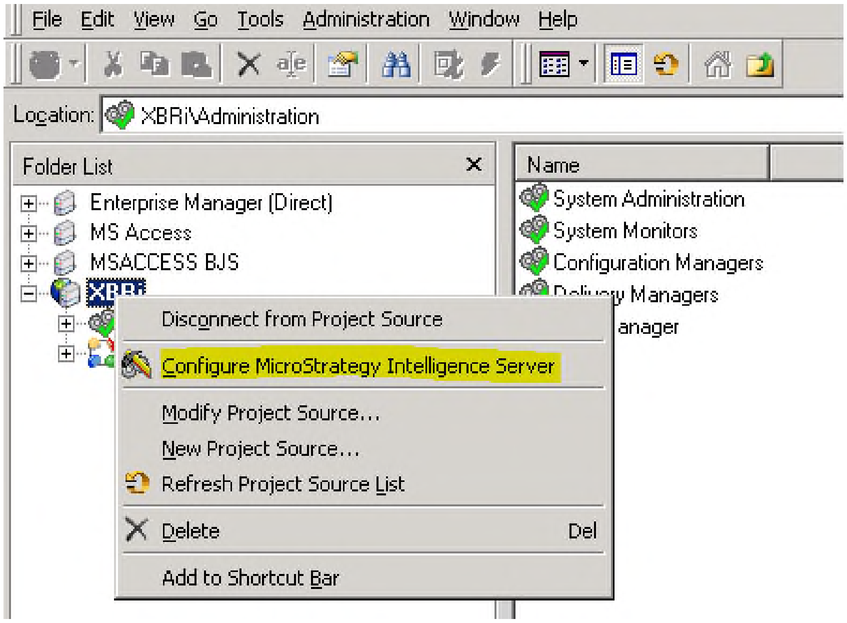
Port Number: 25

☑ Always use Smart Host

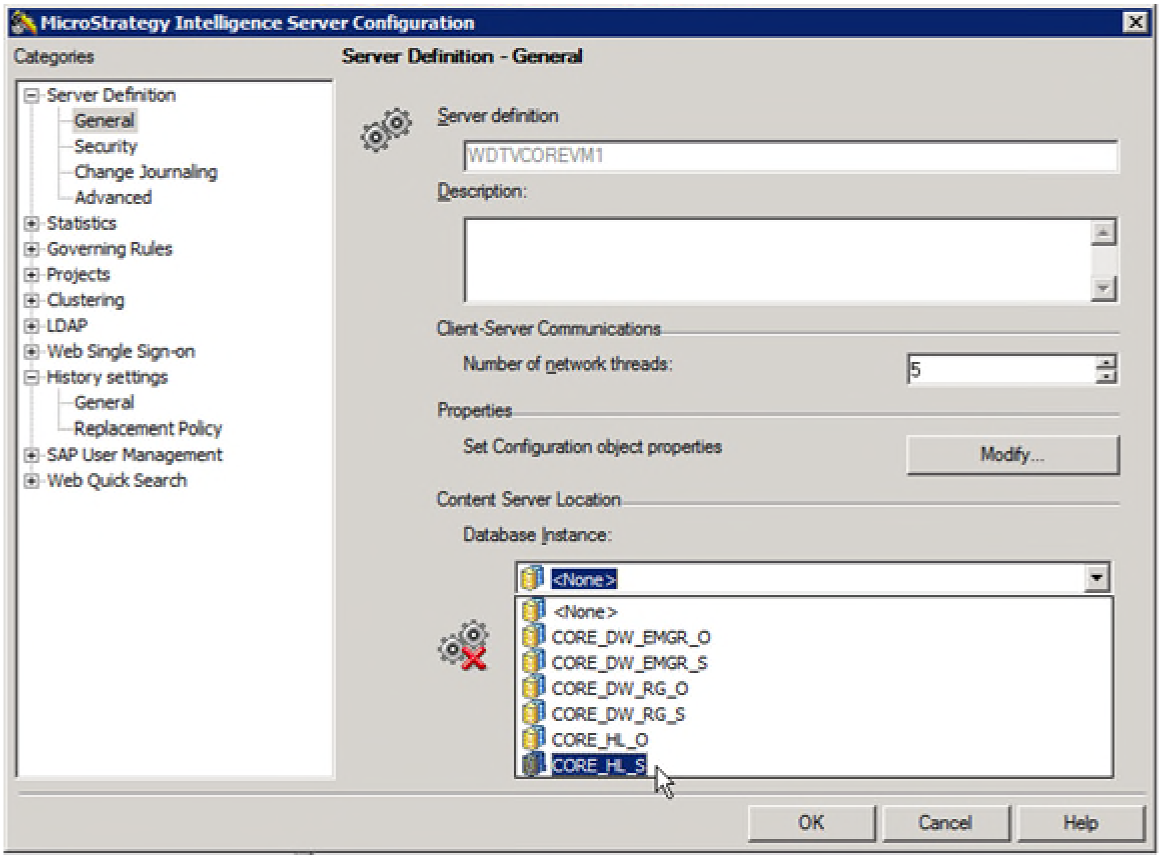
4. Enter the correct E-Mail Server settings.

Step 3: Configure I-Server Settings:

1. Log in to MicroStrategy Desktop.
2. Right click on **XBR^i** (project Source) and click on **Configure Intelligence Server.**


File Edit View Go Tools Administration Window Help
Location: XBRi\Administration
Folder List
Enterprise Manager (Direct)
MS Access
MSACCESS BJS
XBRi
Name
System Administration
System Monitors
Configuration Managers
Delivery Managers
anager
Disconnect from Project Source
Configure MicroStrategy Intelligence Server
Modify Project Source...
New Project Source...
Refresh Project Source List
Delete
Del
Add to Shortcut Bar

3. Specify the content server location. This is the database connection that will be used for the History List. Right click on project source and choose configure Intelligence Server. On the **Server definition General** page, configure the settings as they are displayed in the screenshot below.



MicroStrategy Intelligence Server Configuration

Server Definition - General

Server definition: WDTVCOREVM1

Description:

Client-Server Communications

Number of network threads: 5

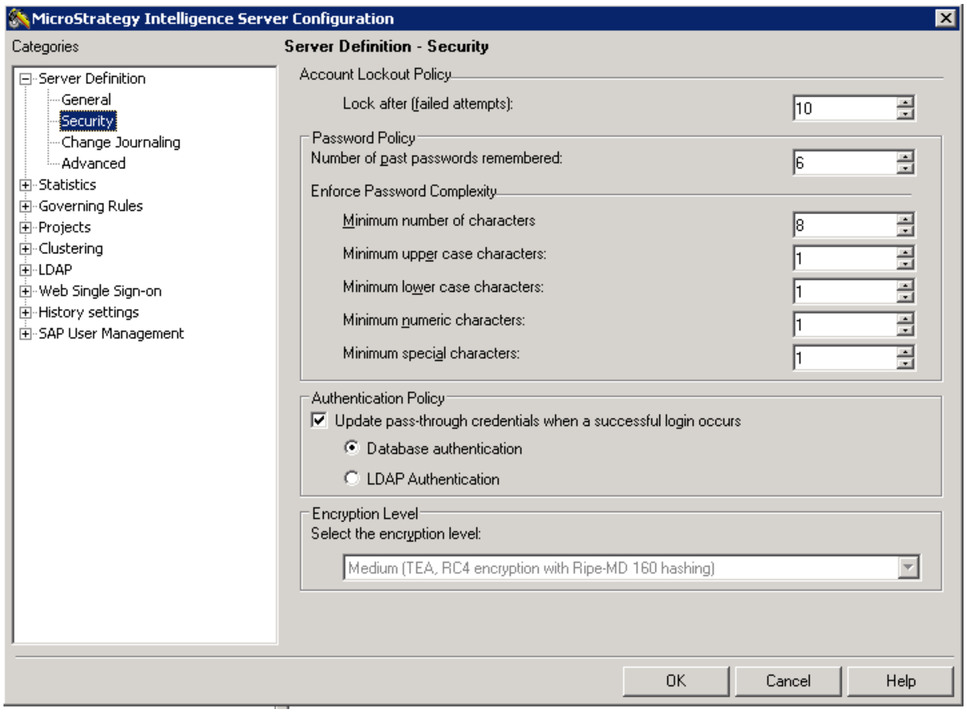
Properties

Set Configuration object properties

Content Server Location

Database Instance: <None>

4. On the **Server definition > Security** page, configure the settings as they are displayed in the screenshot below:



Server Definition - Security

Account Lockout Policy

Lock after (failed attempts): 10

Password Policy

Number of past passwords remembered: 6

Enforce Password Complexity

Minimum number of characters 8

Minimum upper case characters: 1

Minimum lower case characters: 1

Minimum numeric characters: 1

Minimum special characters: 1

Authentication Policy

☑ Update pass-through credentials when a successful login occurs

● Database authentication

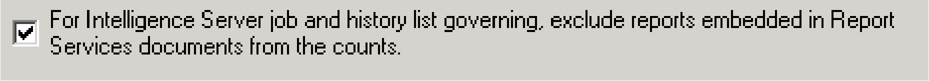
○ LDAP Authentication

Encryption Level

Select the encryption level:

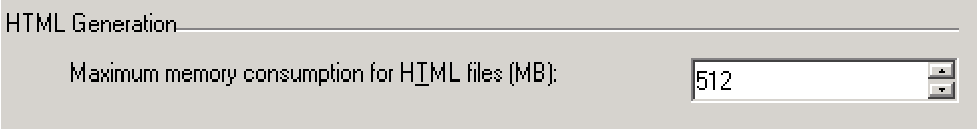
Medium (TEA, RC4 encryption with Ripe-MD 160 hashing)

5. Navigate to the **Governing rules > Default > General** page.
6. Select the check box below:



☑ For Intelligence Server job and history list governing, exclude reports embedded in Report Services documents from the counts.

7. Navigate to the **Governing rules > Default > File Generation** page.
8. Under HTML Generation, set the **Maximum memory consumption for HTML files [MB]** for the customer. (Small/medium/Large) = (100/512/1024)

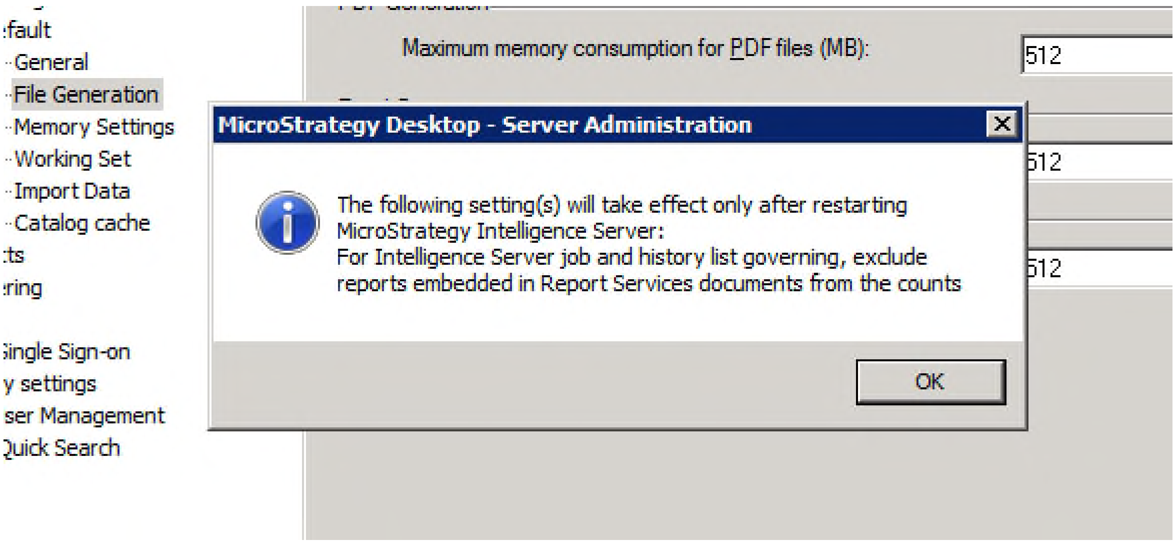


HTML Generation

Maximum memory consumption for HTML files (MB): 512

9. Click **OK** to accept the changes.

10. Click **OK** in the message box:



The following setting(s) will take effect only after restarting MicroStrategy Intelligence Server:
For Intelligence Server job and history list governing, exclude reports embedded in Report Services documents from the counts

Step 4: Configure Project Configuration Settings

To configure the project:

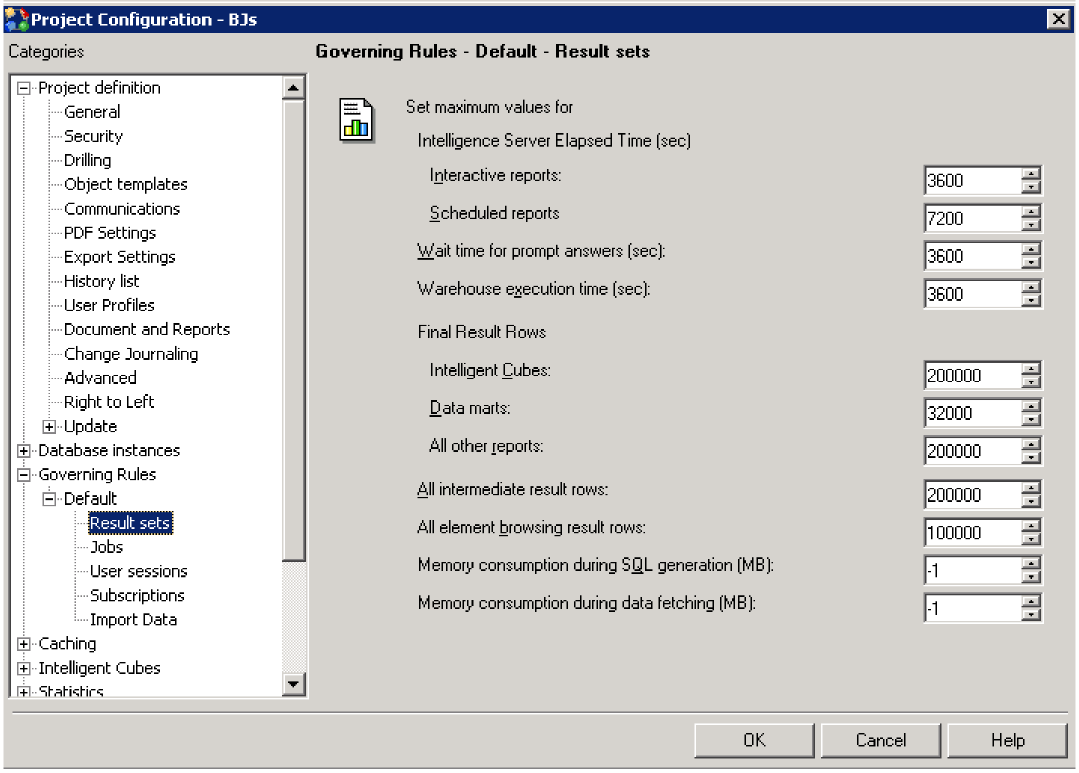
1. Log in to MicroStrategy Desktop if not already logged in.
2. In the **XBR^{i}** project Source right click on the project name and select **Project Configuration.**
3. In the Project Definition - History List page, clear the check box for **Save Report Service Document dataset messages to history list.**

4. Navigate to the Governing rules > Result Sets page.

   Set **Wait time for Prompt answer (sec)** to 3600

   Set **Warehouse execution time (sec)** to 3600.

   Set **Memory Consumption during SQL generation (MB)** to -1.



Governing Rules - Default - Result sets

Set maximum values for

Intelligence Server Elapsed Time (sec)

Interactive reports: 3600

Scheduled reports 7200

Wait time for prompt answers (sec): 3600

Warehouse execution time (sec): 3600

Final Result Rows

Intelligent Cubes: 200000

Data marts: 32000

All other reports: 200000

All intermediate result rows: 200000

All element browsing result rows: 100000

Memory consumption during SQL generation (MB): -1

Memory consumption during data fetching (MB): -1

5. Navigate to the **Governing Rules > Default > Jobs** page and use these guidelines to enter the following settings:

   Jobs per user account – Set to 50

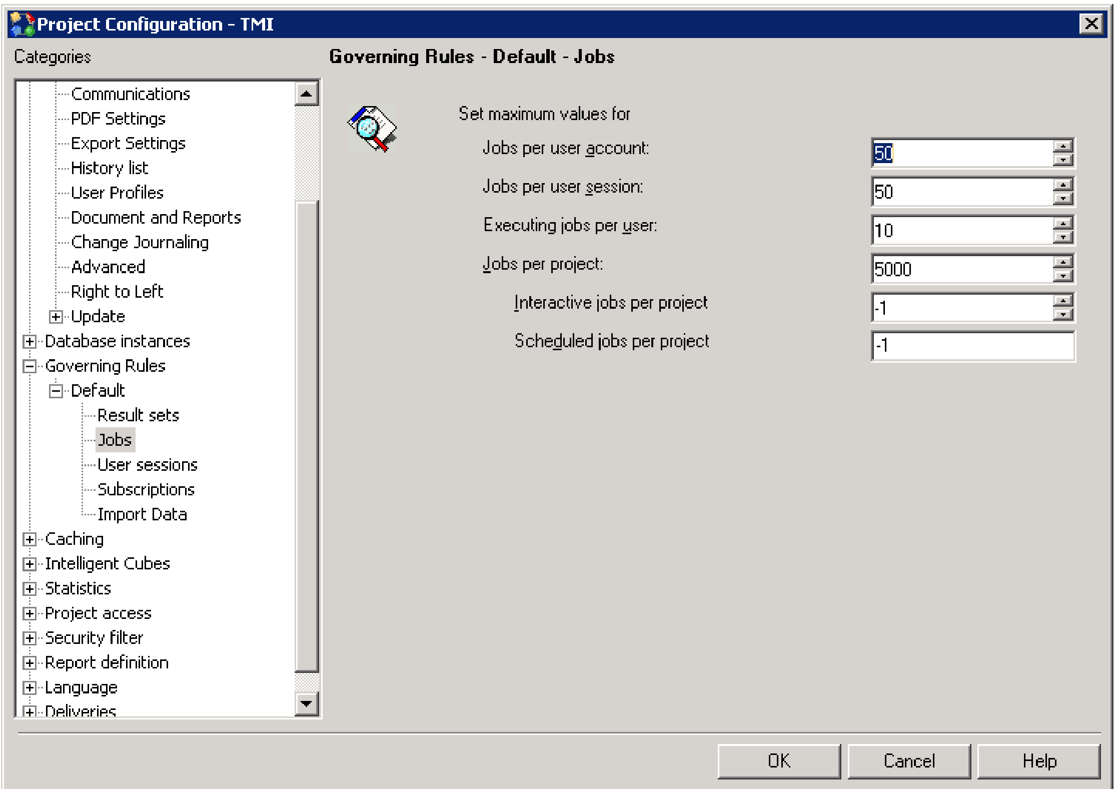
   Jobs per session – Set to 50

   Executing jobs per user – Set to 10

   Jobs per project – Limits the number of concurrent jobs that may exist on the I server, Recommended settings are: Small – 1000, Medium – 5000, Large - 50000

   Interactive jobs per project - Set to -1

   Scheduled jobs per project – Set to -1



Project Configuration - TMI

Governing Rules - Default - Jobs

Set maximum values for

Jobs per user account: 50

Jobs per user session: 50

Executing jobs per user: 10

Jobs per project: 5000

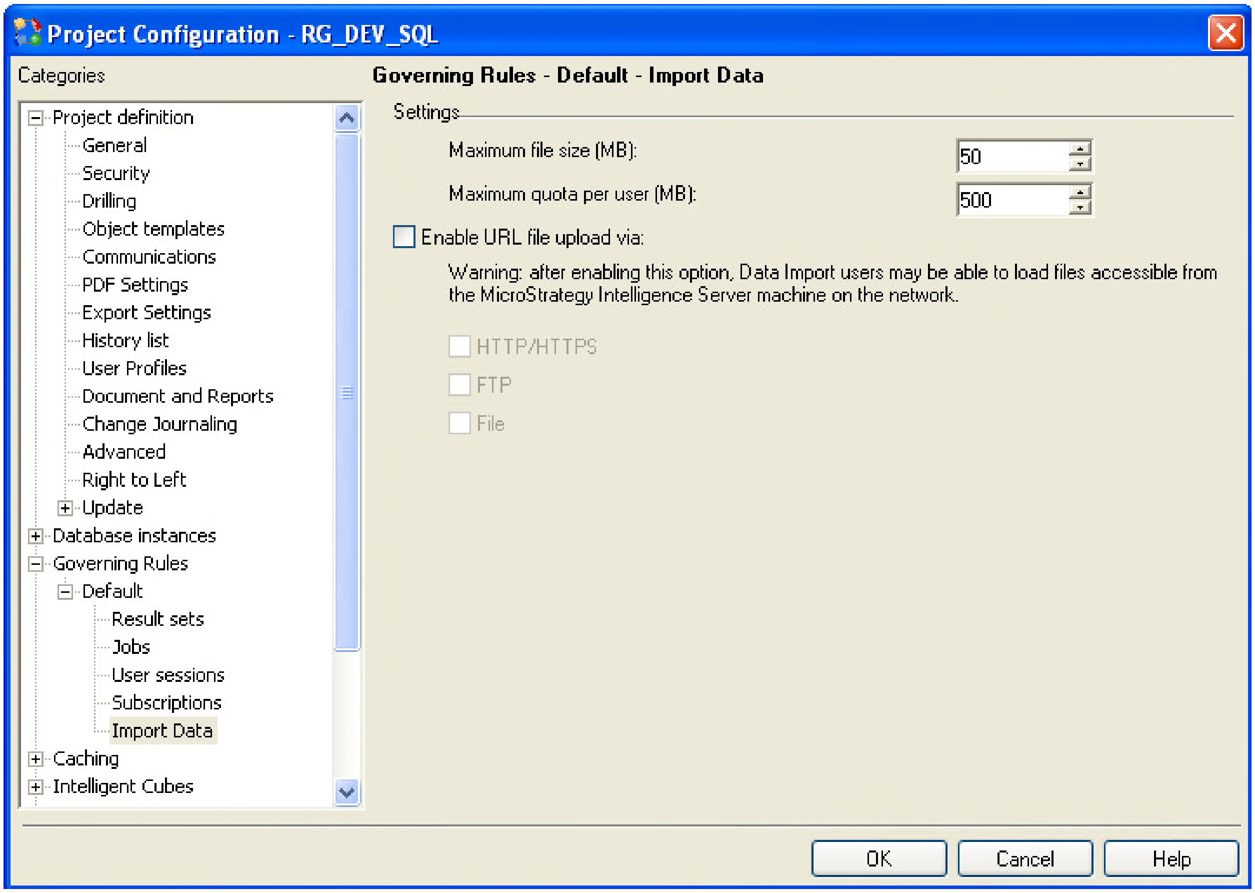
Interactive jobs per project: -1

Scheduled jobs per project: -1

6. Navigate to the **Governing Rules > Default > Import Data** page and use these guidelines to enter the following settings:

   Maximum File Size – Set to 50

   Maximum Quota Per User– Set to 500



Governing Rules - Default - Import Data

Settings

Maximum file size (MB): 50

Maximum quota per user (MB): 500

□ Enable URL file upload via:

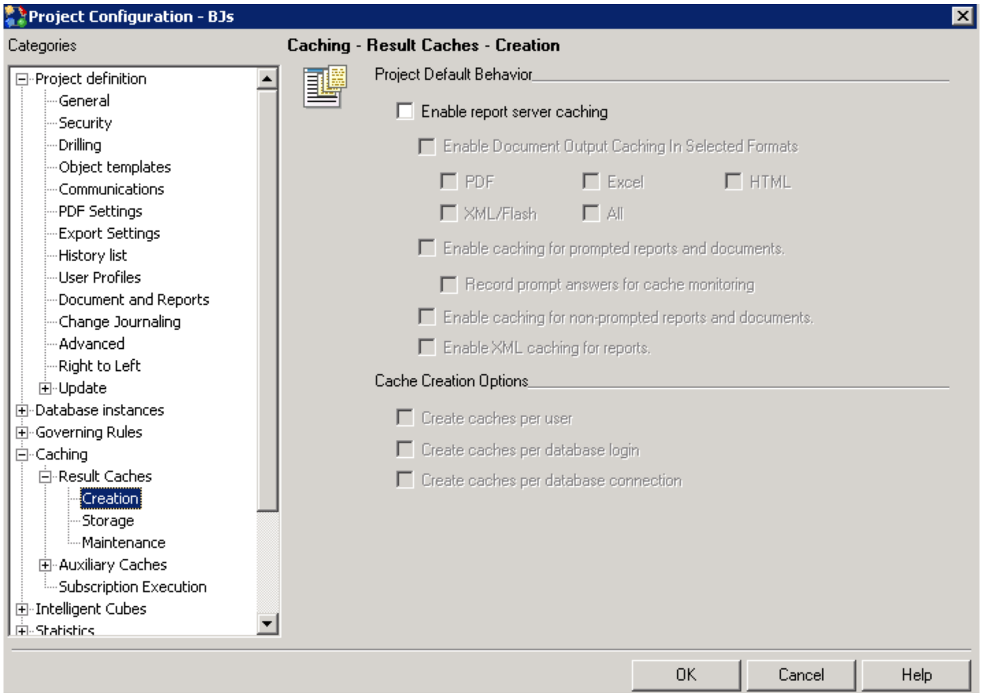
Warning: after enabling this option, Data Import users may be able to load files accessible from the MicroStrategy Intelligence Server machine on the network.

□ HTTP/HTTPS

□ FTP

□ File

7. Navigate to the **Caching >Result Caches> Creation** page and clear the **Enable report server caching** check box.



Project Configuration - BJs

Caching - Result Caches - Creation

Project Default Behavior

□ Enable report server caching

□ Enable Document Output Caching In Selected Formats

□ PDF □ Excel □ HTML

□ XML/Flash □ All

□ Enable caching for prompted reports and documents.

□ Record prompt answers for cache monitoring

□ Enable caching for non-prompted reports and documents.

□ Enable XML caching for reports.

Cache Creation Options

□ Create caches per user

□ Create caches per database login

□ Create caches per database connection

8. Navigate to the **Caching >Result Caches> Storage** page.

   Set **Cache file directory** to .\Caches

   Under **Datasets:**

   Set Maximum Ram usage (Mbytes) to 100/512/2048 (small/medium/large)

   Set "Maximum number of caches to -1

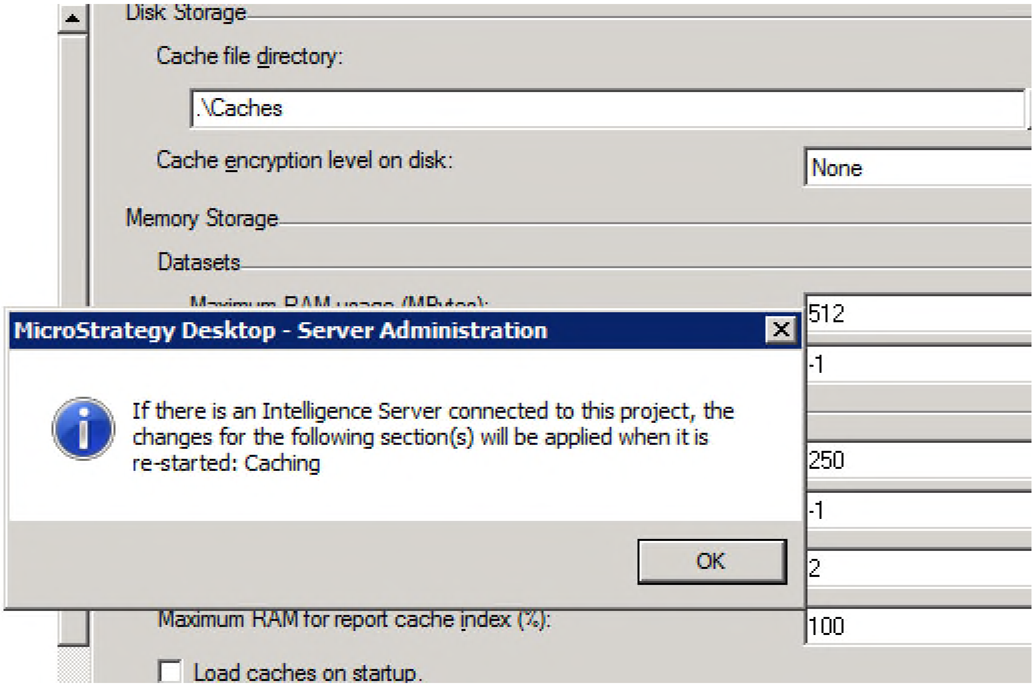
   Under **Formatted Documents**:

   Set **Maximum RAM usage (Mbytes)** to one of these values: 100/250/500 (small/medium/large)

   Set **Maximum number of caches** to -1

   Clear the **Load caches on startup** check box.

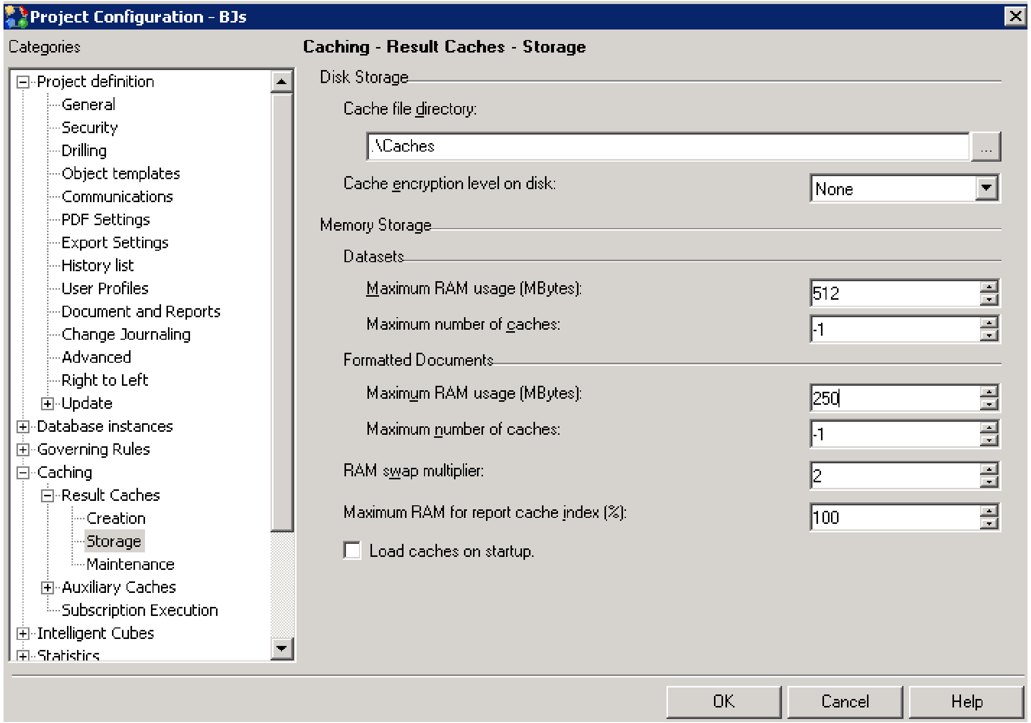
9. Click OK, and then click OK in the message that is displayed:



MicroStrategy Desktop - Server Administration

If there is an Intelligence Server connected to this project, the changes for the following section(s) will be applied when it is re-started: Caching

This returns you to the Caching – Result Caches – Storage window.



Project Configuration - BJs

Caching - Result Caches - Storage

Disk Storage

Cache file directory: .\Caches

Cache encryption level on disk: None

Memory Storage

Datasets

Maximum RAM usage (MBytes): 512

Maximum number of caches: -1

Formatted Documents

Maximum RAM usage (MBytes): 250

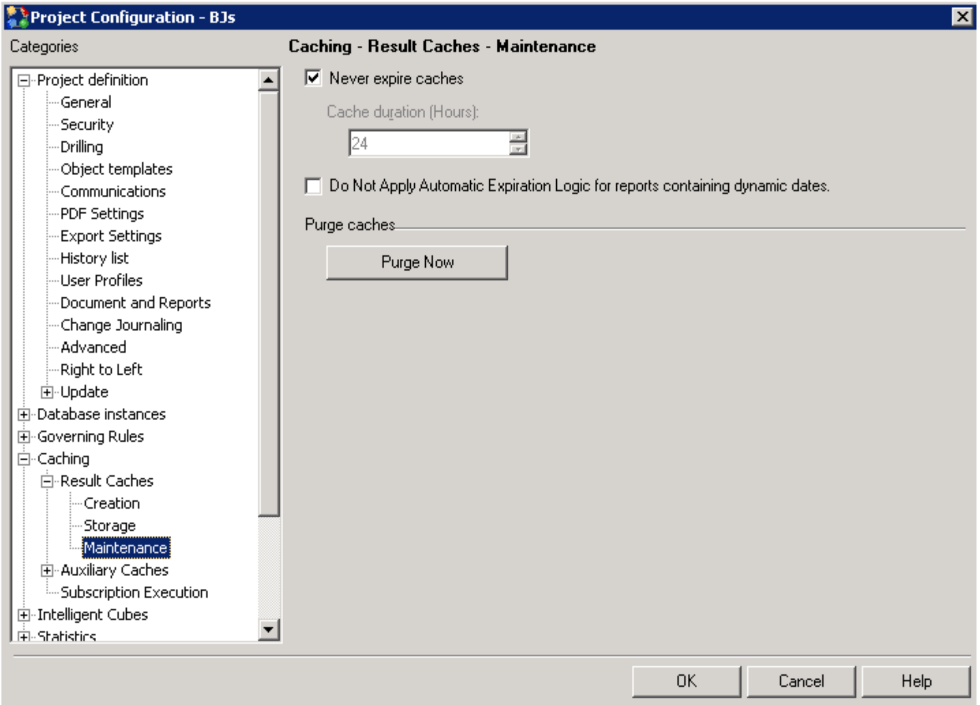
Maximum number of caches: -1

RAM swap multiplier: 2

Maximum RAM for report cache index (%): 100

□ Load caches on startup.

10. Navigate to the **Caching >Result Caches > Maintenance** page, and select the **Never expire caches** check box.



Caching - Result Caches - Maintenance

☑ Never expire caches

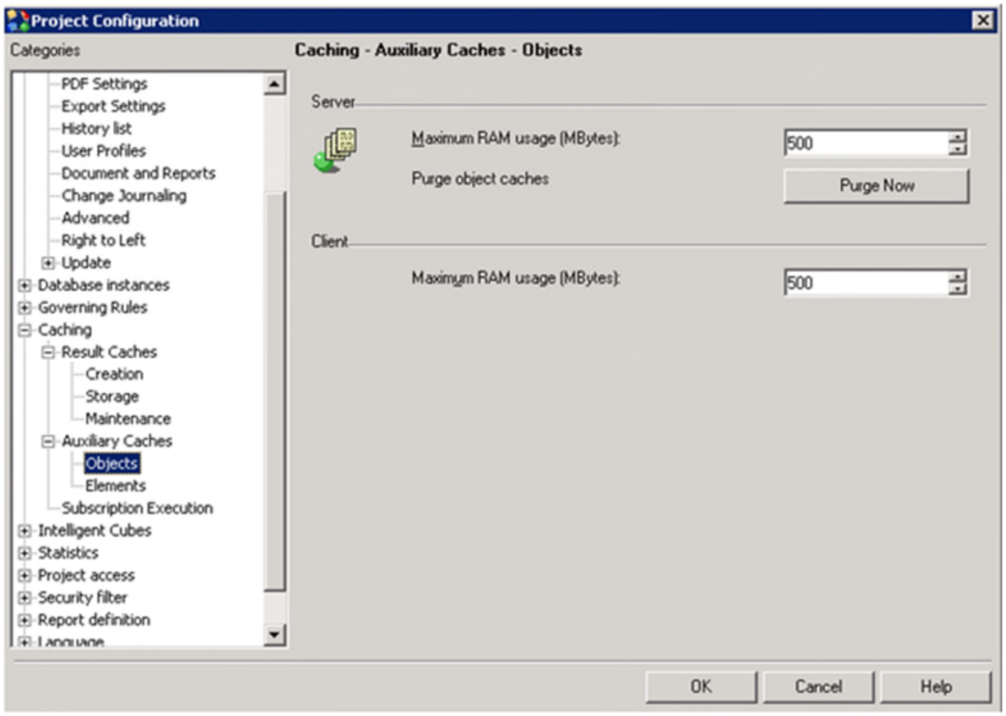
Cache duration (Hours): 24

□ Do Not Apply Automatic Expiration Logic for reports containing dynamic dates.

11. Navigate to the **Caching >Auxiliary Caches>Objects** page

Under **Server**: Set **Maximum RAM Usage (Mbytes)** to 500

Under **Client**: Set **Maximum RAM Usage (Mbytes)** to 500



Project Configuration

Caching - Auxiliary Caches - Objects

Server

Maximum RAM usage (MBytes): 500

Purge object caches

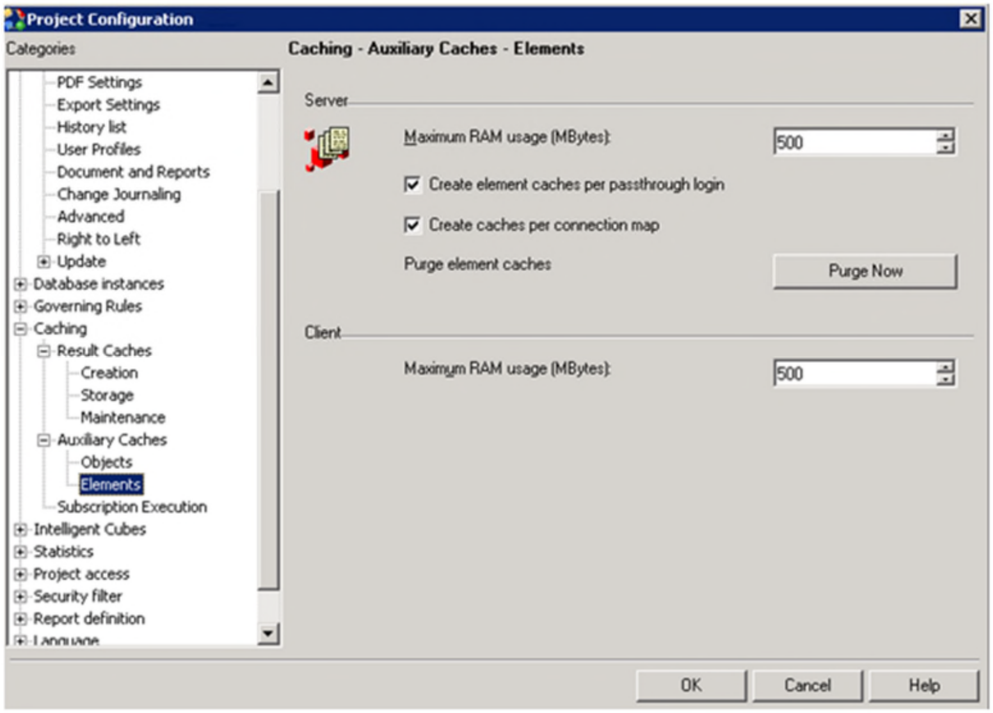
Client

Maximum RAM usage (MBytes): 500

12. Navigate to the **Caching > Auxiliary Caches > Elements** page

Under **Server**: Set **Maximum RAM Usage (Mbytes)** to 500

Under **Client**: Set **Maximum RAM Usage (Mbytes)** to 500



Project Configuration

Caching - Auxiliary Caches - Elements

Server

Maximum RAM usage (MBytes): 500

☑ Create element caches per passthrough login

☑ Create caches per connection map

Purge element caches

Client

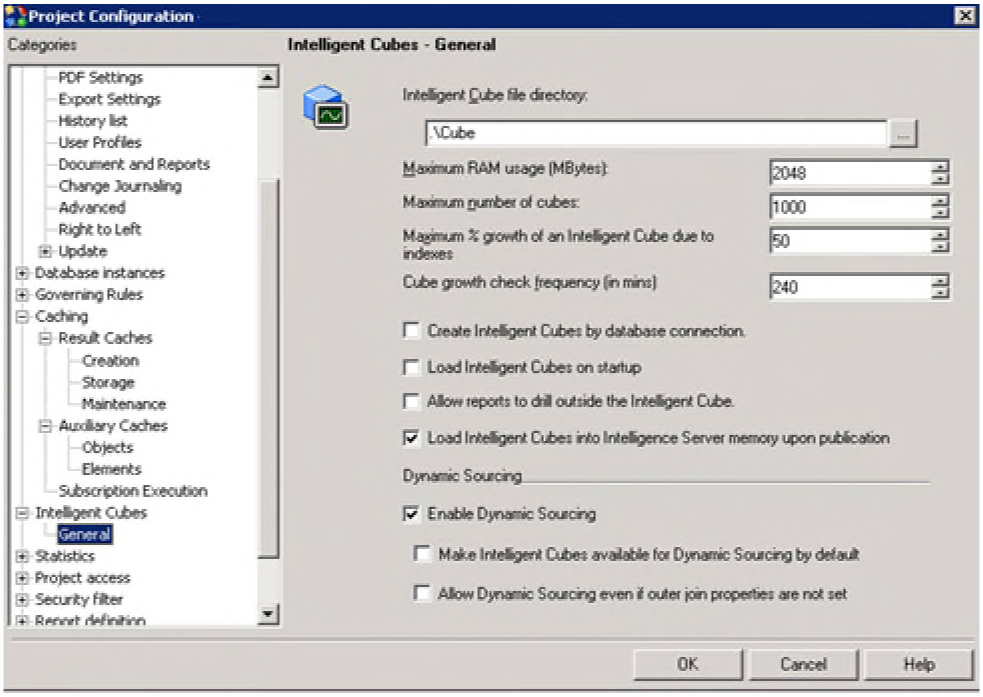
Maximum RAM usage (MBytes): 500

Navigate to the **Intelligent Cubes > General** page.

Set **Maximum % growth of an Intelligent Cube due to indexes** to 50

Set **Cube growth check frequency (in mins)** to 240

Clear the **Load Intelligent Cubes** on startup check box.



Intelligent Cubes - General

Intelligent Cube file directory: .\Cube

Maximum RAM usage (MBytes): 2048

Maximum number of cubes: 1000

Maximum % growth of an Intelligent Cube due to indexes: 50

Cube growth check frequency (in mins): 240

☐ Create Intelligent Cubes by database connection.

☐ Load Intelligent Cubes on startup

☐ Allow reports to drill outside the Intelligent Cube.

☑ Load Intelligent Cubes into Intelligence Server memory upon publication

Dynamic Sourcing

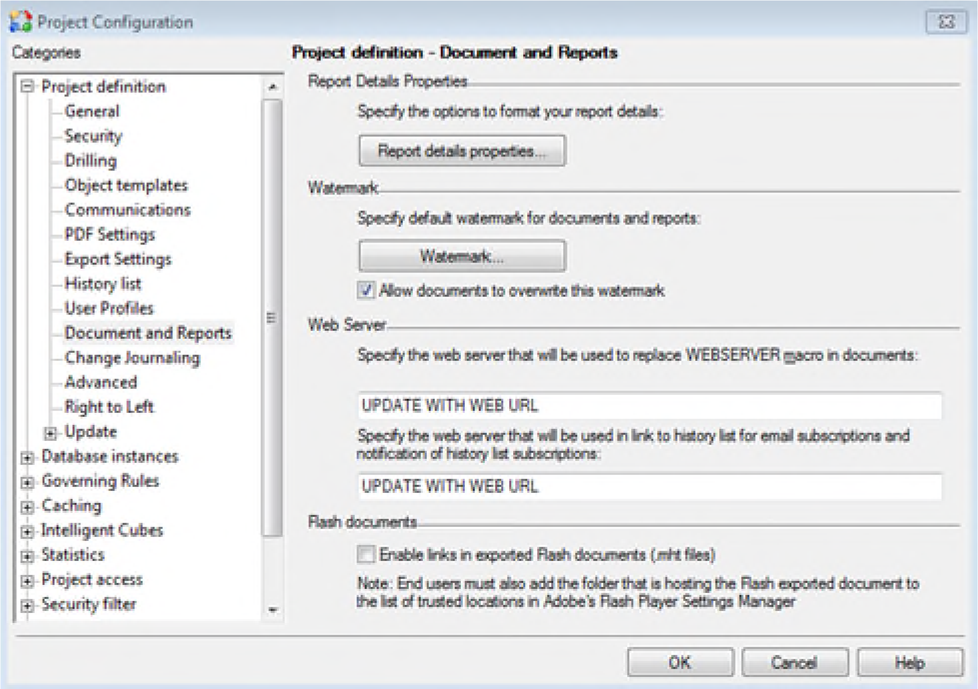
☑ Enable Dynamic Sourcing

☐ Make Intelligent Cubes available for Dynamic Sourcing by default

☐ Allow Dynamic Sourcing even if outer join properties are not set

To update the web URL:

1. Log in to MicroStrategy Desktop.
2. Right click on **XBR^i** (project Source) and click on **Project Configuration.**
3. Navigate to **Project definition > Documents and Reports** .



Project definition - Document and Reports

Report Details Properties

Specify the options to format your report details:

Watermark

Specify default watermark for documents and reports:

☑ Allow documents to overwrite this watermark

Web Server

Specify the web server that will be used to replace WEBSERVER macro in documents:

UPDATE WITH WEB URL

Specify the web server that will be used in link to history list for email subscriptions and notification of history list subscriptions:

UPDATE WITH WEB URL

Flash documents

□ Enable links in exported Flash documents (.mht files)

Note: End users must also add the folder that is hosting the Flash exported document to the list of trusted locations in Adobe's Flash Player Settings Manager

4. In the two fields under **Web Server**, enter the URL of the Web Server.

   Example:
   http://WEBSERVER/analytics/servlet/mstrWeb
   or for SSL
   https://WEBSERVER/analytics/servlet/mstrWeb

Oracle installations Only

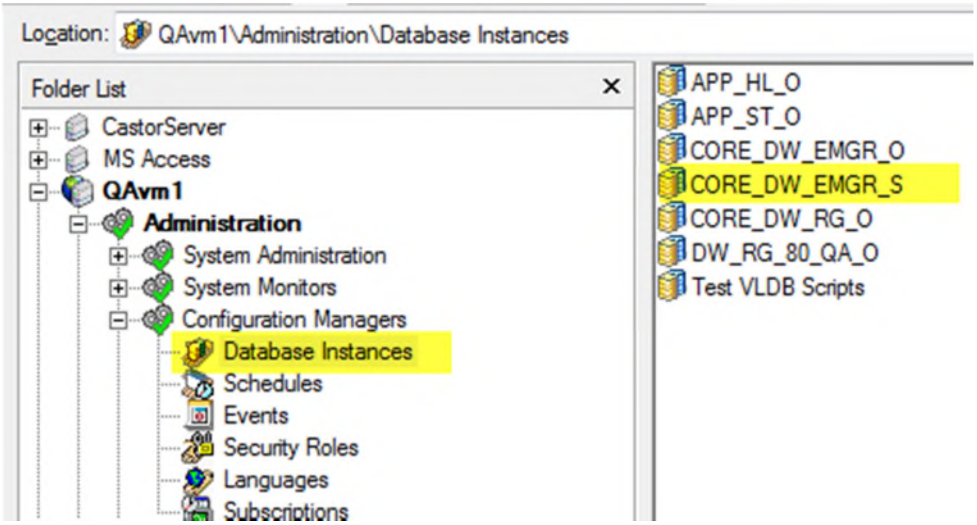
5. **Note:** this step is for Oracle users only. Click on the Database Instances folder and select SQL Data Warehouses.

Configure Database Instance

If you are doing an installation for a customer with an Oracle database, you must change the database instance in MicroStrategy Desktop for SQL to point to Oracle. This is a workaround that corrects a current problem with using the Oracle database instance.

To change the SQL Database Instance to Oracle:

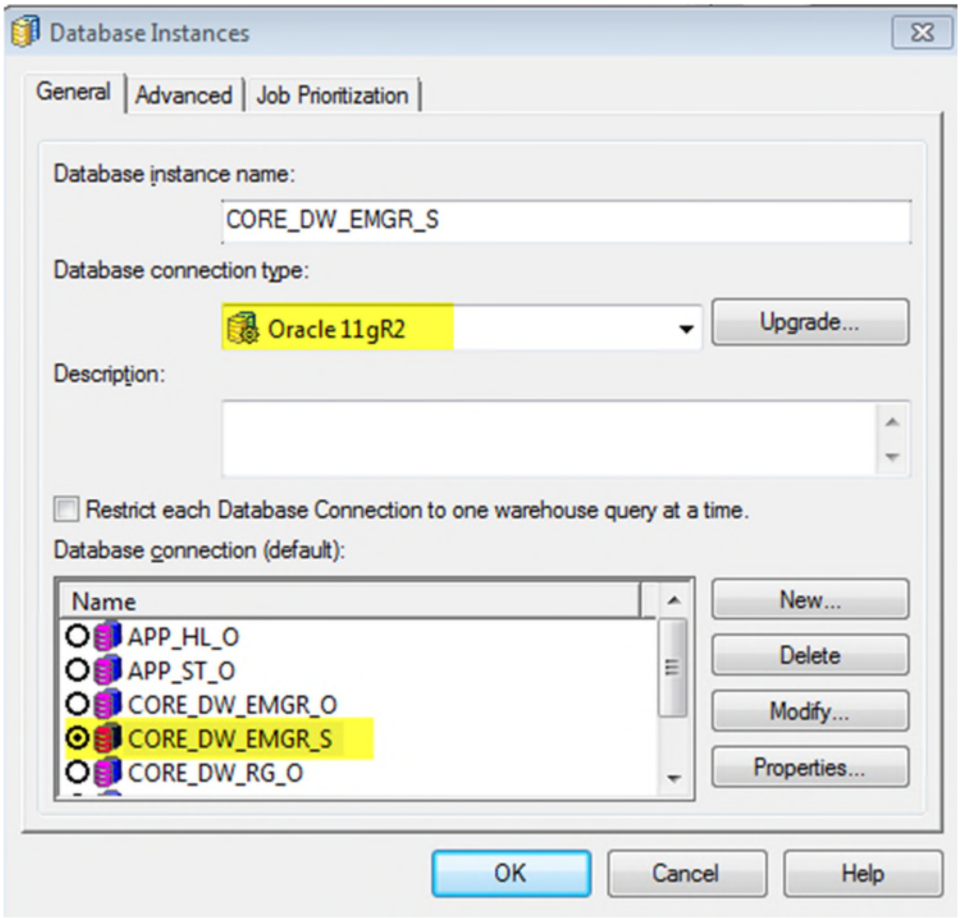
1. Log into the Desktop.
2. Navigate to **Administration > Configuration Managers > Database Instances**.
3. Select the **CORE_DW_EMGR_S** database instance.



Location: QAvm1\Administration\Database Instances

4. Double click on it, or right click and choose **Edit** from the context menu.

Either action displays the **Database Instances** editor.



Database Instances

General | Advanced | Job Prioritization

Database instance name: CORE_DW_EMGR_S

Database connection type: Oracle 11gR2

Description:

☐ Restrict each Database Connection to one warehouse query at a time.

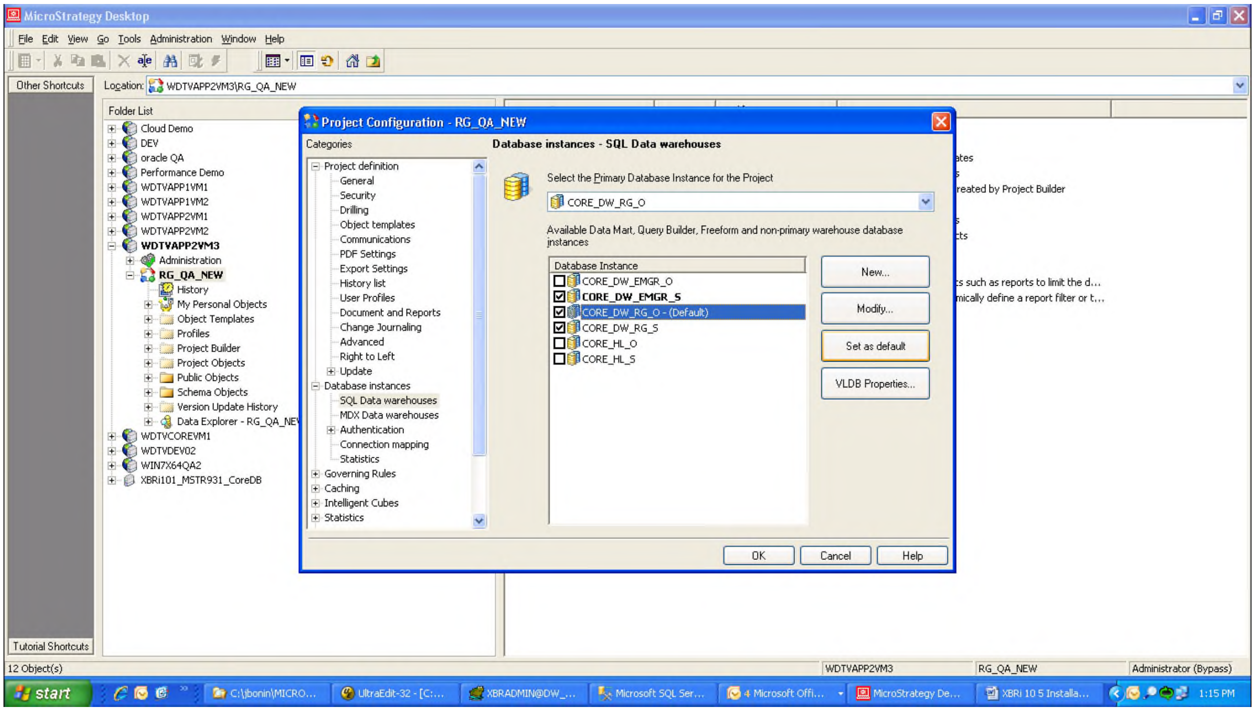
Database connection (default):

Name
○ APP_HL_O
○ APP_ST_O
○ CORE_DW_EMGR_O
● CORE_DW_EMGR_S
○ CORE_DW_RG_O

5. From the **Database connection type** drop-down menu, select Oracle 11gR2.
6. In the **Database connection (default)** list, select **APP_ST_O.**

7. Click the **Modify** button. This displays the Database Connections dialog.
8. Verify that **APP_ST_O is** selected, and click **OK**.
9. Click **OK** in the Comments dialog.
10. Click **OK** and exit the dialog box.

The images below show the default configuration:



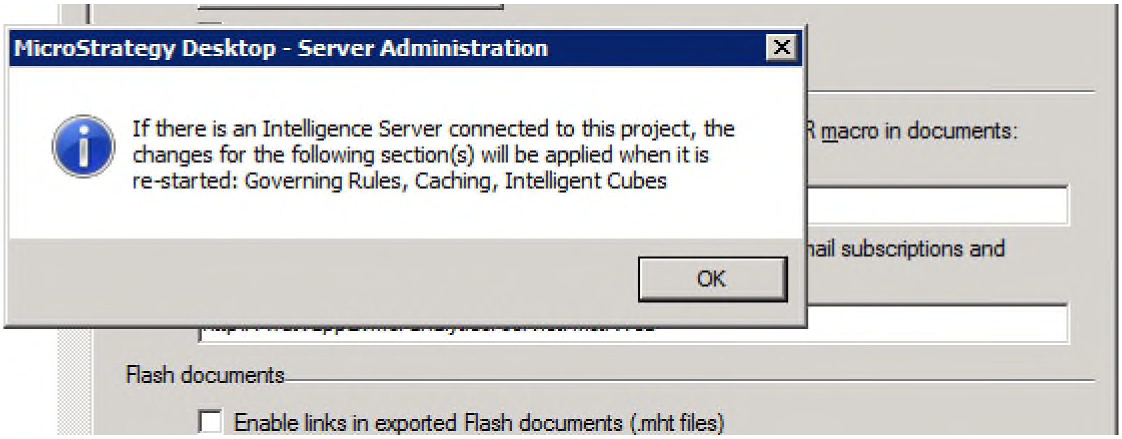
Database instances - SQL Data warehouses

Select the Primary Database Instance for the Project: CORE_DW_RG_O

Available Data Mart, Query Builder, Freeform and non-primary warehouse database instances

Database Instance
□ CORE_DW_EMGR_O
☑ CORE_DW_EMGR_S
☑ CORE_DW_RG_O - (Default)
☑ CORE_DW_RG_S
□ CORE_HL_O
□ CORE_HL_S

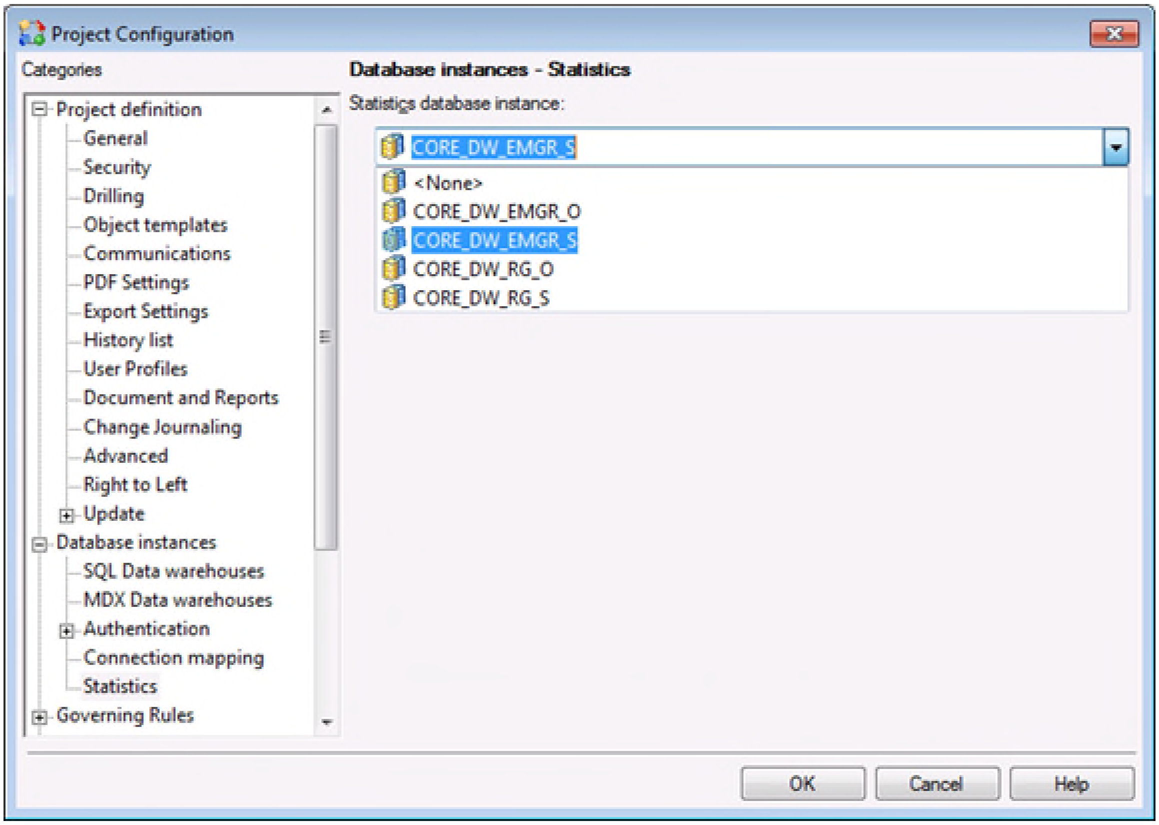
1. (Oracle users only) Highlight the instance CORE_DW_RG_O for Retail installations, or CORE_DW_FB_O for Food & Beverage installations, and click the **Set as Default** button. Click **OK.**
2. Click **OK** in the message that is displayed:


MicroStrategy Desktop - Server Administration
OK
R macro in documents:
nail subscriptions and
Flash documents
Enable links in exported Flash documents (.mht files)

If there is an Intelligence Server connected to this project, the changes for the following section(s) will be applied when it is re-started: Governing Rules, Caching, Intelligent Cubes

Step 5: Configure the Enterprise Manager

1. Navigate to the **Project Configuration > Database Instances > Statistics** page, and select the DSN created for the Statistics database :



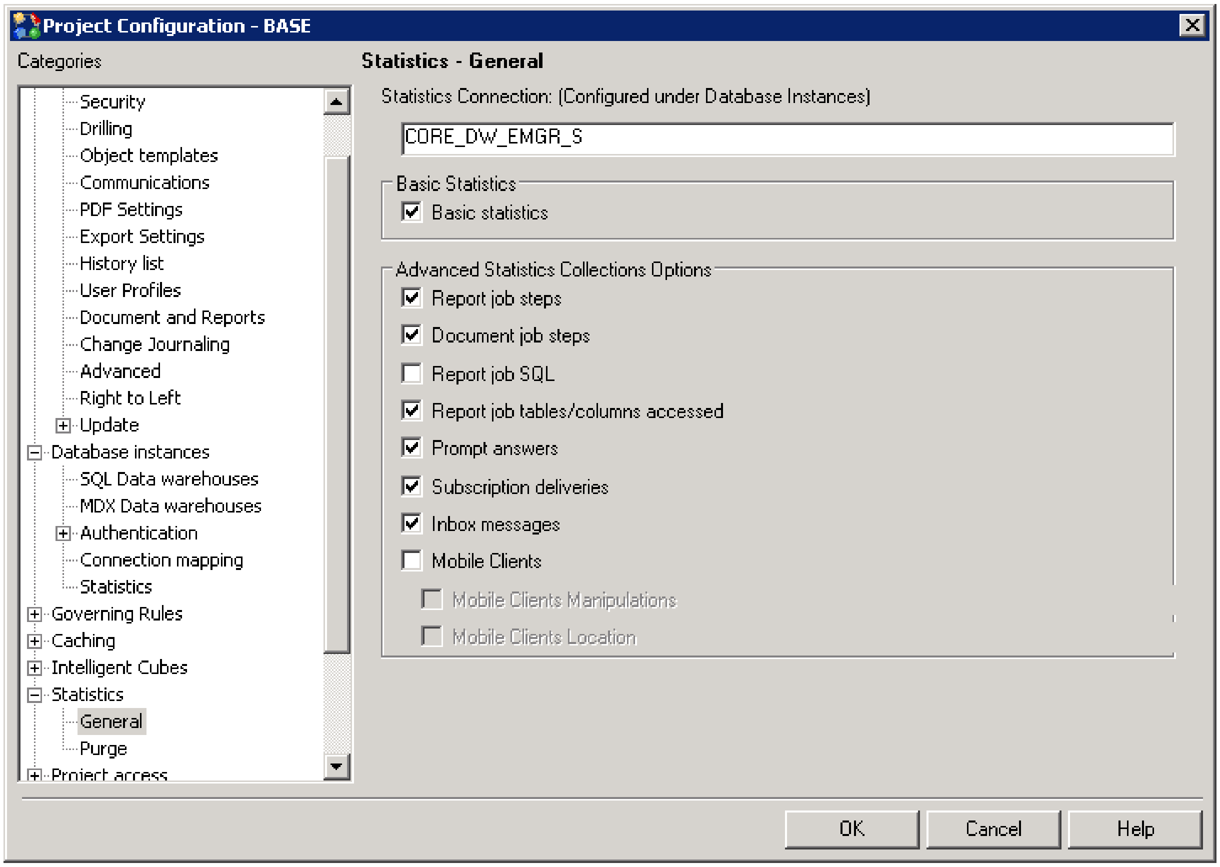
Project Configuration

Database instances - Statistics

Statistics database instance: CORE_DW_EMGR_S

This value should always be CORE_DW_EMGR_S.

2. Navigate to the **Statistics > General** page and select the options as in the screenshot that follows:



Project Configuration - BASE

Statistics - General

Statistics Connection: (Configured under Database Instances)

CORE_DW_EMGR_S

Basic Statistics

☑ Basic statistics

Advanced Statistics Collections Options

☑ Report job steps

☑ Document job steps

☐ Report job SQL

☑ Report job tables/columns accessed

☑ Prompt answers

☑ Subscription deliveries

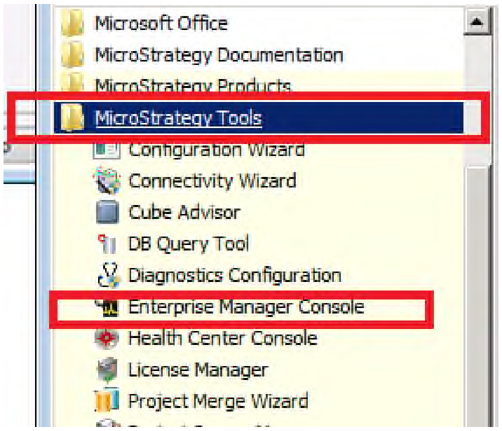
☑ Inbox messages

☐ Mobile Clients

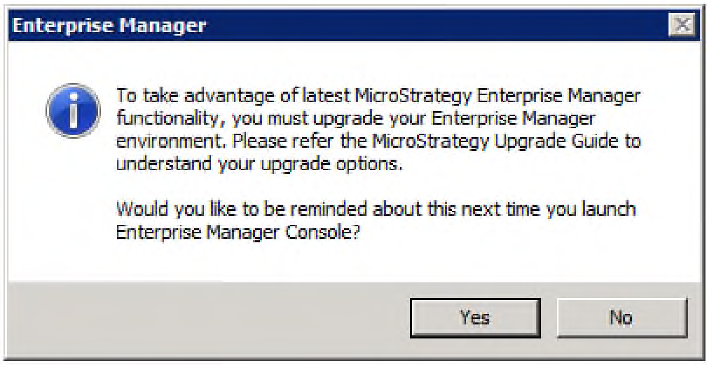
☐ Mobile Clients Manipulations

☐ Mobile Clients Location

3. Click **OK**. This configures the Statistics database.
4. From the Start menu, expand the **MicroStrategy > Tools** folder and click Enterprise Manager Console.



5. Click **Yes** in the Enterprise Manager message.



Enterprise Manager

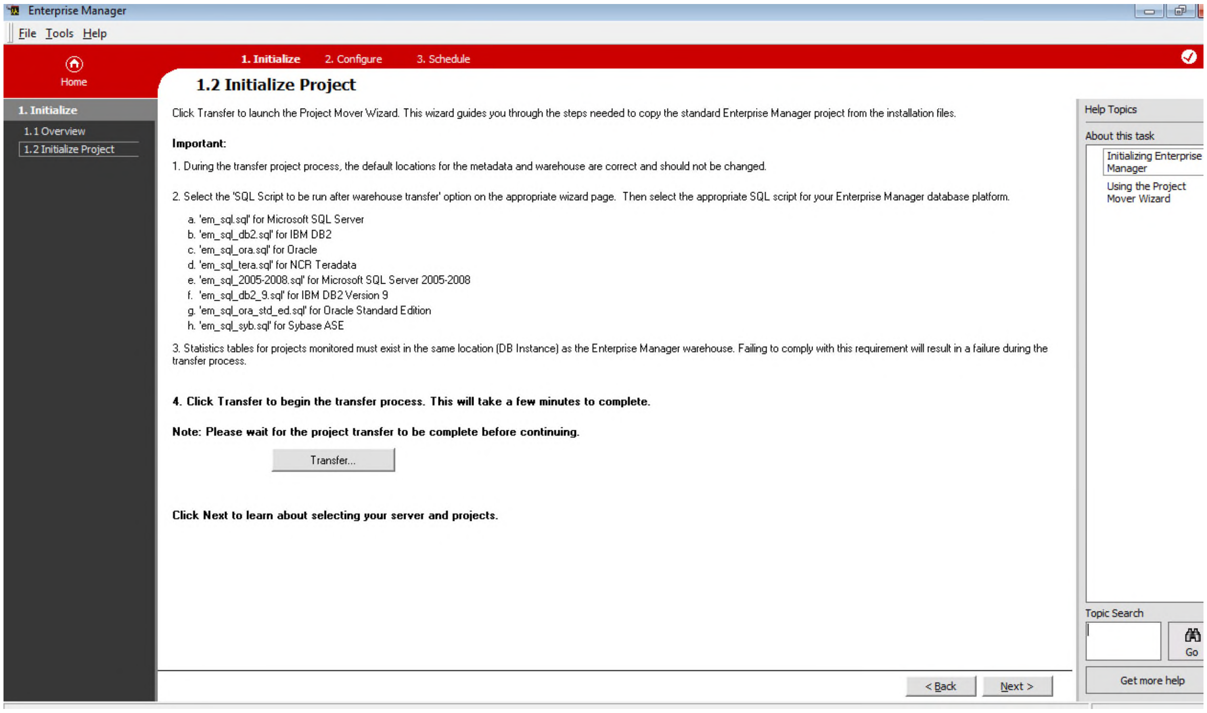
To take advantage of latest MicroStrategy Enterprise Manager functionality, you must upgrade your Enterprise Manager environment. Please refer the MicroStrategy Upgrade Guide to understand your upgrade options.

Would you like to be reminded about this next time you launch Enterprise Manager Console?

This displays the Enterprise Manager Console.

In the Enterprise Manager Console:

1. Click **1. Initialize** then **Next** to Initialize the project. This displays the 1.2 Initialize Project window.
2. Click the **Transfer** button. This transfers the statistics database tables.



1.2 Initialize Project

Click Transfer to launch the Project Mover Wizard. This wizard guides you through the steps needed to copy the standard Enterprise Manager project from the installation files.

Important:

1. During the transfer project process, the default locations for the metadata and warehouse are correct and should not be changed.

2. Select the 'SQL Script to be run after warehouse transfer' option on the appropriate wizard page. Then select the appropriate SQL script for your Enterprise Manager database platform.

a. 'em_sql.sql' for Microsoft SQL Server
b. 'em_sql_db2.sql' for IBM DB2
c. 'em_sql_ora.sql' for Oracle
d. 'em_sql_tera.sql' for NCR Teradata
e. 'em_sql_2005-2008.sql' for Microsoft SQL Server 2005-2008
f. 'em_sql_db2_9.sql' for IBM DB2 Version 9
g. 'em_sql_ora_std_ed.sql' for Oracle Standard Edition
h. 'em_sql_syb.sql' for Sybase ASE

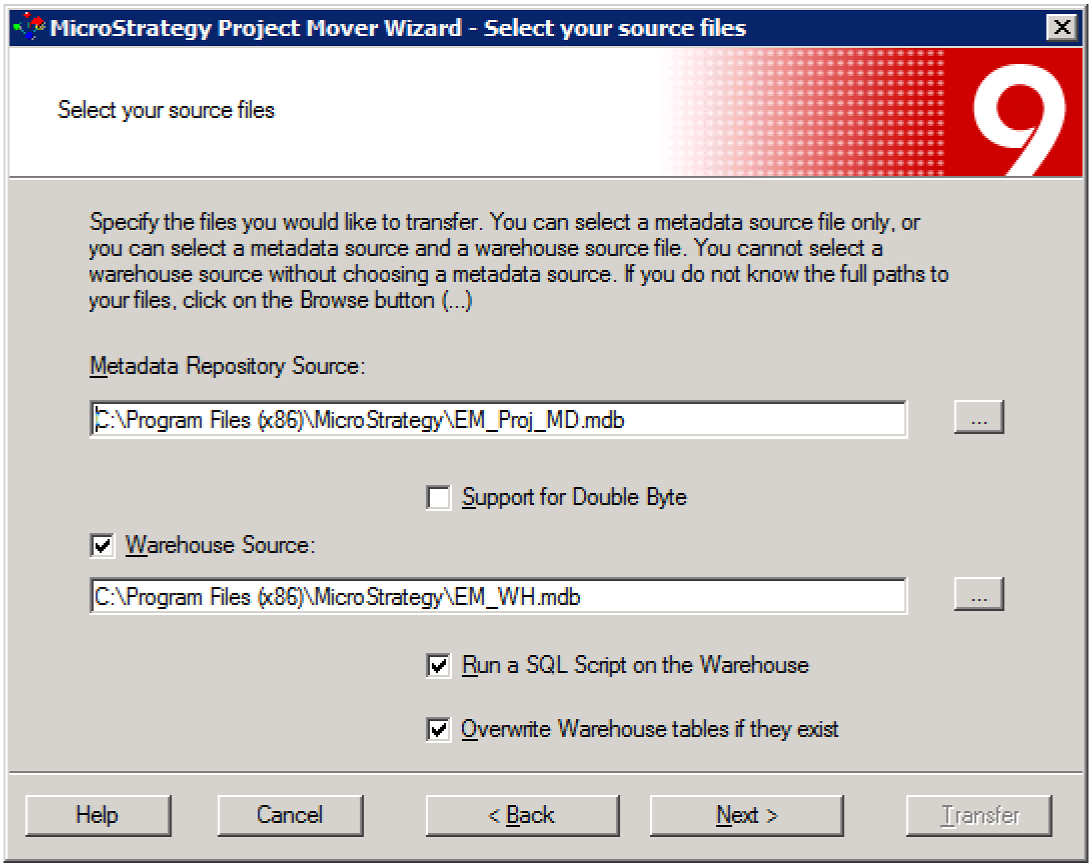
3. Statistics tables for projects monitored must exist in the same location (DB Instance) as the Enterprise Manager warehouse. Failing to comply with this requirement will result in a failure during the transfer process.

4. Click Transfer to begin the transfer process. This will take a few minutes to complete.

Note: Please wait for the project transfer to be complete before continuing.

Click Next to learn about selecting your server and projects.

This initiates the Project Mover Wizard.



MicroStrategy Project Mover Wizard - Select your source files

Select your source files

Specify the files you would like to transfer. You can select a metadata source file only, or you can select a metadata source and a warehouse source file. You cannot select a warehouse source without choosing a metadata source. If you do not know the full paths to your files, click on the Browse button (...)

Metadata Repository Source:

C:\Program Files (x86)\MicroStrategy\EM_Proj_MD.mdb

□ Support for Double Byte

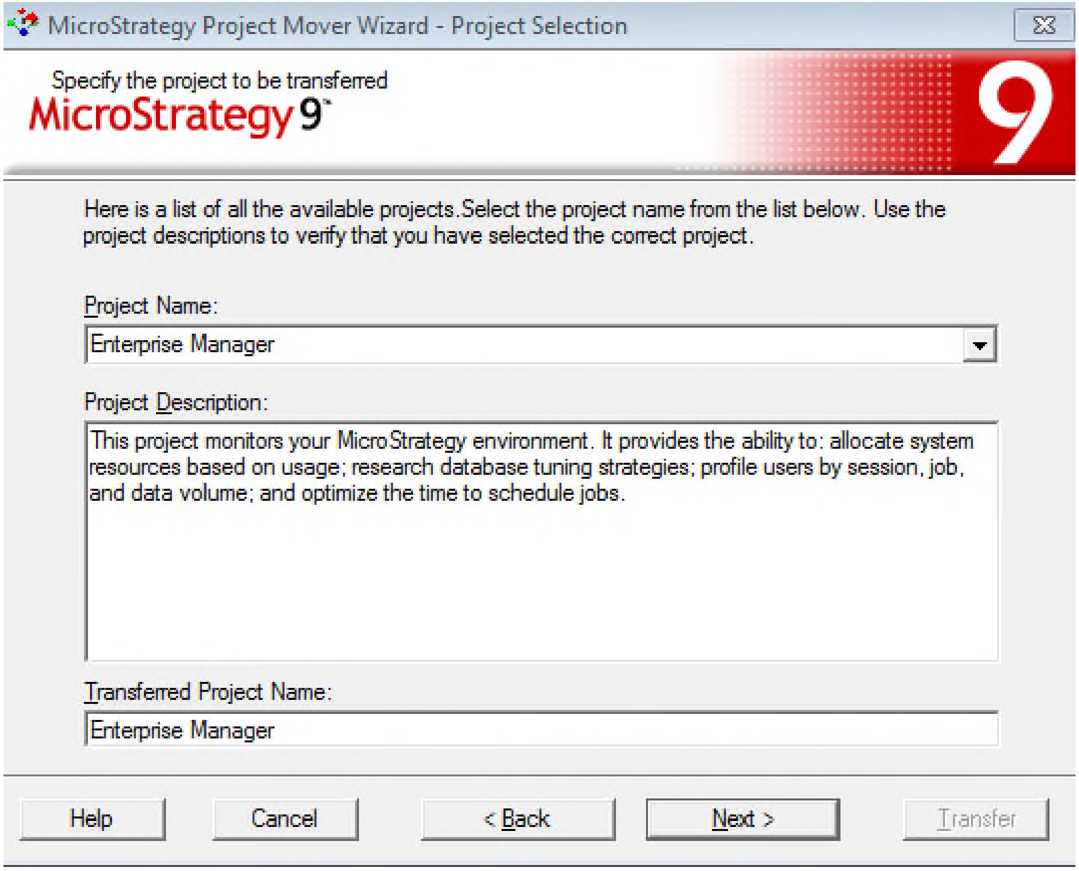
☑ Warehouse Source:

C:\Program Files (x86)\MicroStrategy\EM_WH.mdb

☑ Run a SQL Script on the Warehouse

☑ Overwrite Warehouse tables if they exist

Verify that the locations of the Metadata Repository Source \ and Warehouse Source are correct, and click **Next**.



MicroStrategy Project Mover Wizard - Project Selection

Specify the project to be transferred

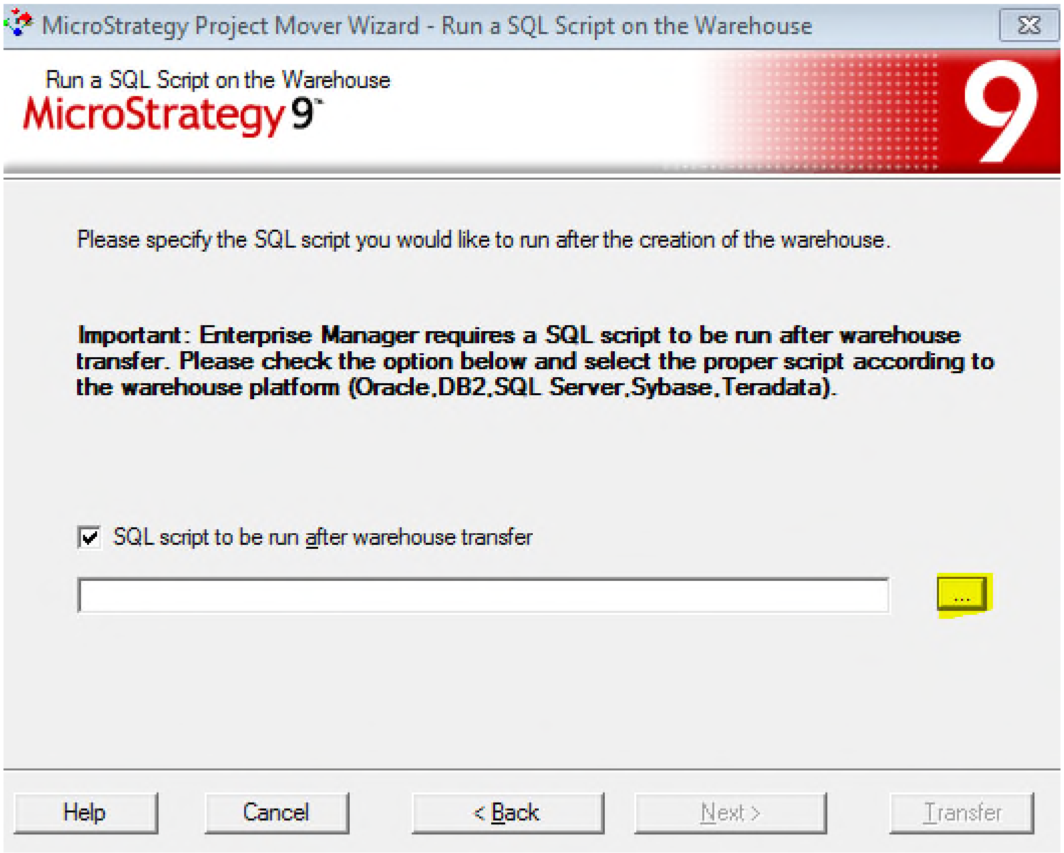
Here is a list of all the available projects.Select the project name from the list below. Use the project descriptions to verify that you have selected the correct project.

Project Name: Enterprise Manager

Project Description: This project monitors your MicroStrategy environment. It provides the ability to: allocate system resources based on usage; research database tuning strategies; profile users by session, job, and data volume; and optimize the time to schedule jobs.

Transferred Project Name: Enterprise Manager

Make sure the correct project is selected and click **Next.**



MicroStrategy Project Mover Wizard - Run a SQL Script on the Warehouse

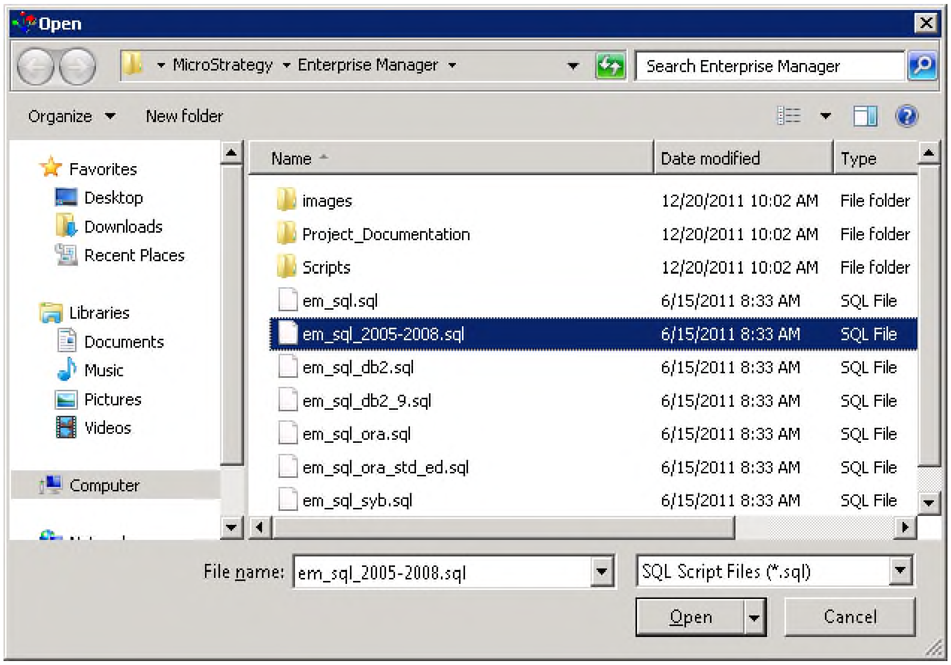
Run a SQL Script on the Warehouse

Please specify the SQL script you would like to run after the creation of the warehouse.

Important: Enterprise Manager requires a SQL script to be run after warehouse transfer. Please check the option below and select the proper script according to the warehouse platform (Oracle,DB2,SQL Server,Sybase,Teradata).

☑ SQL script to be run after warehouse transfer

Click the browse icon. This displays the list of sql assoicated with different dabases.

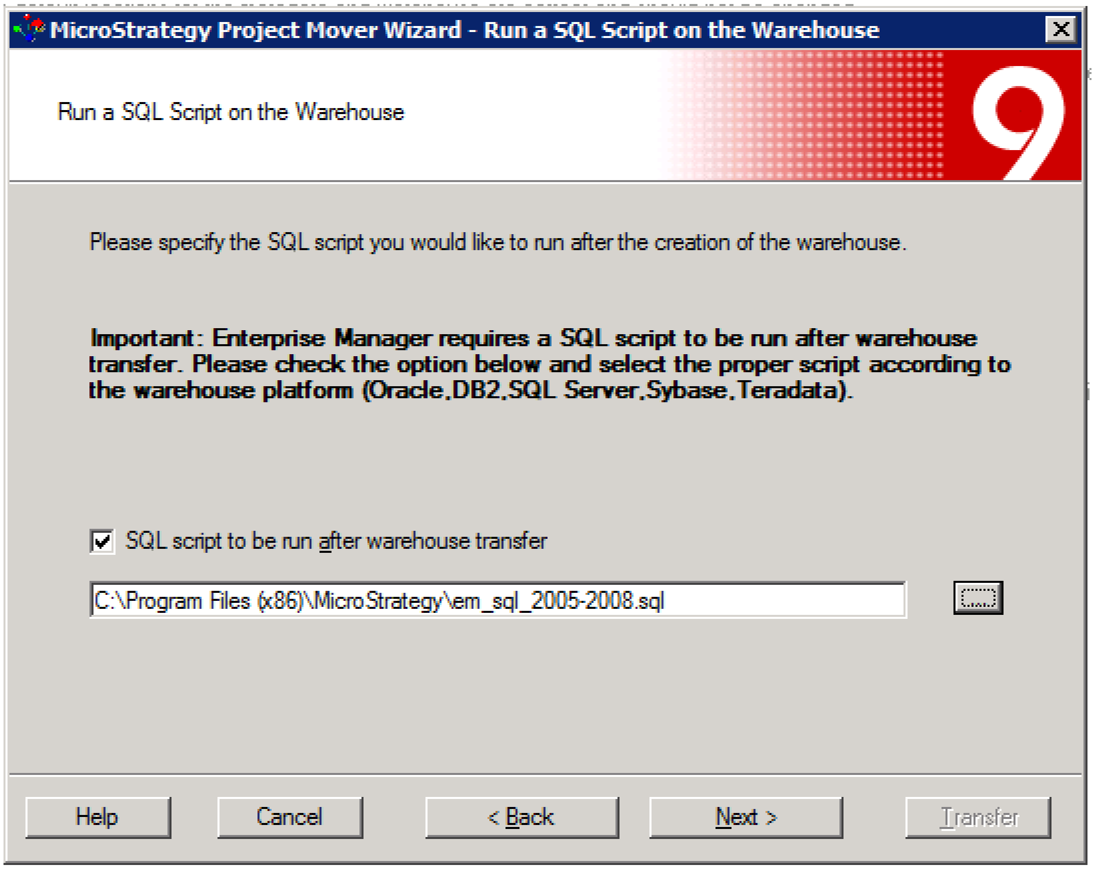


Name	Date modified	Type
images	12/20/2011 10:02 AM	File folder
Project_Documentation	12/20/2011 10:02 AM	File folder
Scripts	12/20/2011 10:02 AM	File folder
em_sql.sql	6/15/2011 8:33 AM	SQL File
em_sql_2005-2008.sql	6/15/2011 8:33 AM	SQL File
em_sql_db2.sql	6/15/2011 8:33 AM	SQL File
em_sql_db2_9.sql	6/15/2011 8:33 AM	SQL File
em_sql_ora.sql	6/15/2011 8:33 AM	SQL File
em_sql_ora_std_ed.sql	6/15/2011 8:33 AM	SQL File
em_sql_syb.sql	6/15/2011 8:33 AM	SQL File

File name: em_sql_2005-2008.sql

SQL Script Files (*.sql)

Select the appropriate sql and click **Open**.



MicroStrategy Project Mover Wizard - Run a SQL Script on the Warehouse

Run a SQL Script on the Warehouse

Please specify the SQL script you would like to run after the creation of the warehouse.

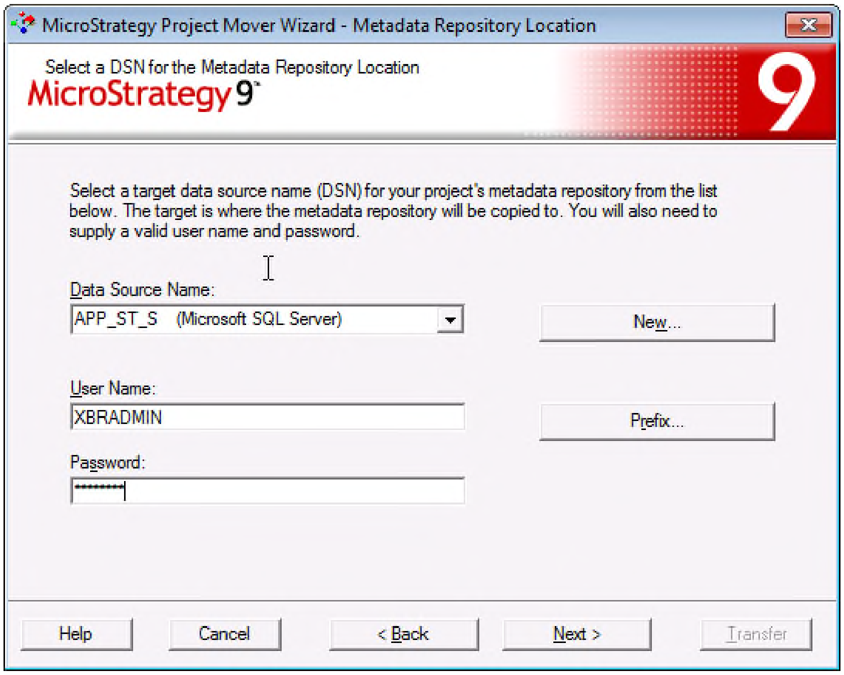
Important: Enterprise Manager requires a SQL script to be run after warehouse transfer. Please check the option below and select the proper script according to the warehouse platform (Oracle,DB2,SQL Server,Sybase,Teradata).

☑ SQL script to be run after warehouse transfer

C:\Program Files (x86)\MicroStrategy\em_sql_2005-2008.sql

For Sql : select em_sql or em_sql_2005_2008. (depends on type of database).
For Oracle : Select em_sql_ora.sql.

Click **Next**.



MicroStrategy Project Mover Wizard - Metadata Repository Location

Select a DSN for the Metadata Repository Location

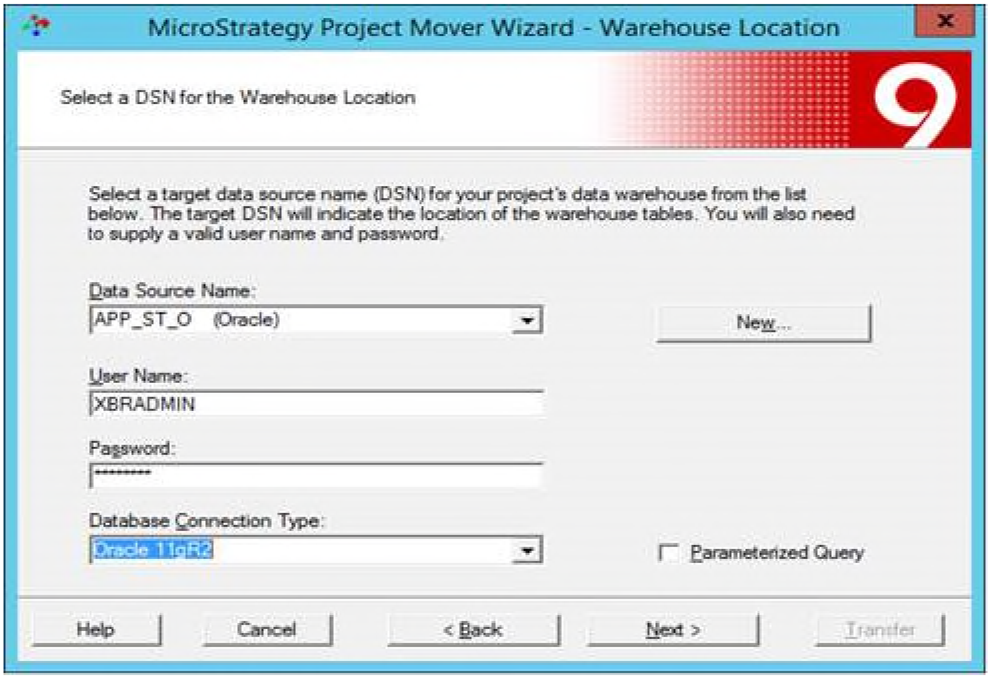
Select a target data source name (DSN) for your project's metadata repository from the list below. The target is where the metadata repository will be copied to. You will also need to supply a valid user name and password.

Data Source Name: APP_ST_S (Microsoft SQL Server)

User Name: XBRADMIN

Password: ********

Select the Data Source Name of the Statistics database and provide User Name and Password for the statistics database for the Metadata Repository. Click **Next**. Do the same for the Warehouse Location.



MicroStrategy Project Mover Wizard - Warehouse Location

Select a DSN for the Warehouse Location

Select a target data source name (DSN) for your project's data warehouse from the list below. The target DSN will indicate the location of the warehouse tables. You will also need to supply a valid user name and password.

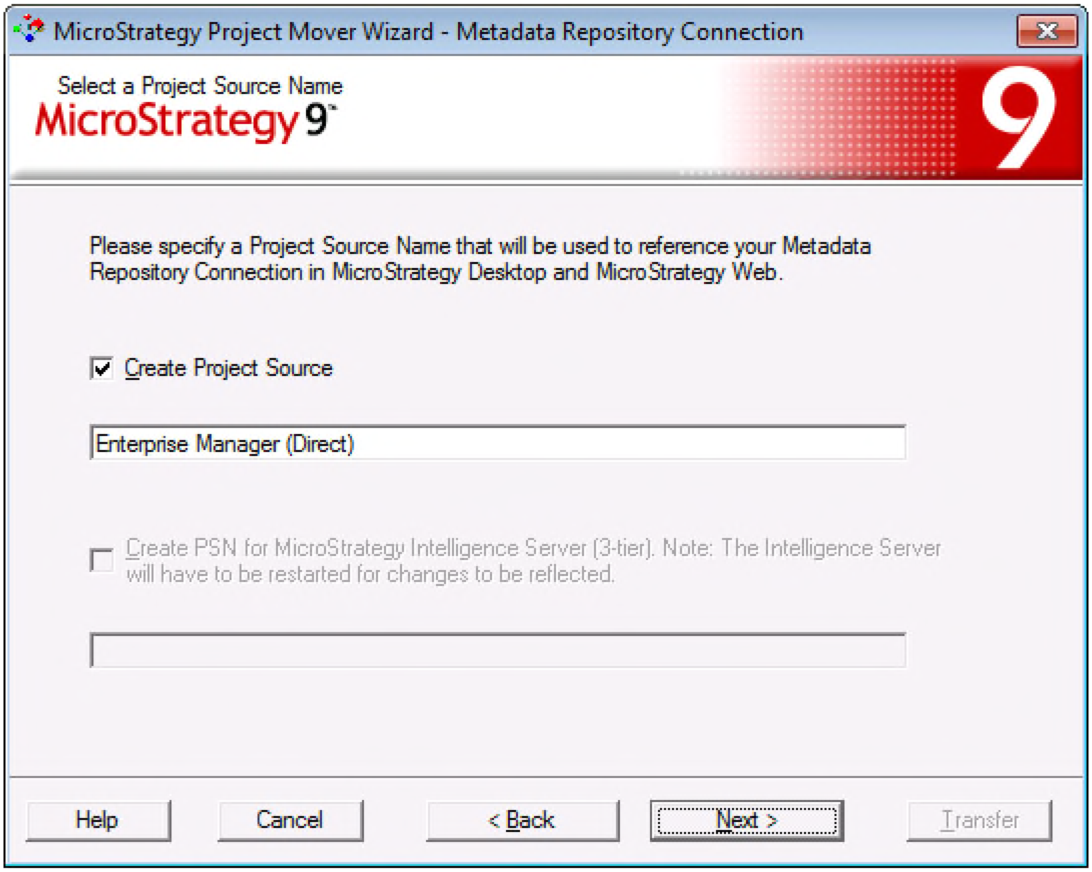
Data Source Name: APP_ST_O (Oracle)

User Name: XBRADMIN

Password: *********

Database Connection Type: Oracle 11gR2

☐ Parameterized Query


MicroStrategy Project Mover Wizard - Metadata Repository Connection
Select a Project Source Name
MicroStrategy 9
9

Please specify a Project Source Name that will be used to reference your Metadata Repository Connection in MicroStrategy Desktop and MicroStrategy Web.

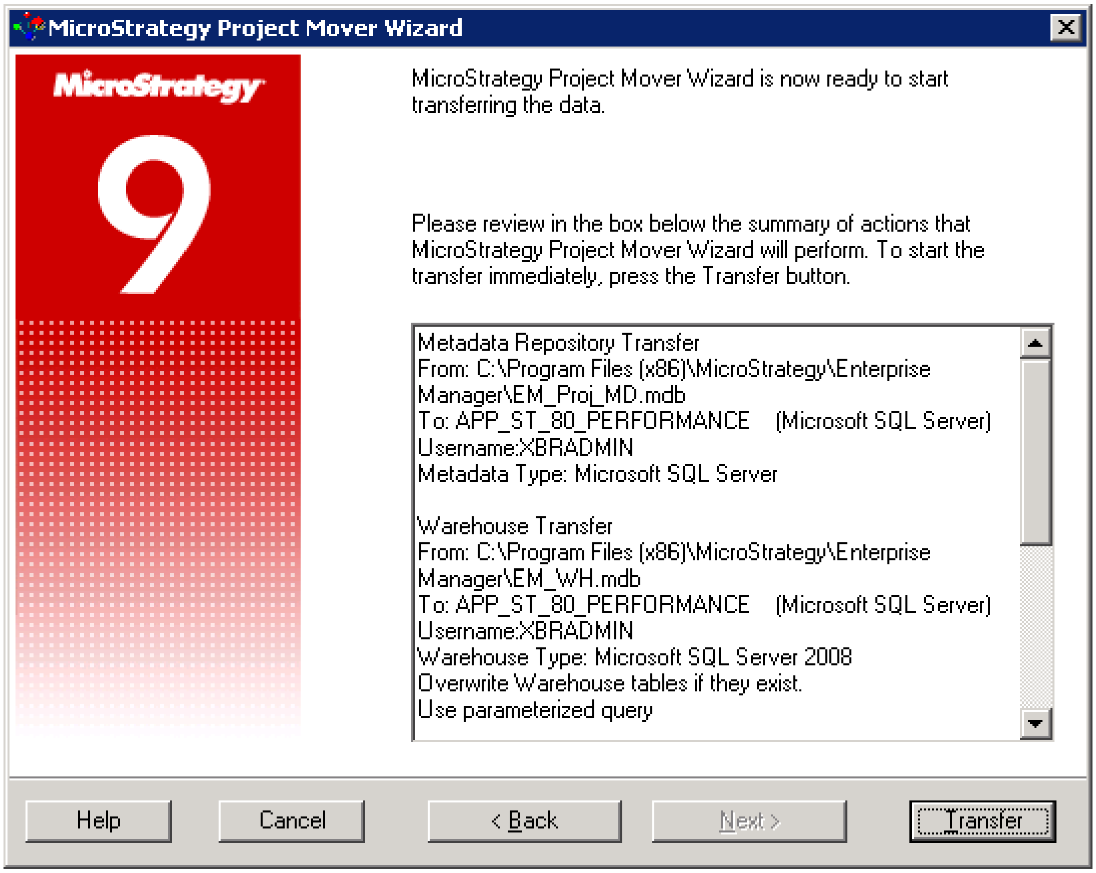
☑ Create Project Source

Enterprise Manager (Direct)

□ Create PSN for MicroStrategy Intelligence Server (3-tier). Note: The Intelligence Server will have to be restarted for changes to be reflected.

Help
Cancel
< Back
Next >
Transfer

Verify that the Create Project Source check box is selected and that the project source is correct. Click **Next**.



MicroStrategy Project Mover Wizard is now ready to start transferring the data.

Please review in the box below the summary of actions that MicroStrategy Project Mover Wizard will perform. To start the transfer immediately, press the Transfer button.

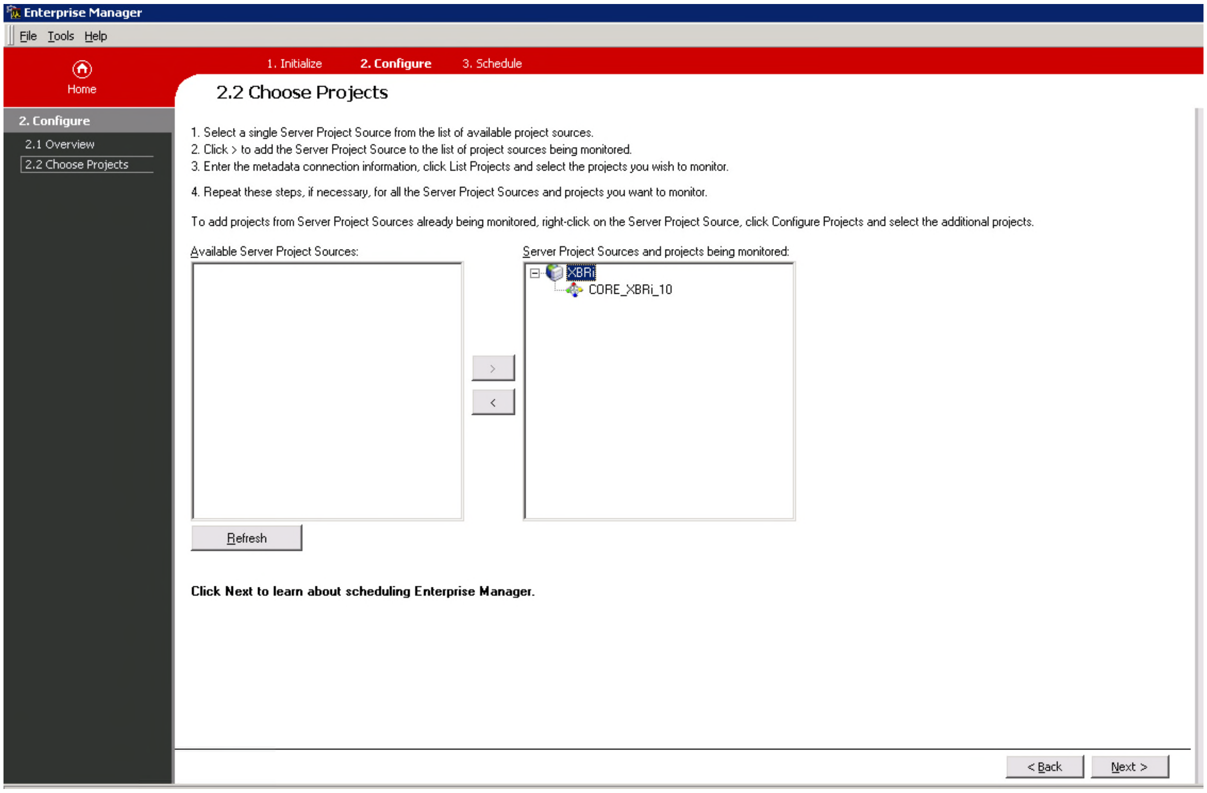
```
Metadata Repository Transfer
From: C:\Program Files (x86)\MicroStrategy\Enterprise
Manager\EM_Proj_MD.mdb
To: APP_ST_80_PERFORMANCE    (Microsoft SQL Server)
Username:XBRADMIN
Metadata Type: Microsoft SQL Server

Warehouse Transfer
From: C:\Program Files (x86)\MicroStrategy\Enterprise
Manager\EM_WH.mdb
To: APP_ST_80_PERFORMANCE    (Microsoft SQL Server)
Username:XBRADMIN
Warehouse Type: Microsoft SQL Server 2008
Overwrite Warehouse tables if they exist.
Use parameterized query
```

Verify the details you have provided and click on **Transfer**.

This initiates loading the statistics table into the database.

Wait until the transfer is complete and click **Next**.

Click **2.2 Choose Projects**.



2.2 Choose Projects

1. Select a single Server Project Source from the list of available project sources.
2. Click > to add the Server Project Source to the list of project sources being monitored.
3. Enter the metadata connection information, click List Projects and select the projects you wish to monitor.

4. Repeat these steps, if necessary, for all the Server Project Sources and projects you want to monitor.

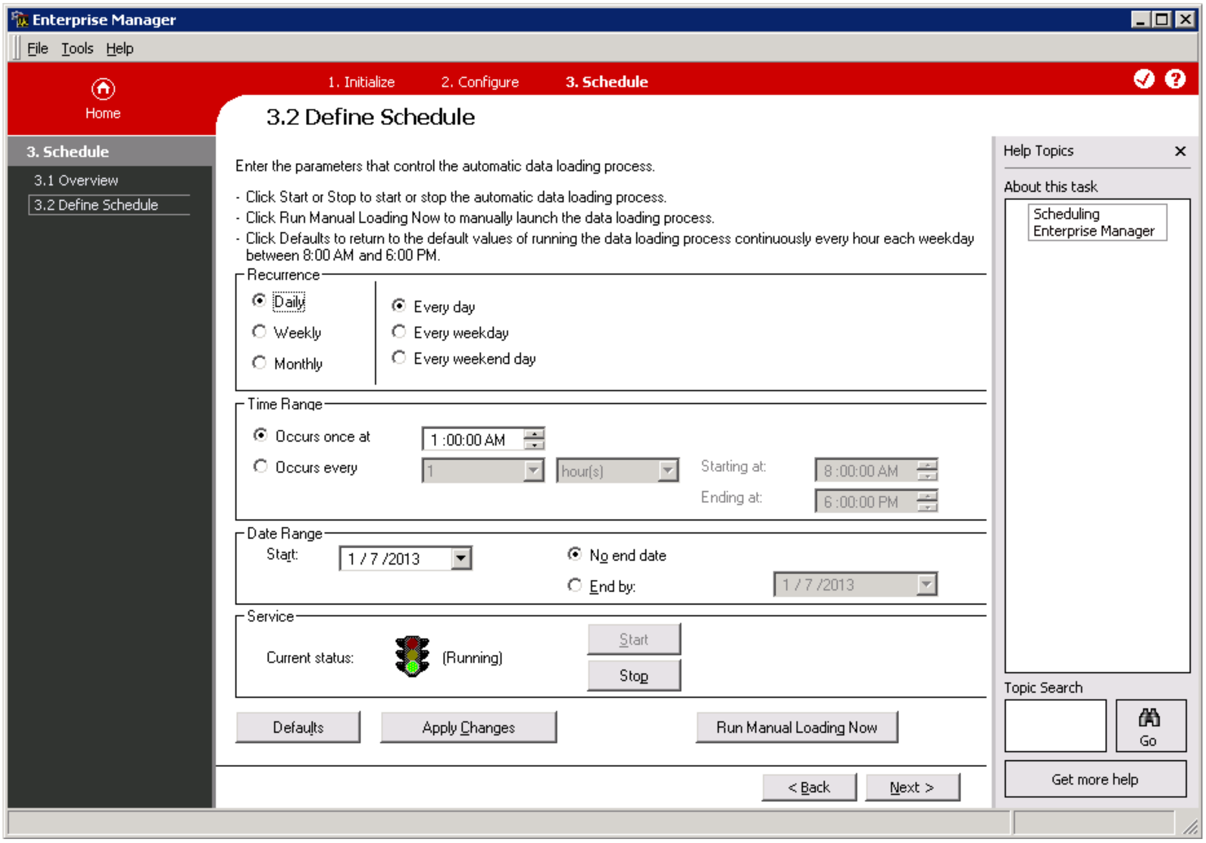
To add projects from Server Project Sources already being monitored, right-click on the Server Project Source, click Configure Projects and select the additional projects.

Available Server Project Sources:

Server Project Sources and projects being monitored:

Click Next to learn about scheduling Enterprise Manager.

Configure the server project source and project and click **Next**. You will need to supply the current Administrator user and password CoreAdmin12!



3.2 Define Schedule

Enter the parameters that control the automatic data loading process.

- Click Start or Stop to start or stop the automatic data loading process.
- Click Run Manual Loading Now to manually launch the data loading process.
- Click Defaults to return to the default values of running the data loading process continuously every hour each weekday between 8:00 AM and 6:00 PM.

Recurrence

● Daily ○ Weekly ○ Monthly

● Every day ○ Every weekday ○ Every weekend day

Time Range

● Occurs once at 1 :00:00 AM

○ Occurs every 1 hour(s) Starting at: 8 :00:00 AM Ending at: 6 :00:00 PM

Date Range

Start: 1 / 7 /2013 ● No end date ○ End by: 1 / 7 /2013

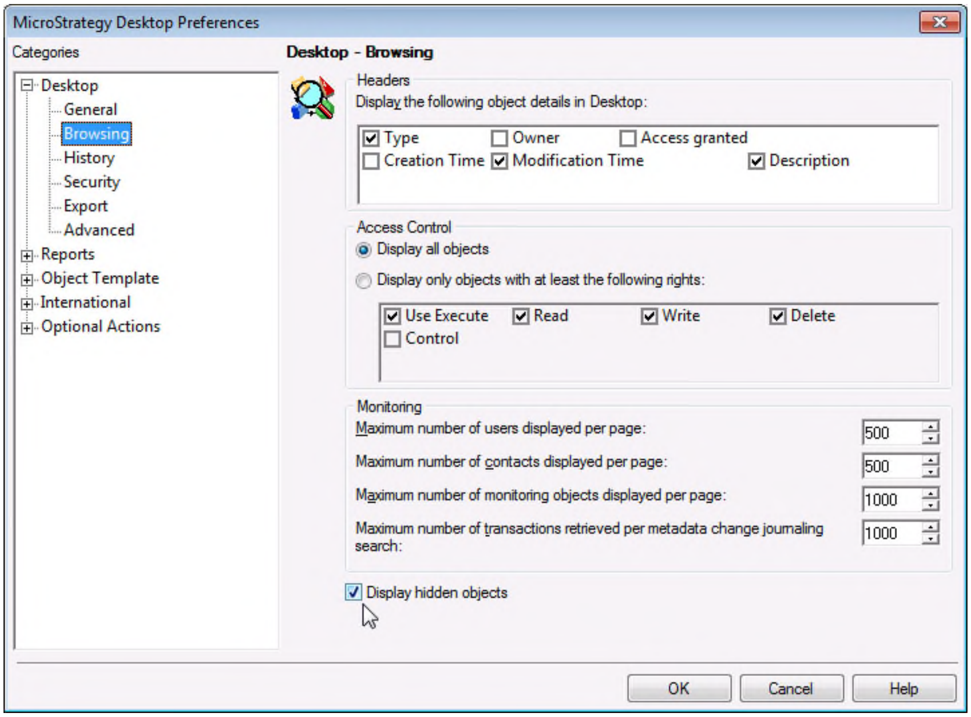
Service

Current status: (Running) Start Stop

Define the schedule for loading data. The schedule can be automated or manual.

Step 6: Refresh Cubes

1. Log into the Desktop.
2. From the menu choose **Tools > Desktop Preferences** and navigate to **Desktop > Browsing**
3. Select the **Display hidden objects** checkbox as shown below. Click **OK**.



Desktop - Browsing

Headers

Display the following object details in Desktop:

☑ Type □ Owner □ Access granted
□ Creation Time ☑ Modification Time ☑ Description

Access Control

● Display all objects
○ Display only objects with at least the following rights:

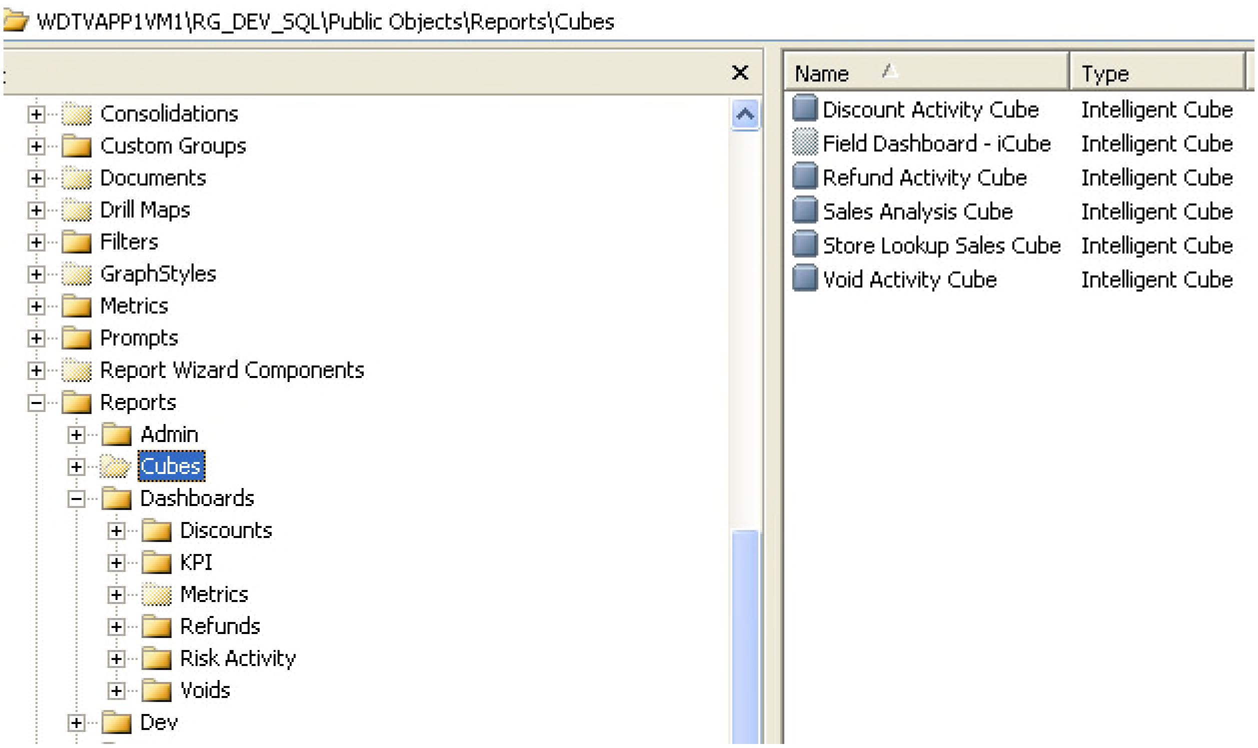
☑ Use Execute ☑ Read ☑ Write ☑ Delete
□ Control

Monitoring

Maximum number of users displayed per page: 500
Maximum number of contacts displayed per page: 500
Maximum number of monitoring objects displayed per page: 1000
Maximum number of transactions retrieved per metadata change journaling search: 1000

☑ Display hidden objects

4. Expand the project folder.
5. Navigate to **Public Objects > Reports > Cubes**.
6. Double click on each cube to run it and refresh the Intelligence Cube caches



Name	Type
Discount Activity Cube	Intelligent Cube
Field Dashboard - iCube	Intelligent Cube
Refund Activity Cube	Intelligent Cube
Sales Analysis Cube	Intelligent Cube
Store Lookup Sales Cube	Intelligent Cube
Void Activity Cube	Intelligent Cube

Scheduling daily refresh

To refresh the Intelligence Cubes on a daily basis, set up a Windows Task Scheduler job to run a batch command file, i.e. cube_update.bat with command to launch command manager from the command line and run a command manager script, i.e. cube_update.scp with commands to publish each cube

cube_update.bat

```
cmdmgr.exe" -n XBRi -u Administrator -p CoreAdmin12! -f C:\XBRi\cube_update.scp -or
C:\XBRi\cube_update_results.log -of C:\XBRi\cube_update_fail.log -os
C:\XBRi\cube_update_success.log –e
```

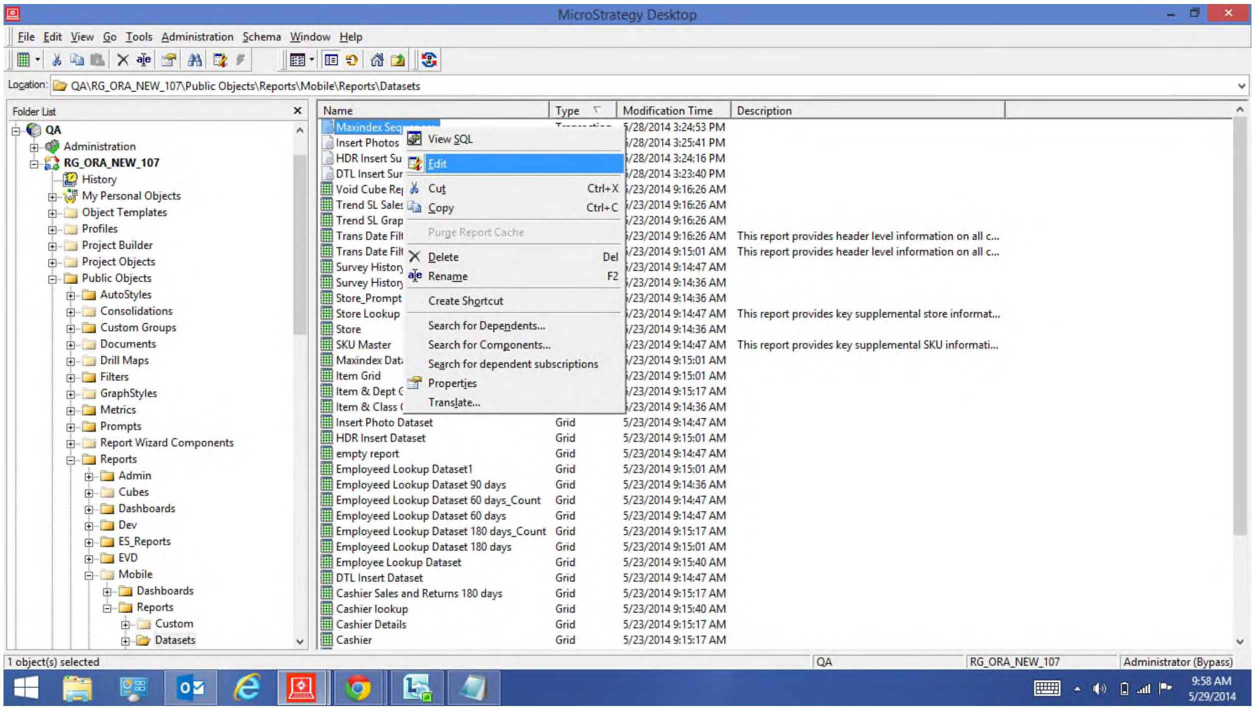
cube_update.scp

```
PUBLISH INTELLIGENT CUBE "Field Dashboard - iCube" IN FOLDER "\Public
Objects\Reports\Cubes" FOR PROJECT "XBRi";
...
```

Step 7: Update Database instance for Transaction Reports

> ! This procedure is for Oracle installations only
>
> Follow this procedure for all of the Transaction reports in a folder.

Right click on the Transaction report and choose **Edit**.

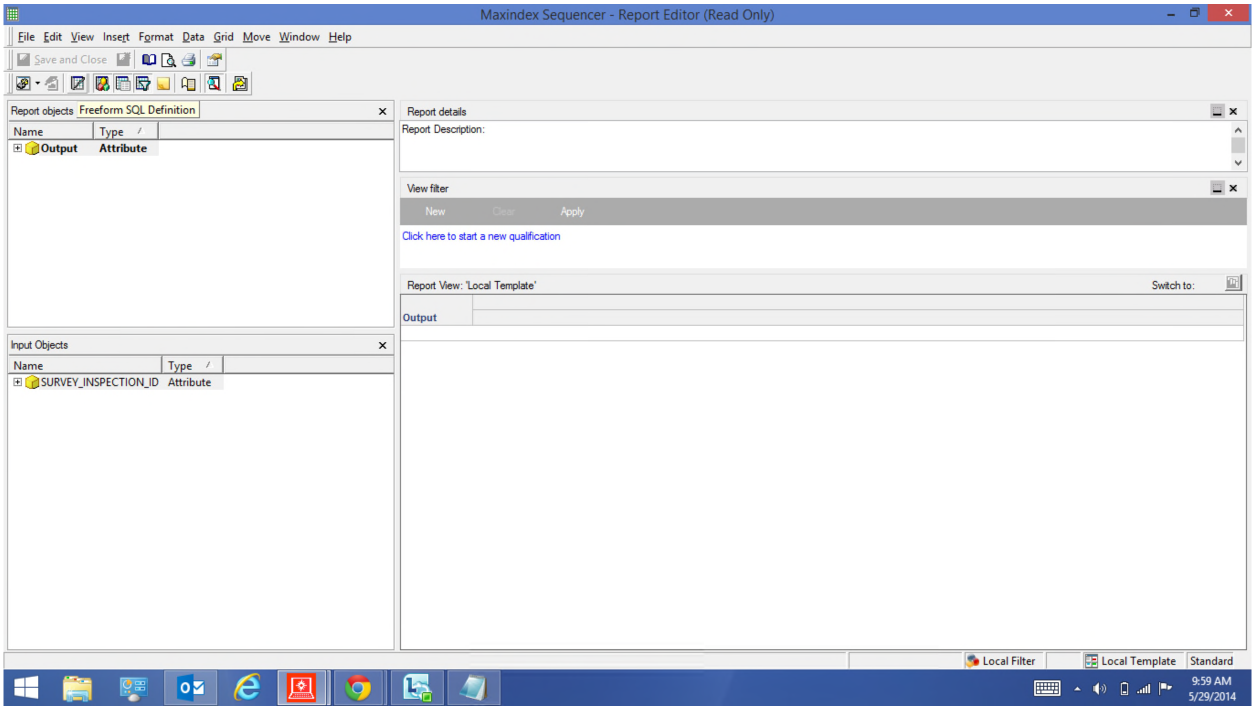


Location: QA\RG_ORA_NEW_107\Public Objects\Reports\Mobile\Reports\Datasets

Name	Type	Modification Time	Description
Maxindex Seq		5/28/2014 3:24:53 PM	
Insert Photos		5/28/2014 3:25:41 PM	
HDR Insert Su		5/28/2014 3:24:16 PM	
DTL Insert Sur		5/28/2014 3:23:40 PM	
Void Cube Re		5/23/2014 9:16:26 AM	
Trend SL Sales		5/23/2014 9:16:26 AM	
Trend SL Grap		5/23/2014 9:16:26 AM	
Trans Date Filt		5/23/2014 9:16:26 AM	This report provides header level information on all c...
Trans Date Filt		5/23/2014 9:15:01 AM	This report provides header level information on all c...
Survey History		5/23/2014 9:14:47 AM	
Survey History		5/23/2014 9:14:36 AM	
Store_Prompt		5/23/2014 9:14:36 AM	
Store Lookup		5/23/2014 9:14:47 AM	This report provides key supplemental store informat...
Store		5/23/2014 9:14:36 AM	
SKU Master		5/23/2014 9:14:47 AM	This report provides key supplemental SKU informati...
Maxindex Dat		5/23/2014 9:15:01 AM	
Item Grid		5/23/2014 9:15:01 AM	
Item & Dept C		5/23/2014 9:15:17 AM	
Item & Class C		5/23/2014 9:14:36 AM	
Insert Photo Dataset	Grid	5/23/2014 9:14:47 AM	
HDR Insert Dataset	Grid	5/23/2014 9:15:01 AM	
empty report	Grid	5/23/2014 9:14:47 AM	
Employeed Lookup Dataset1	Grid	5/23/2014 9:15:01 AM	
Employeed Lookup Dataset 90 days	Grid	5/23/2014 9:14:36 AM	
Employeed Lookup Dataset 60 days_Count	Grid	5/23/2014 9:14:47 AM	
Employeed Lookup Dataset 60 days	Grid	5/23/2014 9:14:47 AM	
Employeed Lookup Dataset 180 days_Count	Grid	5/23/2014 9:15:17 AM	
Employeed Lookup Dataset 180 days	Grid	5/23/2014 9:15:01 AM	
Employee Lookup Dataset	Grid	5/23/2014 9:15:40 AM	
DTL Insert Dataset	Grid	5/23/2014 9:14:47 AM	
Cashier Sales and Returns 180 days	Grid	5/23/2014 9:15:17 AM	
Cashier lookup	Grid	5/23/2014 9:15:40 AM	
Cashier Details	Grid	5/23/2014 9:15:17 AM	
Cashier	Grid	5/23/2014 9:15:17 AM	

1 object(s) selected | QA | RG_ORA_NEW_107 | Administrator (Bypass)

This opens the Transaction report. Click the **Freeform SQL Definition** button.



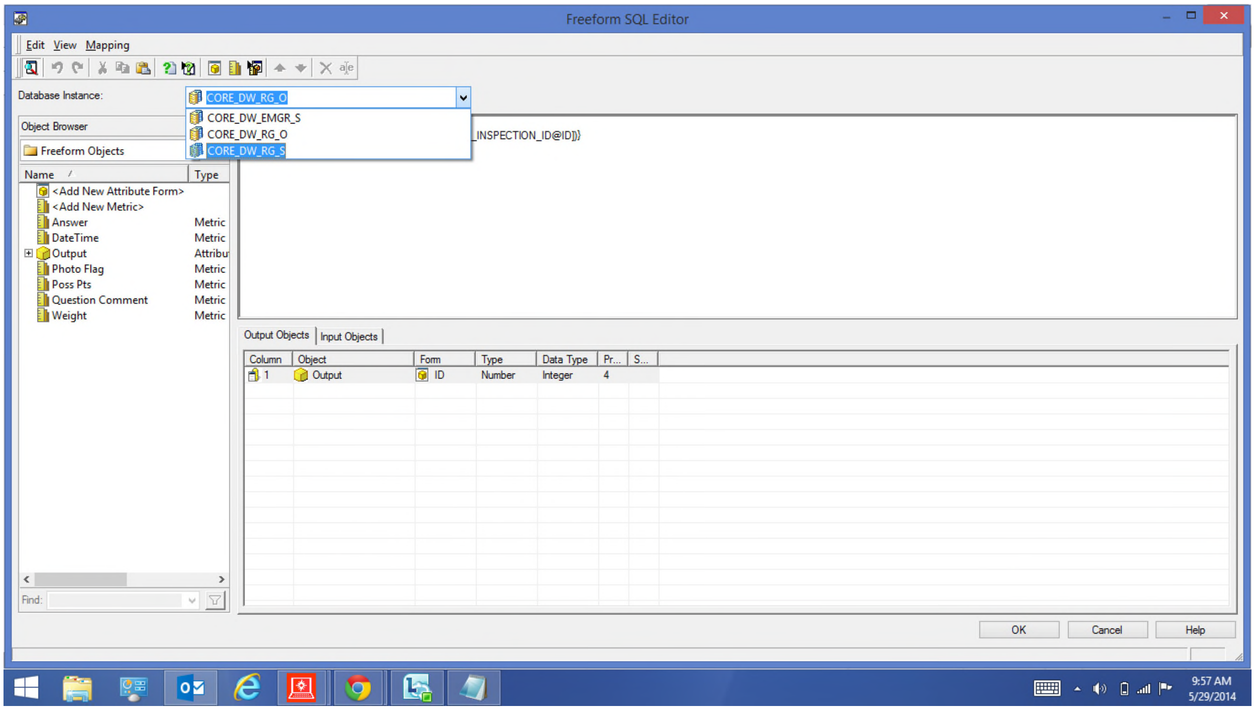
Report objects

Name	Type
Output	Attribute

Input Objects

Name	Type
SURVEY_INSPECTION_ID	Attribute

This displays the Freeform SQL window. From the **Database Instance** drop-down list, select the appropriate database instance.



Database Instance: CORE_DW_RG_O

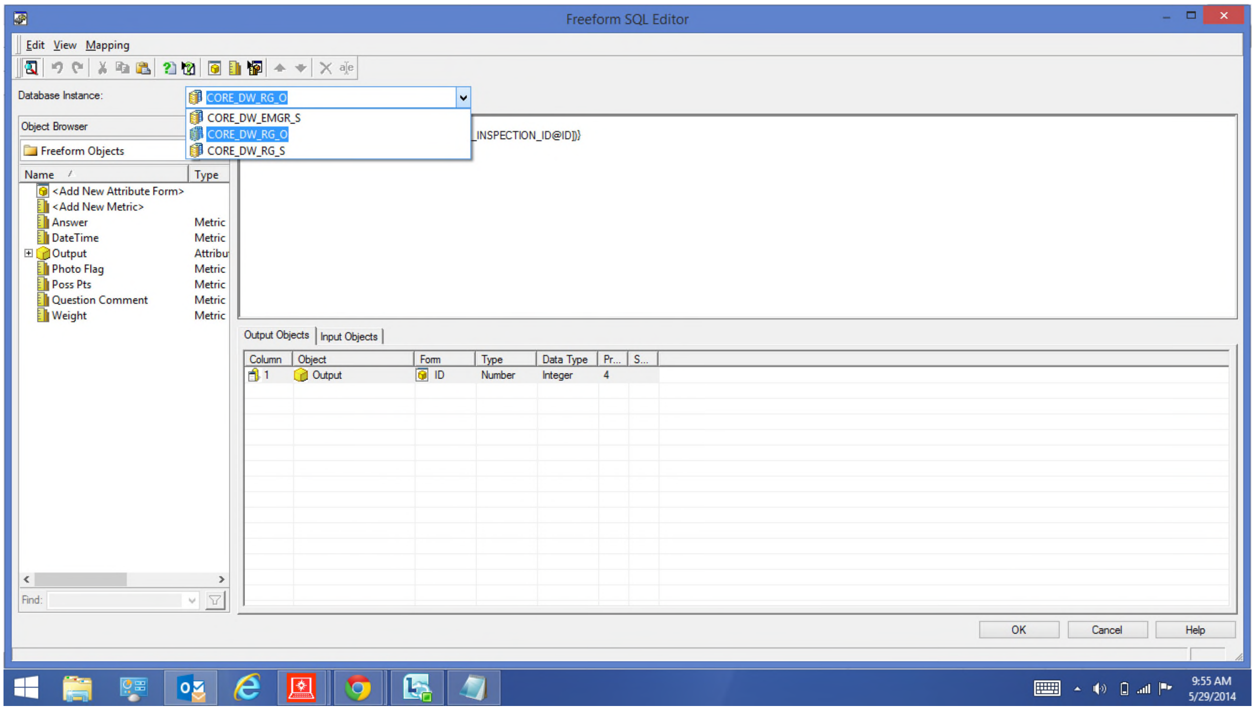
- CORE_DW_EMGR_S
- CORE_DW_RG_O
- CORE_DW_RG_S

_INSPECTION_ID@ID]}

Name	Type
<Add New Attribute Form>	
<Add New Metric>	
Answer	Metric
DateTime	Metric
Output	Attribu
Photo Flag	Metric
Poss Pts	Metric
Question Comment	Metric
Weight	Metric

Column	Object	Form	Type	Data Type	Pr...	S...
1	Output	ID	Number	Integer	4	

Click **OK** and **Save and Close**.



Database Instance: CORE_DW_RG_O

- CORE_DW_EMGR_S
- CORE_DW_RG_O
- CORE_DW_RG_S

_INSPECTION_ID@ID]}

Name	Type
<Add New Attribute Form>	
<Add New Metric>	
Answer	Metric
DateTime	Metric
Output	Attribu
Photo Flag	Metric
Poss Pts	Metric
Question Comment	Metric
Weight	Metric

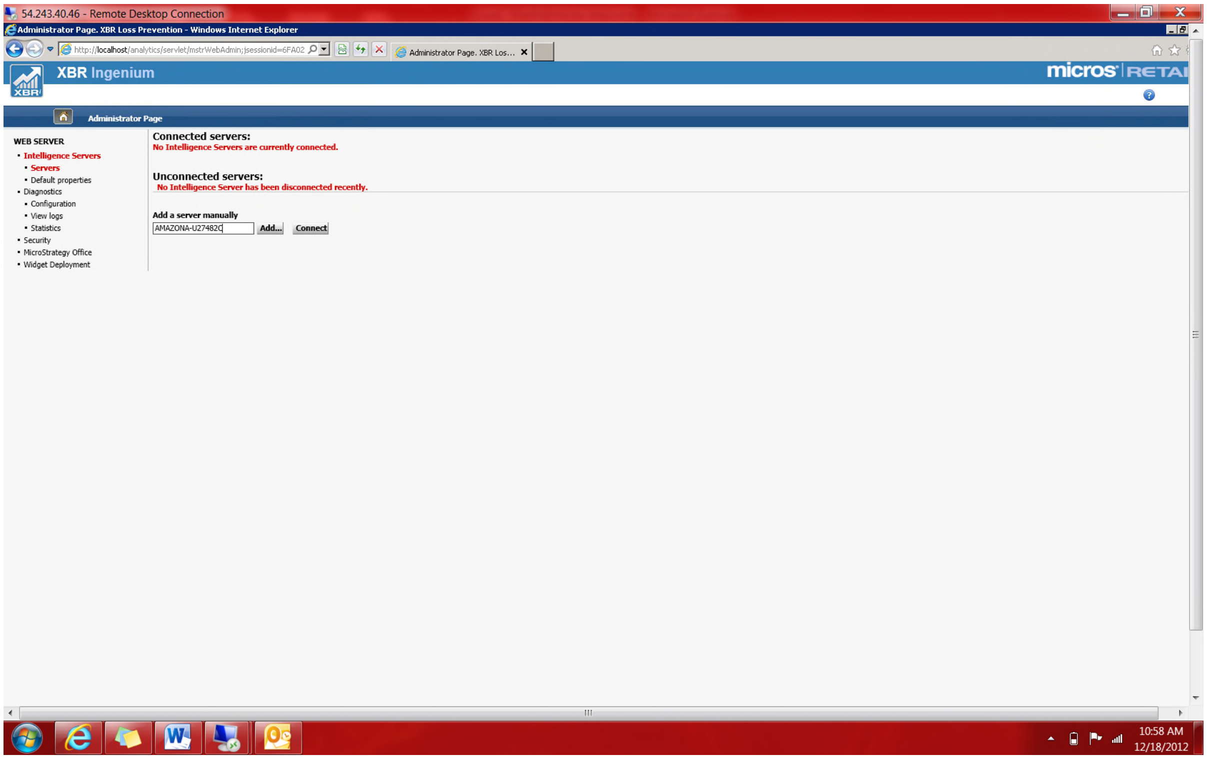
Column	Object	Form	Type	Data Type	Pr...	S...
1	Output	ID	Number	Integer	4	

Repeat these steps for every Transaction report in the folder.

Step 8: Create Trusted Authentication.

Start the Apache Tomcat XBR^i Webserver service and launch the XBR^i URL (http://WEBSERVERNAME/analytics/servlet/mstrWebAdmin). If this is the first time the Webserver is started, there will be a delay while the war file is un-archived. Log in with the webadmin user and password w3b@dm1n.

Set up trusted authentication



54.243.40.46 - Remote Desktop Connection

Administrator Page. XBR Loss Prevention - Windows Internet Explorer

http://localhost/analytics/servlet/mstrWebAdmin;jsessionid=6FA02

Connected servers:

No Intelligence Servers are currently connected.

Unconnected servers:

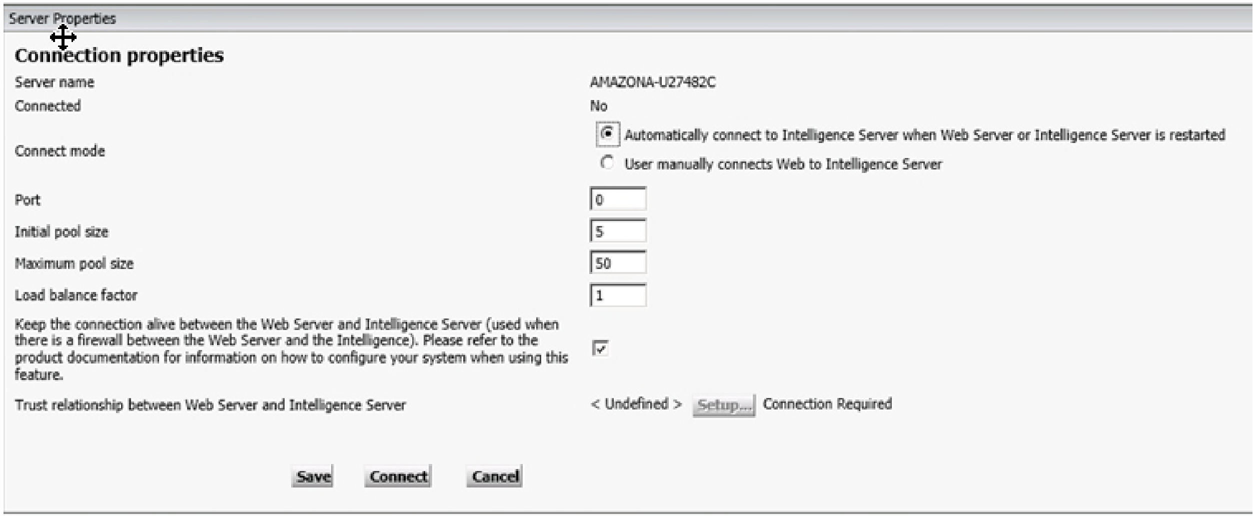
No Intelligence Server has been disconnected recently.

Add a server manually

AMAZONA-U27482C

Under Web Server, navigate to **Intelligence Servers > Server**.

Enter the I-Server Name, and click **Add**. This adds the I-Server to the list under Web Server.

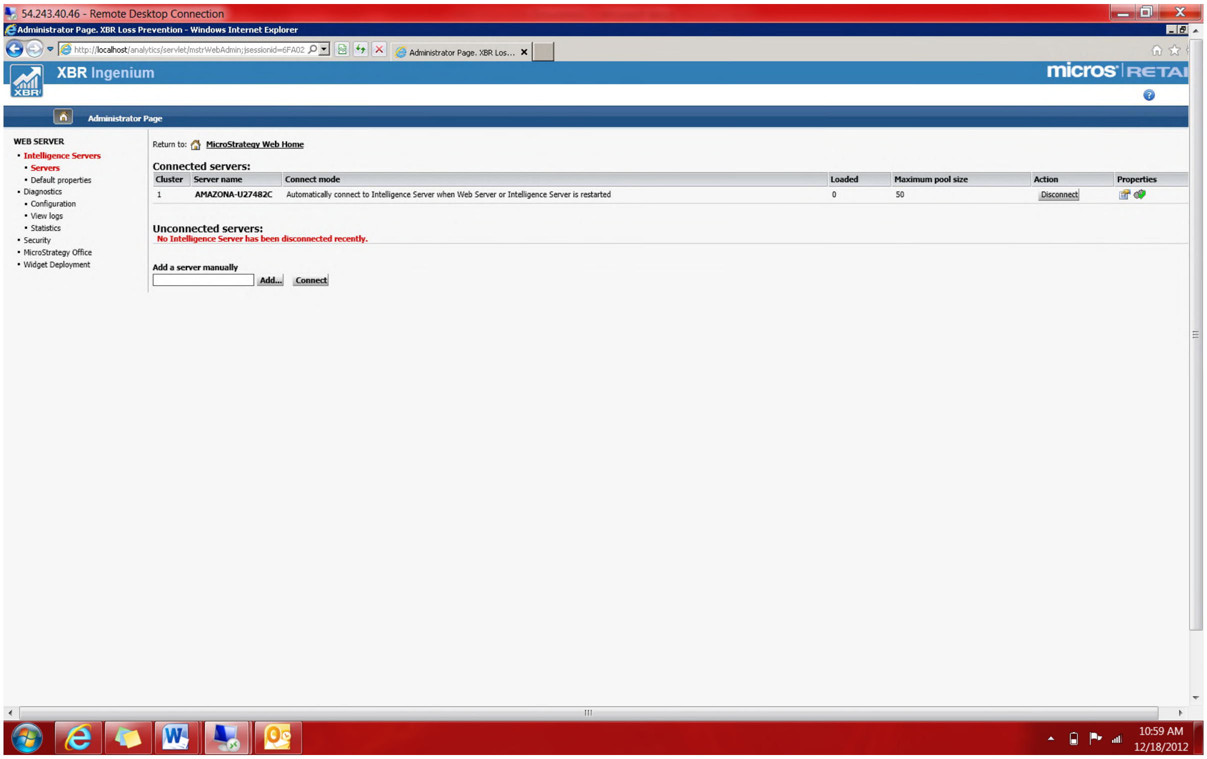


Connection properties

Server name	AMAZONA-U27482C
Connected	No
Connect mode	● Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted ○ User manually connects Web to Intelligence Server
Port	0
Initial pool size	5
Maximum pool size	50
Load balance factor	1
Keep the connection alive between the Web Server and Intelligence Server (used when there is a firewall between the Web Server and the Intelligence). Please refer to the product documentation for information on how to configure your system when using this feature.	☑
Trust relationship between Web Server and Intelligence Server	< Undefined > Setup... Connection Required

Click on the I-Server name and configure the Connection Properties if required.

Click **Connect**.



54.243.40.46 - Remote Desktop Connection
Administrator Page. XBR Loss Prevention - Windows Internet Explorer
http://localhost/analytics/servlet/mstrWebAdmin;jsessionid=6FA02
Administrator Page. XBR Los...
XBR Ingenium
micros | RETAI
Administrator Page
WEB SERVER
Intelligence Servers
Servers
Default properties
Diagnostics
Configuration
View logs
Statistics
Security
MicroStrategy Office
Widget Deployment
Return to: MicroStrategy Web Home

Connected servers:

Cluster	Server name	Connect mode	Loaded	Maximum pool size	Action	Properties
1	AMAZONA-U27482C	Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted	0	50	Disconnect	

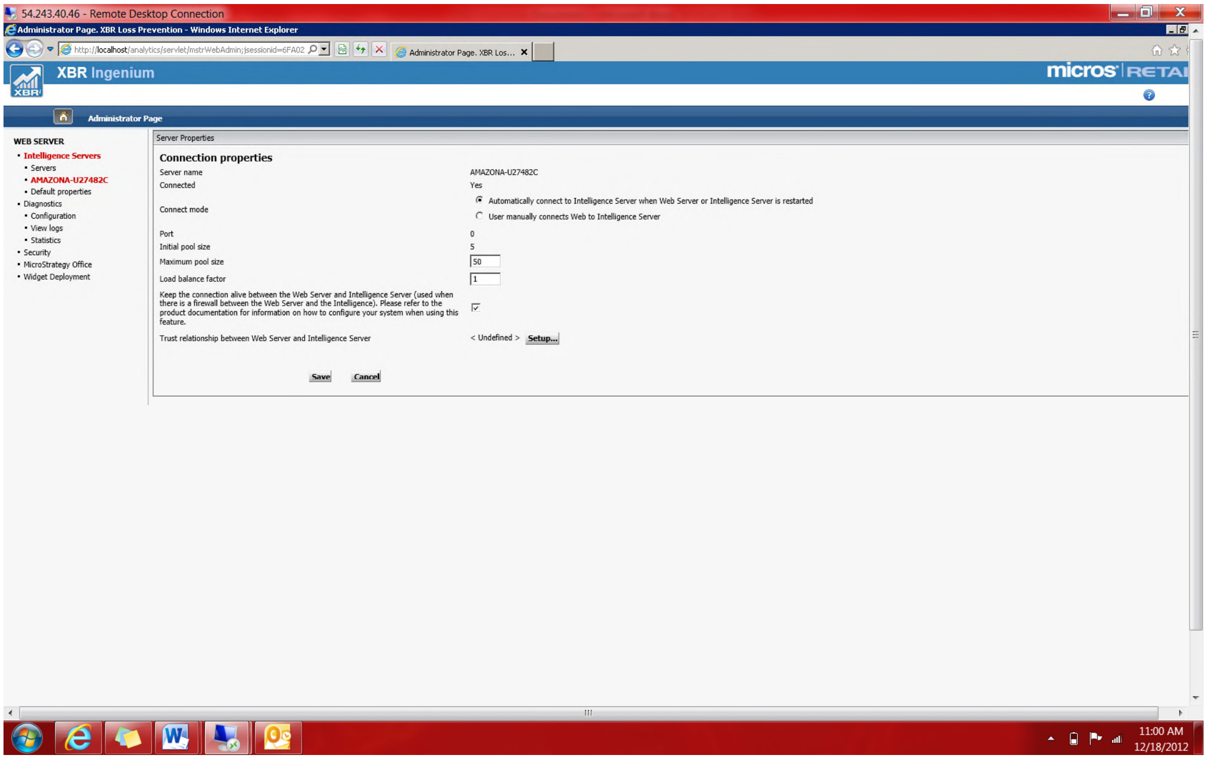
Unconnected servers:

No Intelligence Server has been disconnected recently.

Add a server manually

Add...
Connect
10:59 AM
12/18/2012

The I-Server is displayed under **Connected Servers**. Click the properties icon to the right of the page.

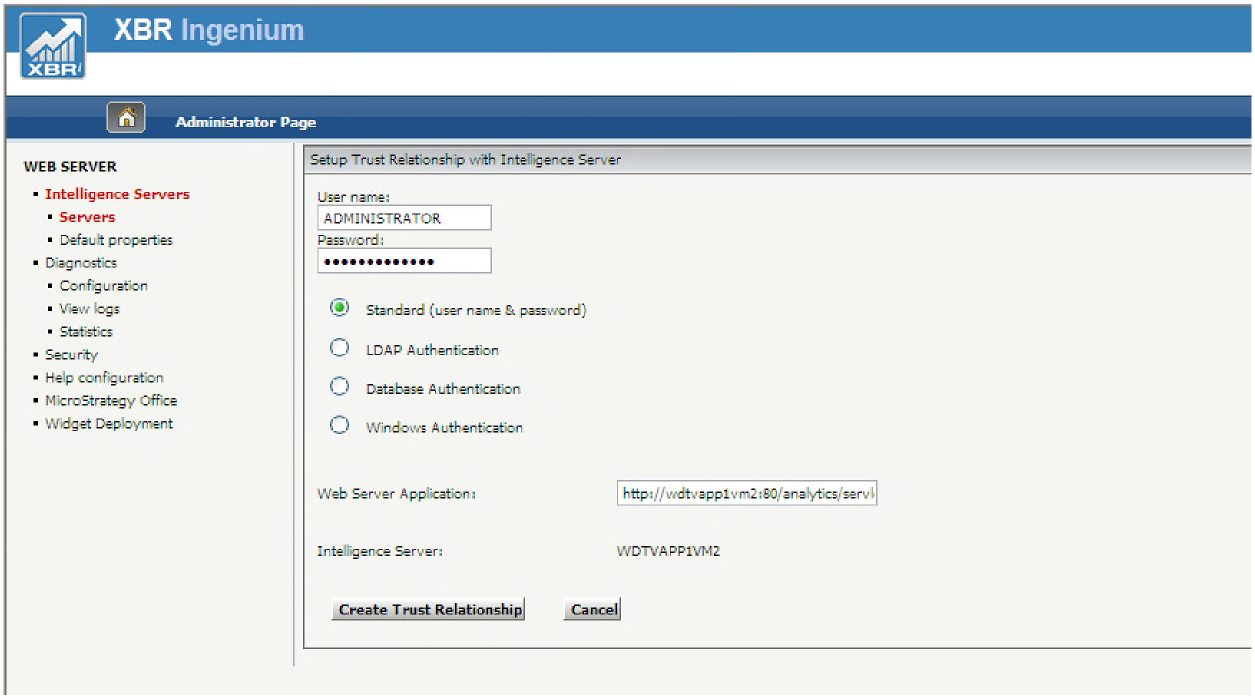


Connection properties

Server name	AMAZONA-U27482C
Connected	Yes
Connect mode	● Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted ○ User manually connects Web to Intelligence Server
Port	0
Initial pool size	5
Maximum pool size	50
Load balance factor	1
Keep the connection alive between the Web Server and Intelligence Server (used when there is a firewall between the Web Server and the Intelligence). Please refer to the product documentation for information on how to configure your system when using this feature.	☑
Trust relationship between Web Server and Intelligence Server	< Undefined > Setup...

Click on the **Setup** button in the Server Properties panel.

Set up the Trust Relationship



Setup Trust Relationship with Intelligence Server

User name: ADMINISTRATOR

Password: •••••••••••••

● Standard (user name & password)

○ LDAP Authentication

○ Database Authentication

○ Windows Authentication

Web Server Application: http://wdtvapp1vm2:80/analytics/servl

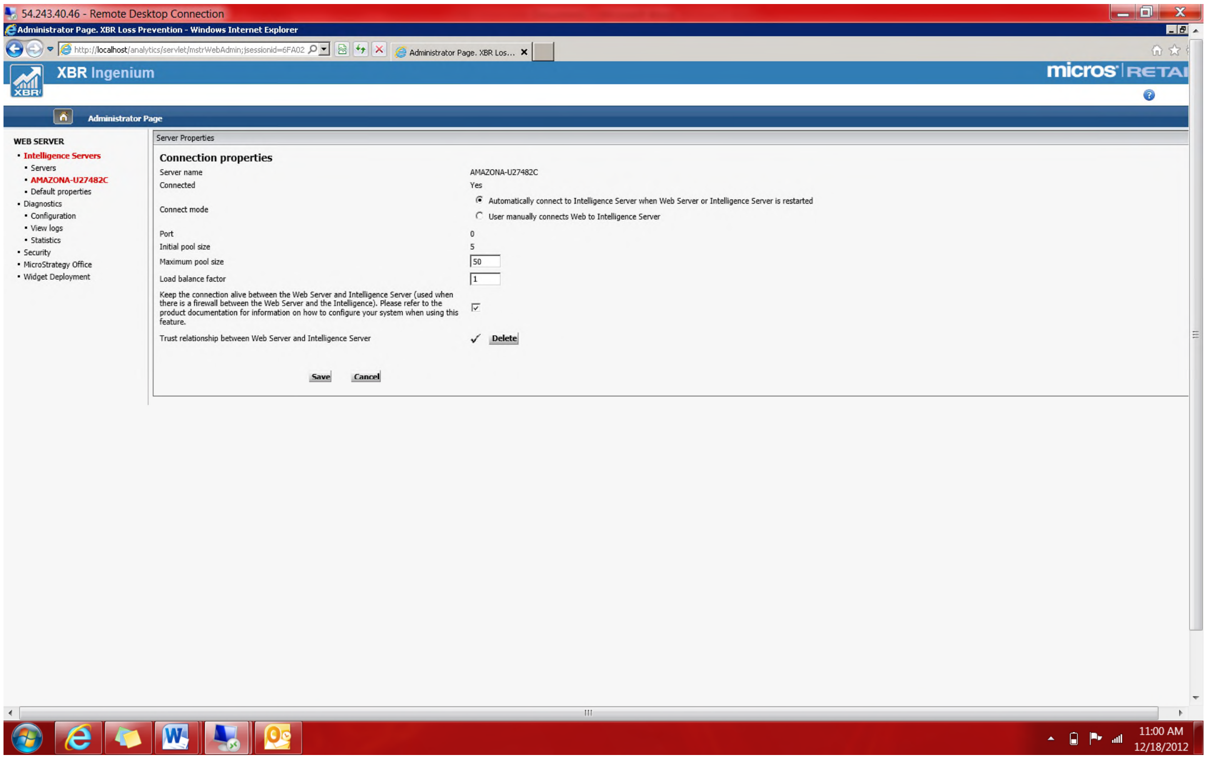
Intelligence Server: WDTVAPP1VM2

Select the **Standard (user name and password)** option.

Enter the MicroStrategy Administrator **User Name** and **Password**.

Enter the URL of the **Web Server Application**.

Click **Create Trust Relationship**.



Connection properties

Server name AMAZONA-U27482C

Connected Yes

Connect mode
● Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted
○ User manually connects Web to Intelligence Server

Port 0

Initial pool size 5

Maximum pool size 50

Load balance factor 1

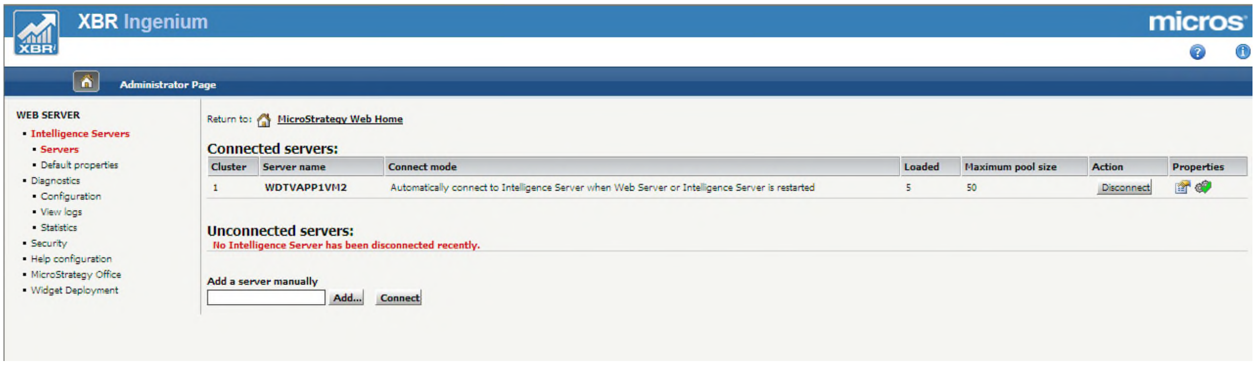
Keep the connection alive between the Web Server and Intelligence Server (used when there is a firewall between the Web Server and the Intelligence). Please refer to the product documentation for information on how to configure your system when using this feature. ☑

Trust relationship between Web Server and Intelligence Server ✓

Verify that the Connection properties are OK and click **Save**.

Step 9: Set the Default Start Page to the Home Page

Click the MicroStrategy Web Home link



Return to: MicroStrategy Web Home

Connected servers:

Cluster	Server name	Connect mode	Loaded	Maximum pool size	Action	Properties
1	WDTVAPP1VM2	Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted	5	50	Disconnect	

Unconnected servers:
No Intelligence Server has been disconnected recently.

Add a server manually

1. Log in as the Core XBR^i Administrator user for the project.
2. From the Admin menu, choose **Project Defaults**.
3. Set the Default start page to Home.
4. **Apply** or **Save** the change and log out.

Step 10: Set up File and Print Subscriptions

This step should not be done for hosted customers and customers not using file and print subscriptions.

Configure Printer and Install Adobe Acrobat Reader®

This step is required for print subscriptions to work correctly.

Notes:

- The Intelligence Server must be running as a service.
- The Windows NT account running the Intelligence Server must have correct privileges or permissions to access printers on the network or local Intelligence Server machine.
- The latest version of **Adobe Acrobat®** or **Adobe Acrobat Reader®** must be installed on the Intelligence Server 9.x machine for Print subscriptions to print correctly.
- If **Adobe Acrobat®** or **Adobe Acrobat Reader®** has been installed, Print subscriptions will not work correctly until the Adobe License Agreement has been accepted. The license must be accepted while logged in with the Windows NT account running Intelligence Server.

1. In Windows Services, stop the MicroStrategy Intelligence Server service.
2. Set the MicroStrategy Intelligence Server service to run with a domain ID, not the local system.
3. In Windows Services, restart the MicroStrategy Intelligence Server service.
4. Go to the Adobe website http://www.adobe.com/support/downloads/detail.jsp?ftpID=5336%20 and download the latest version of Adobe Acrobat Reader®.
5. Start Adobe Acrobat Reader® installation and accept the license agreement.
6. After Acrobat Reader® is installed, add a printer as a local printer.
7. Share the printer.
8. Open Desktop.
9. Create a new device type, Print. Enter a name and description for it.
10. For the Print Location, enter the name of the local printer added in step 6.
11. On the PDF tab in the Application Priority section, select Intelligence Server.
12. On the Advanced tab, under Backup Delivery Options, select the Save to Backup Location check box.
13. Select the Save Files to Location radio button and enter the name of a writeable directory on the server.
14. In the Governing section, enter as the File Location the name of a writeable directory on the server.
15. Set the Retry and Timeout settings to practical values such as 5 retries and 10 minute timeout.
16. Modify ACL settings to give Everyone View privileges on the printed output in the specified directories. Remove all other ACL entries except Administrator.

For more information, see MicroStrategy Technical Note 3075, which provides detailed steps for setting up a printer for distribution services.
https://resource.microstrategy.com/support/Authoring/DisplayTN.aspx?tnkey=30756&formatted=1

Step 11: Create First Customer Administrator

After XBR^i is installed, you need to create a new Customer Administrator account. After you set up the account, an email is mailed to the Customer Administrator with a temporary password with which to log into the application.

To create the customer administrator:

1. Go to the Analytics website at http://WEBSERVERURL/analytics.
2. Log into XBR^i using the following credentials:
   Org code – customer's org code / three letter user name prefix (Food & Beverage install only)
   User name – the user name of the XBR^i administrator
   Password – default password
3. From the **Admin** menu, choose **User Manager**.
4. Click on the **Administrator** group. **Important!** - go to the lowest Administrator group level if there is more than one.
5. Click the **Create New User** icon. This displays the User Editor.
6. On the **General** tab, enter the following:
   Login name – The name the customer administrator will use when logging into the XBR^i.
   Full name – A description of the user.
   Set User Type – Choose Administrator from the drop-down list.
7. On the **Addresses** tab, under E-mail Addresses, click **Add a new address**, and enter the following:
   Address Name – the customer administrator's e-mail name.
   Physical Address – add the customer administrator's email address.
8. Under Actions, click **Save**.
9. On the **Feature Security** tab, select the check boxes next to the Features that the customer wants enabled.
10. Click **OK** when done.

An email is sent to the user with a temporary login password. During their first login, they will be prompted to specify security questions and answers.

Step 12: Customer Administrator Creates New Users and Groups

Only use a Customer Administrator account to create new users and groups.

The Customer Administrator must create an account for each XBR^i user to enable them to log into the application and to grant them access to the features and privileges appropriate to their role. When the user is created, they are added by default to the Everybody group and to the User Type group that the administrator selects when creating the user. Oracle Retail provides the Everybody group and the User Type groups, which cannot be modified. The Customer Administrator can create additional customizable groups and add users to them.

To create a user:

1. Log in to XBR^i as the Customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager, which lists the user groups.
3. Click the **New User** icon on the toolbar. This displays the User Editor.
4. On the **General** tab, enter the following information:
    - **Login name** and **Full name** of the new user, and a **Description**. Note: The login ID is limited to 50 characters
    - Set the **Password expiration frequency**.
    - Select a **User Type** from the drop-down list. This determines the privileges the user will have, for example on reports, documents and features.
    - Make sure the **Account disabled** check box is cleared.
5. On the **Security Filters** tab, assign a security filter to the user. These restrict the data the user can see displayed in reports. In many cases you will need to create a new security filter for the user. (This step is optional).
6. On the **Groups** tab, select the group(s) to which you want to assign this user. The user inherits any features that are enabled for the group, and inherits any security filter restrictions from security filters assigned to the group to which he or she belongs. The user is automatically assigned to the group associated with the selected user type as well as the Everybody group. (This step is optional).
7. On the **Addresses** tab, add e-mail, file, or printer addresses. At least one e-mail address is required. These are used for report and document delivery if the user is subscribed to it.
8. On the **Contacts** tab, grant the user access to specific shared contacts and contact groups. Contacts can be used when scheduling report or document deliveries for recipients who are not application users. **Note:** Shared contacts and contact groups can be only created by Oracle.
9. On the **Feature Security** tab, select all of the features you want to assign to the user by selecting the check boxes in the **User Level** column.

10. Click **OK** to save the new user and return to the User Manager.

After you save the new user, they are sent an email with a temporary password that they can use to log in for the first time.

To create a group:

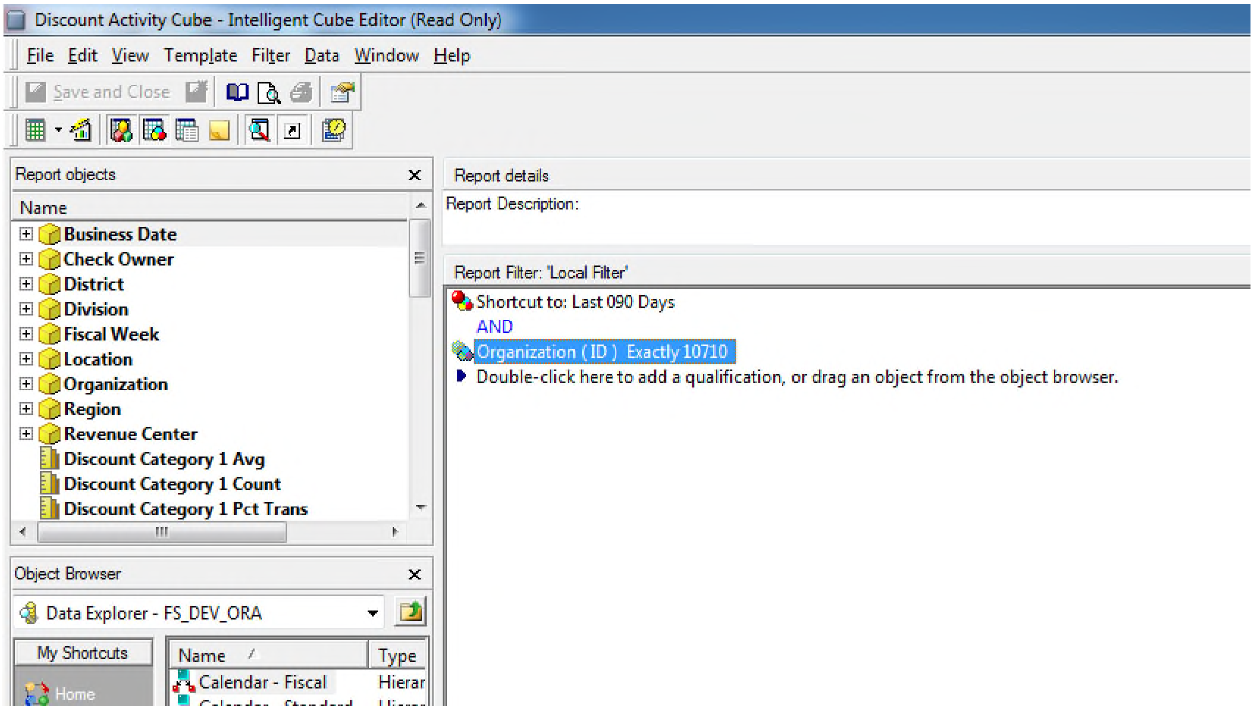
1. Log in to XBR^{i} as the Customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager, which lists the user groups
3. Click the **New Group** icon on the toolbar. This displays the Group Editor.
4. On the **General** tab, enter a name and description for the group.
5. On the **Security Filters** tab, assign security filters. These restrict the data this group can see displayed in reports. (This step is optional).
6. On the **Groups** tab, you can place existing groups within the new group you are creating. Any groups that you select from the list are placed within the new group, and therefore, at a lower level than your new group. You can expand and contract the existing groups to locate specific users, or search for groups using the **Search** field.
7. On the **Members** tab, you can determine which users will belong to your new group. You can expand and contract the existing groups to locate specific users, or search for users using the **Search** field.
8. On the **Feature Security** tab, select the check box next to each feature you want to enable for the group.
9. Click **OK** to save the new group and return to the User Manager.

Step 13: Add ORG ID to Cubes (F&B only)

For Food and Beverage customers, post installation, you will need to make sure that for all cubes in a project, the correct Organization ID appears in the report filter.

To add the ORG ID to cubes:

1. Log into Desktop.
2. Navigate to the **<project_name>\Public Objects\Reports\Cubes** folder.
3. For each cube in the folder, right click on the cube and choose **Edit** from the context menu.
4. In the Inteligent Cube Editor, double click on **Organization (ID) Exactly <ORG ID>**



Discount Activity Cube - Intelligent Cube Editor (Read Only)

Report objects:
- Business Date
- Check Owner
- District
- Division
- Fiscal Week
- Location
- Organization
- Region
- Revenue Center
- Discount Category 1 Avg
- Discount Category 1 Count
- Discount Category 1 Pct Trans

Report Description:

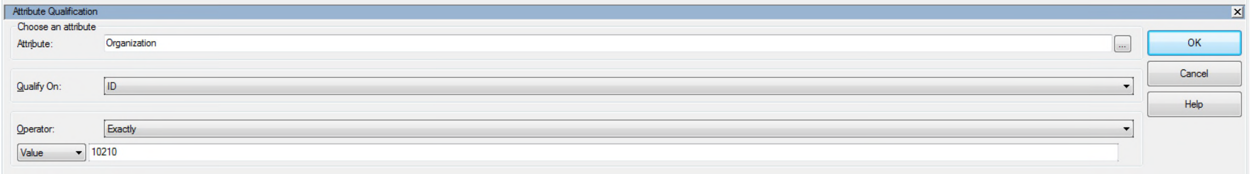
Report Filter: 'Local Filter'

Shortcut to: Last 090 Days
AND
Organization (ID) Exactly 10710
Double-click here to add a qualification, or drag an object from the object browser.

Data Explorer - FS_DEV_ORA

Name	Type
Calendar - Fiscal	Hierar

5. In the Attribute Qualification panel, enter the correct ORG ID in the **Value** field.



Attribute Qualification

Choose an attribute

Attribute: Organization

Qualify On: ID

Operator: Exactly

Value 10210

6. Click **OK**.
7. Click **Save and Close**.
8. Continue until you have entered the correct ORG ID number in the report filter for each cube.
9. After you have finished, republish all of the cubes you have edited.

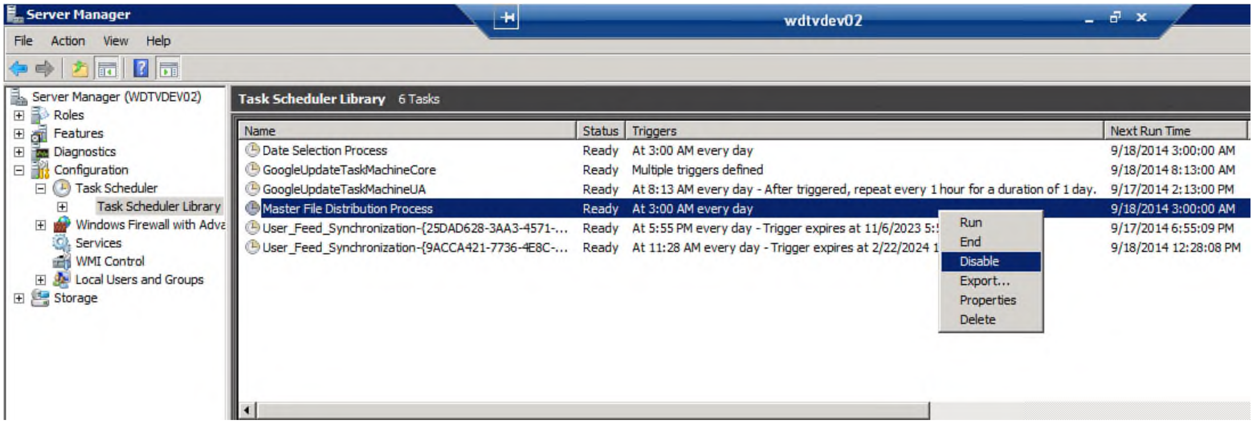
Step 14: Disable MFD Task and Remove Batch File

After installation you must disable the scheduled MFD task in Windows Task Scheduler and remove the MFD batch file from the XBRi application folder.

Note: This step will not be necessary in the next installation program that corrects this problem.

To disable the Master File Distribution process:

1. From the Web server, open the Task Scheduler.

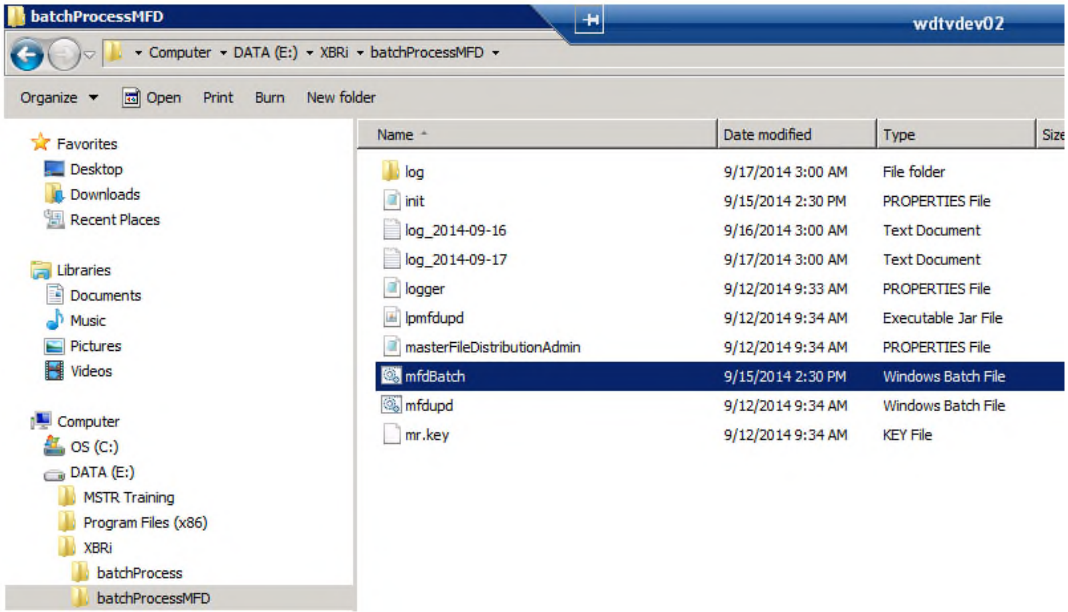


Name	Status	Triggers	Next Run Time
Date Selection Process	Ready	At 3:00 AM every day	9/18/2014 3:00:00 AM
GoogleUpdateTaskMachineCore	Ready	Multiple triggers defined	9/18/2014 8:13:00 AM
GoogleUpdateTaskMachineUA	Ready	At 8:13 AM every day - After triggered, repeat every 1 hour for a duration of 1 day.	9/17/2014 2:13:00 PM
Master File Distribution Process	Ready	At 3:00 AM every day	9/18/2014 3:00:00 AM
User_Feed_Synchronization-{25DAD628-3AA3-4571-...	Ready	At 5:55 PM every day - Trigger expires at 11/6/2023 5:	9/17/2014 6:55:09 PM
User_Feed_Synchronization-{9ACCA421-7736-4E8C-...	Ready	At 11:28 AM every day - Trigger expires at 2/22/2024 1	9/18/2014 12:28:08 PM

2. Navigate to the Task Scheduler library.
3. Locate the Master File Distribution Process on the tasks list and right click on it.
4. From the context menu, choose **Disable**.

To remove the mfdBatch file:

1. On the Web server, navigate to the XBRi\batchProcessMFD folder.



Name	Date modified	Type	Size
log	9/17/2014 3:00 AM	File folder	
init	9/15/2014 2:30 PM	PROPERTIES File	
log_2014-09-16	9/16/2014 3:00 AM	Text Document	
log_2014-09-17	9/17/2014 3:00 AM	Text Document	
logger	9/12/2014 9:33 AM	PROPERTIES File	
lpmfdupd	9/12/2014 9:34 AM	Executable Jar File	
masterFileDistributionAdmin	9/12/2014 9:34 AM	PROPERTIES File	
mfdBatch	9/15/2014 2:30 PM	Windows Batch File	
mfdupd	9/12/2014 9:34 AM	Windows Batch File	
mr.key	9/12/2014 9:34 AM	KEY File	

2. Locate the mfdBatch file and right click on it.
3. From the context menu, choose **Disable**.

Step 15: Configure for Master File Distribution

The Master File Distribution feature allows customers to send subscription reports to recipients who are not defined users in XBR^i. This is done through Dynamic address lists that are derived from reports based on the core master tables for Store, District, and Region for Retail installations and District and Location for Food and Beverage installations. When you create a dynamic address list, it becomes available on the Recipients list for creating email subscriptions.

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They include columns for Email, Device ID and Linked User ID. The Device ID column is initially populated when the application is installed or when new rows are added to the master files.

The Linked User ID column is updated in the master files when you run the Master File Batch Update or through the application. See Step F: Populate the Master File tables.

This section contains the steps form enabling master file distribution to using dynamic address lists:

Step A: Enable Master File Distribution for the project

Step B: Give access to the correct users and groups

Step C: Verify that key columns and security filter key attributes are correct

Step D: Master File Distribution Reports

Step E: Create Dynamic Address Lists

Step F: Populate the Master File tables

Step G: Using Dynamic Address Lists in Subscriptions

Step H: Device IDs in Master Files for Dynamic Address lists

Step I: Change the MFD Key Mapping after the MFD Update has been Run

Step J: Adding New Attributes

Step A: Enable Master File Distribution for the project

1. Log in to XBR^i as the Core XBR^i Administrator.
2. From the Admin menu, choose **Customization Manager**.
3. In the Feature list, select the check box next to **Master File Distribution**.
4. Click **Apply**.

By default, this feature will be On.

Step B: Give access to the MFD feature:

In the XBR^i User Manager, turn on the Master File Distribution feature for the administrator users:

To give users and groups access to the Master File Distribution feature:

1. Log in to XBR^i as a customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager.
    - If you want to give access at the group level, click the **Edit** icon in the Group row.
    - If you want to give access at the user level, expand the group, and click the **Edit** icon in the user row.
3. This displays the Group Editor for a group or the User Editor for a user.
4. Click the **Feature Security** tab.
5. Select the check box next to **Master File Distribution**.
6. Click **OK**.

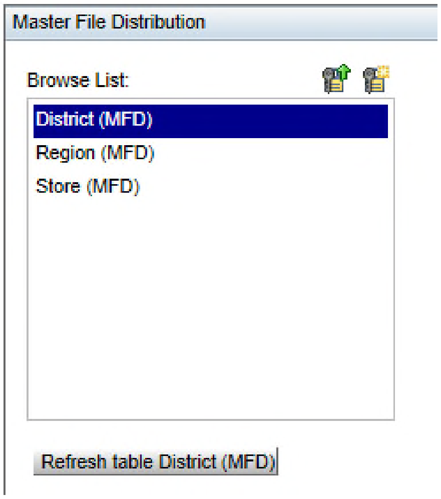
By default, this feature will be On.

Step C: Verify that key columns and security filter key attributes are correct

Several new attributes have been created specifically for Master File Distribution. For Retail, they are Store MFD, District MFD and Region MFD. For Food Service, they are District MFD and Location MFD. These attributes are used in the reports on which the dynamic address lists are based. See: Step D: Master File Distribution Reports.

After XBR^i is installed and MFD is enabled for the project, you need to review the Master File Distribution settings in Project Defaults and verify that the MFD mapping matches the key columns for each of the master tables. For example, if Store is not unique, Store and Division should be selected as keys.

Also, each of the mappings have a security filter associated with it. The security filter ensures the data sent is only for that one store or one district, etc. These also need to be correct for the customer site. If not, you can change them using the editing icons in the Project Defaults Master File Distribution page.



To verify key columns are correct and modify if needed:

1. Log in to XBR^{i} as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. For each table in the Browse List, select the table and click the **Define key columns in database table** icon.

   Verify that the key columns are correct. If not, you can move a column from the **Available** to the **Selected** list.

5. When you are done selecting the key columns, click **OK**.

To verify key attributes in the security filter are correct and modify if needed:

1. Log in to XBR^{i} as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. For each table in the Browse List, select the table and click the **Define key attributes for Security Filter** icon.

   Verify that the key attributes are correct. If not, you can move an attribute from the **Available** to the **Selected** list.

5. When you are done selecting the key attributes, click **OK**.

Step D: Master File Distribution Reports

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They each contain the MFD attributes that are derived from core master tables for Store, District, and Region for Retail installations and District and Location for Food and Beverage installations. They include columns for Email, Device ID and Linked User ID. The Device ID column is populated when the application is installed or upgraded. The Linked User ID column is updated whenever you run the Master File update to populate the Master File tables.

The dynamic address lists that you create in the next step use the addresses associated with the Linked User IDs from the Master File Distribution reports in the Shared Reports > Master File Distribution folder.

Step E: Create Dynamic Address Lists

The next step is to create Dynamic Address lists for the customer. You create a Dynamic Address list by linking it to one of the reports in the Shared Reports > Master File Distribution folder. The emails that will be sent are determined by the report to which it is linked. If you need to create a dynamic address list with a different MFD report, you will need to create or modify the existing MFD reports. For example, you can add a filter to the Store Master File Distribution report to filter for specific stores in the Western Region.

! *The subscription processing cannot handle more than 2000 users at one time. If the master file list of recipient users exceeds or comes close to 2000, the distribution reports must be filtered and run at different times.*

To create Dynamic Address Lists:

1. Log in to XBR^{i} as a customer Administrator or Manager.
2. From the Admin menu, choose **User Preferences**.
3. Under Settings, choose **Dynamic address lists**.
4. Click the **Add a new dynamic address list** link.
5. Click the **Select…** link next to **Report:**.
6. Navigate to the Shared Reports > Master File Distribution folder.
7. For each of the reports in the folder, create a dynamic address list by completing the steps that follow.
8. Select the report and click **OK**.
9. Enter a name for the list in the **Dynamic address list name** field.
10. Under the **Required property** settings, make sure the correct values are selected. For example, for the **Property**, Physical Address, in a list containing the District attribute, the corresponding **Value** should be District (MFD) (Email).

Note: the lower portion of the screen under the **Subscription mappings, Optional property** settings is not used in XBRi.

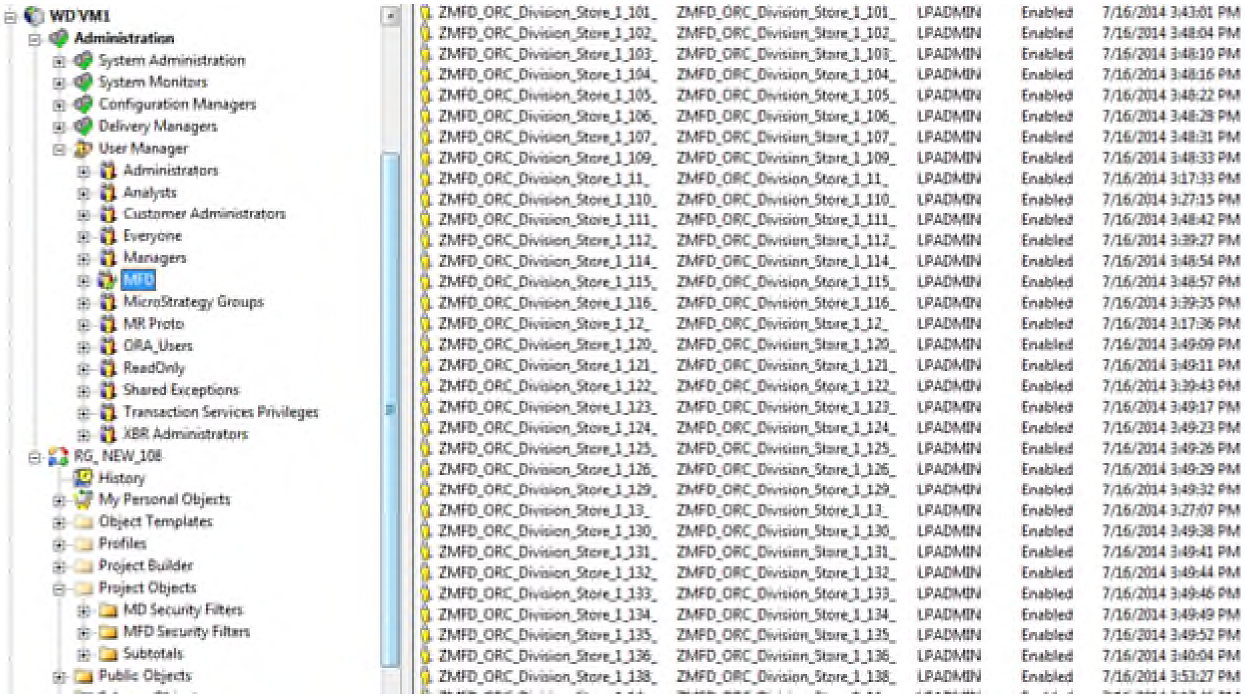
11. Click **Save**.

The new list will be displayed under Dynamic address lists in User Preferences. Repeat steps 8-11 for all of the reports in the Master File Distribution folder.

Step F: Populate the Master File tables

To enable the Dynamic address lists you have created, you must first populate the Master File tables with a linked user id for each row in the master file. For master files containing over 20 rows of data, you must use a batch process. For master files with fewer than 20 rows of data, you can use XBR^{i} Project Defaults, Master File Distribution and run the **Refresh table** option.

The update process sets up an MFD 'dummy' user in the application, and this ID links it to the master table for each row. It also creates an associated security filter to limit the data in the emailed report to only the one store, one district, etc.



ZMFD_ORC_Division_Store_1_101_	ZMFD_ORC_Division_Store_1_101_	LPADMIN	Enabled	7/16/2014 3:43:01 PM
ZMFD_ORC_Division_Store_1_102_	ZMFD_ORC_Division_Store_1_102_	LPADMIN	Enabled	7/16/2014 3:48:04 PM
ZMFD_ORC_Division_Store_1_103_	ZMFD_ORC_Division_Store_1_103_	LPADMIN	Enabled	7/16/2014 3:48:10 PM
ZMFD_ORC_Division_Store_1_104_	ZMFD_ORC_Division_Store_1_104_	LPADMIN	Enabled	7/16/2014 3:48:16 PM
ZMFD_ORC_Division_Store_1_105_	ZMFD_ORC_Division_Store_1_105_	LPADMIN	Enabled	7/16/2014 3:48:22 PM
ZMFD_ORC_Division_Store_1_106_	ZMFD_ORC_Division_Store_1_106_	LPADMIN	Enabled	7/16/2014 3:48:28 PM
ZMFD_ORC_Division_Store_1_107_	ZMFD_ORC_Division_Store_1_107_	LPADMIN	Enabled	7/16/2014 3:48:31 PM
ZMFD_ORC_Division_Store_1_109_	ZMFD_ORC_Division_Store_1_109_	LPADMIN	Enabled	7/16/2014 3:48:33 PM
ZMFD_ORC_Division_Store_1_11_	ZMFD_ORC_Division_Store_1_11_	LPADMIN	Enabled	7/16/2014 3:17:33 PM
ZMFD_ORC_Division_Store_1_110_	ZMFD_ORC_Division_Store_1_110_	LPADMIN	Enabled	7/16/2014 3:27:15 PM
ZMFD_ORC_Division_Store_1_111_	ZMFD_ORC_Division_Store_1_111_	LPADMIN	Enabled	7/16/2014 3:48:42 PM
ZMFD_ORC_Division_Store_1_112_	ZMFD_ORC_Division_Store_1_112_	LPADMIN	Enabled	7/16/2014 3:39:27 PM
ZMFD_ORC_Division_Store_1_114_	ZMFD_ORC_Division_Store_1_114_	LPADMIN	Enabled	7/16/2014 3:48:54 PM
ZMFD_ORC_Division_Store_1_115_	ZMFD_ORC_Division_Store_1_115_	LPADMIN	Enabled	7/16/2014 3:48:57 PM
ZMFD_ORC_Division_Store_1_116_	ZMFD_ORC_Division_Store_1_116_	LPADMIN	Enabled	7/16/2014 3:39:35 PM
ZMFD_ORC_Division_Store_1_12_	ZMFD_ORC_Division_Store_1_12_	LPADMIN	Enabled	7/16/2014 3:17:36 PM
ZMFD_ORC_Division_Store_1_120_	ZMFD_ORC_Division_Store_1_120_	LPADMIN	Enabled	7/16/2014 3:49:09 PM
ZMFD_ORC_Division_Store_1_121_	ZMFD_ORC_Division_Store_1_121_	LPADMIN	Enabled	7/16/2014 3:49:11 PM
ZMFD_ORC_Division_Store_1_122_	ZMFD_ORC_Division_Store_1_122_	LPADMIN	Enabled	7/16/2014 3:39:43 PM
ZMFD_ORC_Division_Store_1_123_	ZMFD_ORC_Division_Store_1_123_	LPADMIN	Enabled	7/16/2014 3:49:17 PM
ZMFD_ORC_Division_Store_1_124_	ZMFD_ORC_Division_Store_1_124_	LPADMIN	Enabled	7/16/2014 3:49:23 PM
ZMFD_ORC_Division_Store_1_125_	ZMFD_ORC_Division_Store_1_125_	LPADMIN	Enabled	7/16/2014 3:49:26 PM
ZMFD_ORC_Division_Store_1_126_	ZMFD_ORC_Division_Store_1_126_	LPADMIN	Enabled	7/16/2014 3:49:29 PM
ZMFD_ORC_Division_Store_1_129_	ZMFD_ORC_Division_Store_1_129_	LPADMIN	Enabled	7/16/2014 3:49:32 PM
ZMFD_ORC_Division_Store_1_13_	ZMFD_ORC_Division_Store_1_13_	LPADMIN	Enabled	7/16/2014 3:27:07 PM
ZMFD_ORC_Division_Store_1_130_	ZMFD_ORC_Division_Store_1_130_	LPADMIN	Enabled	7/16/2014 3:49:38 PM
ZMFD_ORC_Division_Store_1_131_	ZMFD_ORC_Division_Store_1_131_	LPADMIN	Enabled	7/16/2014 3:49:41 PM
ZMFD_ORC_Division_Store_1_132_	ZMFD_ORC_Division_Store_1_132_	LPADMIN	Enabled	7/16/2014 3:49:44 PM
ZMFD_ORC_Division_Store_1_133_	ZMFD_ORC_Division_Store_1_133_	LPADMIN	Enabled	7/16/2014 3:49:46 PM
ZMFD_ORC_Division_Store_1_134_	ZMFD_ORC_Division_Store_1_134_	LPADMIN	Enabled	7/16/2014 3:49:49 PM
ZMFD_ORC_Division_Store_1_135_	ZMFD_ORC_Division_Store_1_135_	LPADMIN	Enabled	7/16/2014 3:49:52 PM
ZMFD_ORC_Division_Store_1_136_	ZMFD_ORC_Division_Store_1_136_	LPADMIN	Enabled	7/16/2014 3:40:04 PM
ZMFD_ORC_Division_Store_1_138_	ZMFD_ORC_Division_Store_1_138_	LPADMIN	Enabled	7/16/2014 3:53:27 PM

Note: If a file has more than 20 rows and you try to use the Refresh Table command in Project defaults, you will see a message that lets you know the file is too large to process. In that case you must use the batch process.

Before you proceed with this step, be aware that depending on the number of records, the batch process can take up to two hours or longer to run.

To populate the linked user id in the Master File tables from Project Defaults:

1. Log in to XBR^{i} as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.

4. Select the master table you want to update in the Browse List and click the **Refresh table <Table name MFD>** button.

To populate the linked user id in the Master File tables using the Batch File Process:

1. On the server where the MS Iserver is installed, in the XBR^i application folder, navigate to the batchProcessMFD folder.
2. Open the init.properties file.

   Example: init.properties file

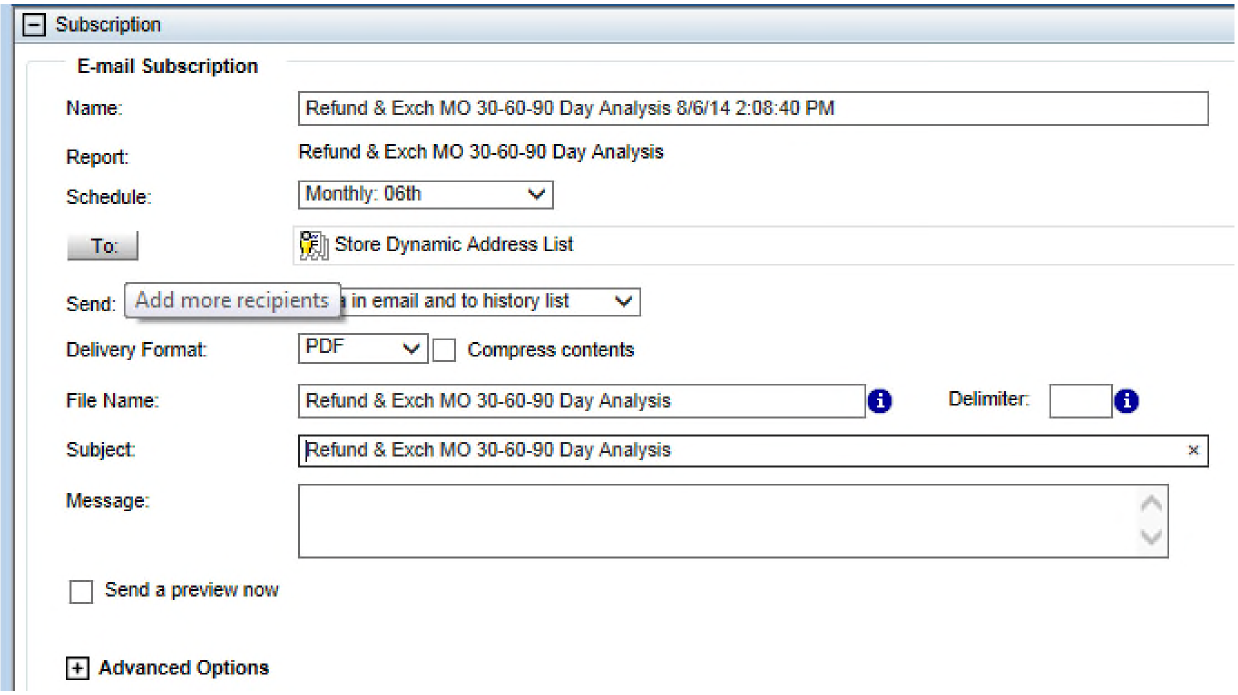
```
#key file
mr.key.file.name=mr.key
iserver.name=<Iserver>
iserver.projectname=<Project name>iserver.port=0
iserver.login=BBA04229B250CB4B8E74B65E25A2169A
iserver.password=NA
useTrusted=true
tokenPath=C:\\XBRi\\tomcat\\webapps\\analytics\\WEB-INF\\xml\\
#DB properties
db.driver=oracle.jdbc.driver.OracleDriver
db.url=jdbc:oracle:thin:@WDTVORADBVM1:1521:dwrgqa
db.login=93B3C6084E4D560252934D6E1965BFD4
db.password=E72ABA033722D1AEADF6CA9D295AF0CE

######################################################
mfd.org.code=ORA
excludeTables=MST_STORE;MST_DISTRICT
```

3. In the init.properties file, edit the IServer and db properties and enter the correct org code. The sections to edit are highlighted in the example above.
4. Use the final line, excludeTables, if you want to exclude tables from the batch process. For example, if you already processed one master table, you can exclude it. In the example above, the MST_STORE and MST_DISTRICT tables are being excluded from the batch process.
5. Double click on the mfdupd.bat file. This runs the batch process.
6. When the batch process has finished, you can check the log file in the batchProcessMFD\log folder to make sure it ran correctly.

Step G: Using Dynamic Address Lists in Subscriptions

After you have completed the steps for configuring Master File Distribution, The dynamic address list will be available as a new recipient in the Add more recipients TO option when creating and editing subscriptions.

When creating the subscription, the attributes (keys) used to define the master file in the project defaults must be in the report or selected in the hierarchy prompt used in the subscription. For example, if store and division are selected keys, these attributes must be included in the report subscription.



Name: Refund & Exch MO 30-60-90 Day Analysis 8/6/14 2:08:40 PM

Report: Refund & Exch MO 30-60-90 Day Analysis

Schedule: Monthly: 06th

To: Store Dynamic Address List

Send: Add more recipients [...] in email and to history list

Delivery Format: PDF □ Compress contents

File Name: Refund & Exch MO 30-60-90 Day Analysis Delimiter:

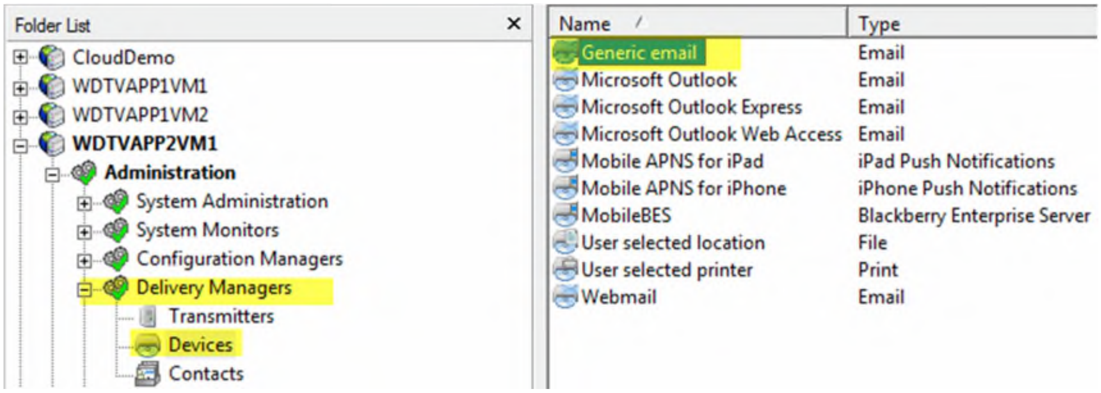
Subject: Refund & Exch MO 30-60-90 Day Analysis

Message:

□ Send a preview now

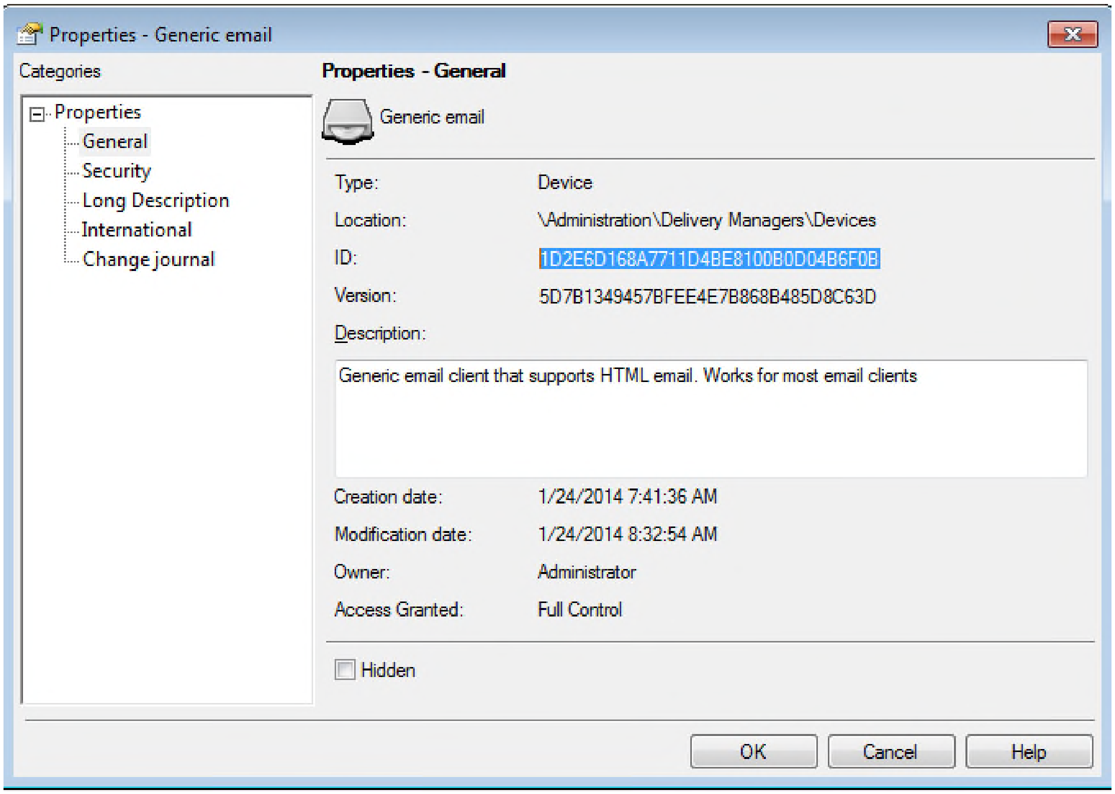
Step H: Device IDs in Master Files for Dynamic Address lists

The master tables used for Master File Distribution all have a default device ID. The default device ID used for the email system for customer installs is Generic email. The object ID of this device is what is being populated in the Device ID column in the master table. You can look up the Device ID corresponding to this and all other supported device types in Desktop in the <Project>\Administration\Delivery Managers\Devices folder:



Name	Type
Generic email	Email
Microsoft Outlook	Email
Microsoft Outlook Express	Email
Microsoft Outlook Web Access	Email
Mobile APNS for iPad	iPad Push Notifications
Mobile APNS for iPhone	iPhone Push Notifications
MobileBES	Blackberry Enterprise Server
User selected location	File
User selected printer	Print
Webmail	Email

You can right click on a supported device in the list and choose Properties to view the device ID number. This ID needs to be populated for each master file entry used in master file distribution.



Properties - General

Generic email

Type: Device

Location: \Administration\Delivery Managers\Devices

ID: 1D2E6D168A7711D4BE8100B0D04B6F0B

Version: 5D7B1349457BFEE4E7B868B485D8C63D

Description:

Generic email client that supports HTML email. Works for most email clients

Creation date: 1/24/2014 7:41:36 AM

Modification date: 1/24/2014 8:32:54 AM

Owner: Administrator

Access Granted: Full Control

☐ Hidden

Step I: Change the MFD Key Mappings after the MFD Update has been Run

If you have already run the MFD update and you want to change the MFD keys or Security Filter keys, you must follow these steps:

1. In the Desktop, navigate to the project folders containing MFD Users and MFD Security filters. In each folder delete all of the users and filters except: **Important!** *Do not delete the MFD 001_mfdtemplate in the MFD Users folder or the Security Filter 001_sf_mfdtemplate in the MFD Security Filter folder*.
2. Using a database editor, navigate to the master table for which you want to change the mapping and delete the linked user ID.
3. Log in to XBR^i as a customer Administrator and change the key columns and security filter attributes as in Step C.
4. Rerun the MFD batch update, as in Step F.

Step J: Adding New Attributes

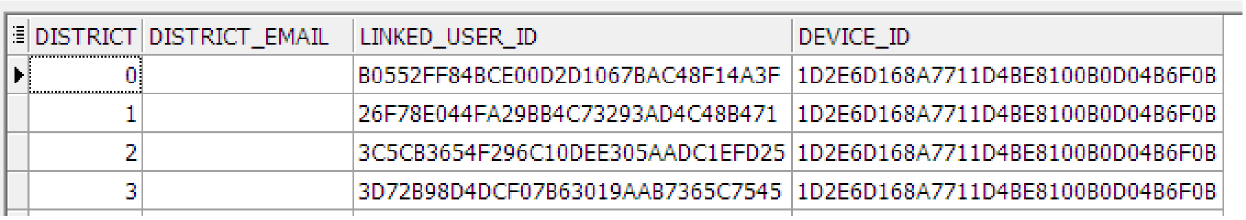
If the customer requires it, you can add new attributes for creating Master File Distribution lists.

Before you begin

When you do this it is recommended that you review an MFD table like the one below, and note the columns that must be included as attribute forms when you create the new attribute:

- Email address field– an email address field to be populated by physical address of the user that the email is going to be sent to
- Linked_User_ ID – to be populated by User GUID that is linked to this recipient.
- Device_ID – to be populated by GUID of the device object (email device, see Step H of this manual)

Example:



DISTRICT	DISTRICT_EMAIL	LINKED_USER_ID	DEVICE_ID
0		B0552FF84BCE00D2D1067BAC48F14A3F	1D2E6D168A7711D4BE8100B0D04B6F0B
1		26F78E044FA29BB4C73293AD4C48B471	1D2E6D168A7711D4BE8100B0D04B6F0B
2		3C5CB3654F296C10DEE305AADC1EFD25	1D2E6D168A7711D4BE8100B0D04B6F0B
3		3D72B98D4DCF07B63019AAB7365C7545	1D2E6D168A7711D4BE8100B0D04B6F0B

To create a new MFD attribute:

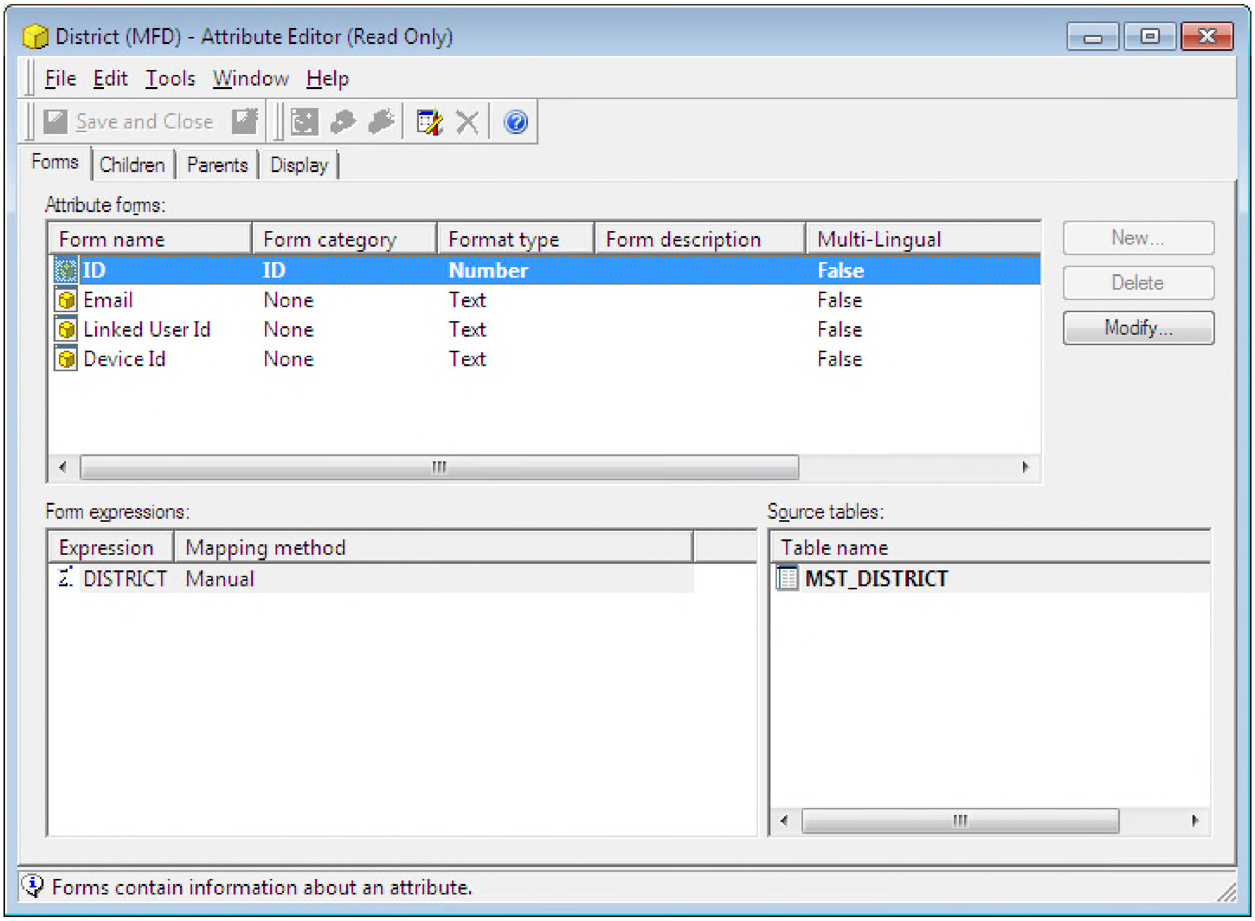
1. Log in to Desktop.
2. Navigate to the **Schema Objects > Attributes > Master File Distribution** folder.
3. Click on the **New Attribute** icon.

4. In the New Attribute Editor, create a new attribute with following attribute forms:
   - Email (map to column Email Address);
   - Linked User Id (map to column Linked_User_ID);
   - Device Id (map to column Device_ID).

See the image below for an example of an MFD attribute in the New Attribute editor.

It is strongly recommended to add the suffix, MFD, to the name of the attribute, for example District (MFD) so it won't be confused with regular attributes.

For more information about creating new attributes, consult the XBRi Project Customization guide.


District (MFD) - Attribute Editor (Read Only)
File Edit Tools Window Help
Save and Close
Forms
Children
Parents
Display
New...
Delete
Modify...

Attribute forms:

Form name	Form category	Format type	Form description	Multi-Lingual
ID	ID	Number		False
Email	None	Text		False
Linked User Id	None	Text		False
Device Id	None	Text		False

Form expressions:

Expression	Mapping method
DISTRICT	Manual

Source tables:

Table name
MST_DISTRICT

Forms contain information about an attribute.

The new attribute will appear in the Project Defaults Master File Distribution page where the table keys and security filter keys are set (see Step C: Verify that key columns and security filter key attributes are correct).

Step 16: SSL Configuration

Prerequisite

You must have a valid certificate from Certificate Authority (CA).
To configure the web application to use https protocol:

1. In the XBR^i program folder, locate: \tomcat\conf\server.xml
2. Edit the server.xml file as follows:
   - If the port 443/8443 is commented, uncomment the whole section of port 443/8443 in the server.xml file.
   - Provide the certificate file and password for example:
     ```
     <Connector port="8443" protocol="HTTP/1.1" SSLEnabled="true"
     keystoreFile="/webapps/CERTIFICATEFILENAME" keystorePass="PASSWORD"
     maxThreads="150" scheme="https" secure="true"
     clientAuth="false" sslEnabledProtocols = "TLSv1,TLSv1.1,TLSv1.2"/>
     ```
   - Add redirect port for 80/8080 (default port) to secure port 443/8443
     ```
     <Connector port="8080" protocol="HTTP/1.1" connectionTimeout="20000"
     redirectPort="8443" />
     ```
3. In the XBR^i program folder, locate: \tomcat\conf\web.xml file and add or edit the following code:

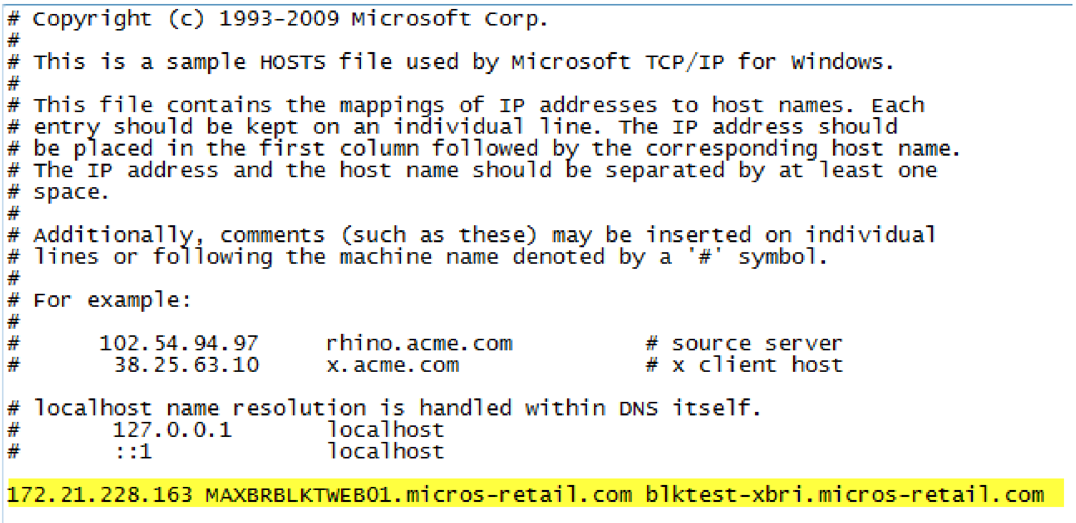
```
<!-- SSL -->
<security-constraint>
<web-resource-collection>
<web-resource-name>securedapp</web-resource-name>
<url-pattern>/*</url-pattern>
</web-resource-collection>
<user-data-constraint>
<transport-guarantee>CONFIDENTIAL</transport-guarantee>
</user-data-constraint>
</security-constraint><security-constraint>
<web-resource-collection>
<web-resource-name>Administrator</web-resource-name>
<url-pattern>/servlet/mstrWebAdmin</url-pattern>
<url-pattern>/servlet/mstrWebAdmin/*</url-pattern>
<url-pattern>/servlet/mstrWeb/mstrWebAdmin</url-pattern>
<url-pattern>/servlet/mstrWeb/mstrWebAdmin/*</url-pattern>
</web-resource-collection>
<auth-constraint>
<role-name>admin</role-name>
</auth-constraint>
<user-data-constraint>
<transport-guarantee>CONFIDENTIAL</transport-guarantee>
</user-data-constraint>
</security-constraint>
<security-constraint>
<web-resource-collection>
<web-resource-name>TaskAdministrator</web-resource-name>
<url-pattern>/servlet/taskAdmin</url-pattern>
<url-pattern>/servlet/taskAdmin/*</url-pattern>
</web-resource-collection>
<auth-constraint>
<role-name>admin</role-name>
</auth-constraint>
```

```
<user-data-constraint>
<transport-guarantee>CONFIDENTIAL</transport-guarantee>
</user-data-constraint>
</security-constraint>
<security-constraint>
<web-resource-collection>
<web-resource-name>TaskDeveloper</web-resource-name>
<url-pattern>/servlet/taskViewer</url-pattern>
<url-pattern>/servlet/taskViewer/*</url-pattern>
</web-resource-collection>
<auth-constraint>
<role-name>taskDeveloper</role-name>
</auth-constraint>
<user-data-constraint>
<transport-guarantee>CONFIDENTIAL</transport-guarantee>
</user-data-constraint>
</security-constraint>
<!-- SSL -->
```

4. Copy the file containing the CA certificate to the tomcat\webapps folder.
   Re-start Tomcat from Windows > Services > Apache Tomcat. When you start the application, it should automatically be redirected to the https protocol.

   If the external site cannot be reached from the web server installation, also complete step 5.

5. Update the Hosts file to point the internal IP address to both the internal DNS and external DSN for correct traffic routing. On the web server, go to C:\Windows\System32\drives\etc. and insert a line in the Hosts file for the site configuration, as in the example below:



```
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#      102.54.94.97     rhino.acme.com          # source server
#       38.25.63.10     x.acme.com              # x client host

# localhost name resolution is handled within DNS itself.
#       127.0.0.1       localhost
#       ::1             localhost

172.21.228.163 MAXBRBLKTWEB01.micros-retail.com blktest-xbri.micros-retail.com
```

Step 16: LDAP Configuration:

This step is only applicable to those implementations that use LDAP or active directory for authentication. After you install XBR^{i} and complete the post-installation manual steps, you create or edit XBR^{i} users in the customer LDAP or active network directory. Once you have created users, you can configure the LDAP server and provide the users' login credentials where prompted.

Creating and Configuring Users

To create and configure XBR^{i} users:

1. Navigate to the customer's LDAP or Active Directory.
2. Create new users or modify existing users to enable them to connect to XBR^{i}. You must provide the following information:
   a) An e-mail address for each user account.
   b) For each user, create a new attribute or edit an existing unused attribute of LDAP user to add <Company code_LDAPlogin Id> to the attribute.
   Example
   For the Attribute **Uid**:
   If the company code is CST and the LDAP User login id is steve, edit the existing attribute *uid* with the value CST_steve.
   <Company code_LDAP login Id>
   Uid = CST_steve

Company code is established by the Oracle Administrator and must be consistent with the Project setup.

LDAP Security and role assignment and import:

Defining the security filters on the LDAP level

An LDAP Security Filter can be defined on 4 levels: OrgID, Division, District, and Store. If for a selected attribute we do not want to create a security filter, then it should be empty, for example, OrgID=. The security filter definition should be included in the group name and assigned to the appropriate user in the following format: group name([security filter definition])

Example: group A (SF: OrgID=, Division=3, District=, Store=1; SR: Administrator;)

The Security Role to be assigned must match the security role that exists in XBR^{i}. The order of parameters defined is important.

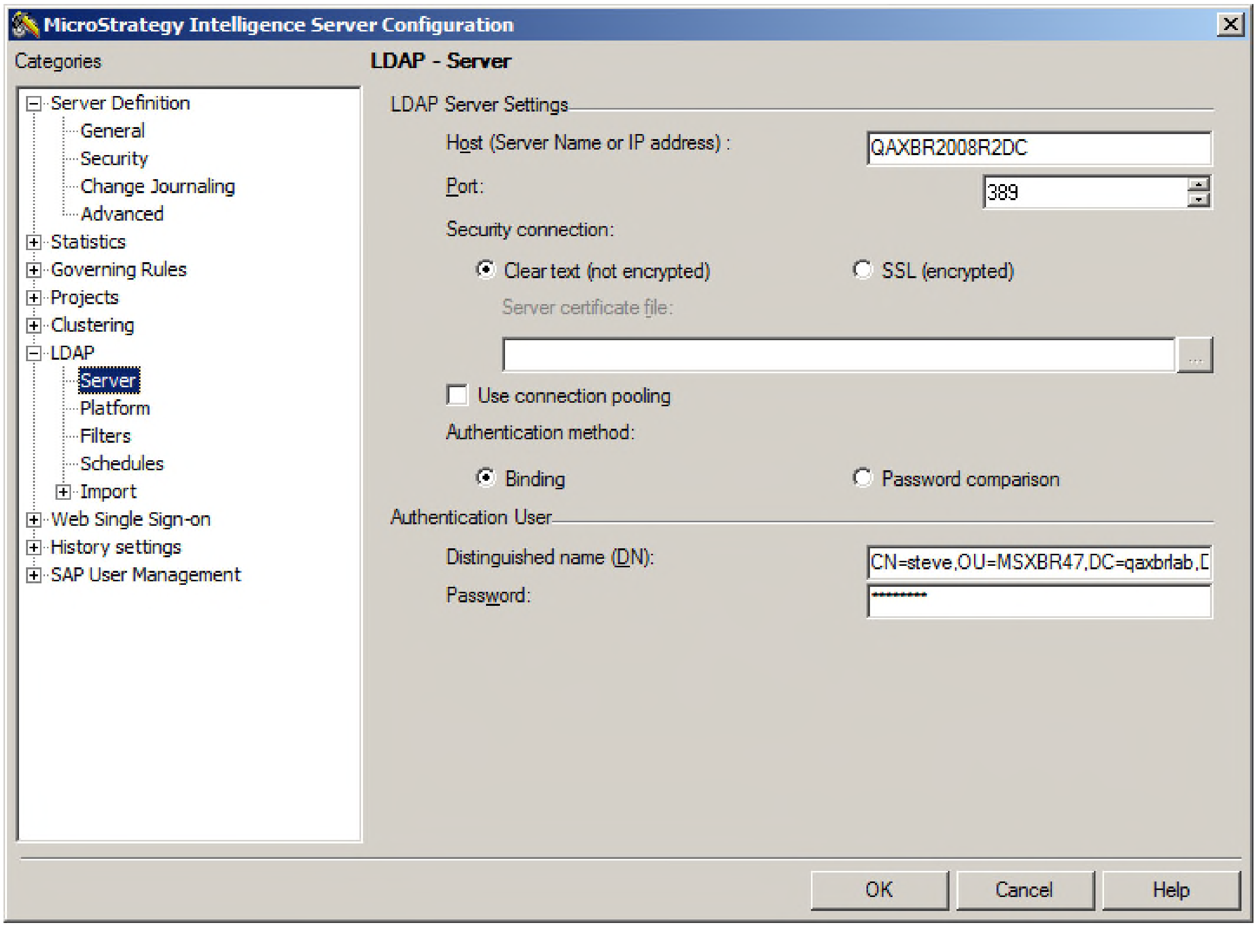
Configuring the LDAP Server

To configure the LDAP Server:

1. Log into MicroStrategy Desktop.
2. Right Click on the Project Source folder and select Intelligence Server Configuration from the context menu.
3. Navigate to the **LDAP > Server** page.
4. Enter the following LDAP Server Information:

Host = LDAP or Active Directory Server Name

Authentication User: This user should have administrator privileges to LDAP or Active Directory repository and the DN name should be given in DN format.



MicroStrategy Intelligence Server Configuration

LDAP - Server

LDAP Server Settings

Host (Server Name or IP address) : QAXBR2008R2DC

Port: 389

Security connection:

● Clear text (not encrypted) ○ SSL (encrypted)

Server certificate file:

□ Use connection pooling

Authentication method:

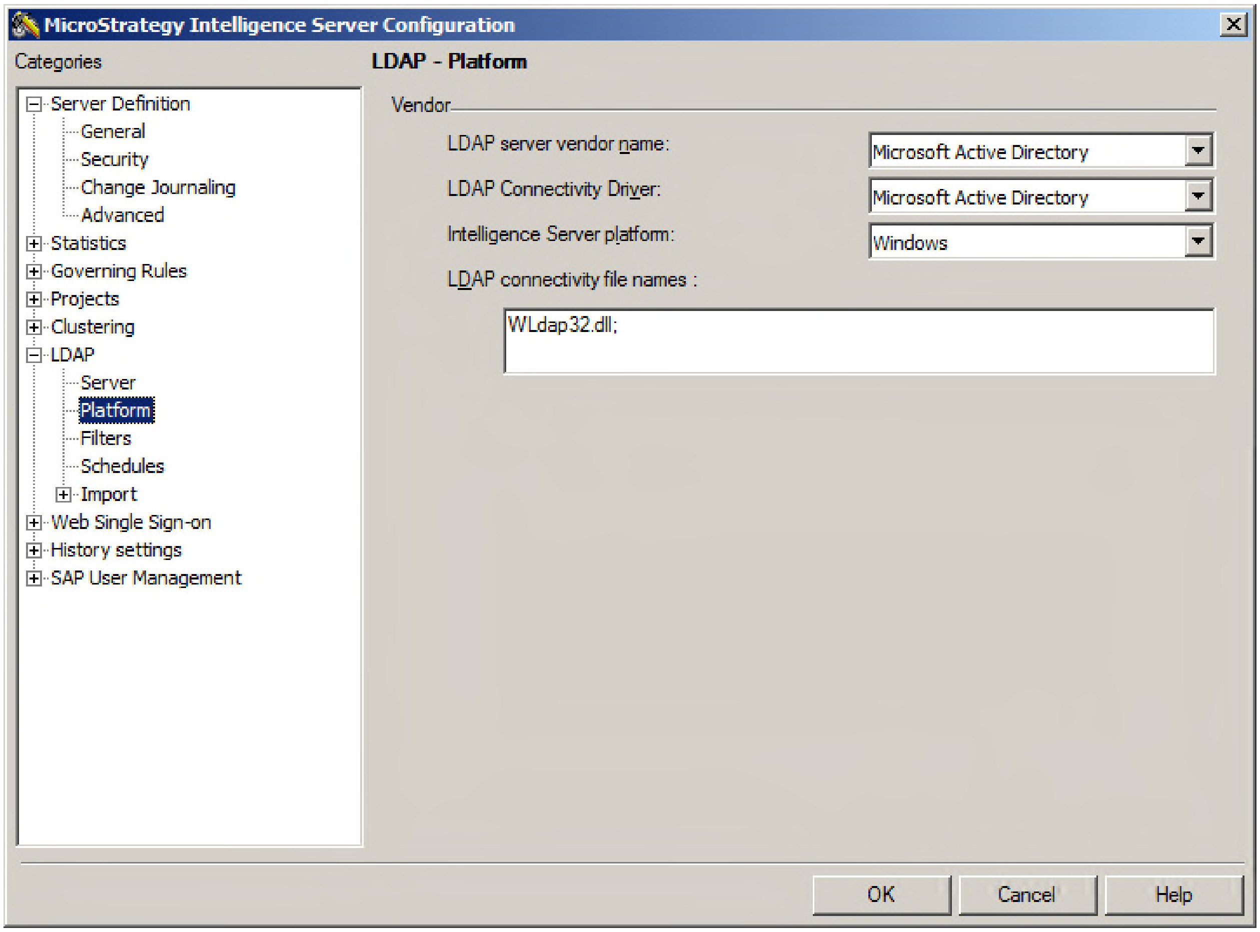
● Binding ○ Password comparison

Authentication User

Distinguished name (DN): CN=steve,OU=MSXBR47,DC=qaxbrlab,D

Password: ********

5. Navigate to the **LDAP > Platform** page.
6. Select options as shown in the following screen capture:



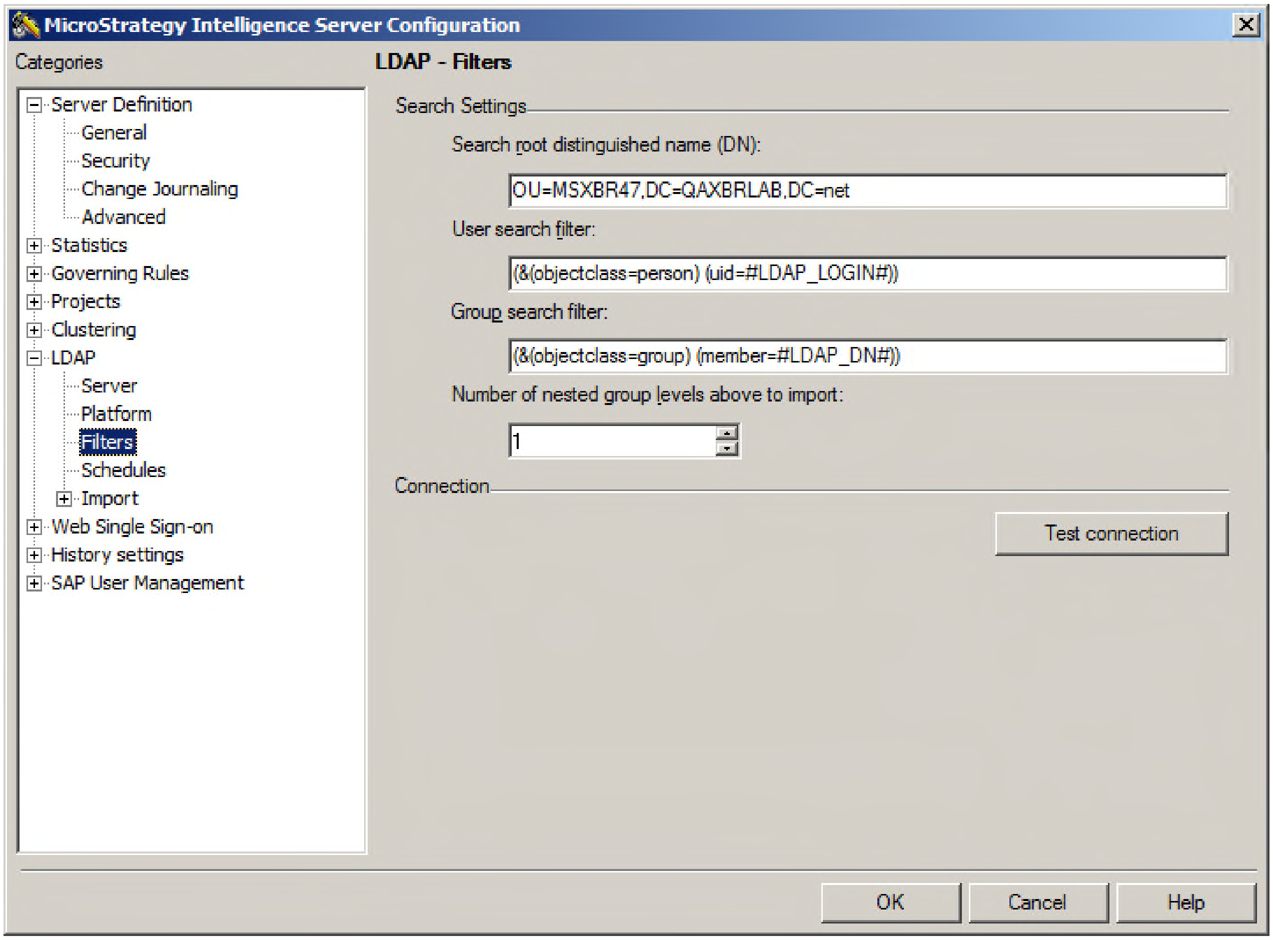
LDAP server vendor name: Microsoft Active Directory

LDAP Connectivity Driver: Microsoft Active Directory

Intelligence Server platform: Windows

LDAP connectivity file names : WLdap32.dll;

7. Navigate to the **LDAP > Filters** page.



LDAP - Filters

Search Settings

Search root distinguished name (DN): OU=MSXBR47,DC=QAXBRLAB,DC=net

User search filter: (&(objectclass=person) (uid=#LDAP_LOGIN#))

Group search filter: (&(objectclass=group) (member=#LDAP_DN#))

Number of nested group levels above to import: 1

Connection

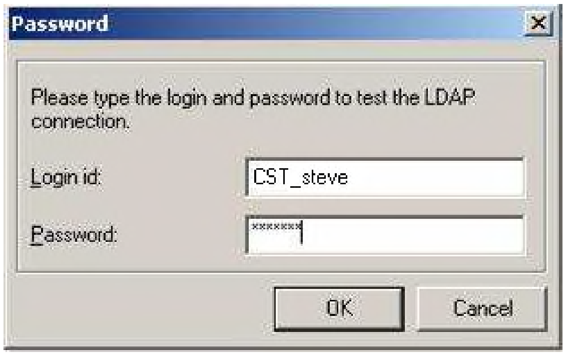
8. Enter the following information:

   Search root distinguished name (DN): Enter the details of the folder where XBR^i users reside in the LDAP repository.

   User Search Filter: Defaults as shown.

   Group Search Filter: Currently we do not import User groups. This field can be left blank or filled as in the screen shot above.

   Test Connection – Click to test the connection after configuring the fields above. Login with the value of the user's LDAP_LOGIN attribute specified in the user search filter above and the user's LDAP password. See prompt, below:



Password

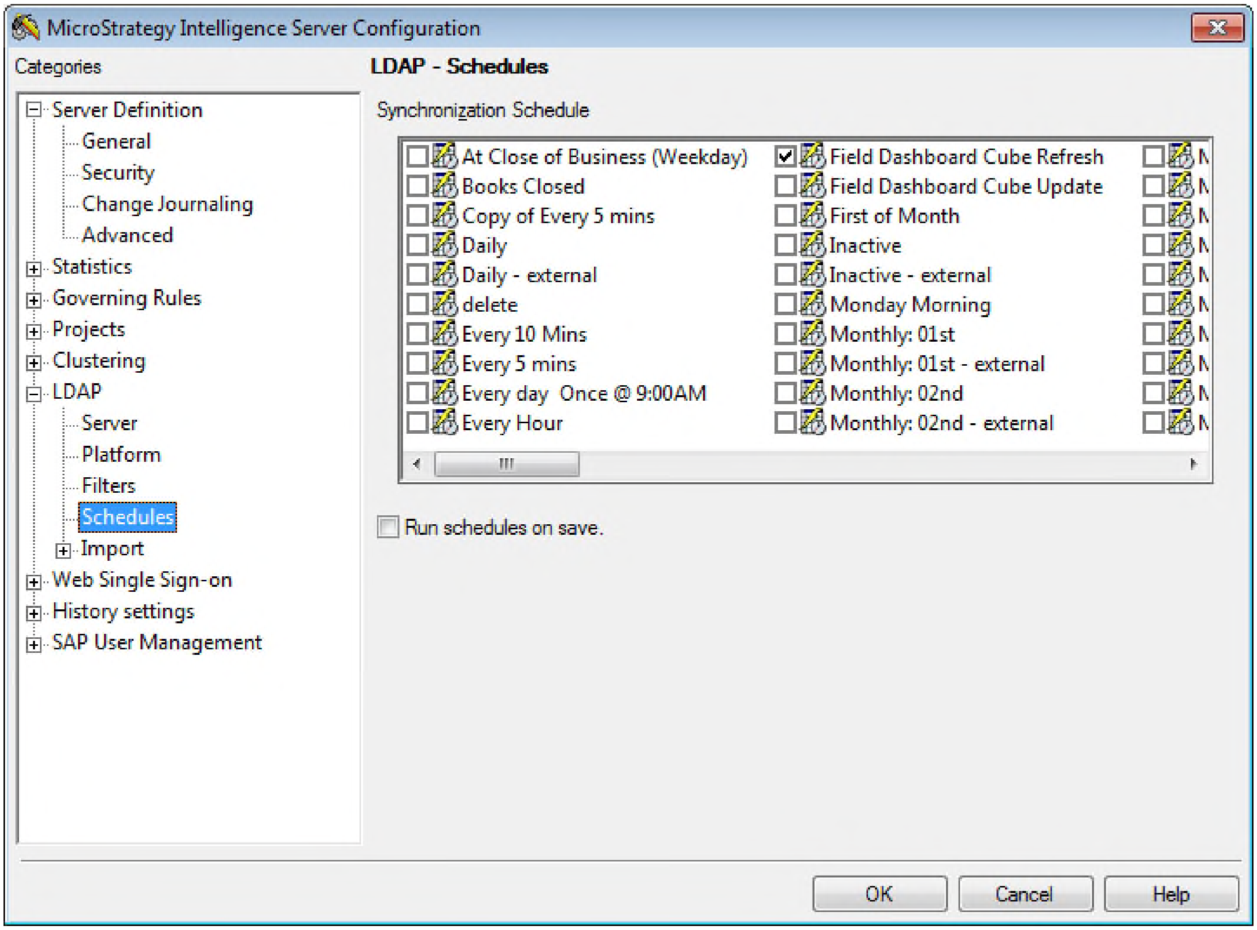
Please type the login and password to test the LDAP connection.

Login id: CST_steve

Password: *******

9. **Navigate to the LDAP > Schedules** page and select a schedule for the batch import process.

Users will migrate to "LDAP Users" group in XBR^i.



MicroStrategy Intelligence Server Configuration

Categories

- Server Definition
  - General
  - Security
  - Change Journaling
  - Advanced
- Statistics
- Governing Rules
- Projects
- Clustering
- LDAP
  - Server
  - Platform
  - Filters
  - Schedules
  - Import
- Web Single Sign-on
- History settings
- SAP User Management

LDAP - Schedules

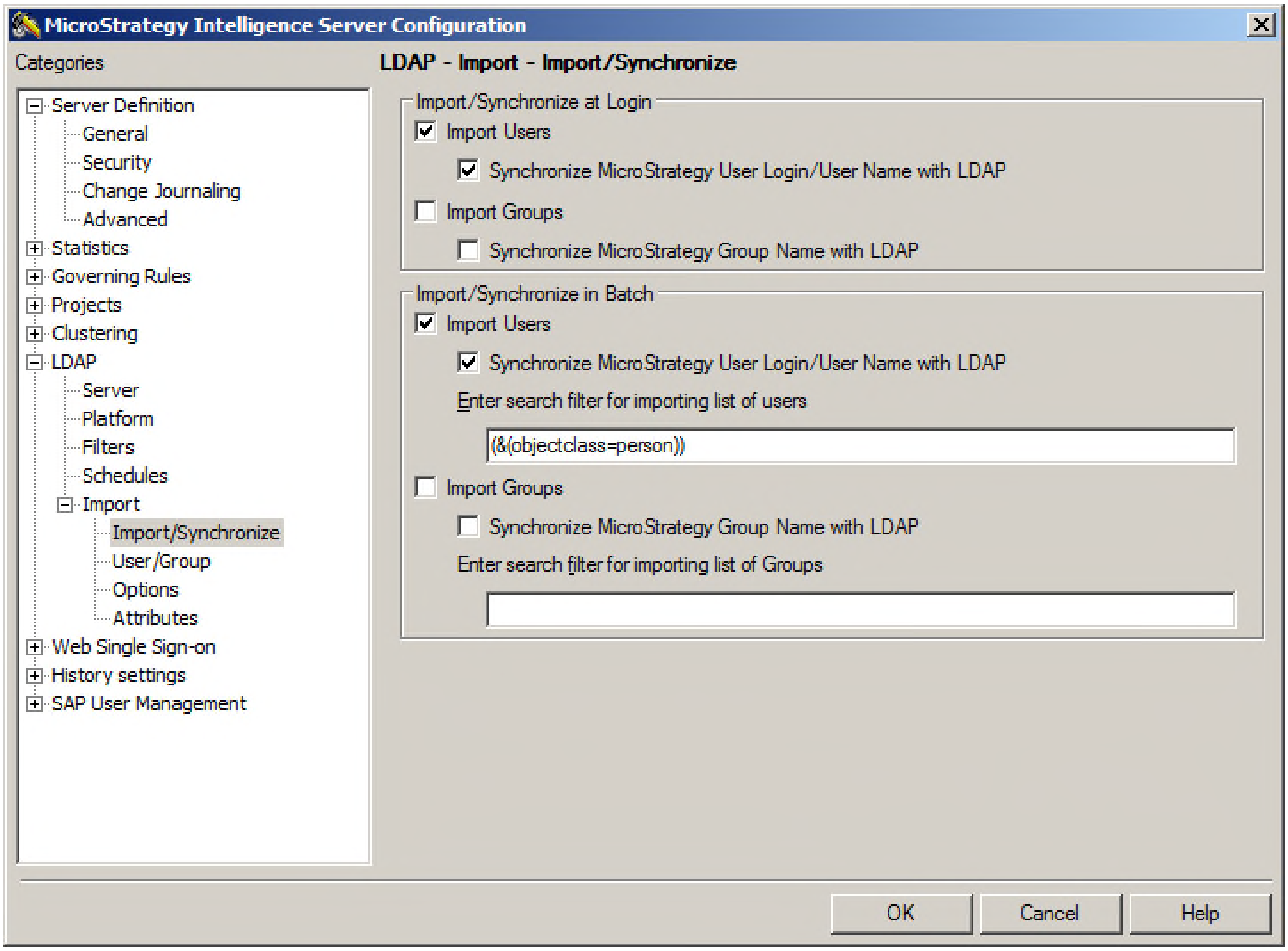
Synchronization Schedule

□ At Close of Business (Weekday)
□ Books Closed
□ Copy of Every 5 mins
□ Daily
□ Daily - external
□ delete
□ Every 10 Mins
□ Every 5 mins
□ Every day Once @ 9:00AM
□ Every Hour
☑ Field Dashboard Cube Refresh
□ Field Dashboard Cube Update
□ First of Month
□ Inactive
□ Inactive - external
□ Monday Morning
□ Monthly: 01st
□ Monthly: 01st - external
□ Monthly: 02nd
□ Monthly: 02nd - external
□ N
□ N
□ N
□ N
□ N
□ N
□ N
□ N
□ N
□ N

□ Run schedules on save.

10. Navigate to the **LDAP > Import > Import /Synchronize** page.

    Select options as shown in the following screen.



MicroStrategy Intelligence Server Configuration

LDAP - Import - Import/Synchronize

Import/Synchronize at Login

☑ Import Users

☑ Synchronize MicroStrategy User Login/User Name with LDAP

☐ Import Groups

☐ Synchronize MicroStrategy Group Name with LDAP

Import/Synchronize in Batch

☑ Import Users

☑ Synchronize MicroStrategy User Login/User Name with LDAP

Enter search filter for importing list of users

(&(objectclass=person))

☐ Import Groups

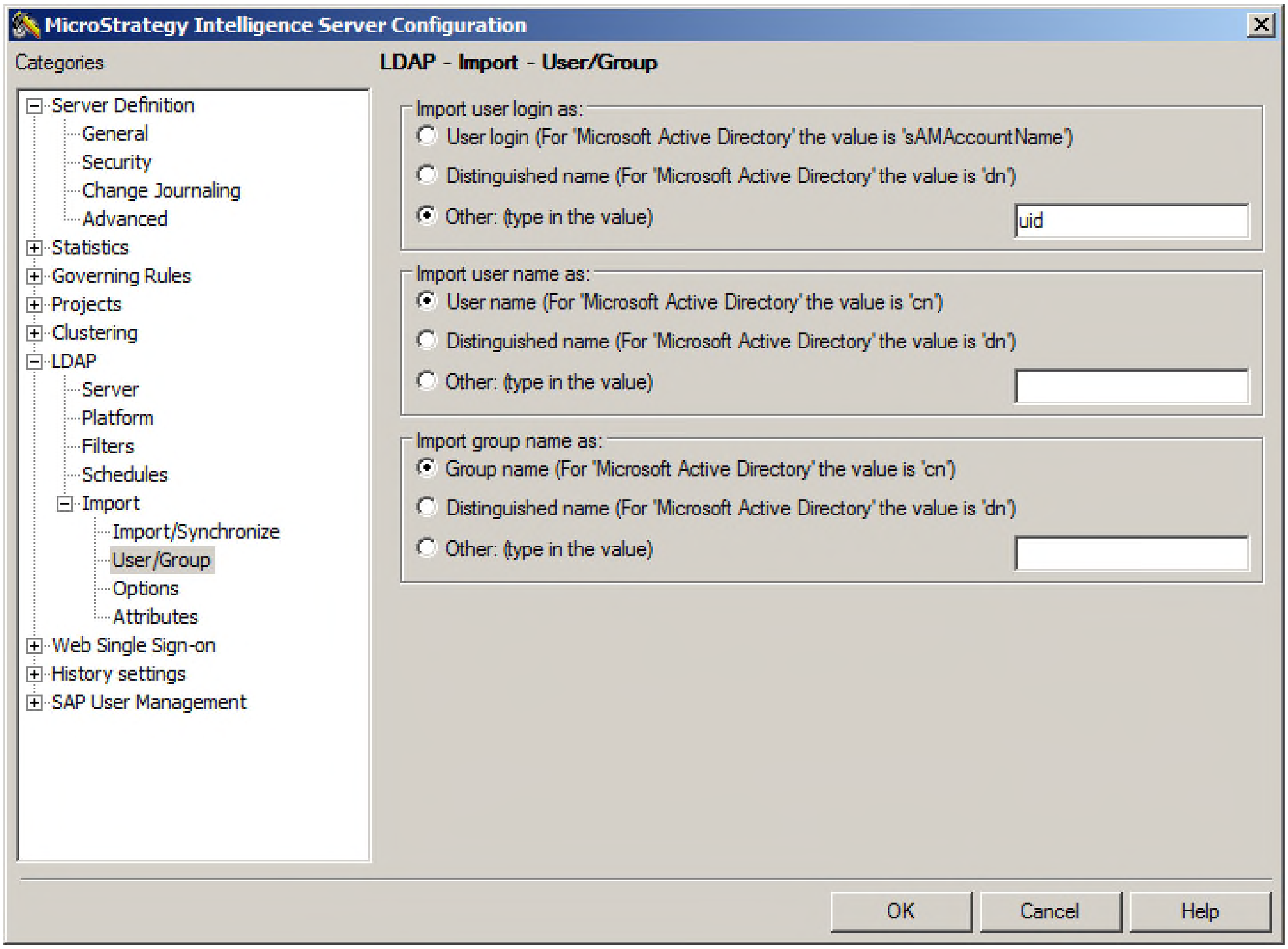
☐ Synchronize MicroStrategy Group Name with LDAP

Enter search filter for importing list of Groups

11. Navigate to the **LDAP > Import > User/Group** page.

    Import user Login as – Select the **Other: type in value** radio button and enter the LDAP user attribute configured when you created XBR^i users.

    The remaining options on this screen should be left as defaulted.



LDAP - Import - User/Group

Import user login as:
○ User login (For 'Microsoft Active Directory' the value is 'sAMAccountName')
○ Distinguished name (For 'Microsoft Active Directory' the value is 'dn')
● Other: (type in the value) uid

Import user name as:
● User name (For 'Microsoft Active Directory' the value is 'cn')
○ Distinguished name (For 'Microsoft Active Directory' the value is 'dn')
○ Other: (type in the value)

Import group name as:
● Group name (For 'Microsoft Active Directory' the value is 'cn')
○ Distinguished name (For 'Microsoft Active Directory' the value is 'dn')
○ Other: (type in the value)

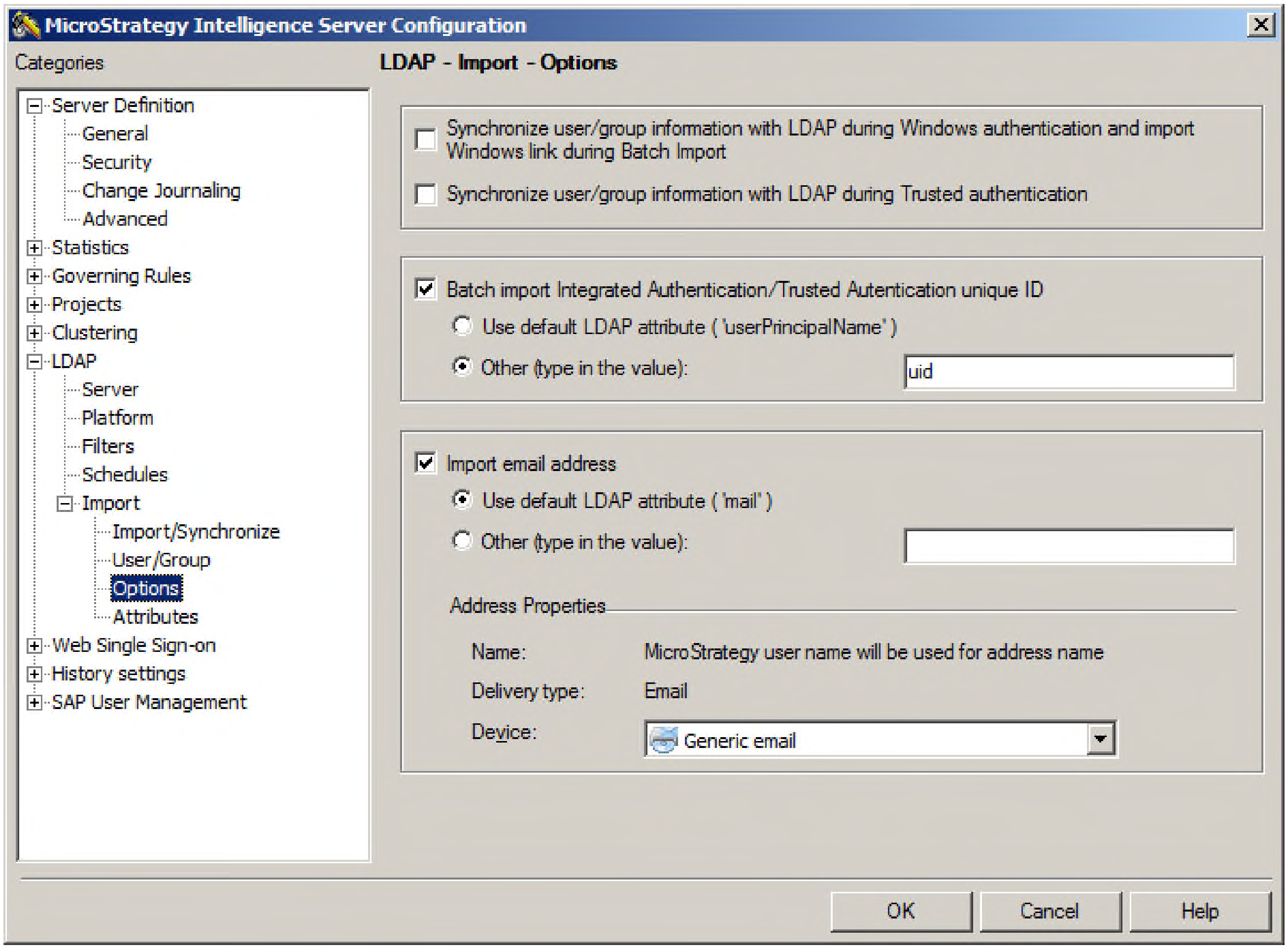
12. Navigate to the **LDAP > Import > Options** page.

    Select the **Batch import Integrated Authentication/Trusted Authentication unique ID** check box.

    Select the **Other: type in value** radio button and enter the LDAP user attribute configured when you created XBR^{i} users.

    Select the **Import email address** check box and the **Use default LDAP attribute (‘mail’)** radio button.

    Under Address properties select Device “Generic Email” from the drop down.



LDAP - Import - Options

☐ Synchronize user/group information with LDAP during Windows authentication and import Windows link during Batch Import

☐ Synchronize user/group information with LDAP during Trusted authentication

☑ Batch import Integrated Authentication/Trusted Autentication unique ID

○ Use default LDAP attribute ('userPrincipalName')

● Other (type in the value): uid

☑ Import email address

● Use default LDAP attribute ('mail')

○ Other (type in the value):

Address Properties

Name: MicroStrategy user name will be used for address name

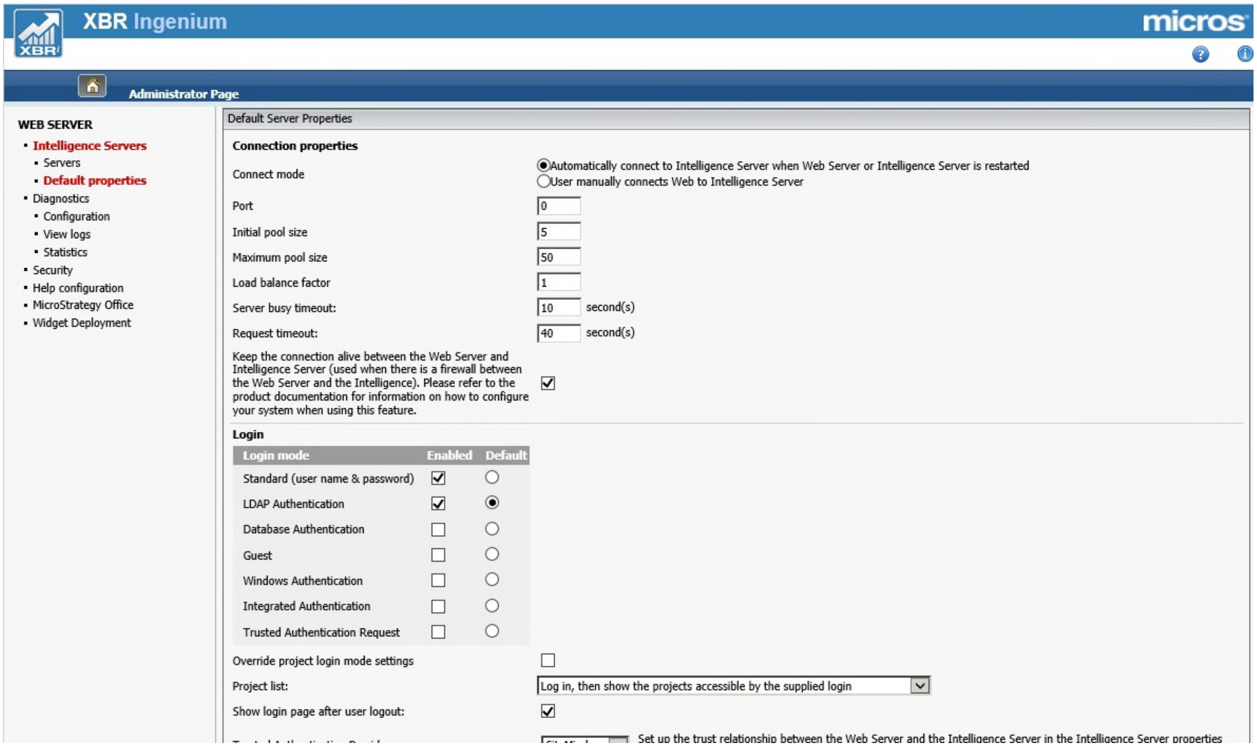
Delivery type: Email

Device: Generic email

Click **OK** to save changes.

Enable LDAP Authentication in the Web Administration Utility

1. Log into the Web Adminsitration Utility (http://WEBSERVERNAME/analytics/servlet/mstrWebAdmin) with the webadmin user and password (same login used for creating trusted authentication).
2. Click on Default Properties. In the login mode table select LDAP Authentication as shown. Optionally, Standard Authentication, may be removed. It is recommended to leave Standard enabled until installation is complete.



Default Server Properties

Connection properties

Connect mode: ● Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted ○ User manually connects Web to Intelligence Server

Port: 0

Initial pool size: 5

Maximum pool size: 50

Load balance factor: 1

Server busy timeout: 10 second(s)

Request timeout: 40 second(s)

Keep the connection alive between the Web Server and Intelligence Server (used when there is a firewall between the Web Server and the Intelligence). Please refer to the product documentation for information on how to configure your system when using this feature. ☑

Login

Login mode	Enabled	Default
Standard (user name & password)	☑	○
LDAP Authentication	☑	●
Database Authentication	□	○
Guest	□	○
Windows Authentication	□	○
Integrated Authentication	□	○
Trusted Authentication Request	□	○

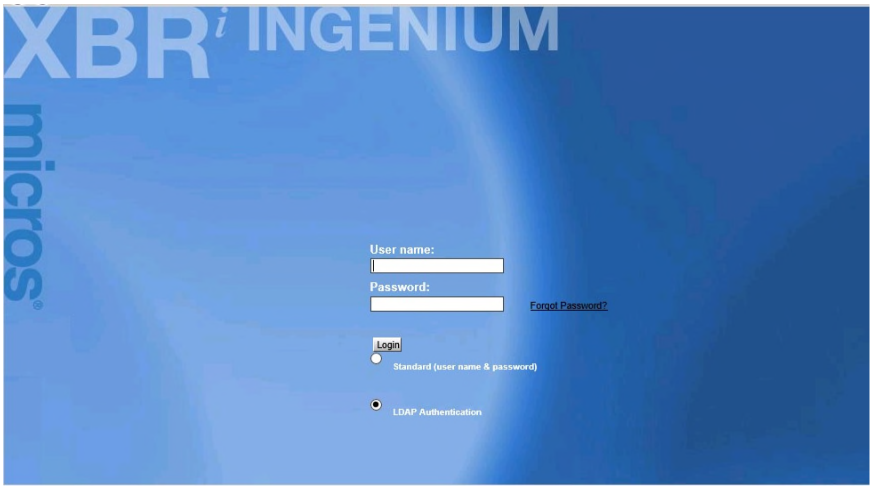
Override project login mode settings □

Project list: Log in, then show the projects accessible by the supplied login

Show login page after user logout: ☑

Set up the trust relationship between the Web Server and the Intelligence Server in the Intelligence Server properties

3. Save settings and click the MicroStrategy Home icon. The login screen will appear with the LDAP Authentication radio button displayed as shown below.



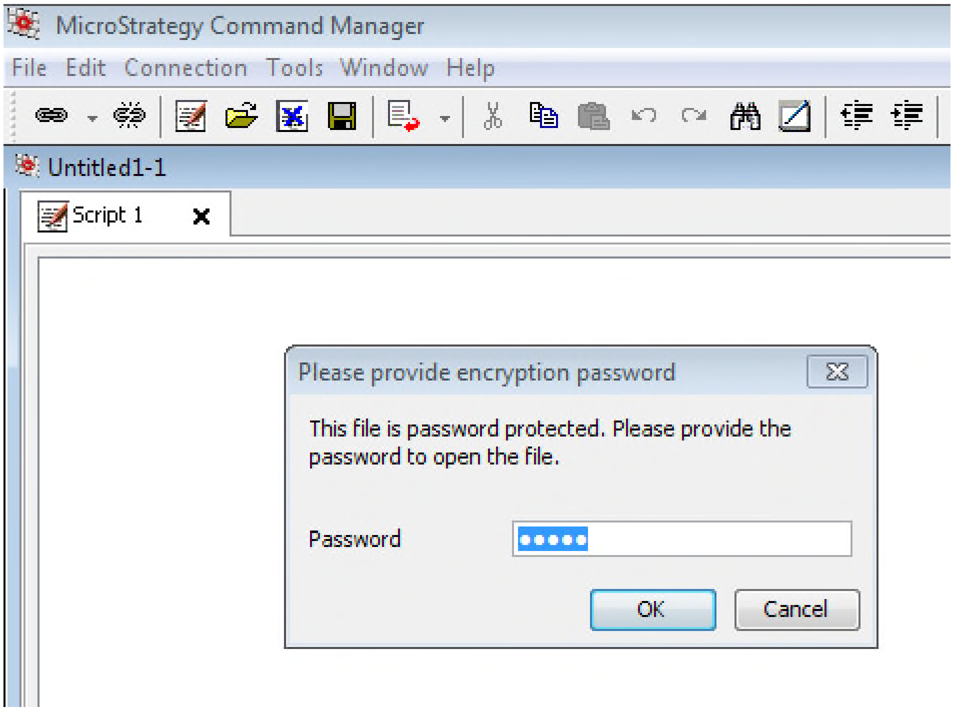
○ Standard (user name & password)

● LDAP Authentication

Creating and Scheduling the Batch Process

After creating users and configuring the LDAP server, you must schedule and run the batch process to import the users from the LDAP server. Make sure you have the password to open the batch script.

1. Locate the LDAP folder.
2. Copy the LDAP folder to the Web Server.
3. Edit LDAP.scp script using Command Manager (Password required)


MicroStrategy Command Manager
File Edit Connection Tools Window Help
Untitled1-1
Script 1
Please provide encryption password

This file is password protected. Please provide the password to open the file.

Password ●●●●●

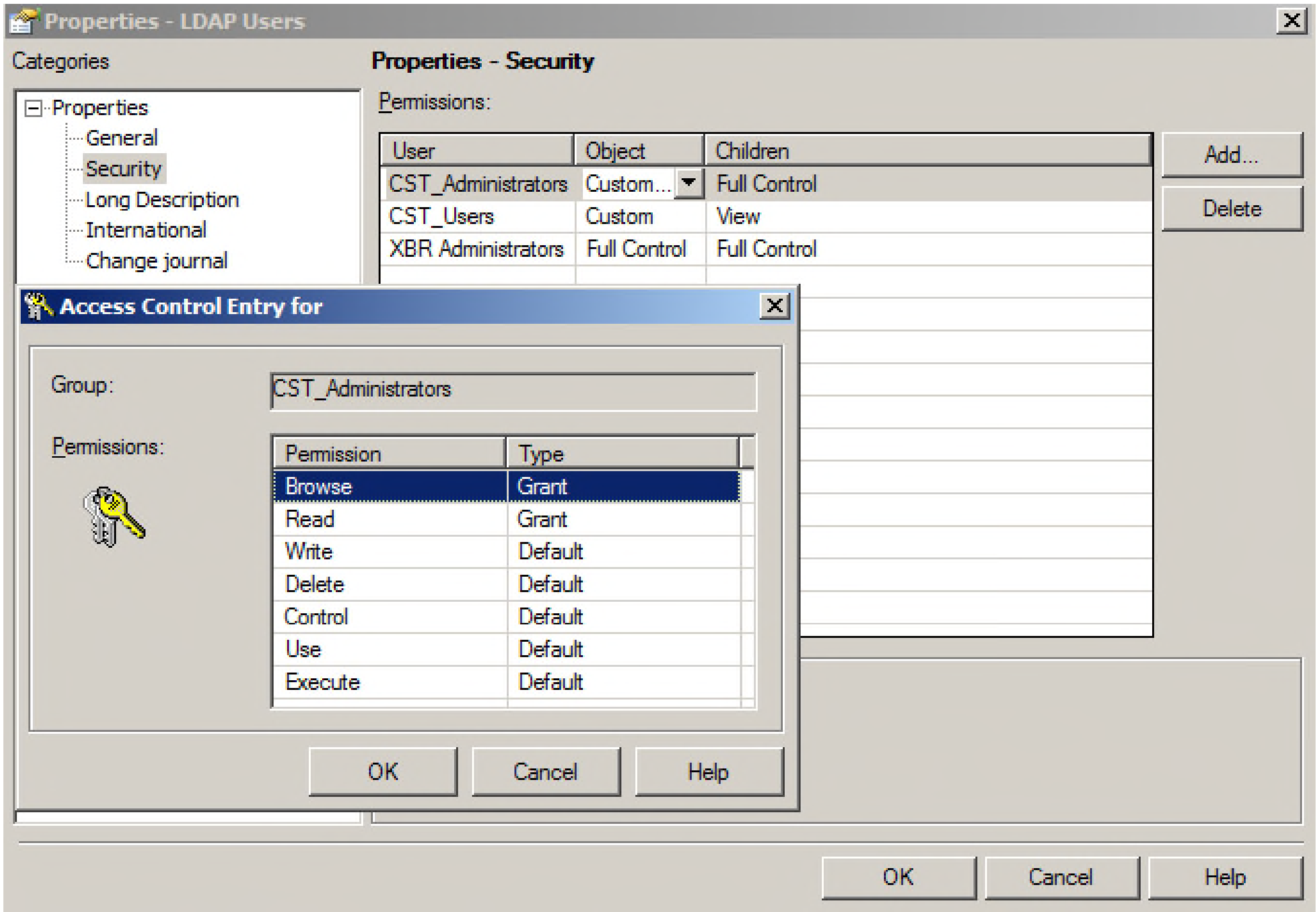
4. Modify the Project Name, user credentials & 3 letter company code in the script.
5. Save the script.
6. Edit LDAP.bat and modify the location of LDAP.scp & Logfile path.
7. Create a Windows Task Schedule to execute the LDAP.bat. **Note**: Execute the script after the execution on the LDAP-Schedule for importing users from the LDAP user group to the XBR^i Everybody group.

Configure Imported Users

Once the Scheduler executes the batch process (i.e., runs the command manager script), users will become available in the Everybody Group in XBR^{i}. The Customer Administrator can login to the application and configure imported users for XBR^{i} (assign appropriate user roles, security filters etc.)

Add ACL (Access Control Entry) on LDAP Users as in the following screenshots

CST_Administrator
CST_Users
XBR Administrators



Properties - Security

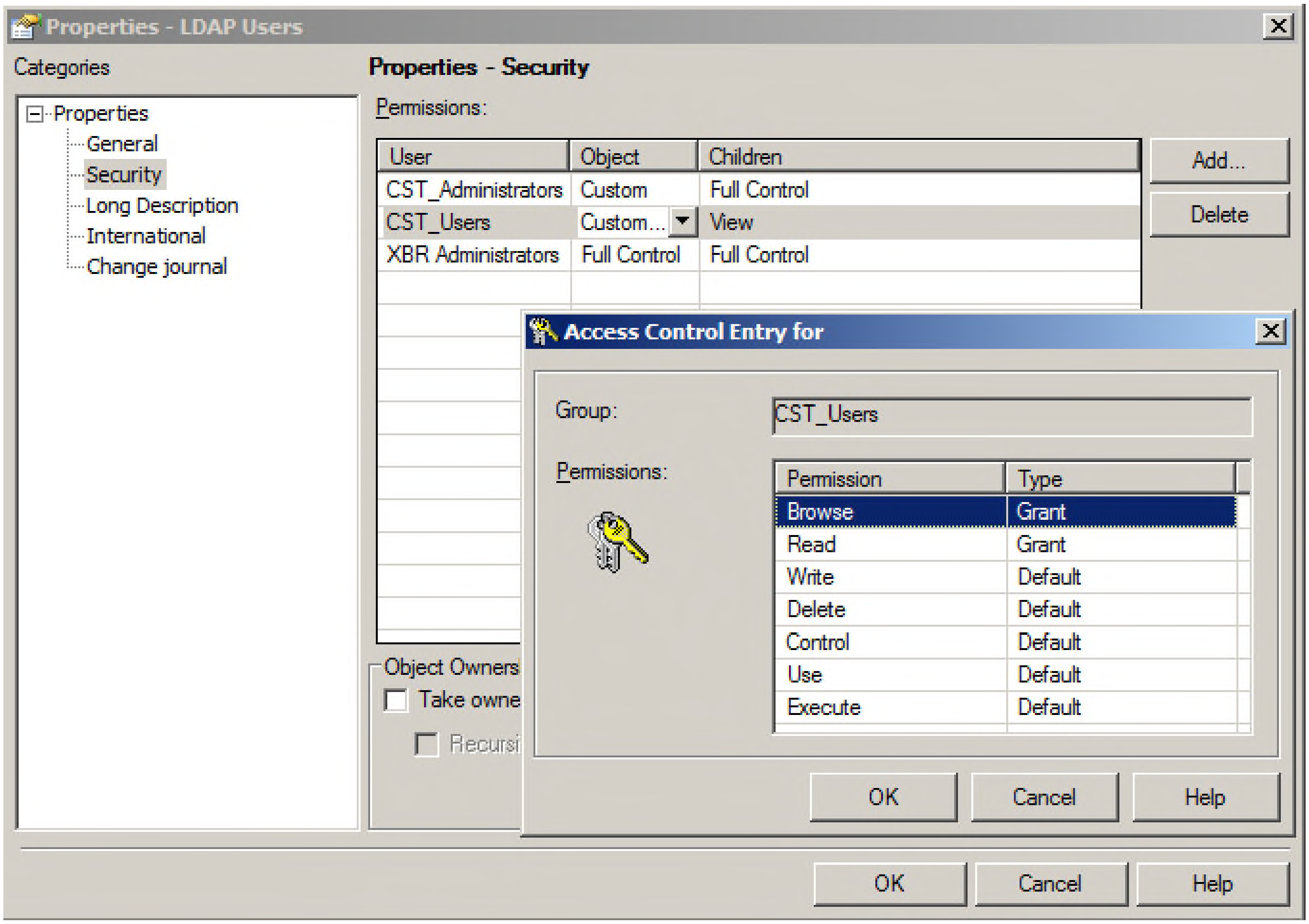
Permissions:

User	Object	Children
CST_Administrators	Custom...	Full Control
CST_Users	Custom	View
XBR Administrators	Full Control	Full Control

Group: CST_Administrators

Permissions:

Permission	Type
Browse	Grant
Read	Grant
Write	Default
Delete	Default
Control	Default
Use	Default
Execute	Default



Properties - Security

Permissions:

User	Object	Children
CST_Administrators	Custom	Full Control
CST_Users	Custom...	View
XBR Administrators	Full Control	Full Control

Access Control Entry for

Group: CST_Users

Permissions:

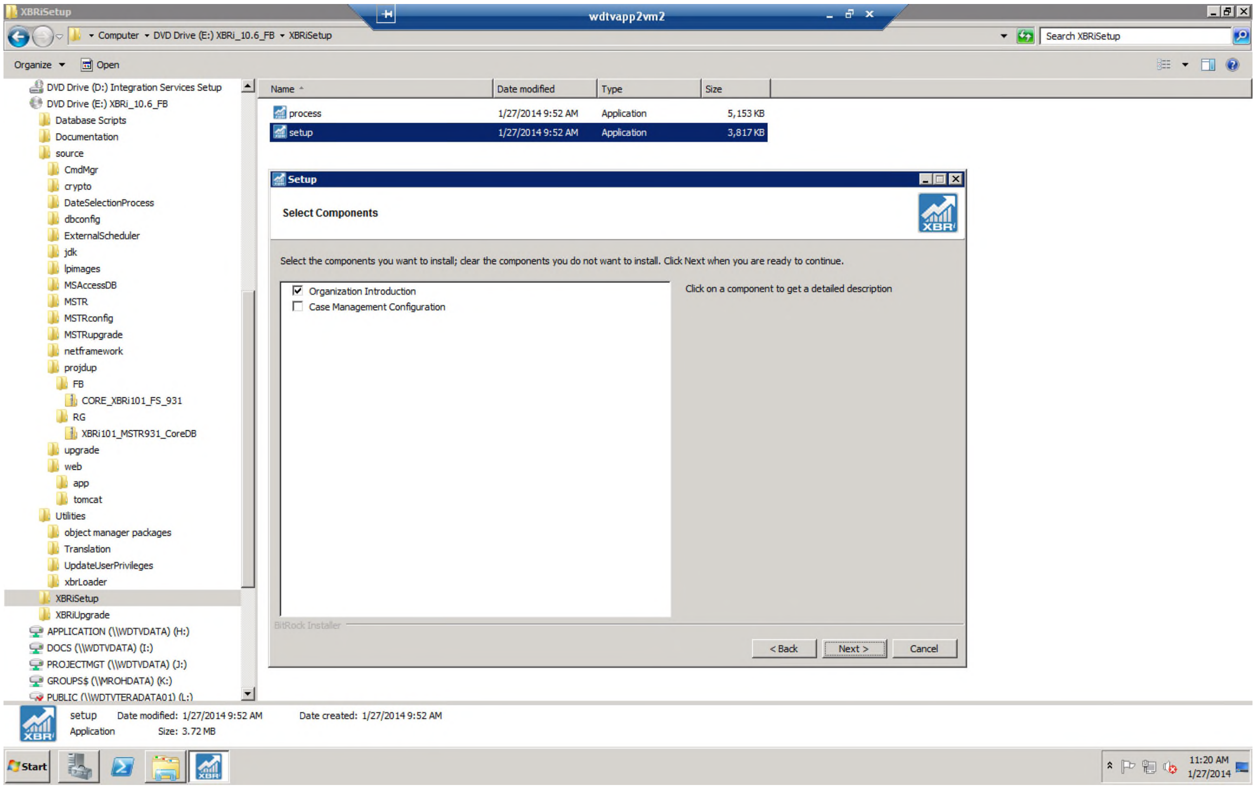
Permission	Type
Browse	Grant
Read	Grant
Write	Default
Delete	Default
Control	Default
Use	Default
Execute	Default

Organization Introduction (New F&B Installations Only)

For Food & Beverage installations, the initial installation introduces the first organization into the environment, so up to that point the installations for Retail & Grocery and Food & Beverage are basically identical except for the core Access database being duplicated and the initial configuration package.

Since XBR^{i} 10.8 Food & Beverage sits on top of the mymicros database, which is a multi-tenant database with multiple organizations separated by OrganizationID, you must run the Organization Introduction module from the installation ISO/DVD for each new organization to be added into XBR^{i}.

Run Setup.exe from the installation folder, and select **Organization Introduction** from the drop-down list.



Name	Date modified	Type	Size
process	1/27/2014 9:52 AM	Application	5,153 KB
setup	1/27/2014 9:52 AM	Application	3,817 KB

Setup

Select Components

Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.

☑ Organization Introduction
□ Case Management Configuration

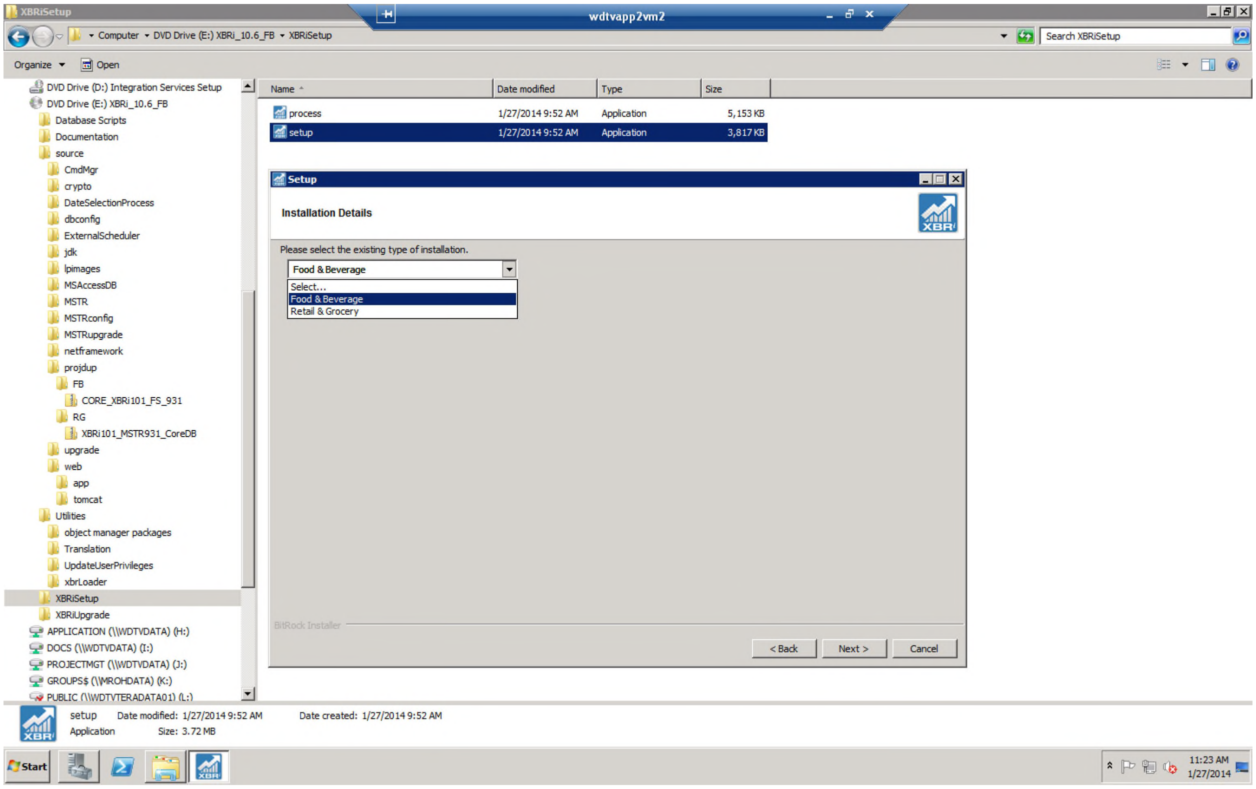
Click on a component to get a detailed description

BitRock Installer

< Back | Next > | Cancel

setup Date modified: 1/27/2014 9:52 AM Date created: 1/27/2014 9:52 AM
Application Size: 3.72 MB

Select the type of installation:, **Food & Beverage** or **Retail & Grocery** from the drop down list:



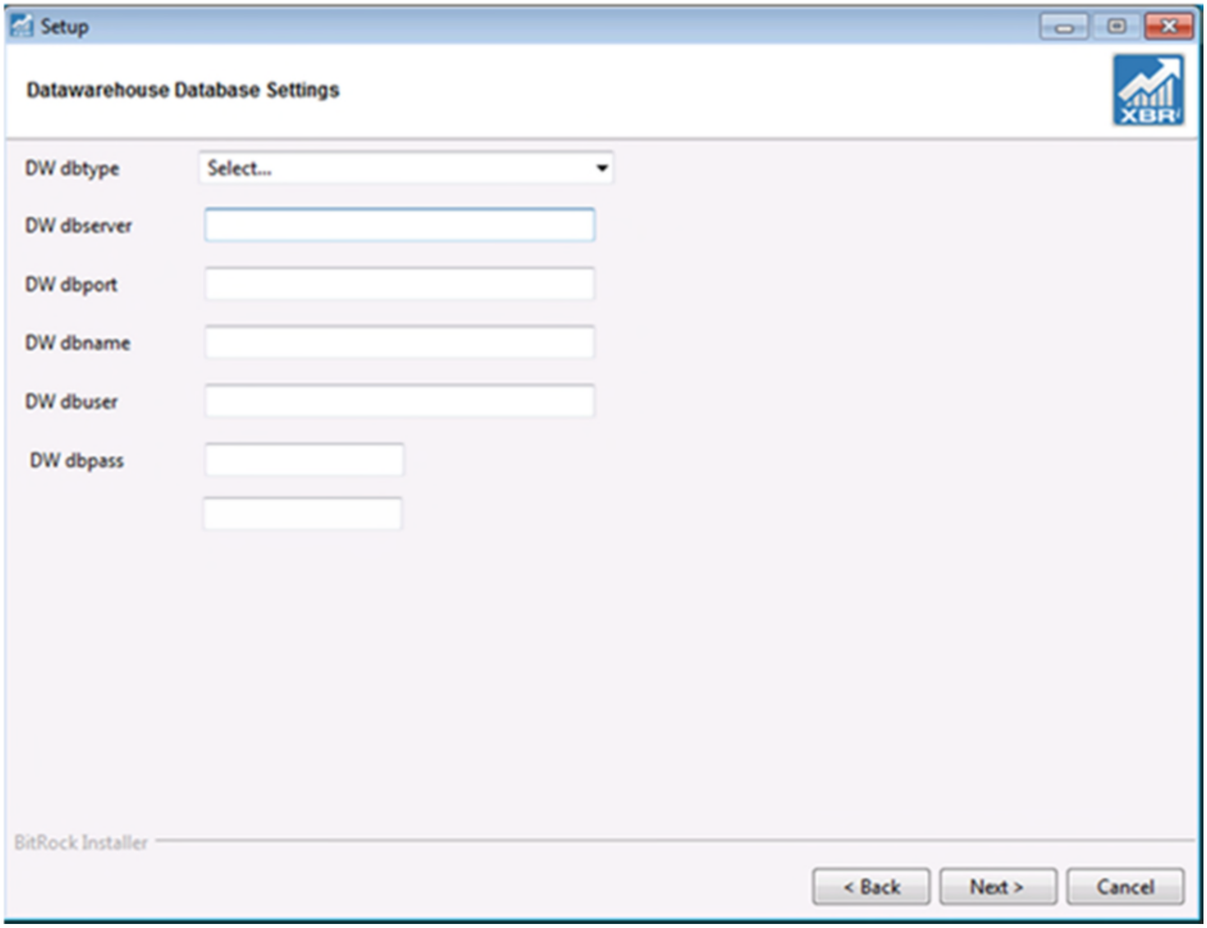
Setup

Installation Details

Please select the existing type of installation.

Food & Beverage

- Select...
- Food & Beverage
- Retail & Grocery



Enter the settings for the Datawarehouse Database. The Database Administrator at the customer site can provide these values:

DW dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

DW dbserver – Enter the data warehouse database server name.

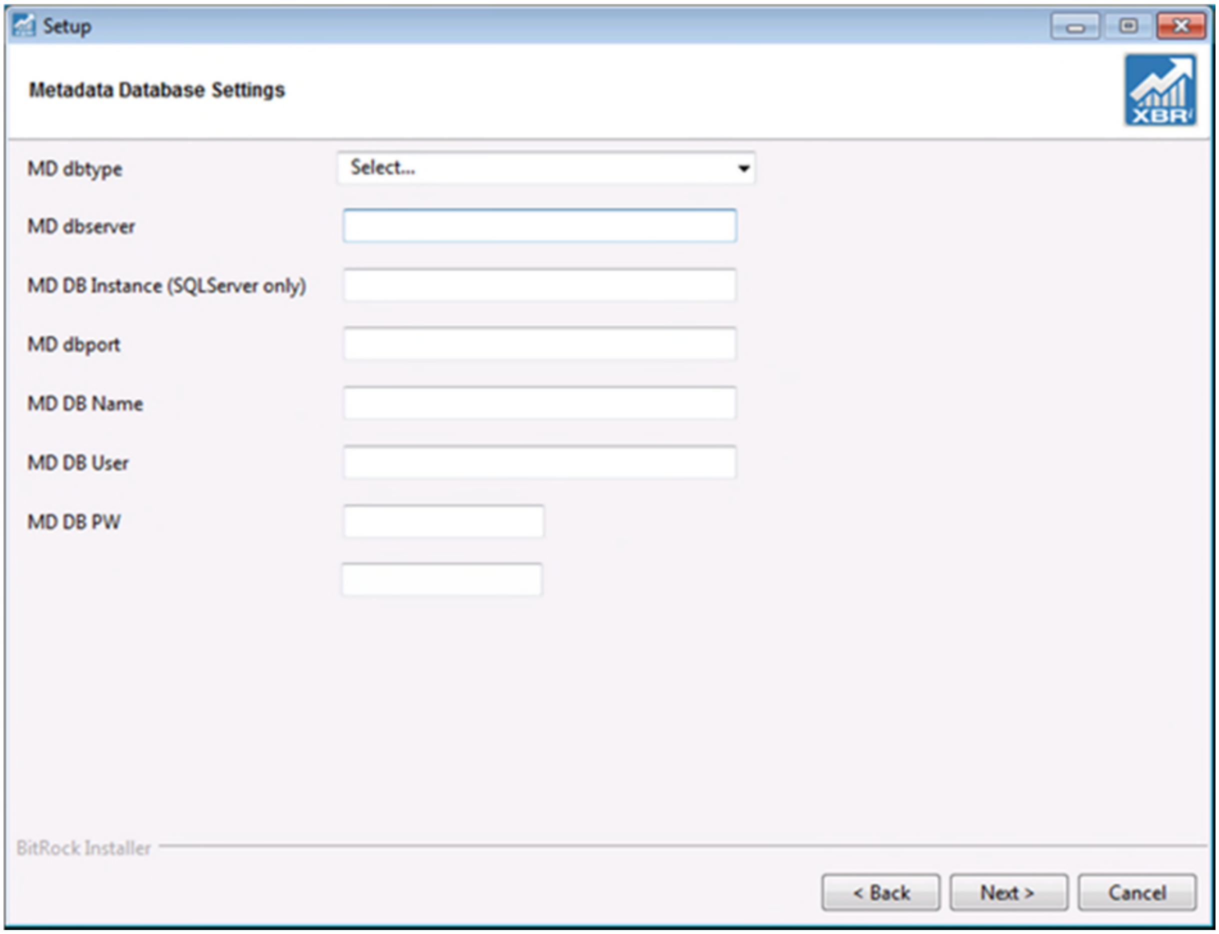
DW dbport – Enter the data warehouse database port number.

DW dbname – Enter the data warehouse database name.

DW dbuser – Enter the datawarehouse database user name.

DW dbpass - Enter the db password in both boxes. This will be encrypted and saved during XBR^i configuration.

When you are done, click **Next**.



Setup

Metadata Database Settings

MD dbtype: Select...

MD dbserver

MD DB Instance (SQLServer only)

MD dbport

MD DB Name

MD DB User

MD DB PW

BitRock Installer

Enter the settings for the Metadata Database. The Database Administrator at the customer site can provide these values:

MD dbtype – Select the type of database server from the drop-down list, Oracle or SQL.

MD dbserver – Enter the metadata database server name.

If MSSQL DW DB Instance – Enter the database instance if the database server is SQL.

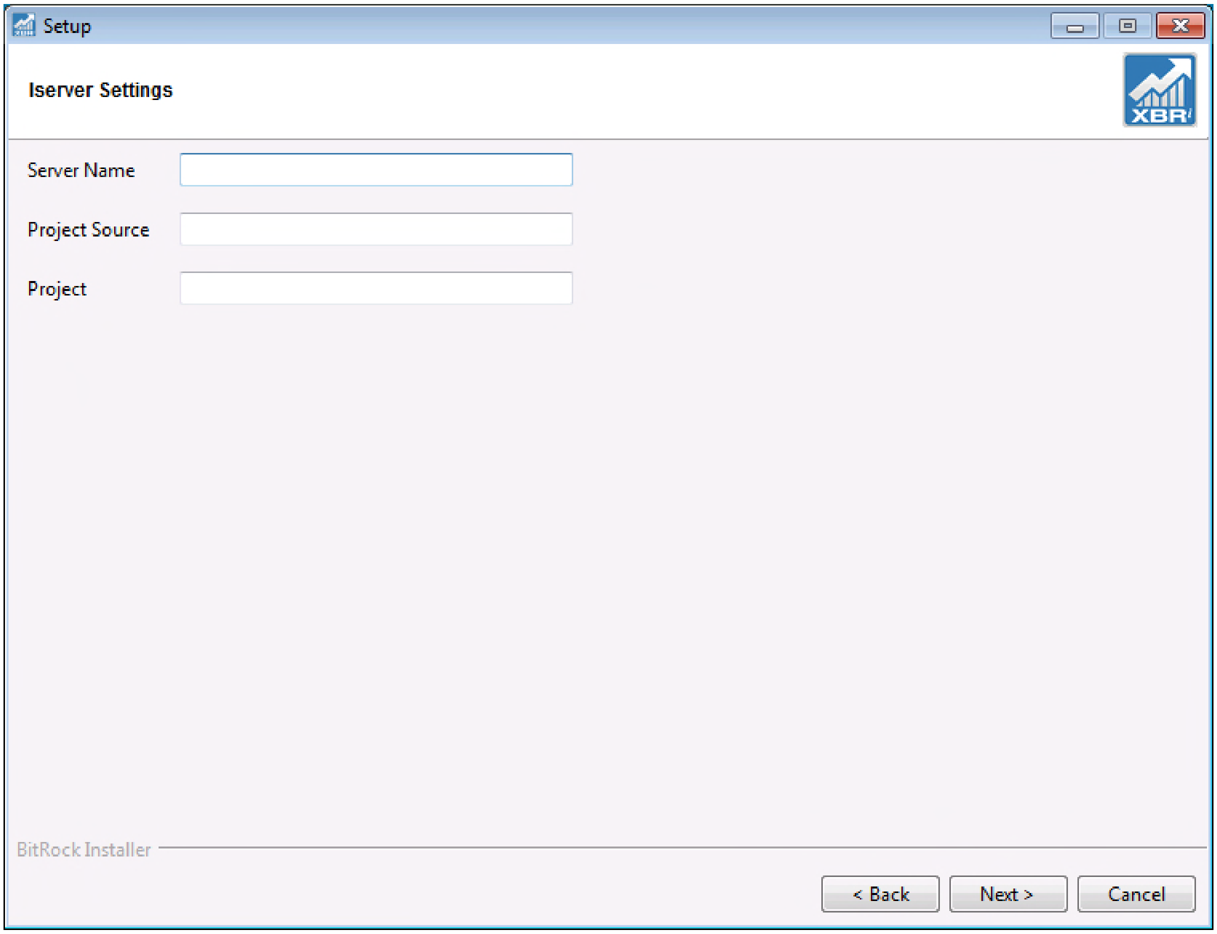
MD dbport – Enter the metadata database port number.

MD dbname – Enter the metadata database name.

MD DB user – This displays the registered user name that was previously entered.

MD DB PW - This displays the password that was previously entered. This will be used when the metadata tables are created.

When you are done, click **Next**.



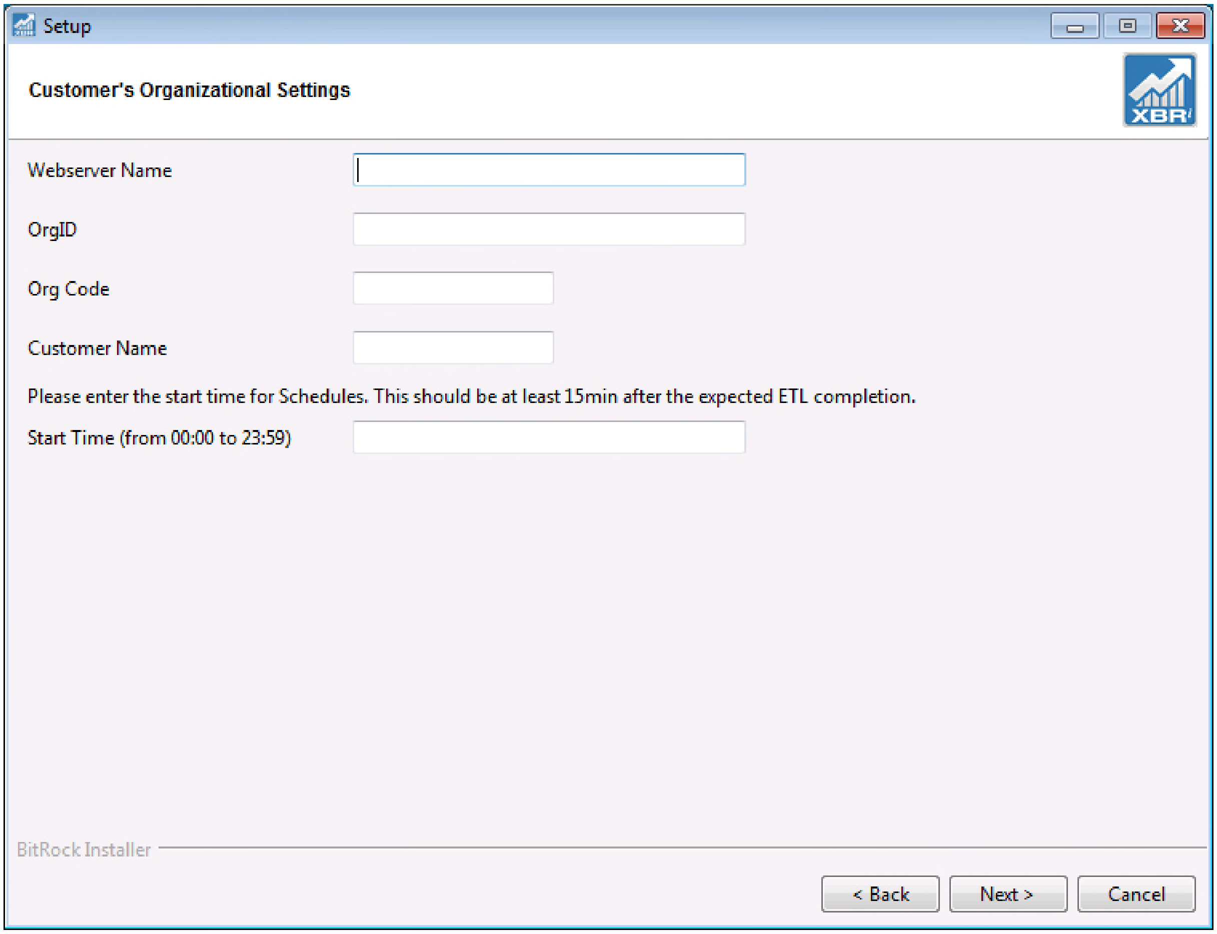
Enter the settings for the I-server.

Server Name – Enter the I-Server name. This is the same name specified in the I-Server installation.

Project Source – Enter the name for the XBR^i project source.

Project - Enter the name for the XBR^i project.

When you are done, click **Next**.



Customer's Organizational Settings

Webserver Name

OrgID

Org Code

Customer Name

Please enter the start time for Schedules. This should be at least 15min after the expected ETL completion.

Start Time (from 00:00 to 23:59)

Enter the customer's Organizational Settings:

Webserver Name – Enter the Web Server name. This is the name of the server where you are currently doing the install.

OrgID – The customer number.

Org Code – The code assigned to the customer by Oracle.

Customer Name – The name of the customer organization.

Start Time – Enter the start time for schedules in the format: 00:00 – 23:59. This should be at least 15 minutes after the expected ETL completion. If the hour is less than 10, you must include a leading zero (09:00).

When you are done, click **Next**.

The installation will now duplicate the project, run the companyCode scripts and execute the org intro and cloning stored procedures.

After this is finished, restart Tomcat.

Each time the organization introduction process is run, a new Project is duplicated from core, therefore all the same Project Configuration steps (after Duplication) must be performed against each new organization's project. In addition to the project configuration, you must also again remove the Everyone group from the Normal Users security role for the new organization's project.

Remove Everyone Group from Normal Users security role (if exists)

1. Navigate to Administration\Configuration managers\Security Roles.
2. Right-click Normal Users security role and select **Edit.**
3. Select new organization's project from dropdown.
4. Remove member group Everyone from right panel and click ok.

To configure the project:

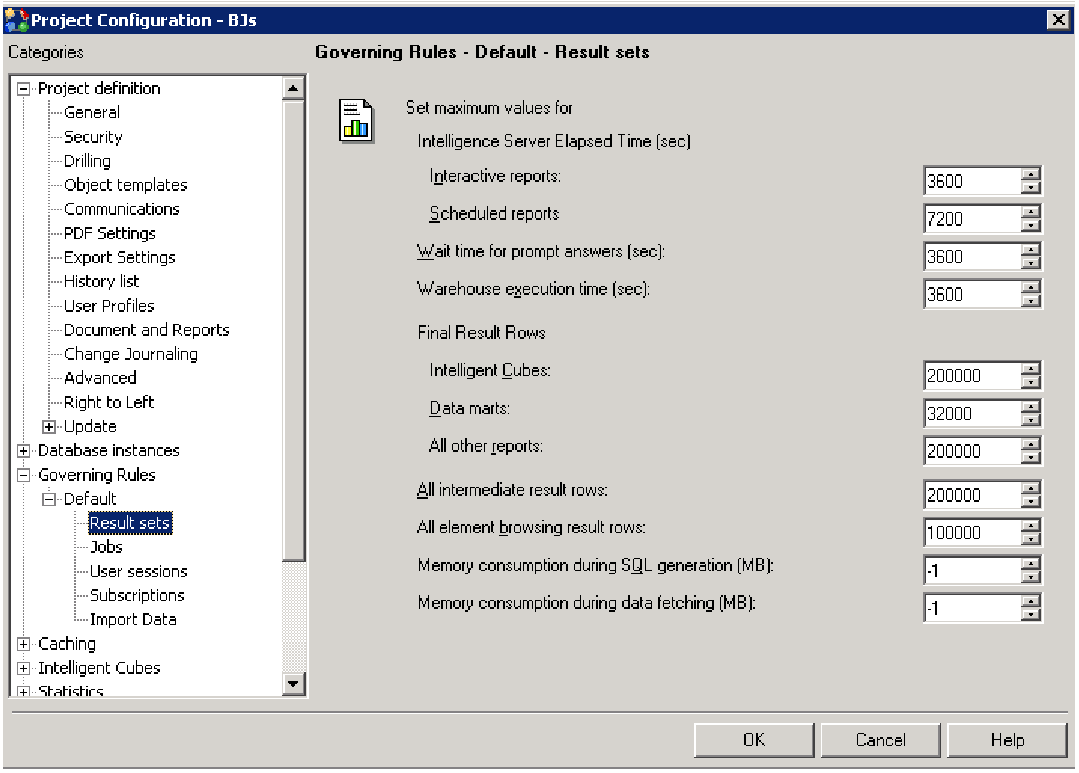
1. Log in to MicroStrategy Desktop if not already logged in.
2. In the **XBR**^{i} project Source right click on the new project name and select **Project Configuration.**
3. In the Project Definition - History List page, clear the check box for **Save Report Service Document dataset messages to history list.**

4. Navigate to the Governing rules > Result Sets page.

   Set **Wait time for Prompt answer (sec)** to 3600

   Set **Warehouse execution time (sec**) to 3600.

   Set **Memory Consumption during SQL generation (MB**) to -1.



Governing Rules - Default - Result sets

Set maximum values for

Intelligence Server Elapsed Time (sec)

Interactive reports: 3600

Scheduled reports 7200

Wait time for prompt answers (sec): 3600

Warehouse execution time (sec): 3600

Final Result Rows

Intelligent Cubes: 200000

Data marts: 32000

All other reports: 200000

All intermediate result rows: 200000

All element browsing result rows: 100000

Memory consumption during SQL generation (MB): -1

Memory consumption during data fetching (MB): -1

5. Navigate to the **Governing Rules > Default > Jobs** page and use these guidelines to enter the following settings:

   Jobs per user account – Set to 50

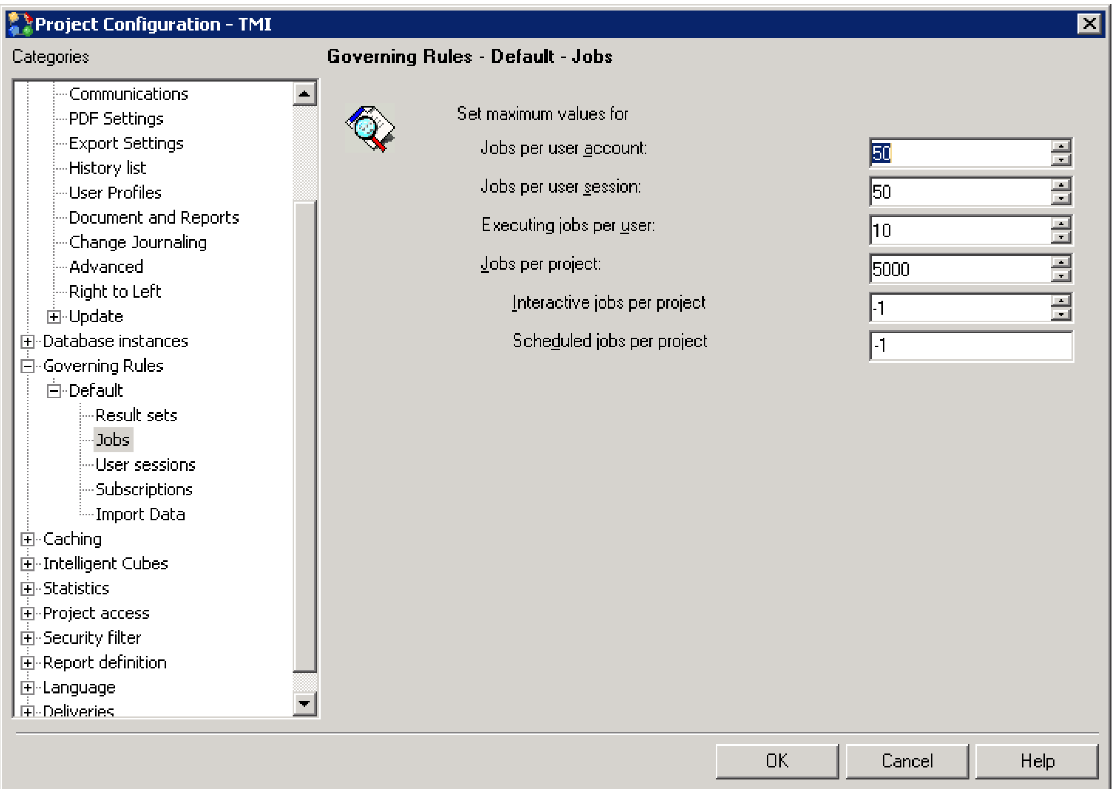
   Jobs per session – Set to 50

   Executing jobs per user – Set to 10

   Jobs per project – Limits the number of concurrent jobs that may exist on the I server, Recommended settings are: Small – 1000, Medium – 5000, Large - 50000

   Interactive jobs per project - Set to -1

   Scheduled jobs per project – Set to -1

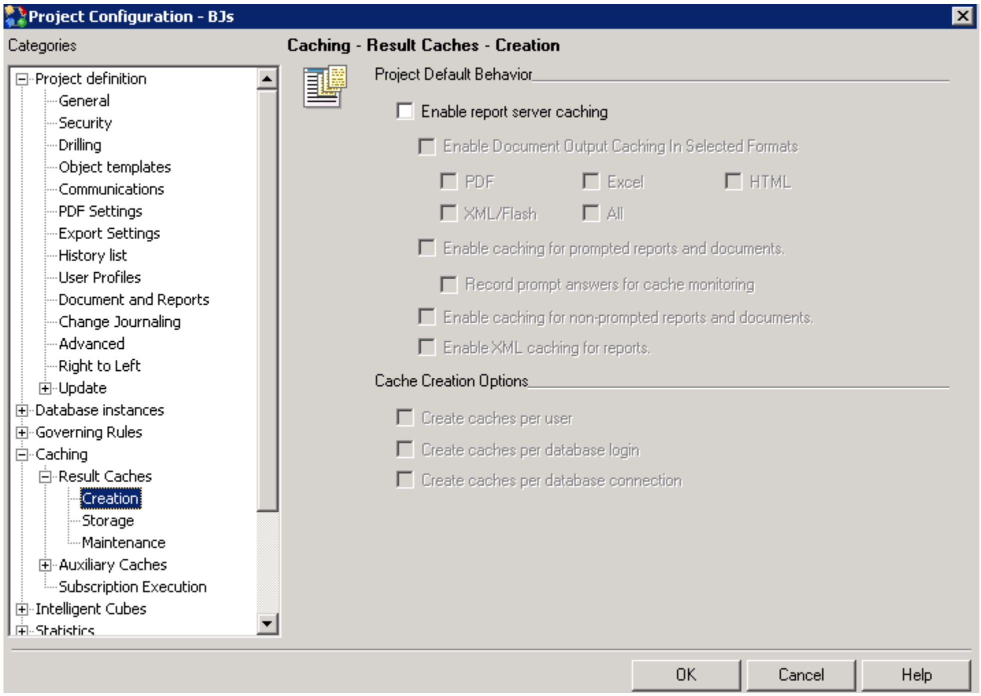


Governing Rules - Default - Jobs

Set maximum values for

Jobs per user account:	50
Jobs per user session:	50
Executing jobs per user:	10
Jobs per project:	5000
Interactive jobs per project	-1
Scheduled jobs per project	-1

6. Navigate to the **Caching >Result Caches> Creation** page and clear the **Enable report server caching** check box.



Project Configuration - BJs

Categories

- Project definition
  - General
  - Security
  - Drilling
  - Object templates
  - Communications
  - PDF Settings
  - Export Settings
  - History list
  - User Profiles
  - Document and Reports
  - Change Journaling
  - Advanced
  - Right to Left
  - Update
- Database instances
- Governing Rules
- Caching
  - Result Caches
    - Creation
    - Storage
    - Maintenance
  - Auxiliary Caches
  - Subscription Execution
- Intelligent Cubes
- Statistics

Caching - Result Caches - Creation

Project Default Behavior

□ Enable report server caching

□ Enable Document Output Caching In Selected Formats

□ PDF □ Excel □ HTML

□ XML/Flash □ All

□ Enable caching for prompted reports and documents.

□ Record prompt answers for cache monitoring

□ Enable caching for non-prompted reports and documents.

□ Enable XML caching for reports.

Cache Creation Options

□ Create caches per user

□ Create caches per database login

□ Create caches per database connection

7. Navigate to the **Caching >Result Caches> Storage** page.

   Set **Cache file directory** to .\Caches

   Under **Datasets:**

   Set Maximum Ram usage (Mbytes) to 100/512/2048 (small/medium/large)

   Set "Maximum number of caches to -1

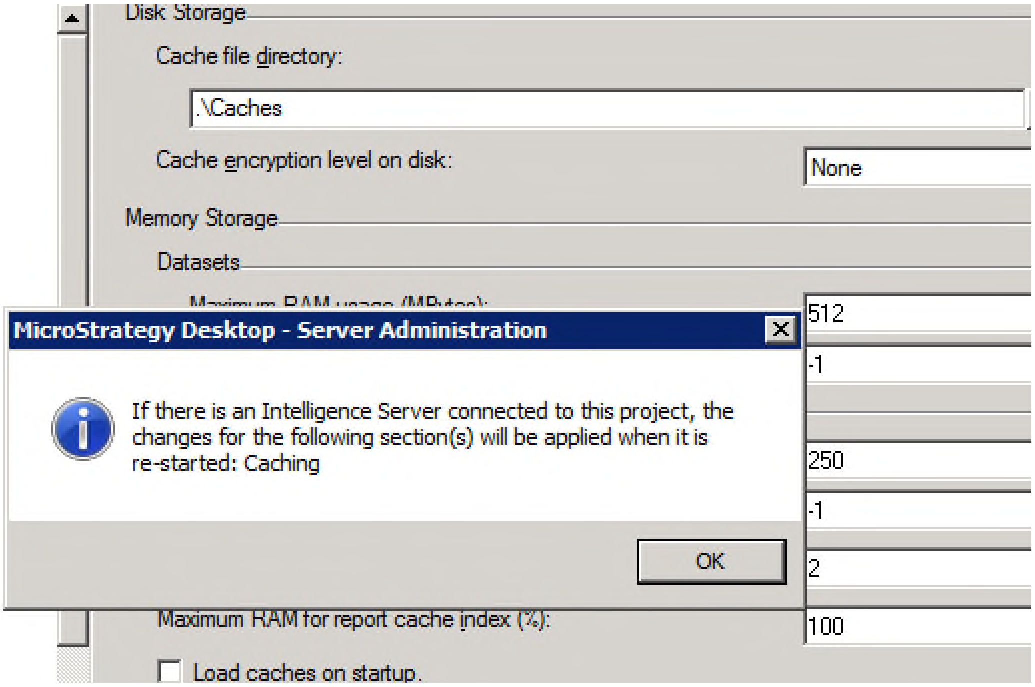
   Under **Formatted Documents**:

   Set **Maximum RAM usage (Mbytes)** to one of these values: 100/250/500 (small/medium/large)

   Set **Maximum number of caches** to -1

   Clear the **Load caches on startup** check box.

8. Click OK, and then click OK in the message that is displayed:



MicroStrategy Desktop - Server Administration

If there is an Intelligence Server connected to this project, the changes for the following section(s) will be applied when it is re-started: Caching

OK

Disk Storage

Cache file directory: .\Caches

Cache encryption level on disk: None

Memory Storage

Datasets

Maximum RAM usage (MBytes): 512

-1

250

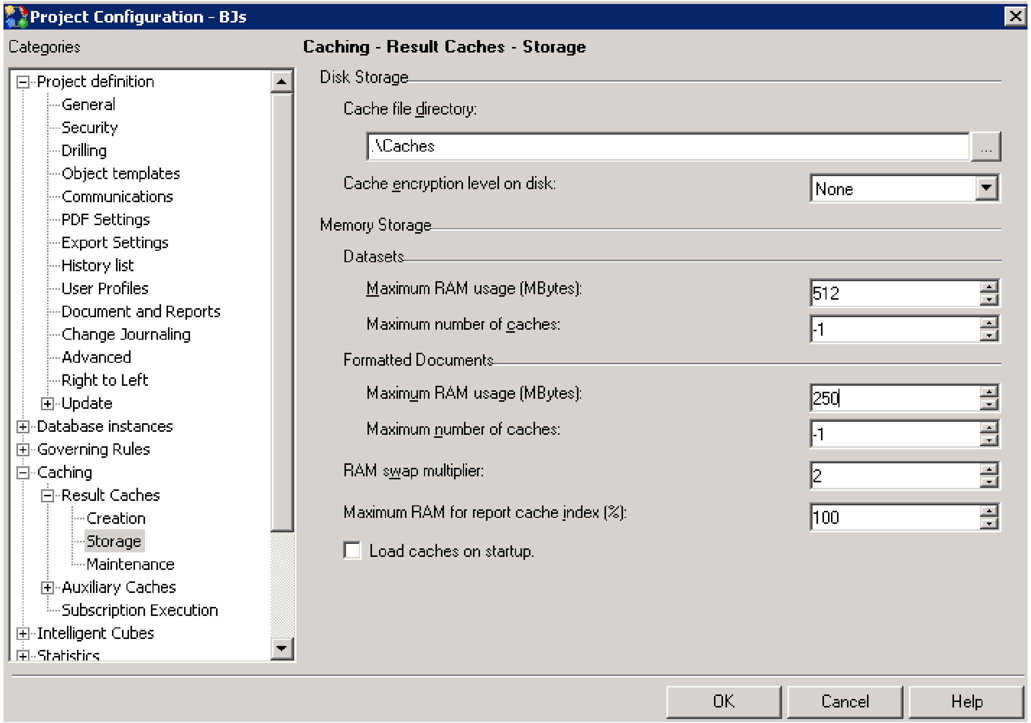
-1

2

Maximum RAM for report cache index (%): 100

□ Load caches on startup.

This returns you to the Caching – Result Caches – Storage window.



Project Configuration - BJs

Caching - Result Caches - Storage

Disk Storage

Cache file directory: .\Caches

Cache encryption level on disk: None

Memory Storage

Datasets

Maximum RAM usage (MBytes): 512

Maximum number of caches: -1

Formatted Documents

Maximum RAM usage (MBytes): 250

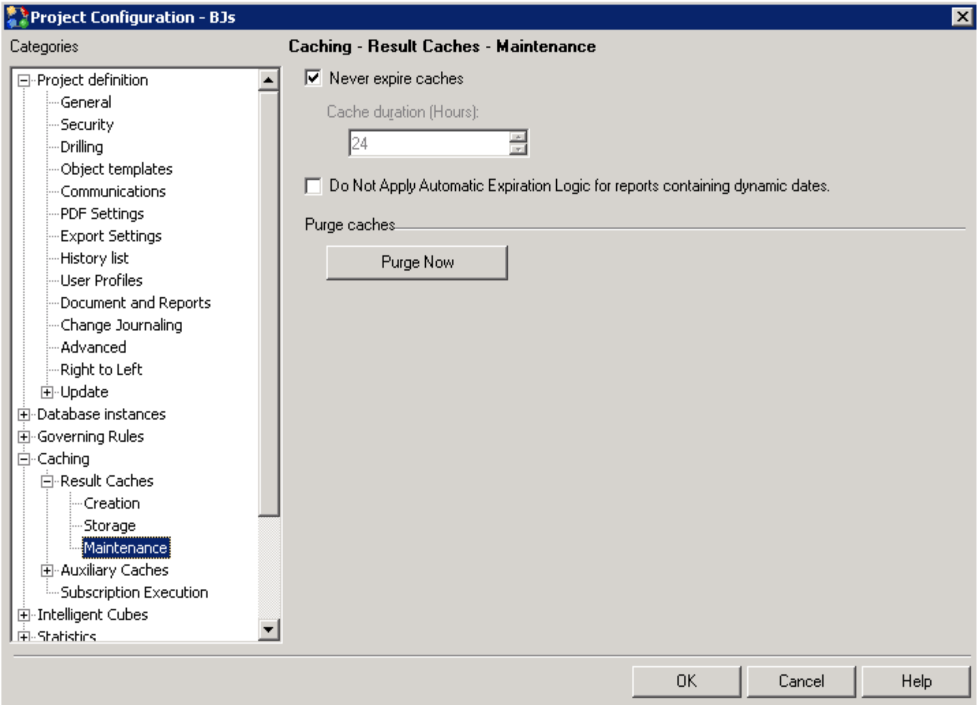
Maximum number of caches: -1

RAM swap multiplier: 2

Maximum RAM for report cache index (%): 100

□ Load caches on startup.

9. Navigate to the **Caching >Result Caches > Maintenance** page, and select the **Never expire caches** check box.



Project Configuration - BJs

Caching - Result Caches - Maintenance

☑ Never expire caches

Cache duration (Hours): 24

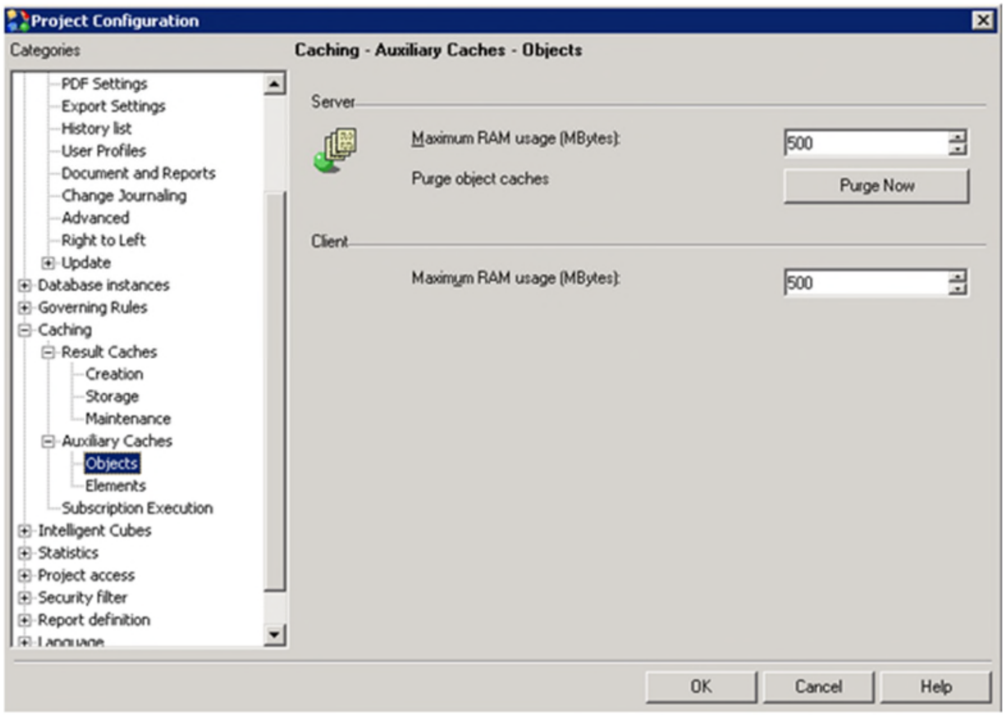
☐ Do Not Apply Automatic Expiration Logic for reports containing dynamic dates.

Purge caches

10. Navigate to the **Caching >Auxiliary Caches>Objects** page

Under **Server**: Set **Maximum RAM Usage (Mbytes)** to 500

Under **Client**: Set **Maximum RAM Usage (Mbytes)** to 500



Project Configuration

Caching - Auxiliary Caches - Objects

Server

Maximum RAM usage (MBytes): 500

Purge object caches

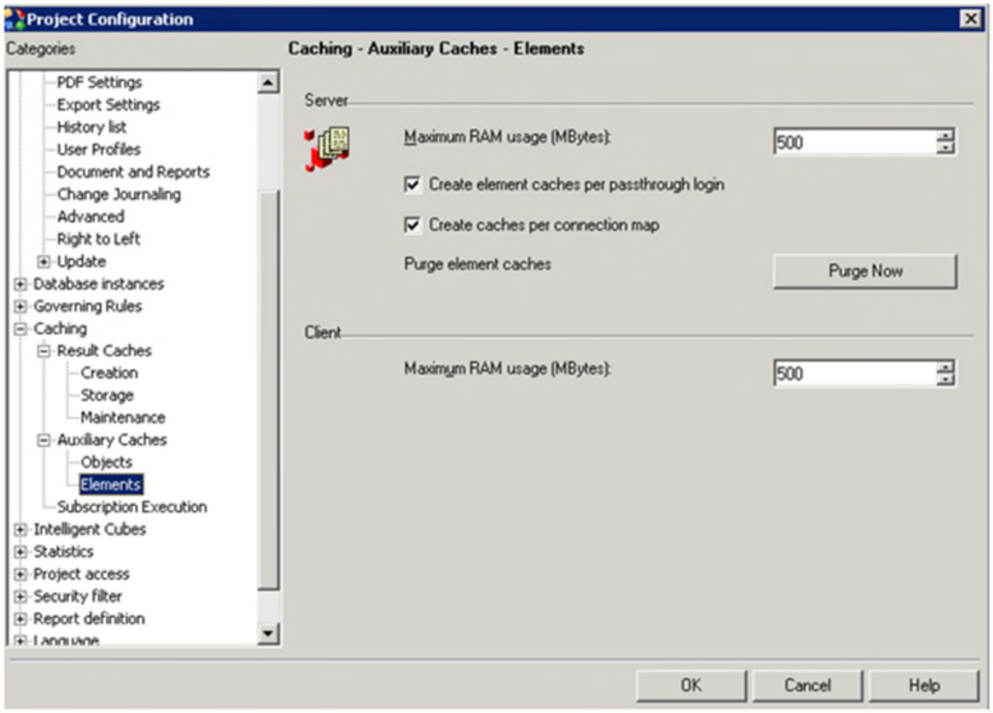
Client

Maximum RAM usage (MBytes): 500

11. Navigate to the **Caching > Auxiliary Caches > Elements** page

Under **Server**: Set **Maximum RAM Usage (Mbytes)** to 500

Under **Client**: Set **Maximum RAM Usage (Mbytes)** to 500



Project Configuration

Caching - Auxiliary Caches - Elements

Server

Maximum RAM usage (MBytes): 500

☑ Create element caches per passthrough login

☑ Create caches per connection map

Purge element caches

Client

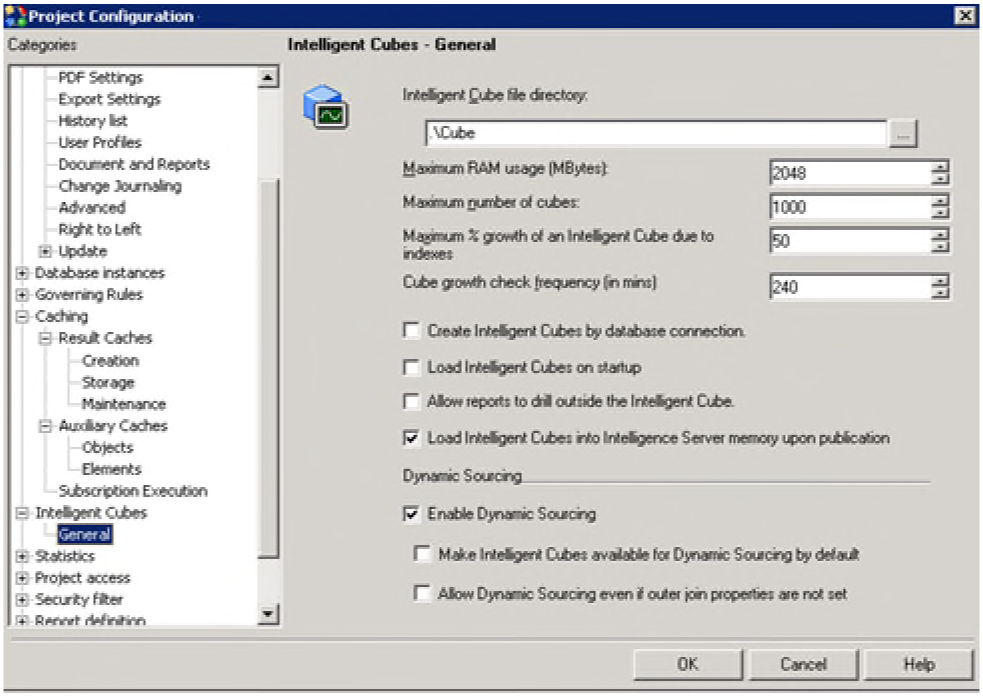
Maximum RAM usage (MBytes): 500

12. Navigate to the **Intelligent Cubes > General** page.

    Set **Maximum % growth of an Intelligent Cube due to indexes** to 50

    Set **Cube growth check frequency (in mins)** to 240

    Clear the **Load Intelligent Cubes** on startup check box.



Intelligent Cubes - General

Intelligent Cube file directory: .\Cube

Maximum RAM usage (MBytes): 2048

Maximum number of cubes: 1000

Maximum % growth of an Intelligent Cube due to indexes 50

Cube growth check frequency (in mins) 240

□ Create Intelligent Cubes by database connection.

□ Load Intelligent Cubes on startup

□ Allow reports to drill outside the Intelligent Cube.

☑ Load Intelligent Cubes into Intelligence Server memory upon publication

Dynamic Sourcing

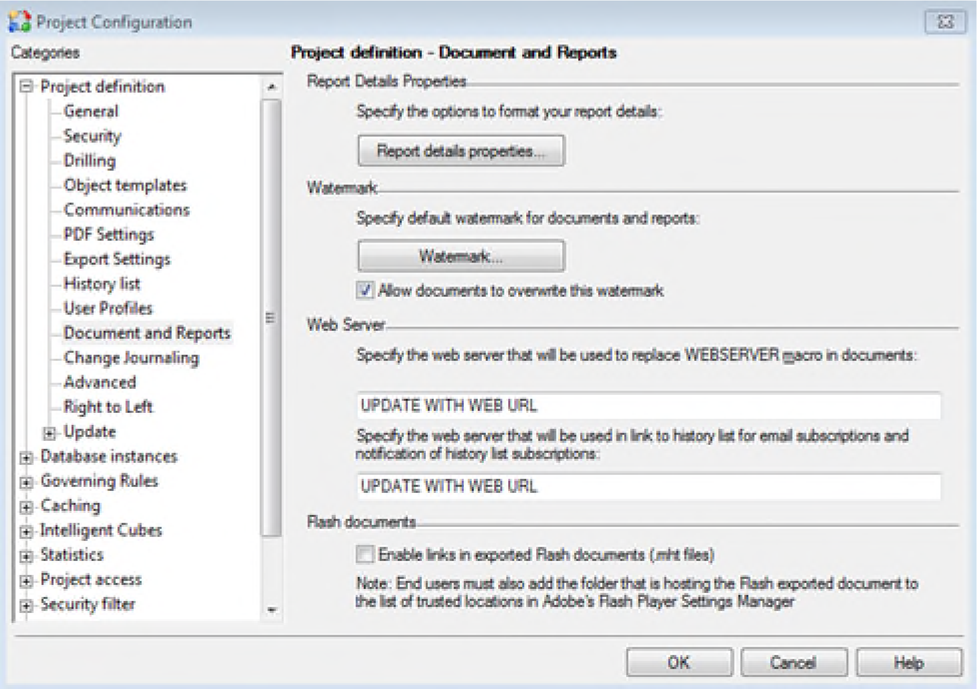
☑ Enable Dynamic Sourcing

□ Make Intelligent Cubes available for Dynamic Sourcing by default

□ Allow Dynamic Sourcing even if outer join properties are not set

To update the web URL:

1. Log in to MicroStrategy Desktop.
2. Right click on **XBR^i** (project Source) and click on **Project Configuration.**
3. Navigate to **Project definition > Documents and Reports** .



Project definition - Document and Reports

Report Details Properties

Specify the options to format your report details:

Watermark

Specify default watermark for documents and reports:

☑ Allow documents to overwrite this watermark

Web Server

Specify the web server that will be used to replace WEBSERVER macro in documents:

UPDATE WITH WEB URL

Specify the web server that will be used in link to history list for email subscriptions and notification of history list subscriptions:

UPDATE WITH WEB URL

Flash documents

☐ Enable links in exported Flash documents (.mht files)

Note: End users must also add the folder that is hosting the Flash exported document to the list of trusted locations in Adobe's Flash Player Settings Manager

4. In the two fields under **Web Server**, enter the URL of the Web Server.

   Example:
   http://WEBSERVER/analytics/servlet/mstrWeb
   or for SSL
   https://WEBSERVER/analytics/servlet/mstrWeb

Run Date Procedure for New Organization

After running the Organization Introduction for the new customer, you will need to execute the date procedure using the new Organization ID.

If the customer needs a different date range or uses the fiscal 4-4-5 format, you must follow the next procedure to regenerate the data in the master date tables. The parameters in the example below will generate the date tables from fiscal 2006 to 2013 with weeks starting on Sunday.

To regenerate the date tables with a different date range than the fiscal 4-5-4 format:

Change the parameters as needed.

In the Query window, enter the following:

Example:

```
BEGIN

 XBRADMIN.SP_MST_UPD_DATE_454 (1234,'29-JAN-2006',2006,2013,7);
```

```
  COMMIT;

END;

/
```

- The first parameter is the organization ID of the customer
- The second parameter is the date for the first day of the Fiscal Year according to NRF standard 4-5-4 calendar. Years supported are from 2000 to 2031. A 4-5-4 fiscal calendar cannot be generated using an invalid fiscal year start date.
- The third parameter is the fiscal year to start the calendar
- The fourth parameter is the fiscal year to end the calendar
- The fifth parameter is the day of the week that starts the fiscal week. The default for the U.S. is Sunday, day seven, with Monday being day one.

Upgrading an XBR^i 10.7 Installation to XBR^{i}10.8

!

VERY IMPORTANT!! Back up your Mobile images and Mobile configuration folders before beginning the upgrade. Failure to do so will result in loss of all mobile employee, store and item images placed in the Images folder by the customer and the mobile configuration information that was added to the configuration folder when the mobile app was configured for the customer.

Mobile Images folder

Image folder location

C:\XBRi\tomcat\webapps\analyticsMobile\images\lpImgs\mobile

Copy the contents of this folder to a safe location outside of the XBRi installation folders.

Mobile Configuration folder

Mobile Configuration folder location

C:\XBRi\tomcat\webapps\analyticsMobile\WEB-INF\xml\mobile

Copy the contents of this folder to a safe location outside of the XBRi installation folders.

Also copy these 3 files from the XML folder:
C:\XBRi\tomcat\webapps\analyticsMobile\WEB-INF\xml

AdminServers.xml, sys_defaults_WEBSERVER and **WEBSERVER.token**

After the upgrade, copy the contents of the saved folders and the three files from the XML folder to the corresponding XBRi folders.

These instructions for performing an upgrade install assume that the IServer and Web Server are installed on the same server. However, it is also possible to install the upgrade in a distributed environment where the IServer and Web Server are each on a dedicated Windows 2008r2 server.

This upgrade assumes your XBRi installation is currently at version 10.7 GA

If you are upgrading from XBR^i 10.7 to 10.8, you will need to upgrade the database:

Oracle Database Upgrade – 10.8 to 10.8.1

Before you begin

- Upgrade scripts are on the release CD in the following location:
  CD:\DATABASE_SCRIPTS\UPGRADE\ORACLE
- Ensure your database is currently at XBRi version 10.8 GA, this database upgrade assumes all previous upgrades have been completed up through XBRi 10.8 GA

Upgrade Oracle Database from XBR^i 10.8 to XBR^i 10.8.1

3. Run the following scripts in the order shown, "appl" before "data."
   xbr_appl_108_to_1081_upgrade.sql

   xbr_data_108_to_1081_upgrade.sql
4. Copy/Paste each entire script into a SQL Query window and execute.

SQL Database Upgrade – 10.8 to 10.8.1

Before you begin

- Upgrade scripts are on the release CD in the following location:

  CD: \DATABASE_SCRIPTS\UPGRADE\MSSQL
- Ensure your database is currently at XBRi version 10.8 GA, this database upgrade assumes all previous upgrades have been completed up through XBRi 10.8 GA

Upgrade SQL Server Database from XBR^i 10.8 to XBR^i 10.8.1

3. Run the following scripts in the order shown, "appl" before "data."
   xbr_appl_108_to_1081_upgrade.sql

   xbr_data_108_to_1081_upgrade.sql
4. Copy/Paste each entire script into a SQL Query window and execute.

In addition, you will need to do the following:

- Delete the trust relationship
- Start the Iserver service.
- Run the Upgrade program which will:
  - Upgrade XBR^i Web Application

  - Upgrade XBR^{i} Utilities – Date Selection and External Scheduler
  - Import Object Manager packages to update project metadata
- Manually configure the Web Server connection to the IServer and create trust relationship

Before you continue with the Tomcat and XBR^{i} upgrade, you must delete the Trust Relationship.

To delete the trust relationship:

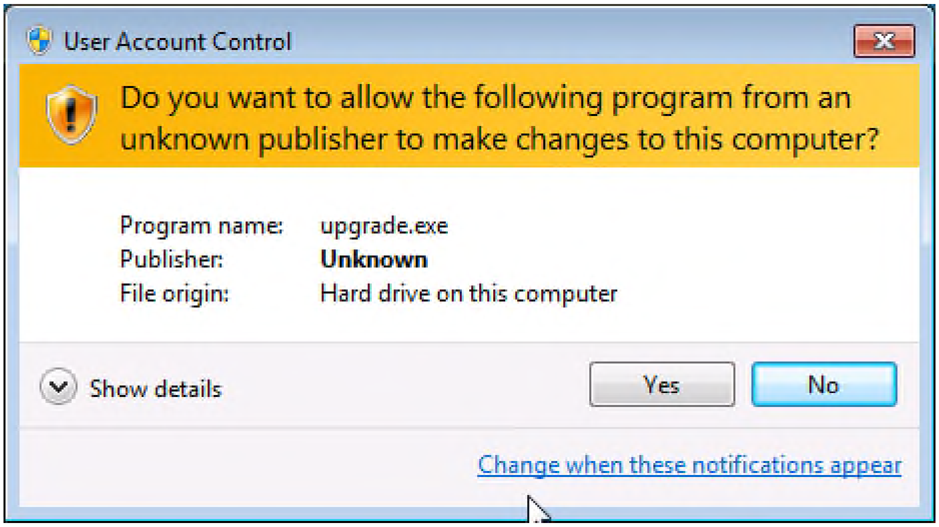
1. In a web browser, go to: https://WEBSERVER/analytics/servlet/mstrWebAdmin.
2. Log in with the webadmin user and password.
3. Right click on the connected ISever and choose **Properties.**
4. Enter the administrator User ID and Password.
5. Click **Delete Trust Relationship** and click **Save**.
6. Log out from web and close web browser.

Run the Upgrade Program

These instructions assume one Windows server is used for both the IServer and Web Server install. If the IServer and Web Server are on separate machines, run the upgrade.exe on the Web server only.

1. Start the IServer service
2. From the installation DVD, launch DVD:\XBRiUpgrade\upgrade.exe

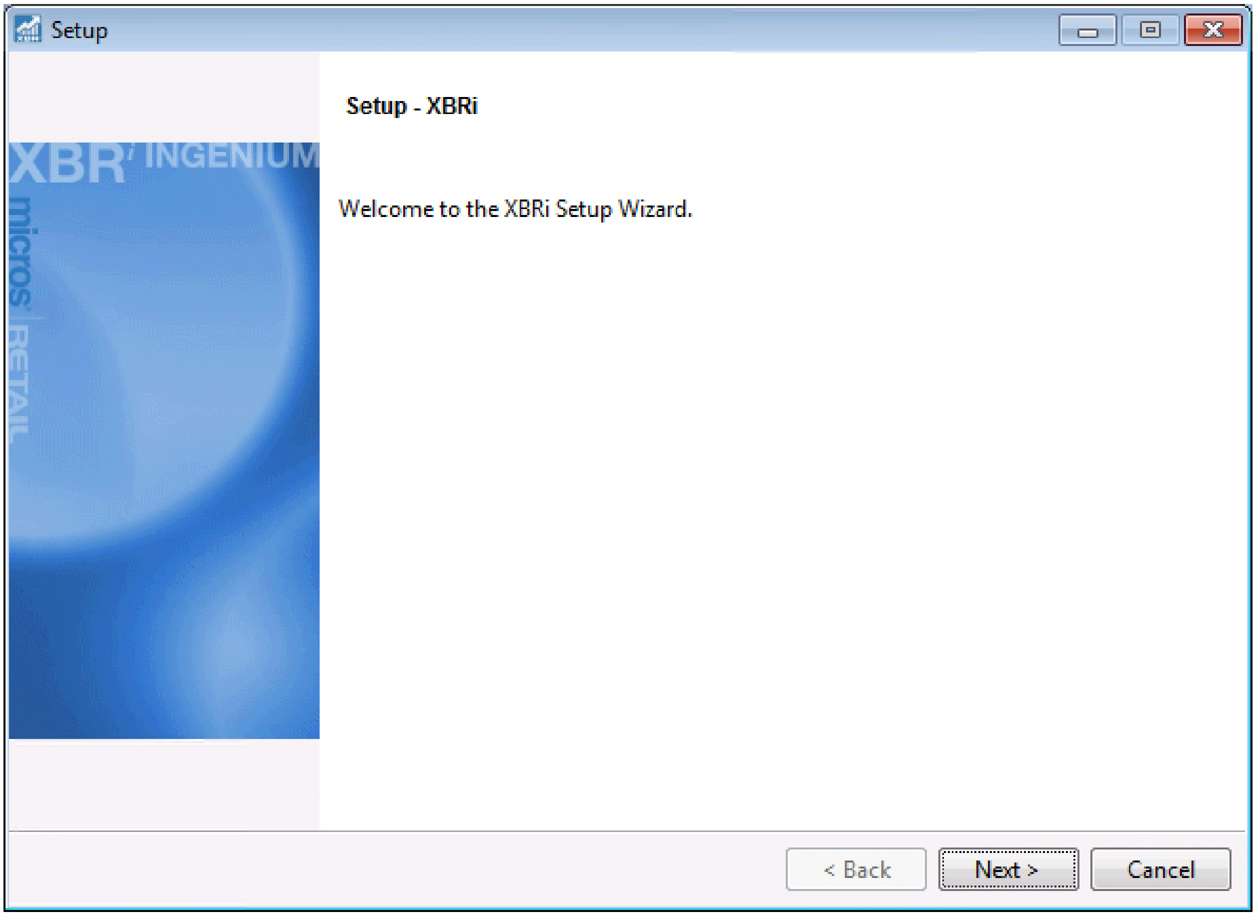
The User Account control confirmation dialog will be displayed. Click **Yes** to continue. This dialog will be displayed and must be confirmed each time upgrade.exe is launched.



User Account Control

Do you want to allow the following program from an unknown publisher to make changes to this computer?

Program name: upgrade.exe
Publisher: **Unknown**
File origin: Hard drive on this computer



Setup - XBRi

Welcome to the XBRi Setup Wizard.

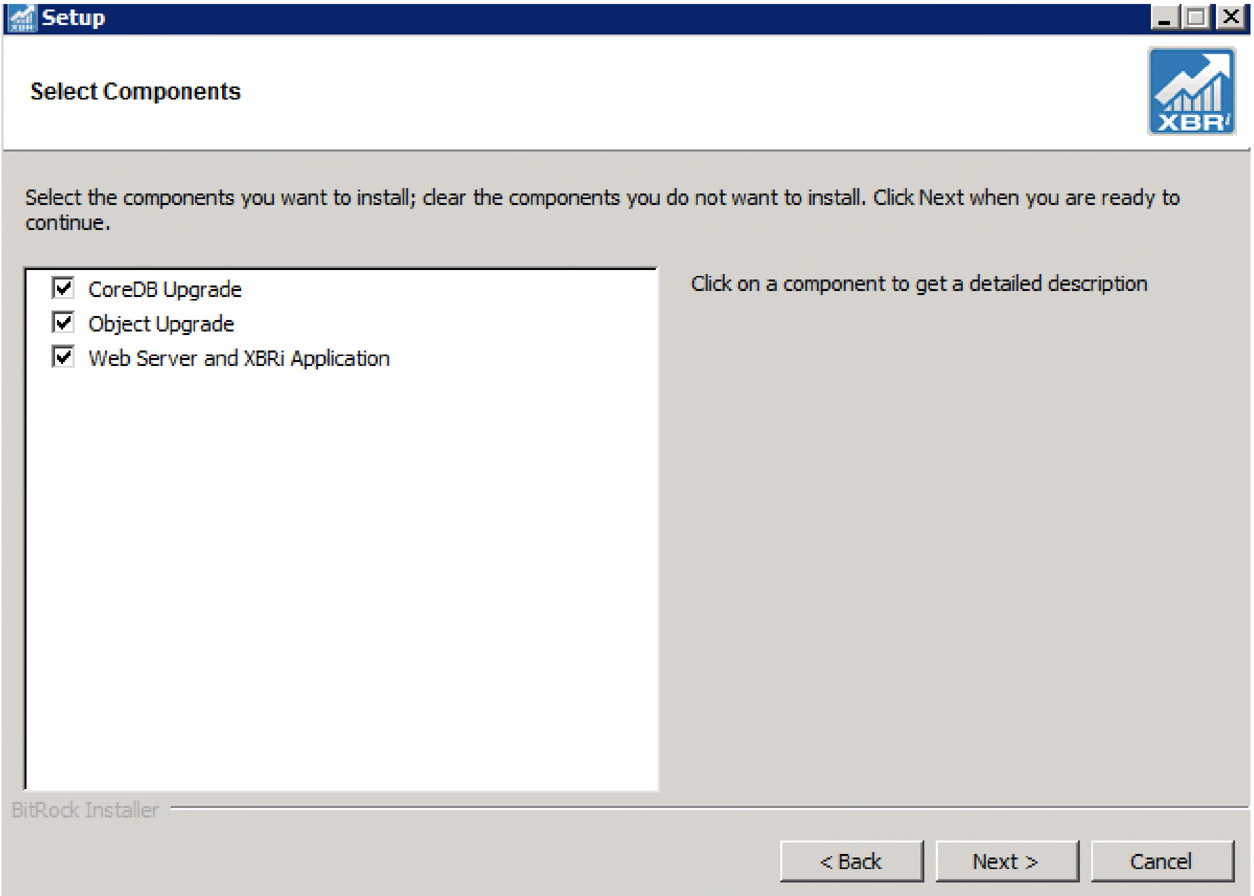
Click **Next** to continue.

Select all components:

CoreDB Upgrade

Object Upgrade

Web Server and XBRi Application



Setup

Select Components

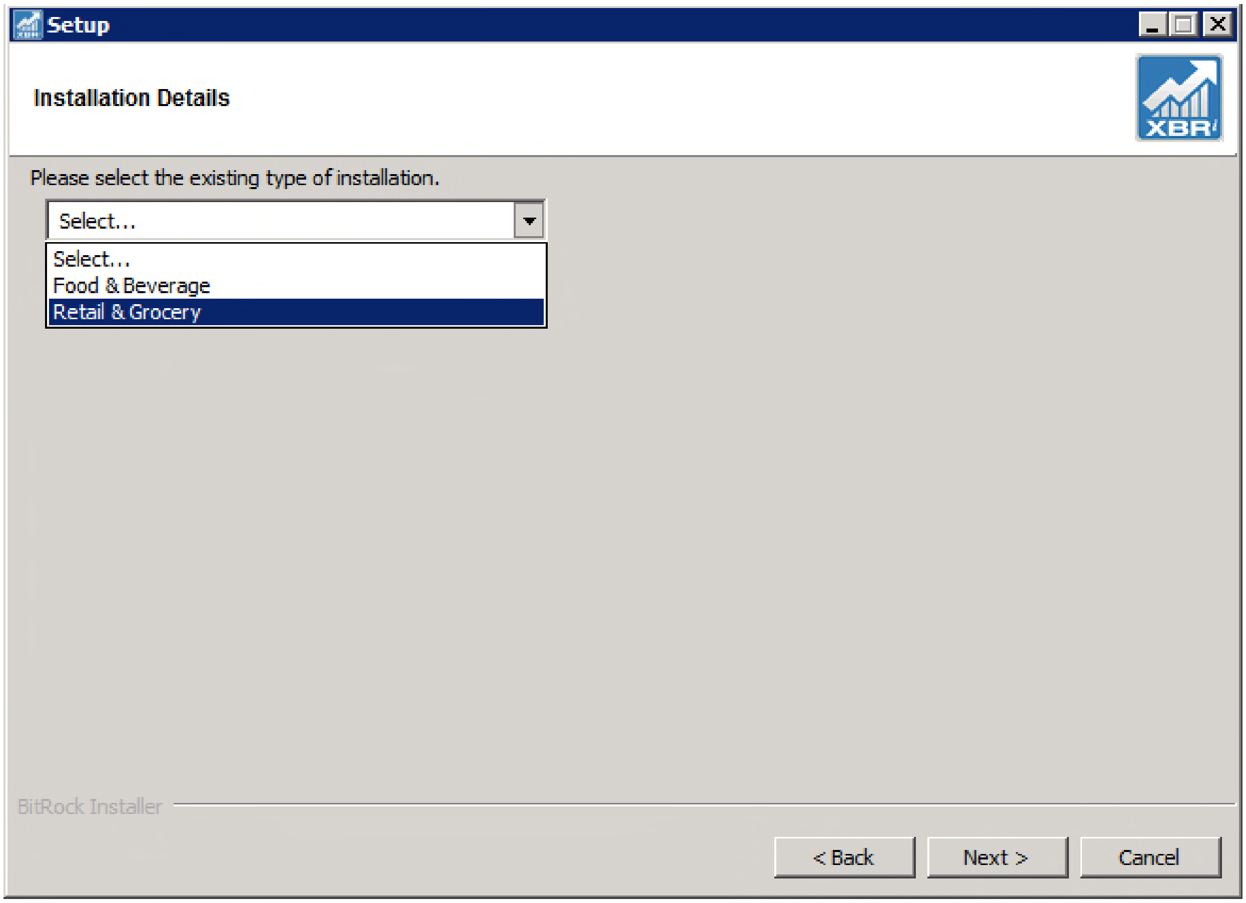
Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.

☑ CoreDB Upgrade
☑ Object Upgrade
☑ Web Server and XBRi Application

Click on a component to get a detailed description

Click **Next** to continue.

Select either Food & Beverage or Retail and Grocery for the upgrade



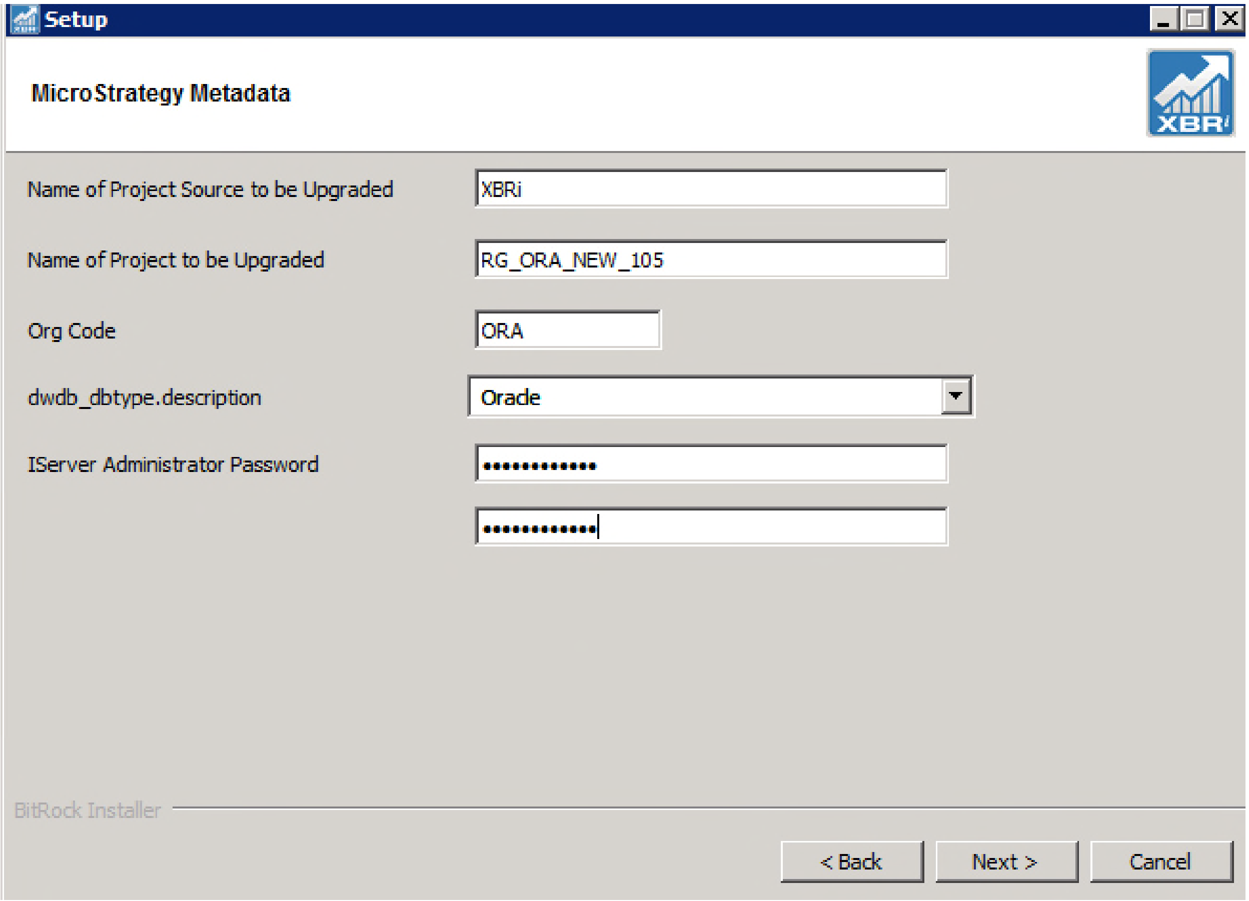
Installation Details

Please select the existing type of installation.

Select...

Select...
Food & Beverage
Retail & Grocery

Click **Next** to continue.



MicroStrategy Metadata

Name of Project Source to be Upgraded: XBRi

Name of Project to be Upgraded: RG_ORA_NEW_105

Org Code: ORA

dwdb_dbtype.description: Oracle

IServer Administrator Password: •••••••••••••

•••••••••••••

Name of the Project Source to be Upgraded - Enter the name of Project Source

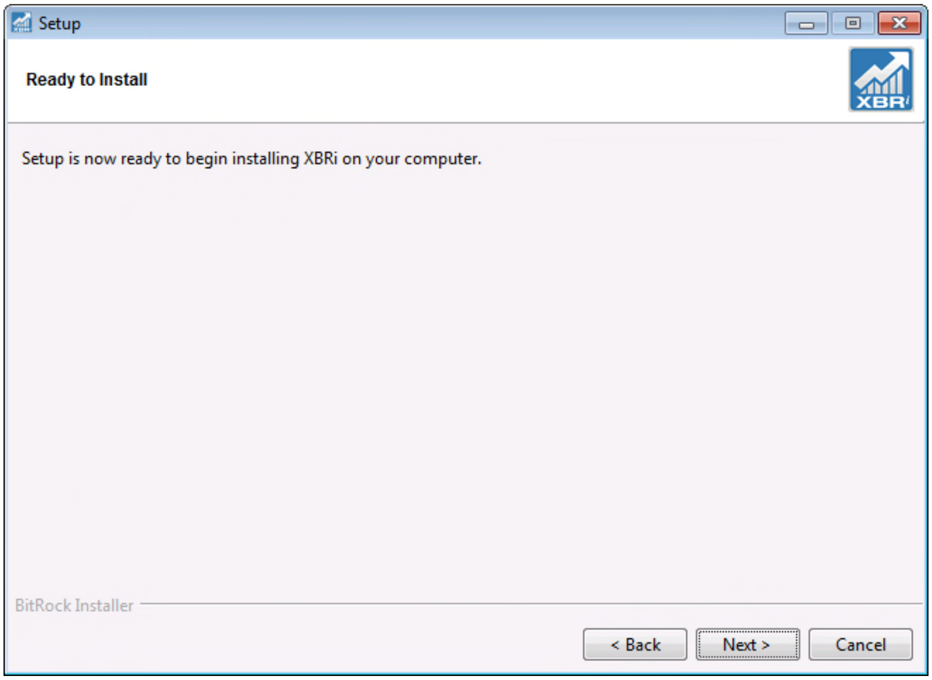
Name of the Project to be Upgraded -Enter name of the target project to be upgraded

Org Code - Enter the Customer Code

dwdb_dbtype.description – Select the database type.

Iserver Administrator Password - Enter Iserver administrator password

Click **Next** to continue.



Setup is now ready to begin installing XBRi on your computer.

Click **Next,** and the installation will proceed.

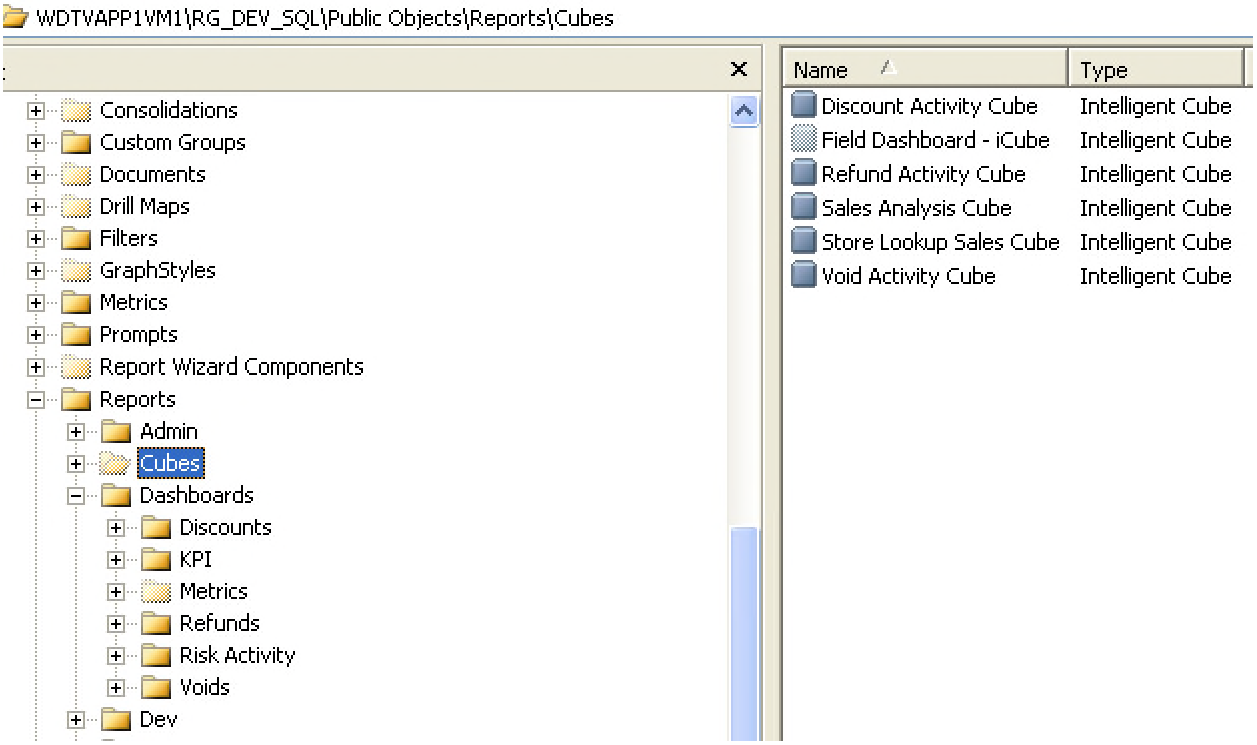
When the installation is done, click Finish and follow the next steps to refresh intelligent cubes.

Food & Beverage only

Repeat the upgrade process for each F&B Customer Project, only selecting Object Upgrade for each remaining project. The CoreDB, Web Server and XBRi Application upgrades are server wide and would only be redundant while adding additional time to the upgrade process.

Refresh Cubes

1. Log into Desktop.
2. Expand the Administration folder.
3. Navigate to **System Monitors > Caches > Intelligent Cubes**.
4. Verify the Discount Activity, Refund Activity, Sales Analysis, Store Lookup Sales, and Void Activity cubes were published successfully and the caches are updated with time of upgrade.
5. Expand the project folder.
6. Navigate to **Public Objects > Reports > Cubes**.
7. Double click on the cube “Field Dashboard – ICube” to run it and refresh the Intelligence Cube cache.



WDTVAPP1VM1\RG_DEV_SQL\Public Objects\Reports\Cubes

Name	Type
Discount Activity Cube	Intelligent Cube
Field Dashboard - iCube	Intelligent Cube
Refund Activity Cube	Intelligent Cube
Sales Analysis Cube	Intelligent Cube
Store Lookup Sales Cube	Intelligent Cube
Void Activity Cube	Intelligent Cube

Scheduling daily cube refresh

To refresh the Intelligence Cubes on a daily basis, set up a Windows Task Scheduler job to run a batch command file, i.e. cube_update.bat with command to launch command manager from the command line and run a command manager script, i.e. cube_update.scp with commands to publish each cube, as in the example below:

cube_update.bat

```
cmdmgr.exe" -n XBRi -u Administrator -p CoreAdmin12! -f C:\XBRi\cube_update.scp -or
C:\XBRi\cube_update_results.log -of C:\XBRi\cube_update_fail.log -os
C:\XBRi\cube_update_success.log –e
```

cube_update.scp

```
PUBLISH INTELLIGENT CUBE "Field Dashboard - iCube" IN FOLDER "\Public
Objects\Reports\Cubes" FOR PROJECT "XBRi";

...
```

Upgrading an XBR^i 10.8 Installation to XBR^{i}10.8.1

VERY IMPORTANT!! Back up your Mobile images and Mobile configuration folders before beginning the upgrade. Failure to do so will result in loss of all mobile employee, store and item images placed in the Images folder by the customer and the mobile configuration information that was added to the configuration folder when the mobile app was configured for the customer.

Mobile Images folder

Image folder location

C:\XBRi\tomcat\webapps\analyticsMobile\images\lpImgs\mobile

Copy the contents of this folder to a safe location outside of the XBRi installation folders.

Mobile Configuration folder

Mobile Configuration folder location

C:\XBRi\tomcat\webapps\analyticsMobile\WEB-INF\xml\mobile

Copy the contents of this folder to a safe location outside of the XBRi installation folders.

Also copy these 3 files from the XML folder:
C:\XBRi\tomcat\webapps\analyticsMobile\WEB-INF\xml

AdminServers.xml, sys_defaults_WEBSERVER and **WEBSERVER.token**

After the upgrade, copy the contents of the saved folders and the three files from the XML folder to the corresponding XBRi folders.

These instructions for performing an upgrade install assume that the IServer and Web Server are installed on the same server. However, it is also possible to install the upgrade in a distributed environment where the IServer and Web Server are each on a dedicated Windows 2008r2 server.

This upgrade assumes your XBRi installation is currently at version 10.8 GA

If you are upgrading from XBR^i 10.8 to 10.8.1, you will need to do the following:

- Upgrade the database as described previously in this guide

- Delete the trust relationship
- Start the Iserver service.
- Run the Upgrade program which will:
  - Upgrade XBR^i Web Application
  - Upgrade XBR^i Utilities – Date Selection and External Scheduler
  - Import Object Manager packages to update project metadata
- Manually configure the Web Server connection to the IServer and create trust relationship

Before you continue with the Tomcat and XBR^i upgrade, you must delete the Trust Relationship.

To delete the trust relationship:

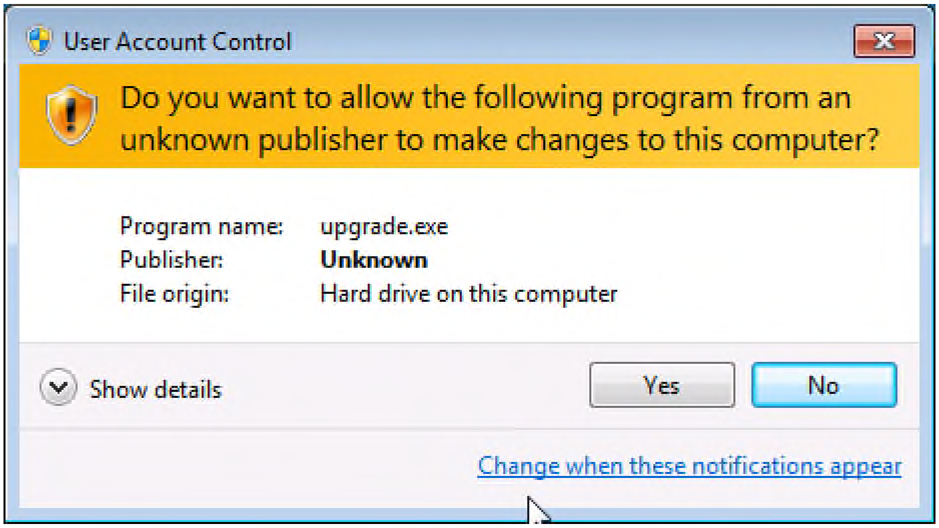
1. In a web browser, go to: https://WEBSERVER/analytics/servlet/mstrWebAdmin.
2. Log in with the webadmin user and password.
3. Right click on the connected ISever and choose **Properties.**
4. Enter the administrator User ID and Password.
5. Click **Delete Trust Relationship** and click **Save**.
6. Log out from web and close web browser.

Run the Upgrade Program

These instructions assume one Windows server is used for both the IServer and Web Server install. If the IServer and Web Server are on separate machines, run the upgrade.exe on the Web server only.

1. Start the IServer service
2. From the installation DVD, launch DVD:\XBRiUpgrade\upgrade.exe

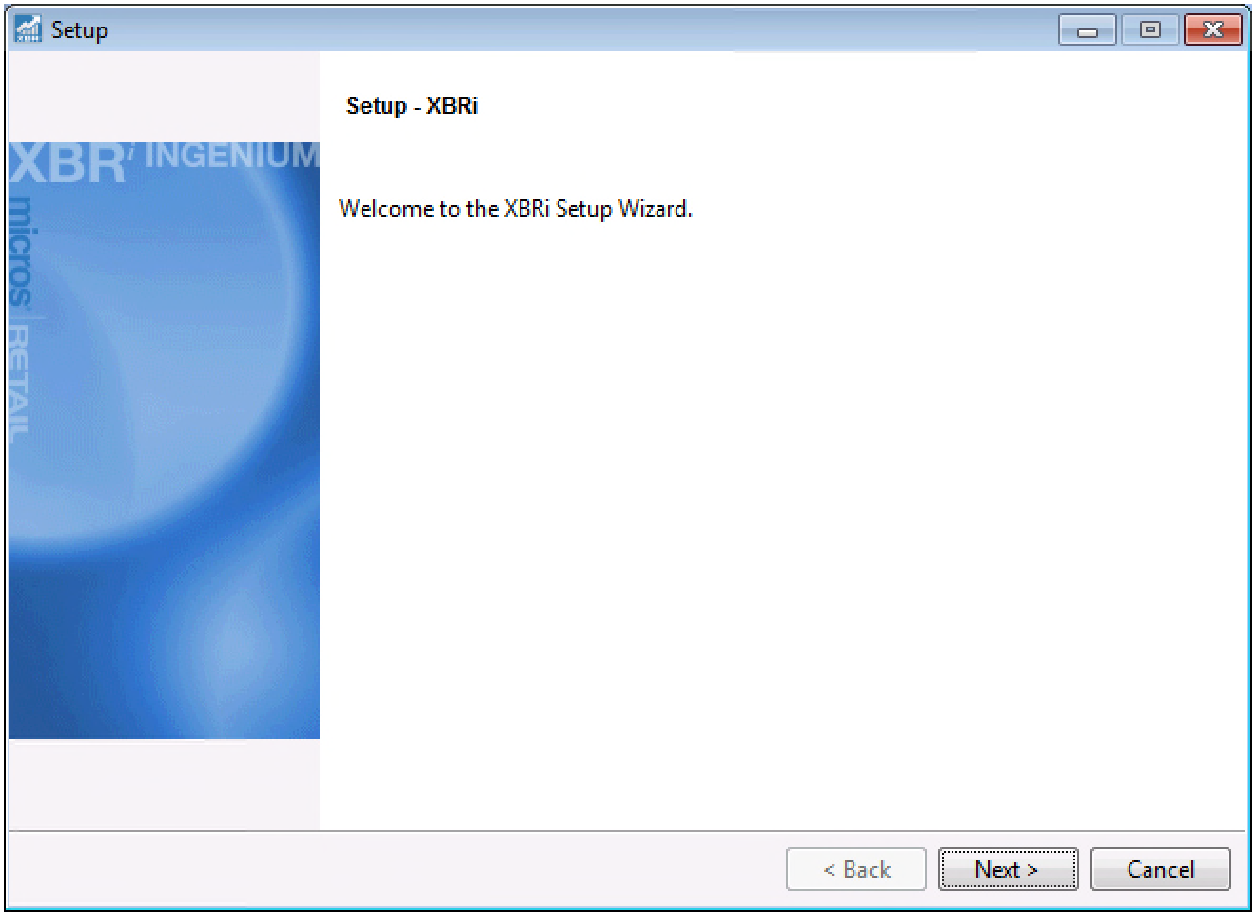
The User Account control confirmation dialog will be displayed. Click **Yes** to continue. This dialog will be displayed and must be confirmed each time upgrade.exe is launched.



User Account Control

Do you want to allow the following program from an unknown publisher to make changes to this computer?

Program name: upgrade.exe
Publisher: **Unknown**
File origin: Hard drive on this computer



Setup - XBRi

Welcome to the XBRi Setup Wizard.

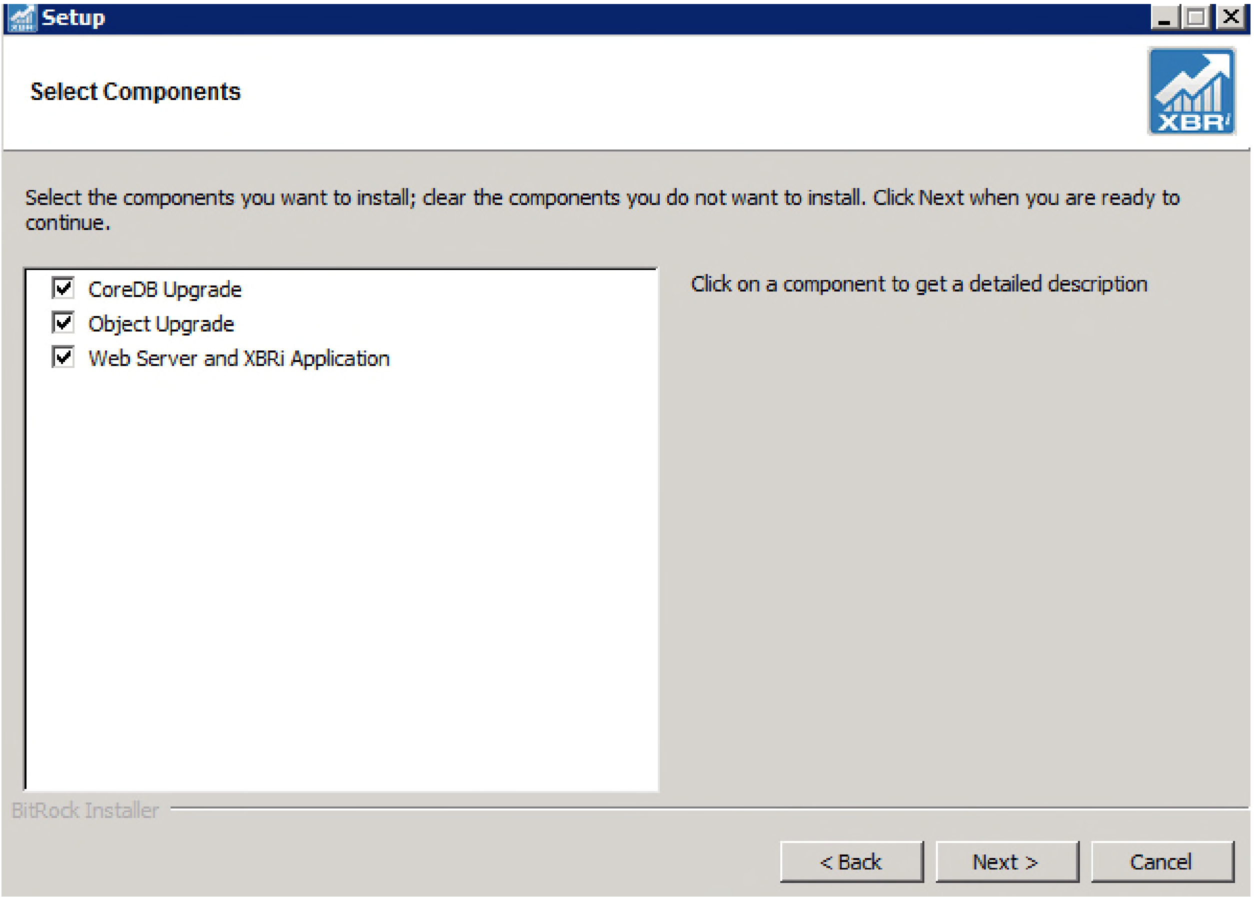
Click **Next** to continue.

. Select all components

CoreDB Upgrade

Object Upgrade

Web Server and XBRi Application



Setup

Select Components

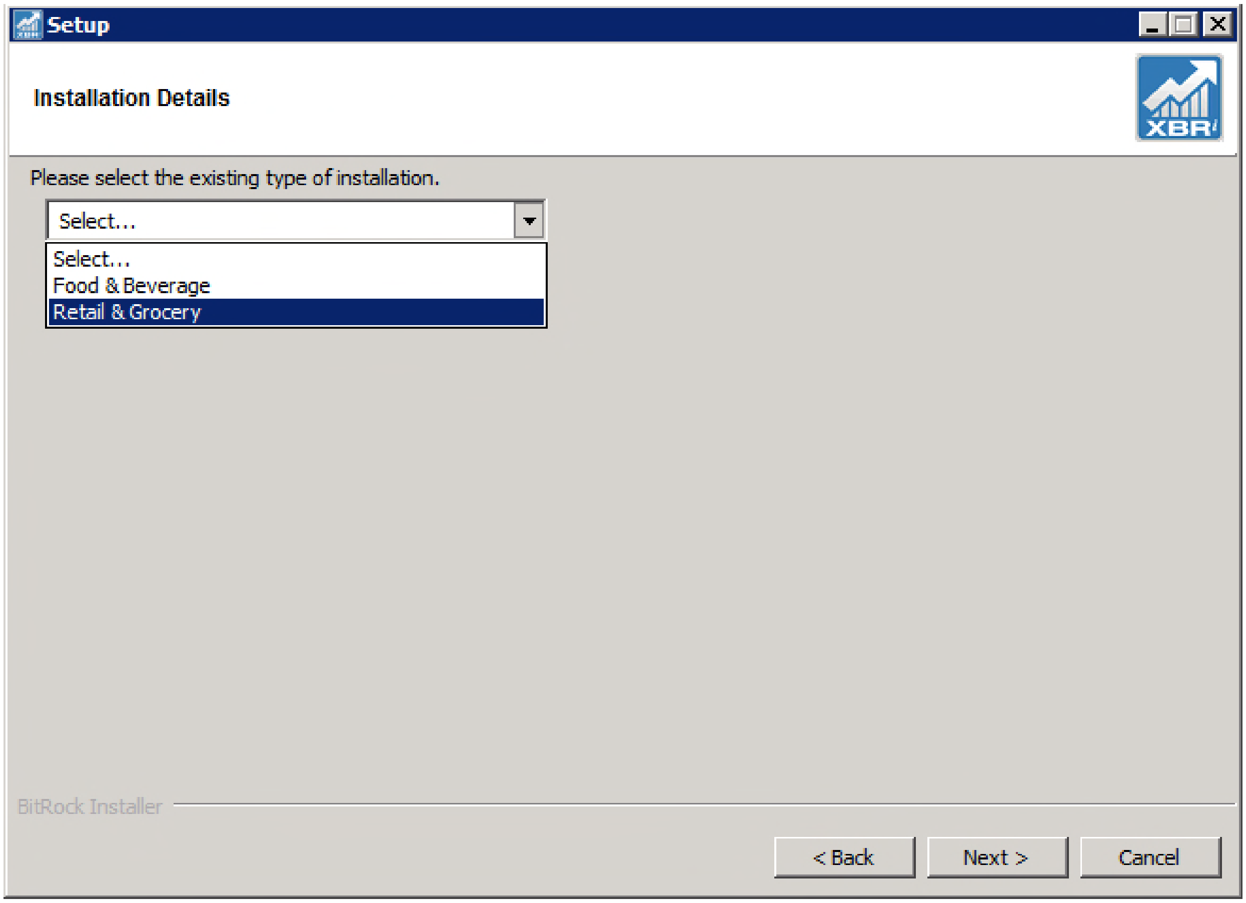
Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.

- ☑ CoreDB Upgrade
- ☑ Object Upgrade
- ☑ Web Server and XBRi Application

Click on a component to get a detailed description

Click **Next** to continue.

Select either Food & Beverage or Retail and Grocery for the upgrade



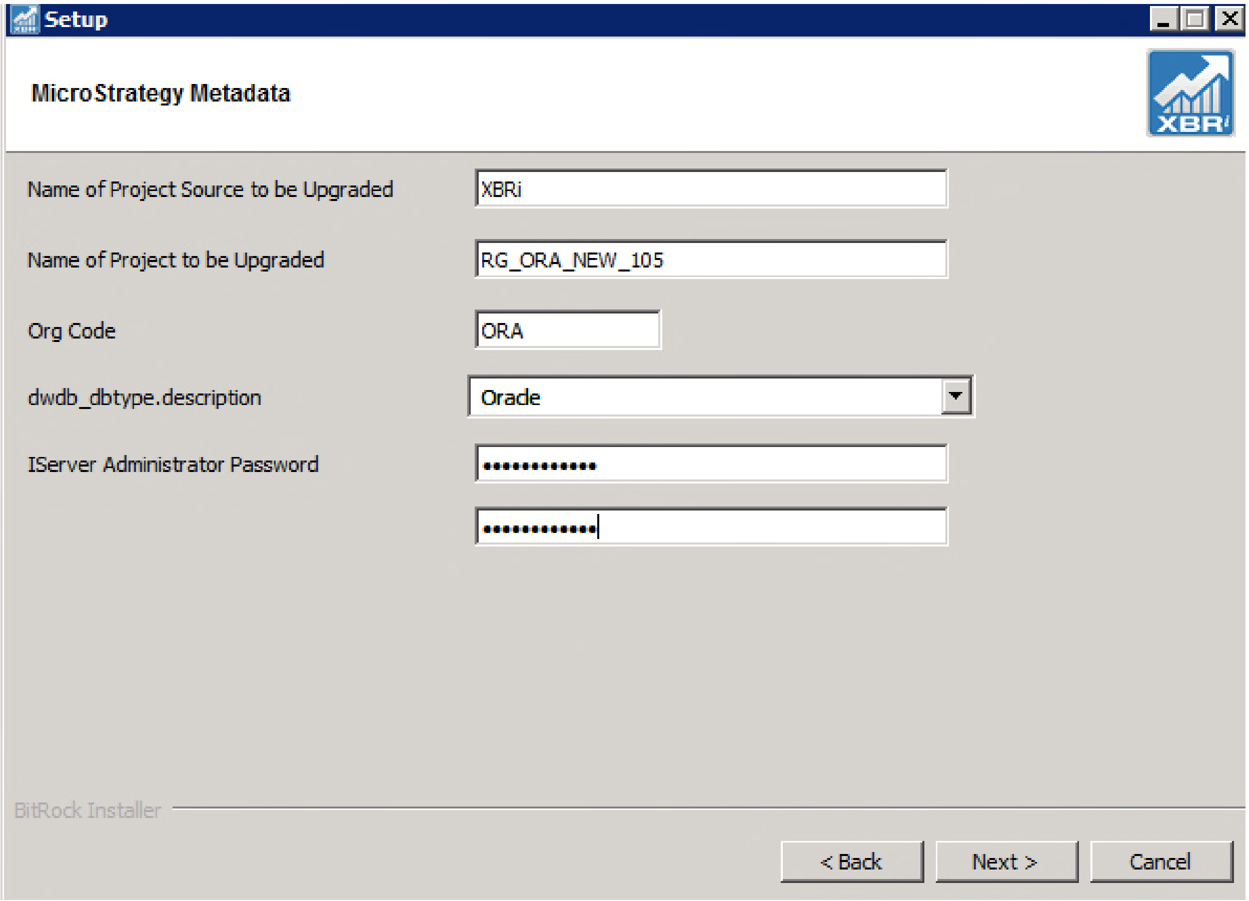
Installation Details

Please select the existing type of installation.

Select...

Select...
Food & Beverage
Retail & Grocery

Click **Next** to continue.



MicroStrategy Metadata

Name of Project Source to be Upgraded: XBRi

Name of Project to be Upgraded: RG_ORA_NEW_105

Org Code: ORA

dwdb_dbtype.description: Oracle

IServer Administrator Password: •••••••••••••

•••••••••••••

Name of the Project Source to be Upgraded - Enter the name of Project Source

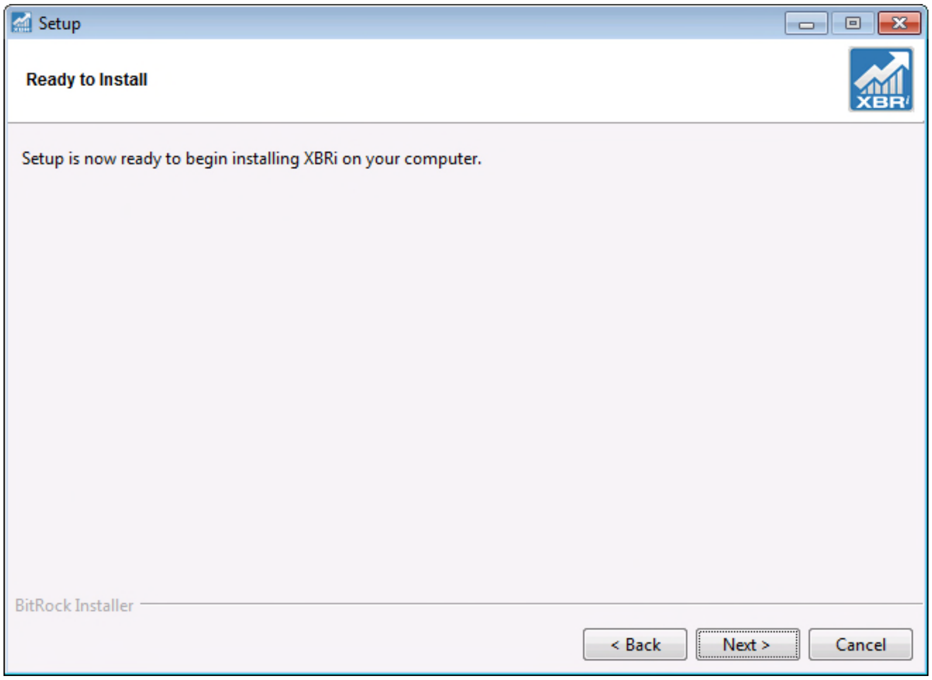
Name of the Project to be Upgraded -Enter name of the target project to be upgraded

Org Code - Enter the Customer Code

dwdb_dbtype.description – Select the database type.

Iserver Administrator Password - Enter Iserver administrator password

Click **Next** to continue.



Setup is now ready to begin installing XBRi on your computer.

Click **Next,** and the installation will proceed.

When the installation is done, click Finish.

Food & Beverage only

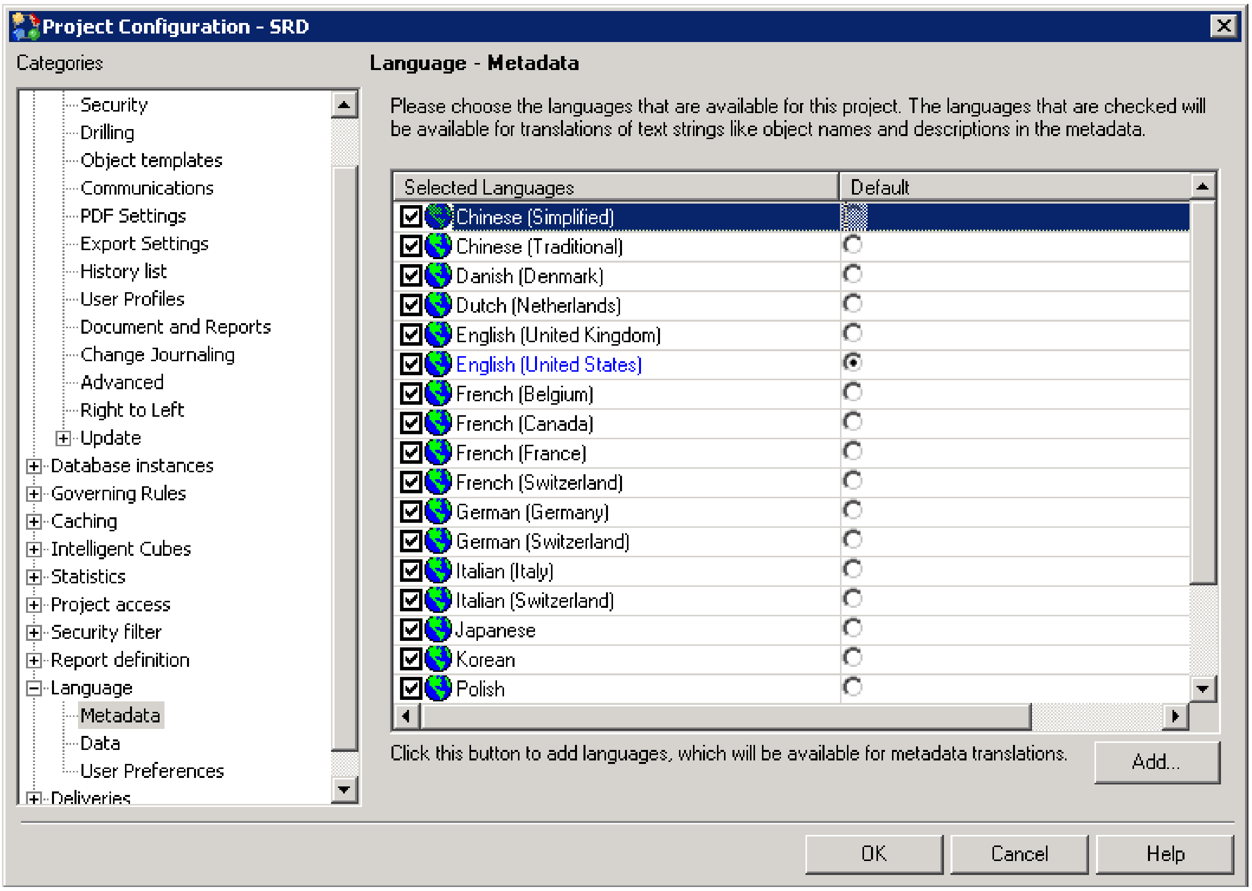
Repeat the upgrade process for each F&B Customer Project, only selecting Object Upgrade for each remaining project. The CoreDB, Web Server and XBRi Application upgrades are server wide and would only be redundant while adding additional time to the upgrade process.

Post Upgrade Configuration

Food & Beverage only

Configure projects to add English Custom language component.

1. Log in to MicroStrategy Desktop if not already logged in.
2. In the **XBR**^{i} project Source right click on the project name and select **Project Configuration.**
3. Expand the **Language** category.
4. Click **Add** button to add languages at lower right of the screen.



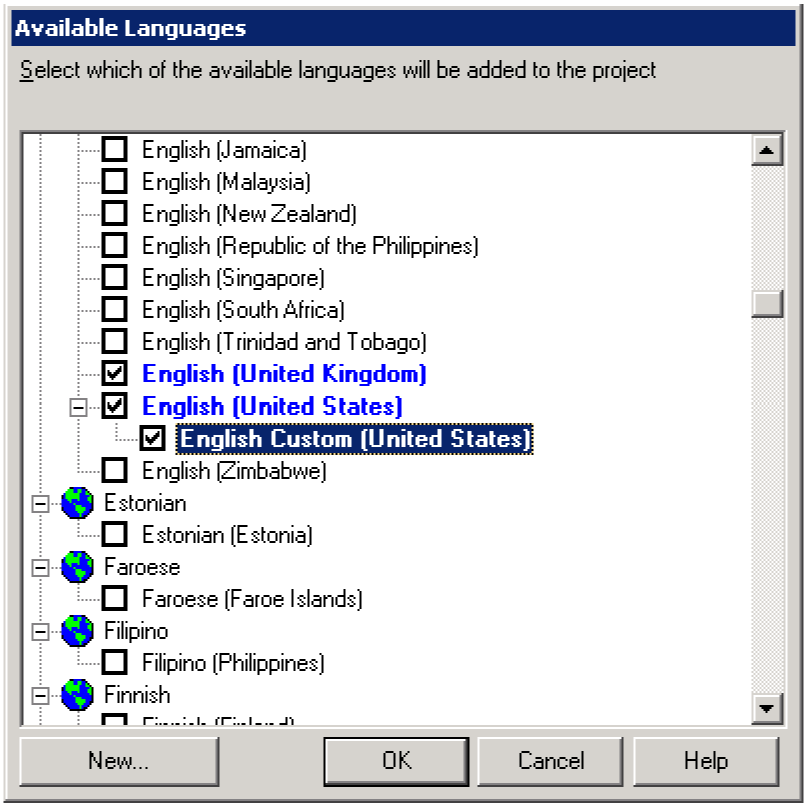
Language - Metadata

Please choose the languages that are available for this project. The languages that are checked will be available for translations of text strings like object names and descriptions in the metadata.

Selected Languages	Default
☑ Chinese (Simplified)	○
☑ Chinese (Traditional)	○
☑ Danish (Denmark)	○
☑ Dutch (Netherlands)	○
☑ English (United Kingdom)	○
☑ English (United States)	●
☑ French (Belgium)	○
☑ French (Canada)	○
☑ French (France)	○
☑ French (Switzerland)	○
☑ German (Germany)	○
☑ German (Switzerland)	○
☑ Italian (Italy)	○
☑ Italian (Switzerland)	○
☑ Japanese	○
☑ Korean	○
☑ Polish	○

Click this button to add languages, which will be available for metadata translations.

Select **English Custom (United States)** under English (United States)



Available Languages
Select which of the available languages will be added to the project
New...
OK
Cancel
Help

- □ English (Jamaica)
- □ English (Malaysia)
- □ English (New Zealand)
- □ English (Republic of the Philippines)
- □ English (Singapore)
- □ English (South Africa)
- □ English (Trinidad and Tobago)
- ☑ English (United Kingdom)
- ☑ English (United States)
  - ☑ English Custom (United States)
- □ English (Zimbabwe)
- Estonian
  - □ Estonian (Estonia)
- Faroese
  - □ Faroese (Faroe Islands)
- Filipino
  - □ Filipino (Philippines)
- Finnish
  - □ Finnish (Finland)

Click **OK**.

Replace Mobile images and configuration folders saved from before upgrade

Copy entire folder back to original locations.

Image folder location

C:\XBRi\tomcat\webapps\analyticsMobile\images\lpImgs\mobile

Now copy your mobile configuration folder to safe location outside of installation folders.

Mobile Configuration folder location

C:\XBRi\tomcat\webapps\analyticsMobile\WEB-INF\xml\mobile

Also restore these 3 files back to the XML folder

AdminServers.xml, sys_defaults_*WEBSERVER* and ***WEBSERVER*.token**

C:\XBRi\tomcat\webapps\analyticsMobile\WEB-INF\xml

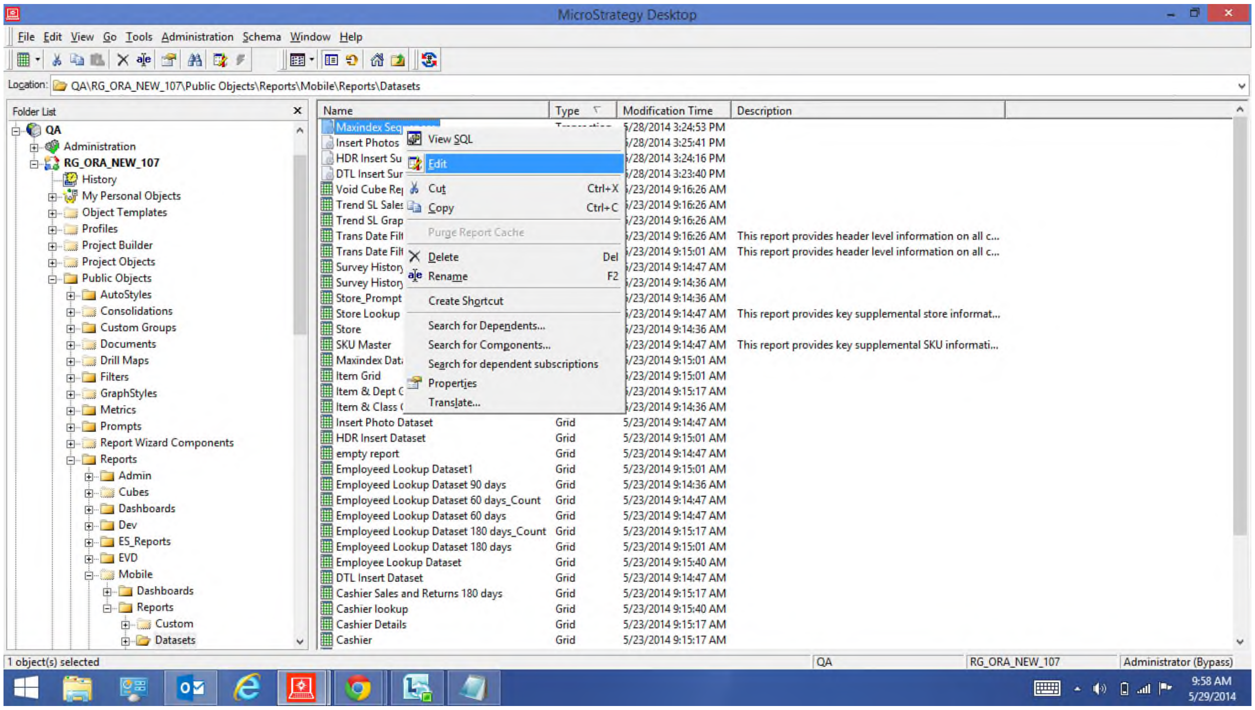
Refresh Cubes (if necessary)

1. Log into MicroStrategy Desktop.
2. Check the Cubes folder for any cubes with date and time of upgrade, those which were upgraded will have the timestamp of the time when the package was imported. You will only need to refresh those cubes which have been modified.
3. To Modify, Expand Administration folder.
4. Navigate to **System Monitors > Caches > Intelligent Cubes**
5. Ensure the Discount Activity, Refund Activity, Sales Analysis, Store Lookup Sales and Void Activity cubes were published successfully and the caches are updated with time of upgrade.
6. Expand the project folder.
7. Navigate to **Public Objects > Reports > Cubes**.
8. Double click on the cube “Field Dashboard – Icube” to run it and refresh the Intelligence Cube cache.

Update Database instance for Transaction Reports

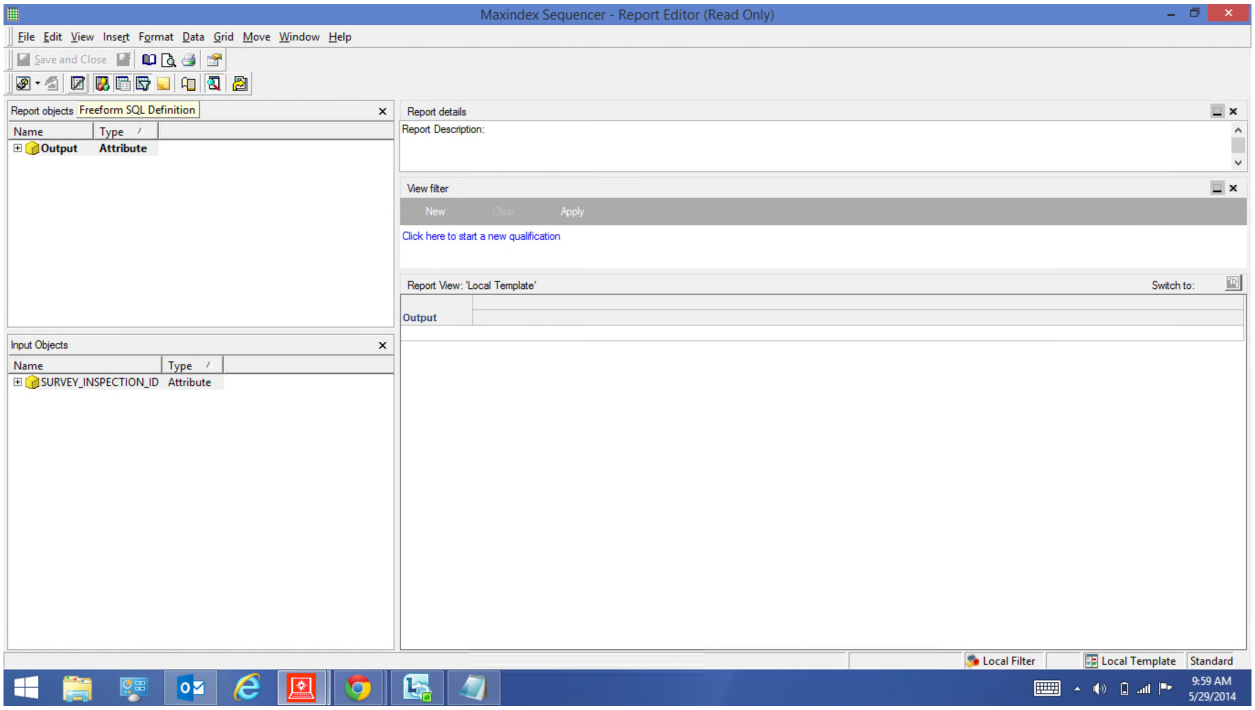
> This procedure is for Oracle installations only.
>
> Follow this procedure for all of the Transaction reports in a folder.

Right click on the Transaction report and choose **Edit**.



Name	Type	Modification Time	Description
Maxindex Seq		5/28/2014 3:24:53 PM	
Insert Photos		5/28/2014 3:25:41 PM	
HDR Insert Su		5/28/2014 3:24:16 PM	
DTL Insert Sur		5/28/2014 3:23:40 PM	
Void Cube Rej		5/23/2014 9:16:26 AM	
Trend SL Sales		5/23/2014 9:16:26 AM	
Trend SL Grap		5/23/2014 9:16:26 AM	
Trans Date Filt		5/23/2014 9:16:26 AM	This report provides header level information on all c...
Trans Date Filt		5/23/2014 9:15:01 AM	This report provides header level information on all c...
Survey History		5/23/2014 9:14:47 AM	
Survey History		5/23/2014 9:14:36 AM	
Store_Prompt		5/23/2014 9:14:36 AM	
Store Lookup		5/23/2014 9:14:47 AM	This report provides key supplemental store informat...
Store		5/23/2014 9:14:36 AM	
SKU Master		5/23/2014 9:14:47 AM	This report provides key supplemental SKU informati...
Maxindex Data		5/23/2014 9:15:01 AM	
Item Grid		5/23/2014 9:15:01 AM	
Item & Dept G		5/23/2014 9:15:17 AM	
Item & Class (		5/23/2014 9:14:36 AM	
Insert Photo Dataset	Grid	5/23/2014 9:14:47 AM	
HDR Insert Dataset	Grid	5/23/2014 9:15:01 AM	
empty report	Grid	5/23/2014 9:14:47 AM	
Employeed Lookup Dataset1	Grid	5/23/2014 9:15:01 AM	
Employeed Lookup Dataset 90 days	Grid	5/23/2014 9:14:36 AM	
Employeed Lookup Dataset 60 days_Count	Grid	5/23/2014 9:14:47 AM	
Employeed Lookup Dataset 60 days	Grid	5/23/2014 9:14:47 AM	
Employeed Lookup Dataset 180 days_Count	Grid	5/23/2014 9:15:17 AM	
Employeed Lookup Dataset 180 days	Grid	5/23/2014 9:15:01 AM	
Employee Lookup Dataset	Grid	5/23/2014 9:15:40 AM	
DTL Insert Dataset	Grid	5/23/2014 9:14:47 AM	
Cashier Sales and Returns 180 days	Grid	5/23/2014 9:15:17 AM	
Cashier lookup	Grid	5/23/2014 9:15:40 AM	
Cashier Details	Grid	5/23/2014 9:15:17 AM	
Cashier	Grid	5/23/2014 9:15:17 AM	

This opens the Transaction report. Click the **Freeform SQL Definition** button.



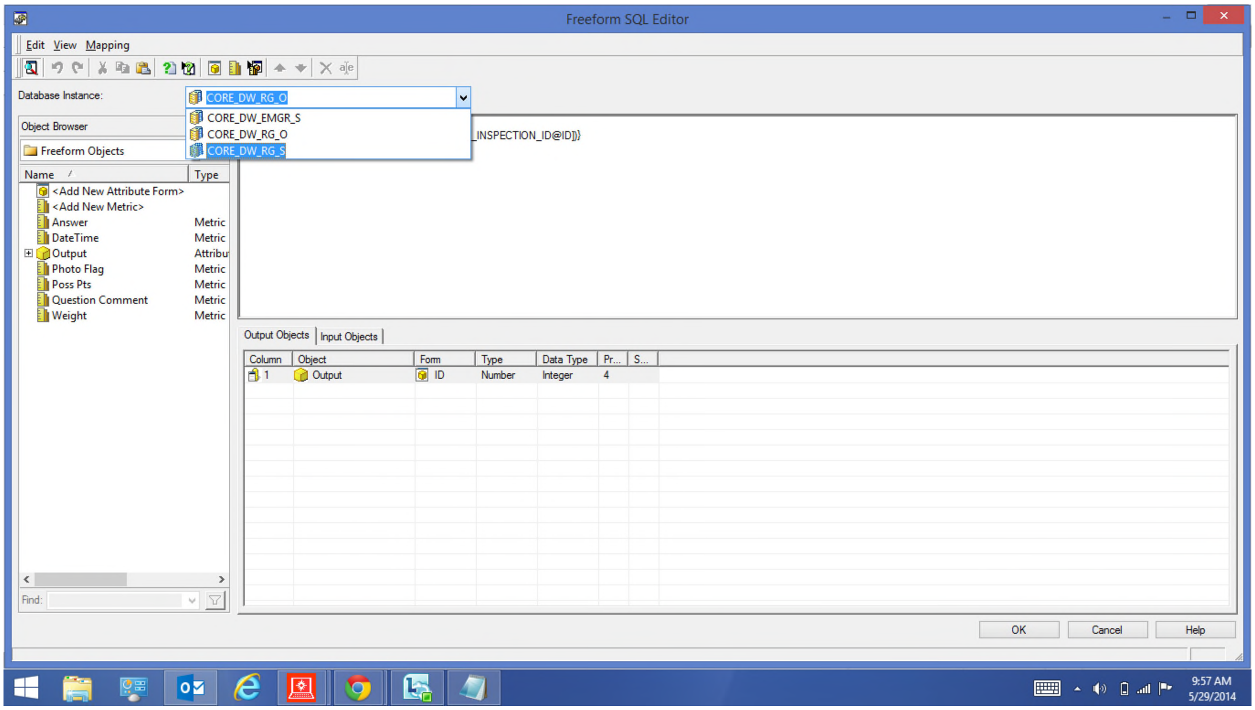
Report objects

Name	Type
Output	Attribute

Input Objects

Name	Type
SURVEY_INSPECTION_ID	Attribute

This displays the Freeform SQL window. From the **Database Instance** drop-down list, select the appropriate database instance.



Database Instance: CORE_DW_RG_O

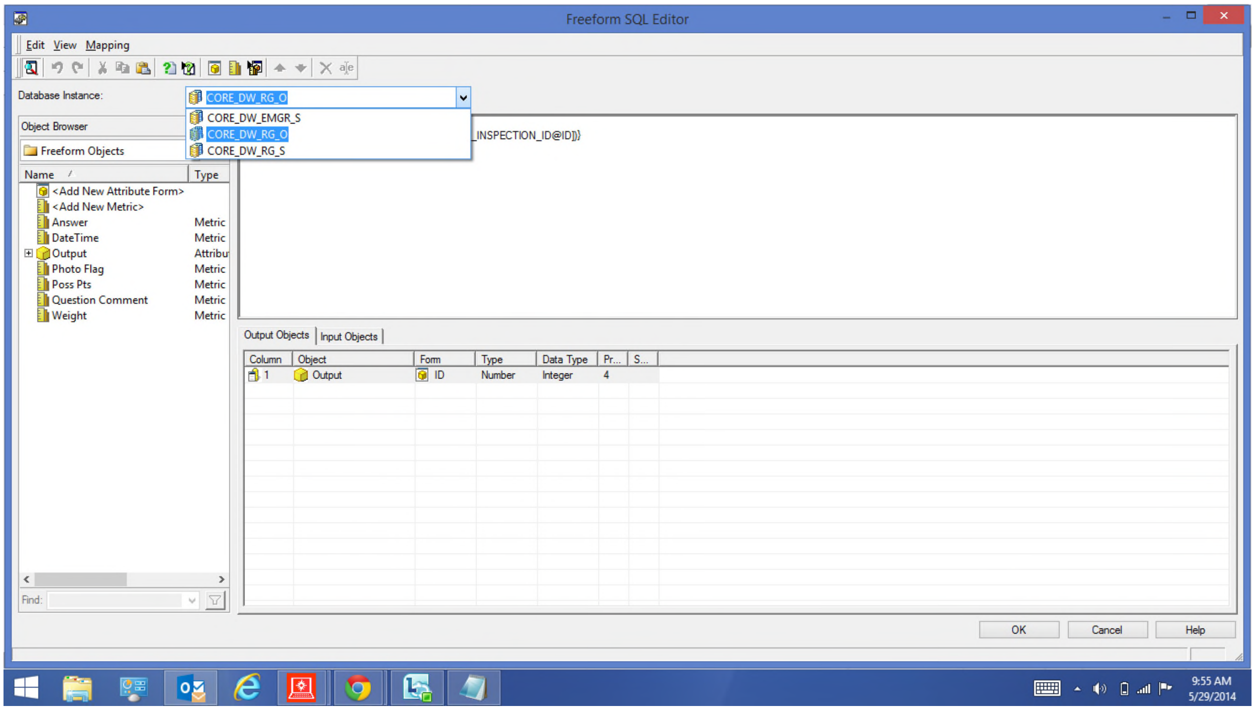
- CORE_DW_EMGR_S
- CORE_DW_RG_O
- CORE_DW_RG_S

Name	Type
<Add New Attribute Form>	
<Add New Metric>	
Answer	Metric
DateTime	Metric
Output	Attribu
Photo Flag	Metric
Poss Pts	Metric
Question Comment	Metric
Weight	Metric

INSPECTION_ID@ID])

Column	Object	Form	Type	Data Type	Pr...	S...
1	Output	ID	Number	Integer	4	

Click **OK** and **Save and Close**.



Database Instance: CORE_DW_RG_O

CORE_DW_EMGR_S
CORE_DW_RG_O
CORE_DW_RG_S

_INSPECTION_ID@ID])}

Name	Type
<Add New Attribute Form>	
<Add New Metric>	
Answer	Metric
DateTime	Metric
Output	Attribu
Photo Flag	Metric
Poss Pts	Metric
Question Comment	Metric
Weight	Metric

Output Objects | Input Objects

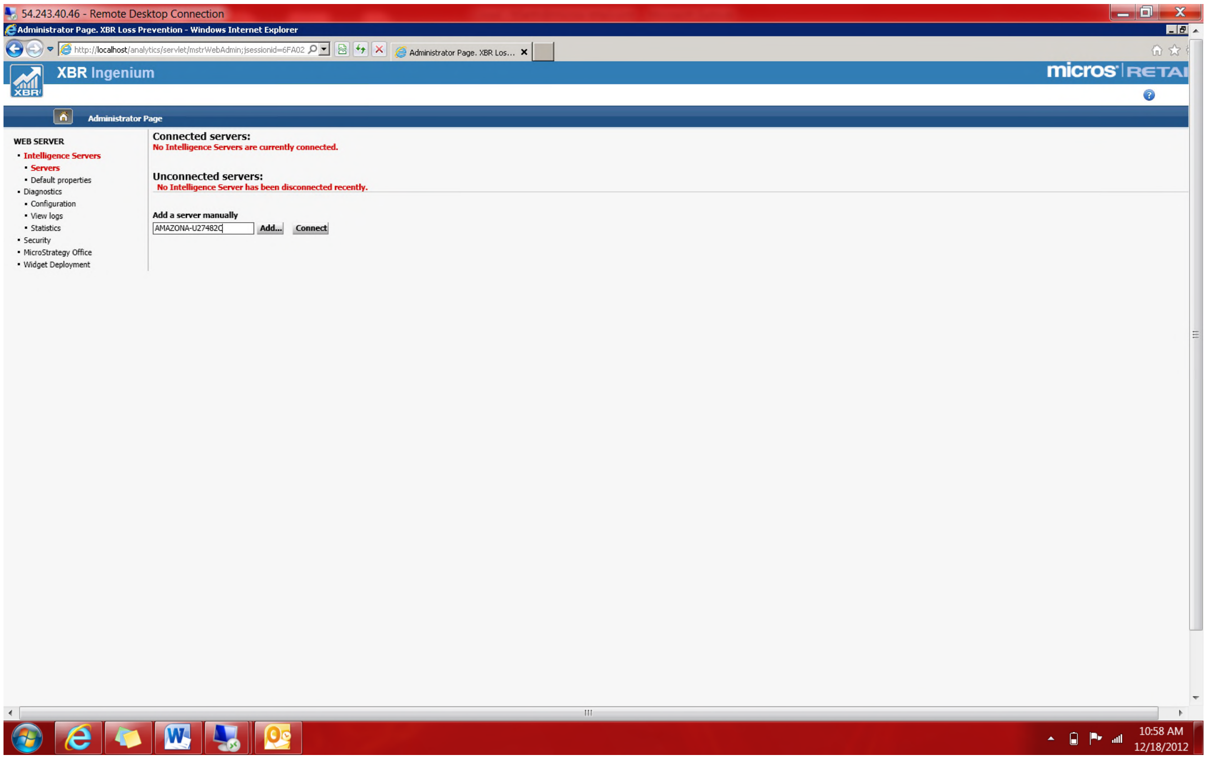
Column	Object	Form	Type	Data Type	Pr...	S...
1	Output	ID	Number	Integer	4	

Repeat these steps for every Transaction report in the folder.

Create Trusted Authentication

Start the XBR^i Webserver and launch the XBR^i URL. If this is the first time the Webserver is started there will be a delay while the war file is un-archived. Login as corexbradmin and then click the Web Administrator link. Log in with the webadmin user and password.

Set up Trusted Authentication



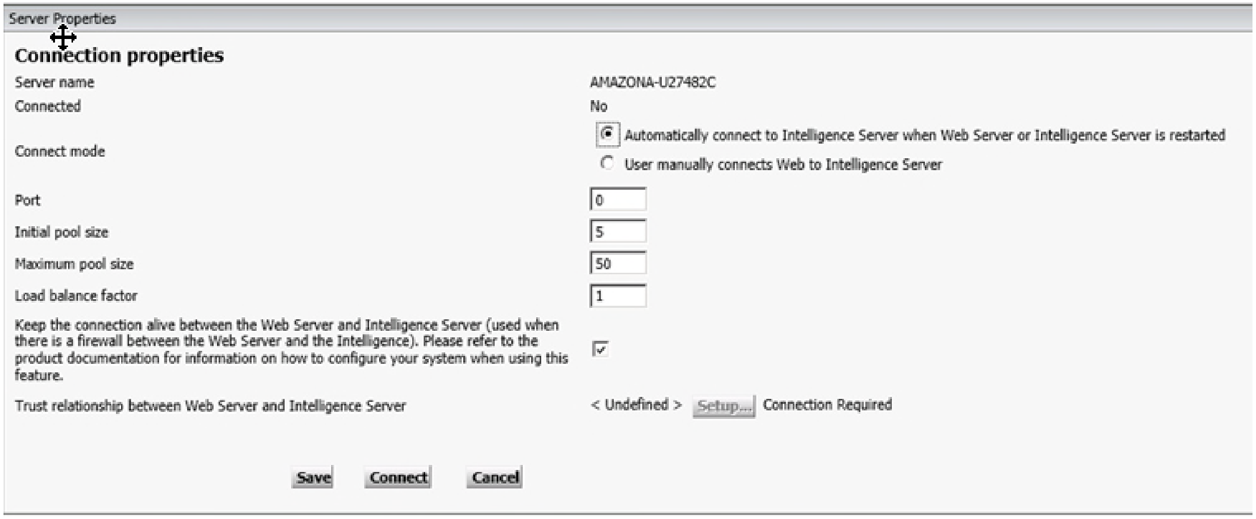
Connected servers:
No Intelligence Servers are currently connected.

Unconnected servers:
No Intelligence Server has been disconnected recently.

Add a server manually
AMAZONA-U27482C

Under Web Server, navigate to **Intelligence Servers > Server**.

Enter the I-Server Name, and click **Add**. This adds the I-Server to the list under Web Server.

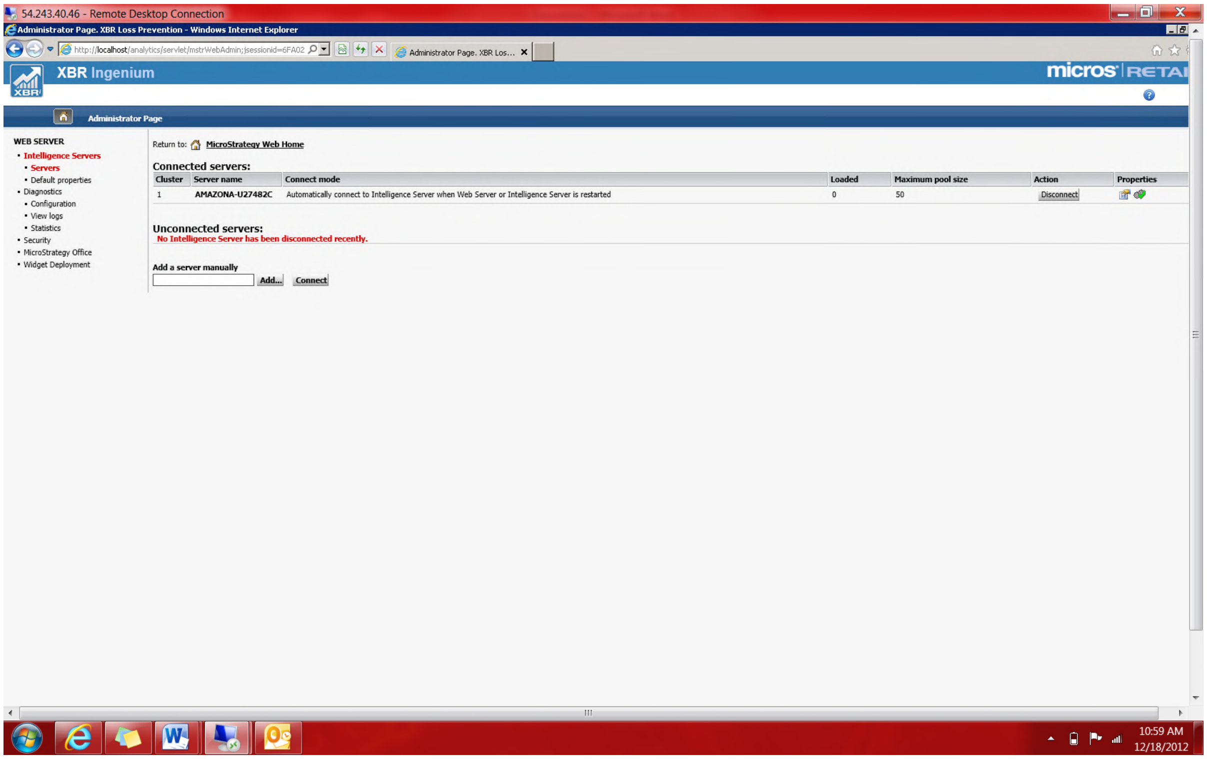


Connection properties

Server name	AMAZONA-U27482C
Connected	No
Connect mode	● Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted ○ User manually connects Web to Intelligence Server
Port	0
Initial pool size	5
Maximum pool size	50
Load balance factor	1
Keep the connection alive between the Web Server and Intelligence Server (used when there is a firewall between the Web Server and the Intelligence). Please refer to the product documentation for information on how to configure your system when using this feature.	☑
Trust relationship between Web Server and Intelligence Server	< Undefined > Setup... Connection Required

Click on the I-Server name and configure the Connection Properties if required.

Click **Connect**.



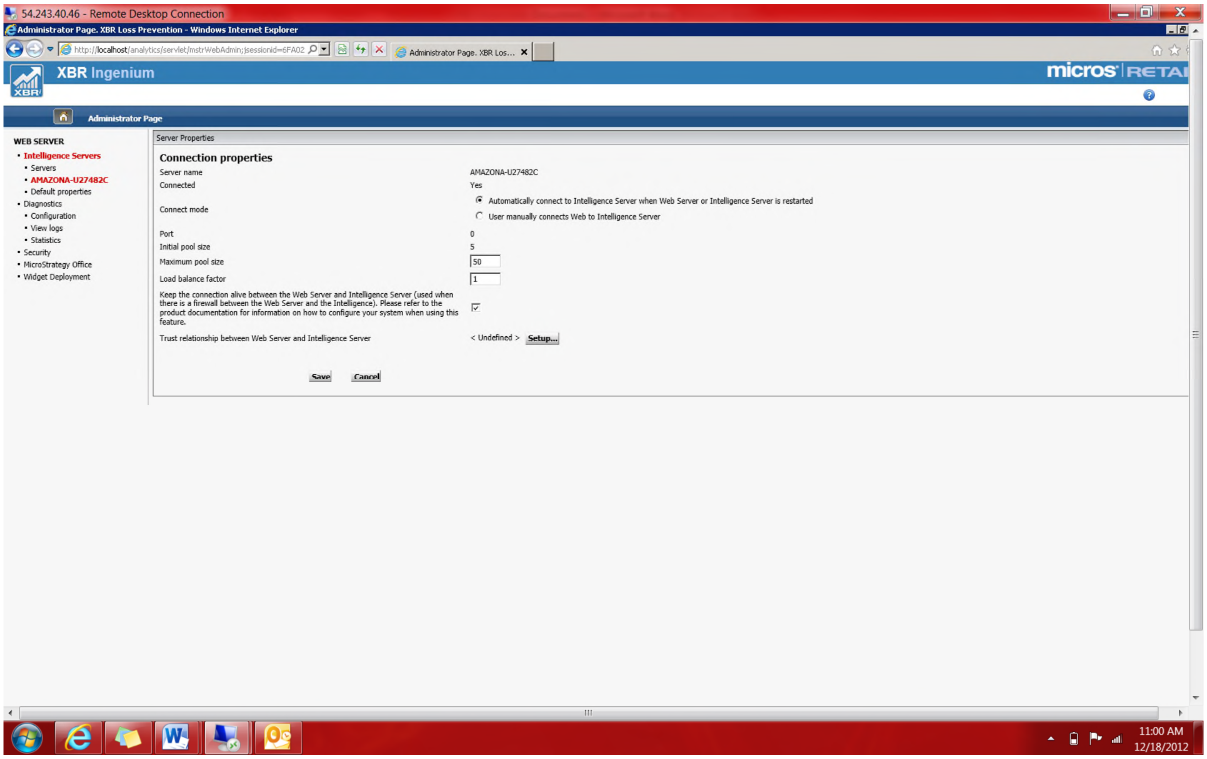
Connected servers:

Cluster	Server name	Connect mode	Loaded	Maximum pool size	Action	Properties
1	AMAZONA-U27482C	Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted	0	50	Disconnect	

Unconnected servers:

No Intelligence Server has been disconnected recently.

The IServer is displayed under **Connected Servers**. Click the properties icon to the right of the page.



Connection properties

Server name AMAZONA-U27482C

Connected Yes

Connect mode
● Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted
○ User manually connects Web to Intelligence Server

Port 0

Initial pool size 5

Maximum pool size 50

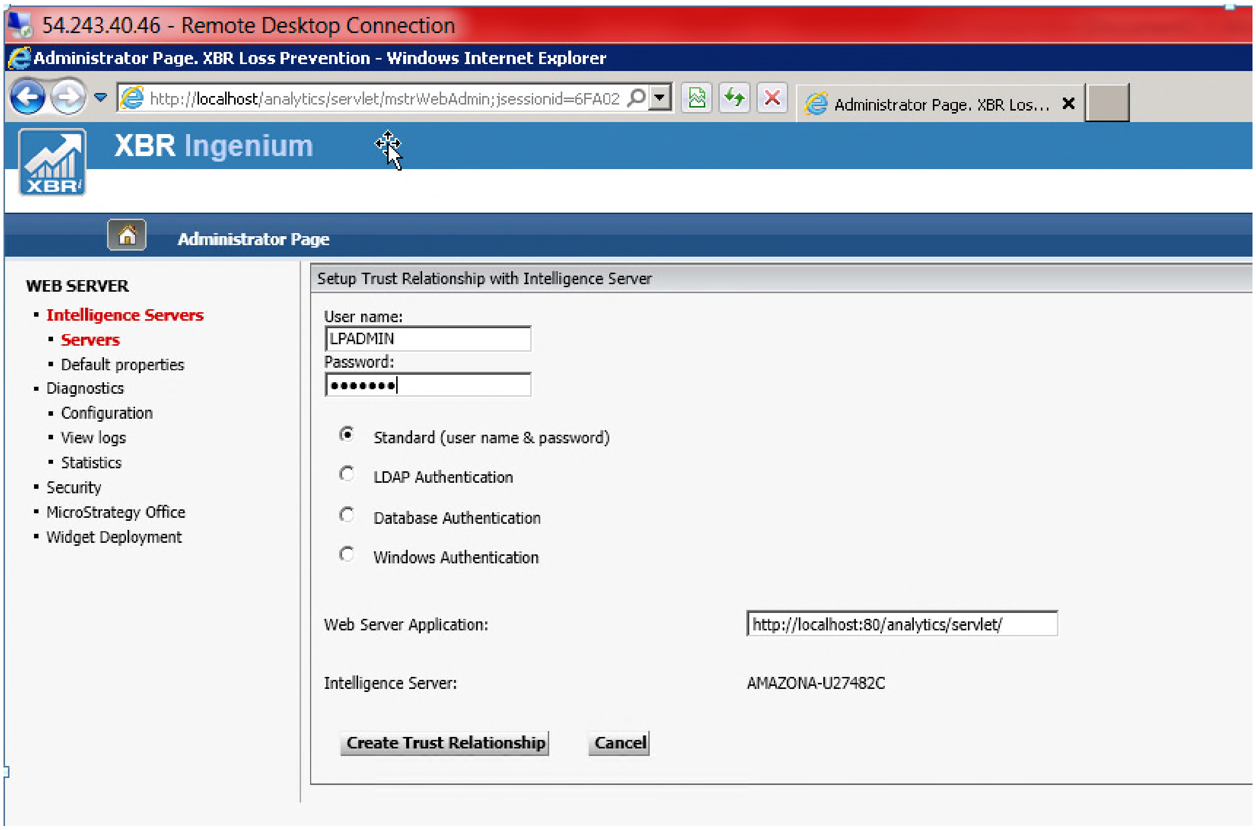
Load balance factor 1

Keep the connection alive between the Web Server and Intelligence Server (used when there is a firewall between the Web Server and the Intelligence). Please refer to the product documentation for information on how to configure your system when using this feature. ☑

Trust relationship between Web Server and Intelligence Server < Undefined > Setup...

Click on the IServer name and confirm settings.

Set up the Trust Relationship


54.243.40.46 - Remote Desktop Connection
Administrator Page. XBR Loss Prevention - Windows Internet Explorer
http://localhost/analytics/servlet/mstrWebAdmin;jsessionid=6FA02
Administrator Page. XBR Los...
XBR Ingenium
XBRi
Administrator Page
WEB SERVER
Intelligence Servers
Servers
Default properties
Diagnostics
Configuration
View logs
Statistics
Security
MicroStrategy Office
Widget Deployment
Create Trust Relationship
Cancel

Setup Trust Relationship with Intelligence Server

User name: LPADMIN

Password: •••••••

● Standard (user name & password)

○ LDAP Authentication

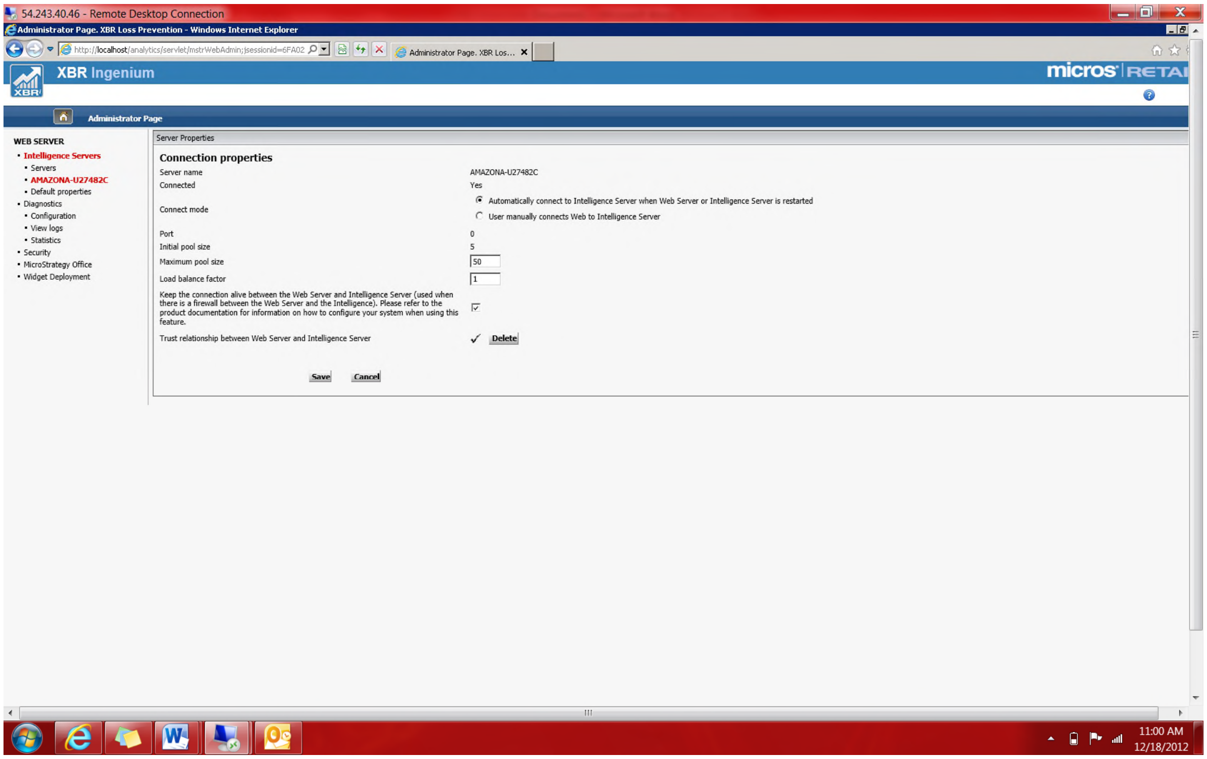
○ Database Authentication

○ Windows Authentication

Web Server Application: http://localhost:80/analytics/servlet/

Intelligence Server: AMAZONA-U27482C

1. Select the **Standard (user name and password)** option.
2. Enter the MicroStrategy Administrator **User Name** and **Password**.
3. Enter the URL of the **Web Server Application**.
4. Click Create **Trust Relationship**.



Connection properties

Server name	AMAZONA-U27482C
Connected	Yes
Connect mode	● Automatically connect to Intelligence Server when Web Server or Intelligence Server is restarted ○ User manually connects Web to Intelligence Server
Port	0
Initial pool size	5
Maximum pool size	50
Load balance factor	1
Keep the connection alive between the Web Server and Intelligence Server (used when there is a firewall between the Web Server and the Intelligence). Please refer to the product documentation for information on how to configure your system when using this feature.	☑
Trust relationship between Web Server and Intelligence Server	✓ Delete

5. Verify that the Connection properties are OK and click **Save**.

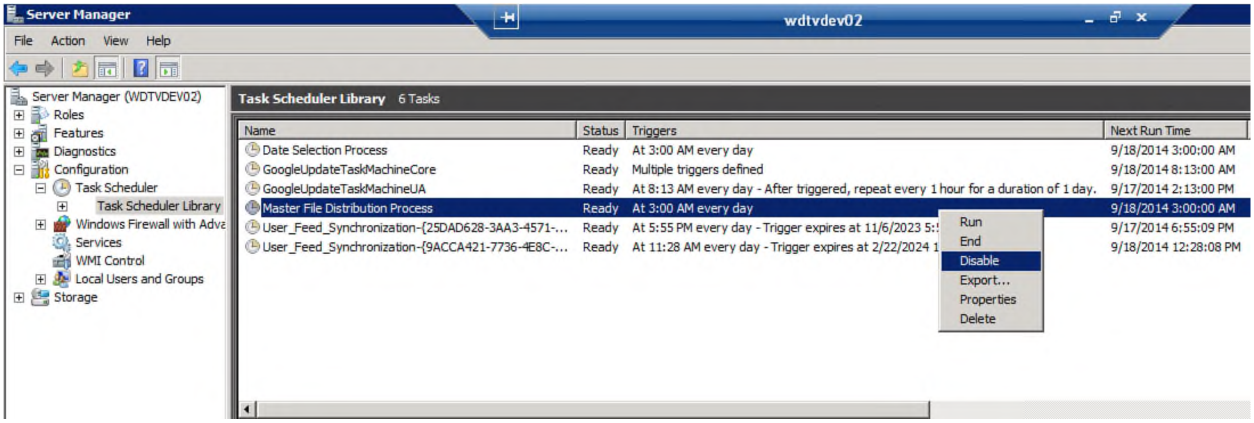
Post Upgrade Step 1: Disable MFD Task and Delete Batch File

After installation you must disable the scheduled MFD task in Windows Task Scheduler and remove the MFD batch file from the XBRi application folder.

Note: This step will not be necessary in the next installation program that corrects this problem.

To disable the Master File Distribution process:

1. From the Web server, open the Task Scheduler.



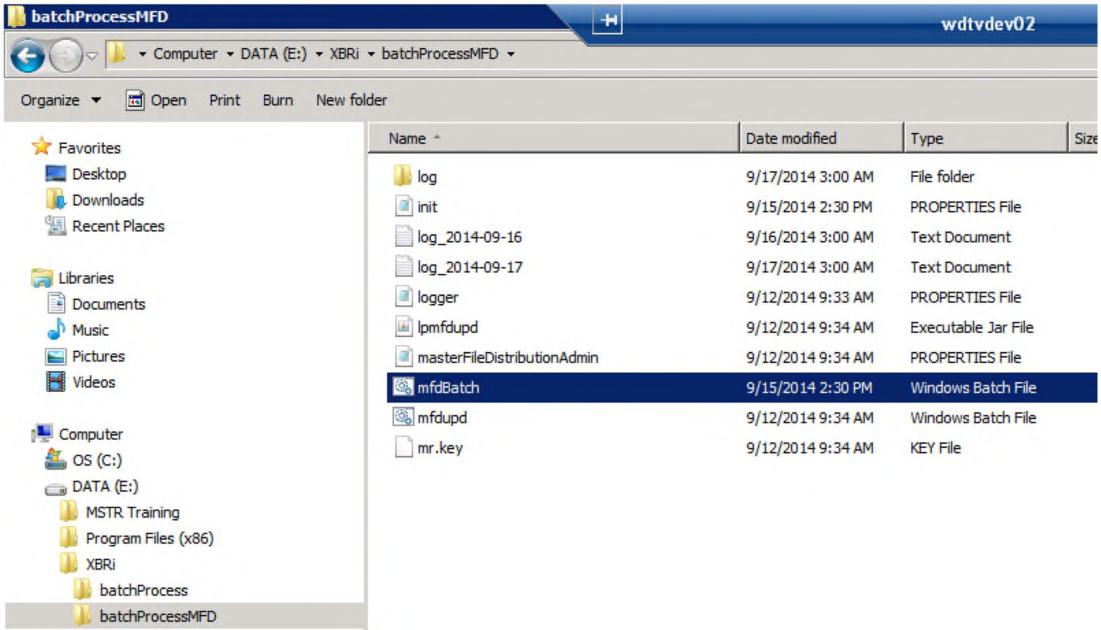
Task Scheduler Library 6 Tasks

Name	Status	Triggers	Next Run Time
Date Selection Process	Ready	At 3:00 AM every day	9/18/2014 3:00:00 AM
GoogleUpdateTaskMachineCore	Ready	Multiple triggers defined	9/18/2014 8:13:00 AM
GoogleUpdateTaskMachineUA	Ready	At 8:13 AM every day - After triggered, repeat every 1 hour for a duration of 1 day.	9/17/2014 2:13:00 PM
Master File Distribution Process	Ready	At 3:00 AM every day	9/18/2014 3:00:00 AM
User_Feed_Synchronization-{25DAD628-3AA3-4571-...	Ready	At 5:55 PM every day - Trigger expires at 11/6/2023 5:	9/17/2014 6:55:09 PM
User_Feed_Synchronization-{9ACCA421-7736-4E8C-...	Ready	At 11:28 AM every day - Trigger expires at 2/22/2024 1	9/18/2014 12:28:08 PM

2. Navigate to the Task Scheduler library.
3. Locate the Master File Distribution Process on the tasks list and right click on it.
4. From the context menu, choose **Disable**.

To remove the mfdBatch file:

1. On the Web server, navigate to the XBRi\batchProcessMFD folder.



Name	Date modified	Type	Size
log	9/17/2014 3:00 AM	File folder	
init	9/15/2014 2:30 PM	PROPERTIES File	
log_2014-09-16	9/16/2014 3:00 AM	Text Document	
log_2014-09-17	9/17/2014 3:00 AM	Text Document	
logger	9/12/2014 9:33 AM	PROPERTIES File	
lpmfdupd	9/12/2014 9:34 AM	Executable Jar File	
masterFileDistributionAdmin	9/12/2014 9:34 AM	PROPERTIES File	
mfdBatch	9/15/2014 2:30 PM	Windows Batch File	
mfdupd	9/12/2014 9:34 AM	Windows Batch File	
mr.key	9/12/2014 9:34 AM	KEY File	

2. Locate the mfdBatch file and right click on it.
3. From the context menu, choose **Delete**.

Post Upgrade Step 2: Configure for Master File Distribution

The Master File Distribution feature allows customers to send subscription reports to recipients who are not defined users in XBR^i. This is done through Dynamic address lists that are derived from reports based on the core master tables for Store, District, and Region for Retail installations and District and Location for Food and Beverage installations. When you create a dynamic address list, it becomes available on the Recipients list for creating email subscriptions.

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They include columns for Email, Device ID and Linked User ID. The Device ID column is initially populated when the application is installed or when new rows are added to the master files.

The Linked User ID column is updated in the master files when you run the Master File Batch Update or through the application. See Step F: Populate the Master File tables.

This section contains the steps form enabling master file distribution to using dynamic address lists:

Step A: Enable Master File Distribution for the project

Step B: Give access to the correct users and groups

Step C: Verify that key columns and security filter key attributes are correct

Step D: Master File Distribution Reports

Step E: Create Dynamic Address Lists

Step F: Populate the Master File tables

Step G: Using Dynamic Address Lists in Subscriptions

Step H: Device IDs in Master Files for Dynamic Address lists

Step I: Change the MFD Key Mapping after the MFD Update has been Run

Step J: Adding New Attributes

Step A: Enable Master File Distribution for the project

1. Log in to XBR^i as the Core XBR^i Administrator.
2. From the Admin menu, choose **Customization Manager**.
3. In the Feature list, select the check box next to **Master File Distribution**.
4. Click **Apply**.

By default, this feature will be On.

Step B: Give access to the MFD feature:

In the XBR^i User Manager, turn on the Master File Distribution feature for the administrator users:

To give users and groups access to the Master File Distribution feature:

1. Log in to XBR^i as a customer Administrator.
2. From the Admin menu, choose **User Manager**. This displays the User Manager.
   - If you want to give access at the group level, click the **Edit** icon ✎ in the Group row.
   - If you want to give access at the user level, expand the group, and click the **Edit** icon ✎ in the user row.
3. This displays the Group Editor for a group or the User Editor for a user.
4. Click the **Feature Security** tab.
5. Select the check box next to **Master File Distribution**.
6. Click **OK**.

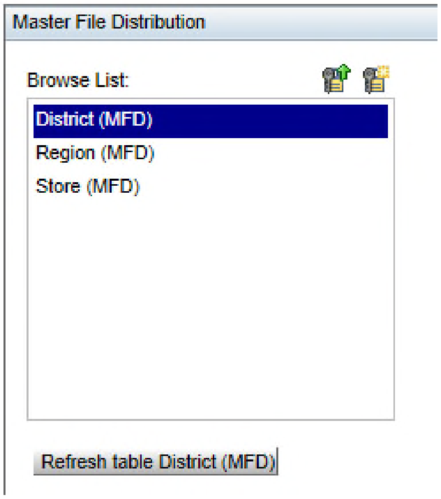
By default, this feature will be On.

Step C: Verify that key columns and security filter key attributes are correct

Several new attributes have been created specifically for Master File Distribution. For Retail, they are Store MFD, District MFD and Region MFD. For Food Service, they are District MFD and Location MFD. These attributes are used in the reports on which the dynamic address lists are based. See: Step D: Master File Distribution Reports.

After XBR^i is installed and MFD is enabled for the project, you need to review the Master File Distribution settings in Project Defaults and verify that the MFD mapping matches the key columns for each of the master tables. For example, if Store is not unique, Store and Division should be selected as keys.

Also, each of the mappings have a security filter associated with it. The security filter ensures the data sent is only for that one store or one district, etc. These also need to be correct for the customer site. If not, you can change them using the editing icons in the Project Defaults Master File Distribution page.



To verify key columns are correct and modify if needed:

1. Log in to XBR^{i} as the Core XBR^{i} Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. For each table in the Browse List, select the table and click the **Define key columns in database table** icon.

   Verify that the key columns are correct. If not, you can move a column from the **Available** to the **Selected** list.

5. When you are done selecting the key columns, click **OK**.

To verify key attributes in the security filter are correct and modify if needed:

1. Log in to XBR^{i} as the Core XBR^{i} Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. For each table in the Browse List, select the table and click the **Define key attributes for Security Filter** icon.

   Verify that the key attributes are correct. If not, you can move an attribute from the **Available** to the **Selected** list.

5. When you are done selecting the key attributes, click **OK**.

Step D: Master File Distribution Reports

The reports used for creating dynamic address lists are stored in the Shared Reports > Master File Distribution folder. They each contain the MFD attributes that are derived from core master tables for Store, District, and Region for Retail installations and District and Location for Food and Beverage installations. They include columns for Email, Device ID and Linked User ID. The Device ID column is populated when the application is installed or upgraded. The Linked User ID column is updated whenever you run the Master File update to populate the Master File tables.

The dynamic address lists that you create in the next step use the addresses associated with the Linked User IDs from the Master File Distribution reports in the Shared Reports > Master File Distribution folder.

Step E: Create Dynamic Address Lists

The next step is to create Dynamic Address lists for the customer. You create a Dynamic Address list by linking it to one of the reports in the Shared Reports > Master File Distribution folder. The emails that will be sent are determined by the report to which it is linked. If you need to create a dynamic address list with a different MFD report, you will need to create or modify the existing MFD reports. For example, you can add a filter to the Store Master File Distribution report to filter for specific stores in the Western Region.

The subscription processing cannot handle more than 2000 users at one time. If the master file list of recipient users exceeds or comes close to 2000, the distribution reports must be filtered and run at different times.

To create Dynamic Address Lists:

1. Log in to XBR^i as a customer Administrator or Manager.
2. From the Admin menu, choose **User Preferences**.
3. Under Settings, choose **Dynamic address lists**.
4. Click the **Add a new dynamic address list** link.
5. Click the **Select…** link next to **Report:**.
6. Navigate to the Shared Reports > Master File Distribution folder.
7. For each of the reports in the folder, create a dynamic address list by completing the steps that follow.
8. Select the report and click **OK**.
9. Enter a name for the list in the **Dynamic address list name** field.
10. Under the **Required property** settings, make sure the correct values are selected. For example, for the **Property**, Physical Address, in a list containing the District attribute, the corresponding **Value** should be District (MFD) (Email).

Note: the lower portion of the screen under the **Subscription mappings, Optional property** settings is not used in XBRi.

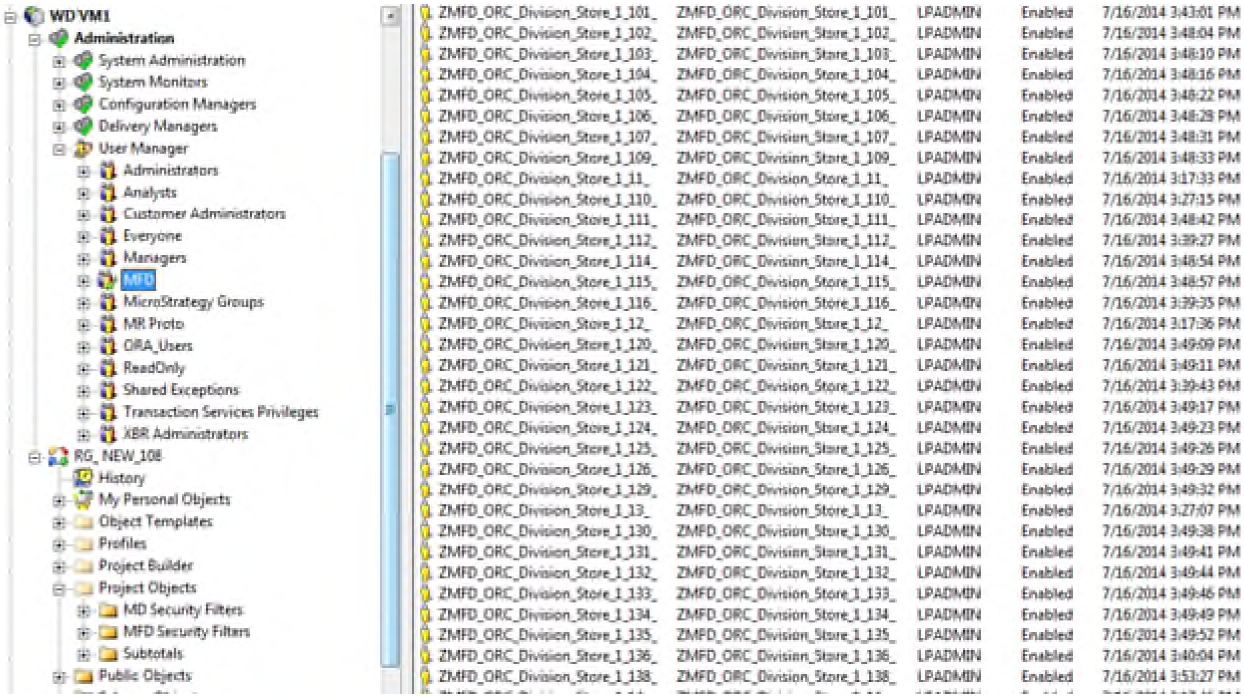
11. Click **Save**.

The new list will be displayed under Dynamic address lists in User Preferences. Repeat steps 8-11 for all of the reports in the Master File Distribution folder.

Step F: Populate the Master File tables

To enable the Dynamic address lists you have created, you must first populate the Master File tables with a linked user id for each row in the master file. For master files containing over 20 rows of data, you must use a batch process. For master files with fewer than 20 rows of data, you can use XBR^i Project Defaults, Master File Distribution and run the **Refresh table** option.

The update process sets up an MFD 'dummy' user in the application, and this ID links it to the master table for each row. It also creates an associated security filter to limit the data in the emailed report to only the one store, one district, etc.



ZMFD_ORC_Division_Store_1_101_	ZMFD_ORC_Division_Store_1_101_	LPADMIN	Enabled	7/16/2014 3:43:01 PM
ZMFD_ORC_Division_Store_1_102_	ZMFD_ORC_Division_Store_1_102_	LPADMIN	Enabled	7/16/2014 3:48:04 PM
ZMFD_ORC_Division_Store_1_103_	ZMFD_ORC_Division_Store_1_103_	LPADMIN	Enabled	7/16/2014 3:48:10 PM
ZMFD_ORC_Division_Store_1_104_	ZMFD_ORC_Division_Store_1_104_	LPADMIN	Enabled	7/16/2014 3:48:16 PM
ZMFD_ORC_Division_Store_1_105_	ZMFD_ORC_Division_Store_1_105_	LPADMIN	Enabled	7/16/2014 3:48:22 PM
ZMFD_ORC_Division_Store_1_106_	ZMFD_ORC_Division_Store_1_106_	LPADMIN	Enabled	7/16/2014 3:48:29 PM
ZMFD_ORC_Division_Store_1_107_	ZMFD_ORC_Division_Store_1_107_	LPADMIN	Enabled	7/16/2014 3:48:31 PM
ZMFD_ORC_Division_Store_1_109_	ZMFD_ORC_Division_Store_1_109_	LPADMIN	Enabled	7/16/2014 3:48:33 PM
ZMFD_ORC_Division_Store_1_11_	ZMFD_ORC_Division_Store_1_11_	LPADMIN	Enabled	7/16/2014 3:17:33 PM
ZMFD_ORC_Division_Store_1_110_	ZMFD_ORC_Division_Store_1_110_	LPADMIN	Enabled	7/16/2014 3:27:15 PM
ZMFD_ORC_Division_Store_1_111_	ZMFD_ORC_Division_Store_1_111_	LPADMIN	Enabled	7/16/2014 3:48:42 PM
ZMFD_ORC_Division_Store_1_112_	ZMFD_ORC_Division_Store_1_112_	LPADMIN	Enabled	7/16/2014 3:39:27 PM
ZMFD_ORC_Division_Store_1_114_	ZMFD_ORC_Division_Store_1_114_	LPADMIN	Enabled	7/16/2014 3:48:54 PM
ZMFD_ORC_Division_Store_1_115_	ZMFD_ORC_Division_Store_1_115_	LPADMIN	Enabled	7/16/2014 3:48:57 PM
ZMFD_ORC_Division_Store_1_116_	ZMFD_ORC_Division_Store_1_116_	LPADMIN	Enabled	7/16/2014 3:39:35 PM
ZMFD_ORC_Division_Store_1_12_	ZMFD_ORC_Division_Store_1_12_	LPADMIN	Enabled	7/16/2014 3:17:36 PM
ZMFD_ORC_Division_Store_1_120_	ZMFD_ORC_Division_Store_1_120_	LPADMIN	Enabled	7/16/2014 3:49:09 PM
ZMFD_ORC_Division_Store_1_121_	ZMFD_ORC_Division_Store_1_121_	LPADMIN	Enabled	7/16/2014 3:49:11 PM
ZMFD_ORC_Division_Store_1_122_	ZMFD_ORC_Division_Store_1_122_	LPADMIN	Enabled	7/16/2014 3:39:43 PM
ZMFD_ORC_Division_Store_1_123_	ZMFD_ORC_Division_Store_1_123_	LPADMIN	Enabled	7/16/2014 3:49:17 PM
ZMFD_ORC_Division_Store_1_124_	ZMFD_ORC_Division_Store_1_124_	LPADMIN	Enabled	7/16/2014 3:49:23 PM
ZMFD_ORC_Division_Store_1_125_	ZMFD_ORC_Division_Store_1_125_	LPADMIN	Enabled	7/16/2014 3:49:26 PM
ZMFD_ORC_Division_Store_1_126_	ZMFD_ORC_Division_Store_1_126_	LPADMIN	Enabled	7/16/2014 3:49:29 PM
ZMFD_ORC_Division_Store_1_129_	ZMFD_ORC_Division_Store_1_129_	LPADMIN	Enabled	7/16/2014 3:49:32 PM
ZMFD_ORC_Division_Store_1_13_	ZMFD_ORC_Division_Store_1_13_	LPADMIN	Enabled	7/16/2014 3:27:07 PM
ZMFD_ORC_Division_Store_1_130_	ZMFD_ORC_Division_Store_1_130_	LPADMIN	Enabled	7/16/2014 3:49:38 PM
ZMFD_ORC_Division_Store_1_131_	ZMFD_ORC_Division_Store_1_131_	LPADMIN	Enabled	7/16/2014 3:49:41 PM
ZMFD_ORC_Division_Store_1_132_	ZMFD_ORC_Division_Store_1_132_	LPADMIN	Enabled	7/16/2014 3:49:44 PM
ZMFD_ORC_Division_Store_1_133_	ZMFD_ORC_Division_Store_1_133_	LPADMIN	Enabled	7/16/2014 3:49:46 PM
ZMFD_ORC_Division_Store_1_134_	ZMFD_ORC_Division_Store_1_134_	LPADMIN	Enabled	7/16/2014 3:49:49 PM
ZMFD_ORC_Division_Store_1_135_	ZMFD_ORC_Division_Store_1_135_	LPADMIN	Enabled	7/16/2014 3:49:52 PM
ZMFD_ORC_Division_Store_1_136_	ZMFD_ORC_Division_Store_1_136_	LPADMIN	Enabled	7/16/2014 3:40:04 PM
ZMFD_ORC_Division_Store_1_138_	ZMFD_ORC_Division_Store_1_138_	LPADMIN	Enabled	7/16/2014 3:53:27 PM

Note: If a file has more than 20 rows and you try to use the Refresh Table command in Project defaults, you will see a message that lets you know the file is too large to process. In that case you must use the batch process.

Important Before you proceed with this step, be aware that depending on the number of records, the batch process can take up to two hours or longer to run.

To populate the linked user id in the Master File tables from Project Defaults:

1. Log in to XBR^i as a customer Administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Master File Distribution**.
4. Select the master table you want to update in the Browse List and click the **Refresh table <Table name MFD>** button.

To populate the linked user id in the Master File tables using the Batch File Process:

1. On the server where the MS Iserver is installed, in the XBR^i application folder, navigate to the batchProcessMFD folder.
2. Open the init.properties file.

   Example: init.properties file

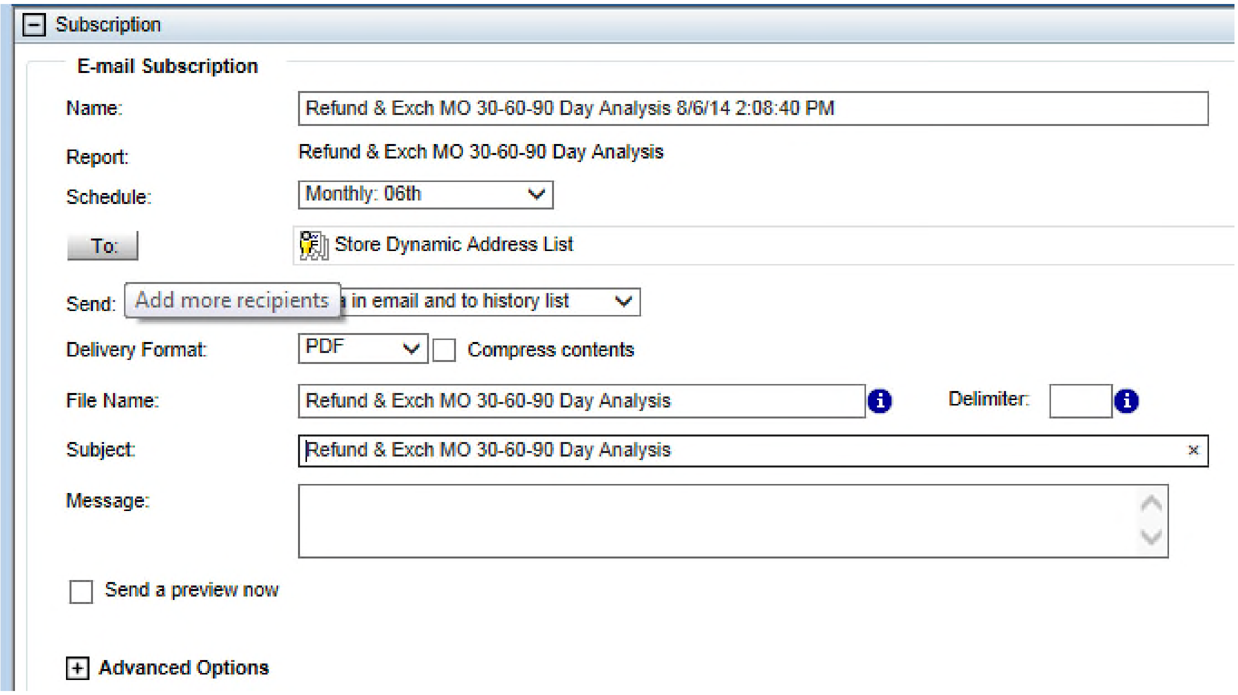
   ```
   #key file
   mr.key.file.name=mr.key
   iserver.name=<Iserver>
   iserver.projectname=<Project name>iserver.port=0
   iserver.login=BBA04229B250CB4B8E74B65E25A2169A
   iserver.password=NA
   useTrusted=true
   tokenPath=C:\\XBRi\\tomcat\\webapps\\analytics\\WEB-INF\\xml\\
   #DB properties
   db.driver=oracle.jdbc.driver.OracleDriver
   db.url=jdbc:oracle:thin:@WDTVORADBVM1:1521:dwrgqa
   db.login=93B3C6084E4D560252934D6E1965BFD4
   db.password=E72ABA033722D1AEADF6CA9D295AF0CE

   ######################################################
   mfd.org.code=ORA
   excludeTables=MST_STORE;MST_DISTRICT
   ```

3. In the init.properties file, edit the IServer and db properties and enter the correct org code. The sections to edit are highlighted in the example above.
4. Use the final line, excludeTables, if you want to exclude tables from the batch process. For example, if you already processed one master table, you can exclude it. In the example above, the MST_STORE and MST_DISTRICT tables are being excluded from the batch process.
5. Double click on the mfdupd.bat file. This runs the batch process.
6. When the batch process has finished, you can check the log file in the batchProcessMFD\log folder to make sure it ran correctly.

Step G: Using Dynamic Address Lists in Subscriptions

After you have completed the steps for configuring Master File Distribution, The dynamic address list will be available as a new recipient in the Add more recipients TO option when creating and editing subscriptions.

> When creating the subscription, the attributes (keys) used to define the master file in the project defaults must be in the report or selected in the hierarchy prompt used in the subscription. For example, if store and division are selected keys, these attributes must be included in the report subscription.



⊟ Subscription

E-mail Subscription

Name: Refund & Exch MO 30-60-90 Day Analysis 8/6/14 2:08:40 PM

Report: Refund & Exch MO 30-60-90 Day Analysis

Schedule: Monthly: 06th

To: Store Dynamic Address List

Send: Add more recipients | in email and to history list

Delivery Format: PDF ☐ Compress contents

File Name: Refund & Exch MO 30-60-90 Day Analysis

Delimiter:

Subject: Refund & Exch MO 30-60-90 Day Analysis

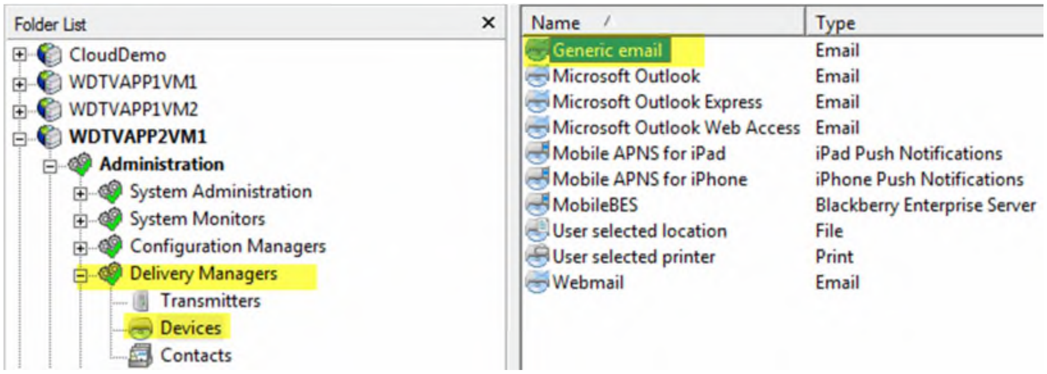
Message:

☐ Send a preview now

⊞ Advanced Options

Step H: Device IDs in Master Files for Dynamic Address lists

The master tables used for Master File Distribution all have a default device ID. The default device ID used for the email system for customer installs is Generic email. The object ID of this device is what is being populated in the Device ID column in the master table. You can look up the Device ID corresponding to this and all other supported device types in Desktop in the <Project>\Administration\Delivery Managers\Devices folder:

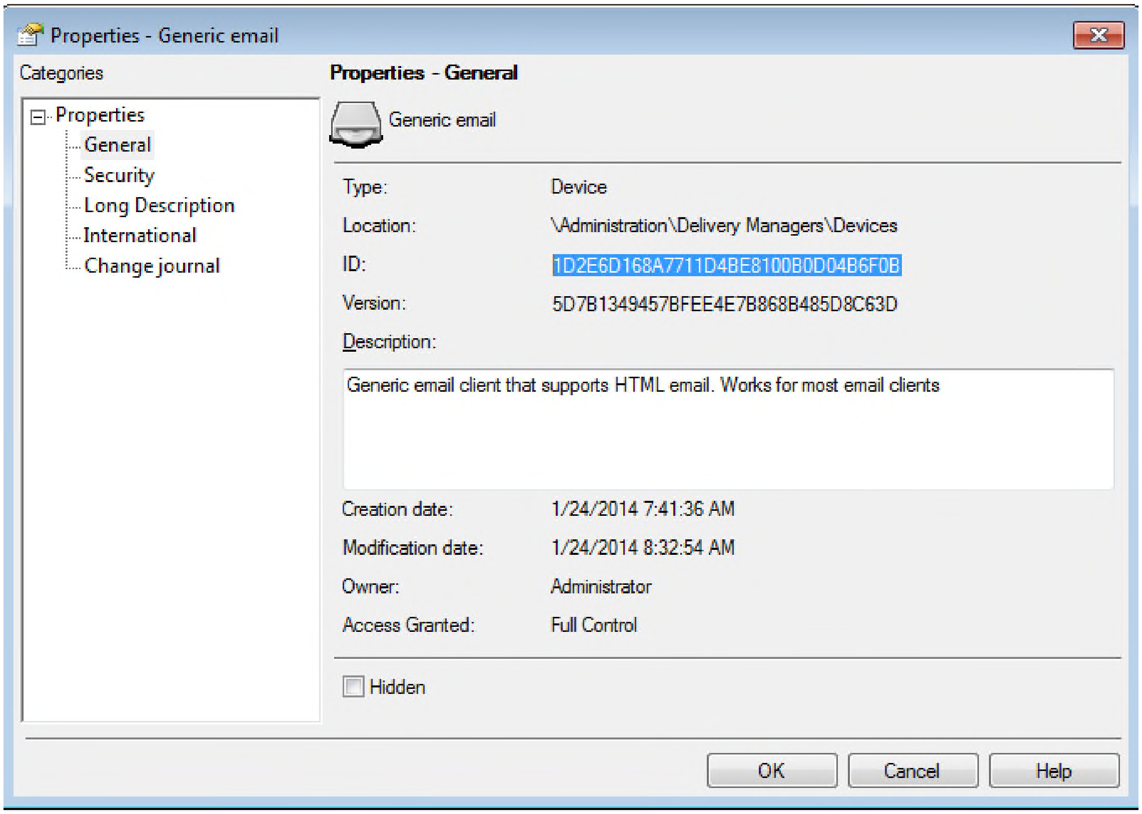


Folder List

- CloudDemo
- WDTVAPP1VM1
- WDTVAPP1VM2
- WDTVAPP2VM1
  - Administration
    - System Administration
    - System Monitors
    - Configuration Managers
    - Delivery Managers
      - Transmitters
      - Devices
      - Contacts

Name	Type
Generic email	Email
Microsoft Outlook	Email
Microsoft Outlook Express	Email
Microsoft Outlook Web Access	Email
Mobile APNS for iPad	iPad Push Notifications
Mobile APNS for iPhone	iPhone Push Notifications
MobileBES	Blackberry Enterprise Server
User selected location	File
User selected printer	Print
Webmail	Email

You can right click on a supported device in the list and choose Properties to view the device ID number. This ID needs to be populated for each master file entry used in master file distribution.



Properties - Generic email

Categories

- Properties
  - General
  - Security
  - Long Description
  - International
  - Change journal

Properties - General

Generic email

Type: Device

Location: \Administration\Delivery Managers\Devices

ID: 1D2E6D168A7711D4BE8100B0D04B6F0B

Version: 5D7B1349457BFEE4E7B868B485D8C63D

Description:

Generic email client that supports HTML email. Works for most email clients

Creation date: 1/24/2014 7:41:36 AM

Modification date: 1/24/2014 8:32:54 AM

Owner: Administrator

Access Granted: Full Control

☐ Hidden

Step I: Change the MFD Key Mappings after the MFD Update has been Run

If you have already run the MFD update and you want to change the MFD keys or Security Filter keys, you must follow these steps:

1. In the Desktop, navigate to the project folders containing MFD Users and MFD Security filters. In each folder delete all of the users and filters except: **Important!** *Do not delete the MFD 001_mfdtemplate in the MFD Users folder or the Security Filter 001_sf_mfdtemplate in the MFD Security Filter folder*.
2. Using a database editor, navigate to the master table for which you want to change the mapping and delete the linked user ID.
3. Log in to XBR^i as a customer Administrator and change the key columns and security filter attributes as in Step C.
4. Rerun the MFD batch update, as in Step F.

Step J: Adding New Attributes

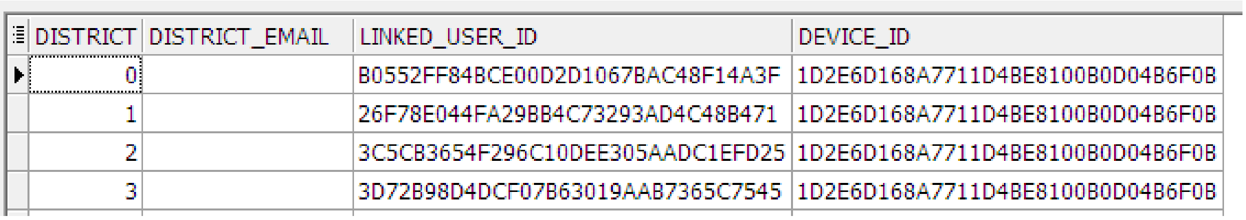
If the customer requires it, you can add new attributes for creating Master File Distribution lists.

Before you begin

When you do this it is recommended that you review an MFD table like the one below, and note the columns that must be included as attribute forms when you create the new attribute:

- Email address field– an email address field to be populated by physical address of the user that the email is going to be sent to
- Linked_User_ ID – to be populated by User GUID that is linked to this recipient.
- Device_ID – to be populated by GUID of the device object (email device, see Step H of this manual)

Example:



DISTRICT	DISTRICT_EMAIL	LINKED_USER_ID	DEVICE_ID
0		B0552FF84BCE00D2D1067BAC48F14A3F	1D2E6D168A7711D4BE8100B0D04B6F0B
1		26F78E044FA29BB4C73293AD4C48B471	1D2E6D168A7711D4BE8100B0D04B6F0B
2		3C5CB3654F296C10DEE305AADC1EFD25	1D2E6D168A7711D4BE8100B0D04B6F0B
3		3D72B98D4DCF07B63019AAB7365C7545	1D2E6D168A7711D4BE8100B0D04B6F0B

To create a new MFD attribute:

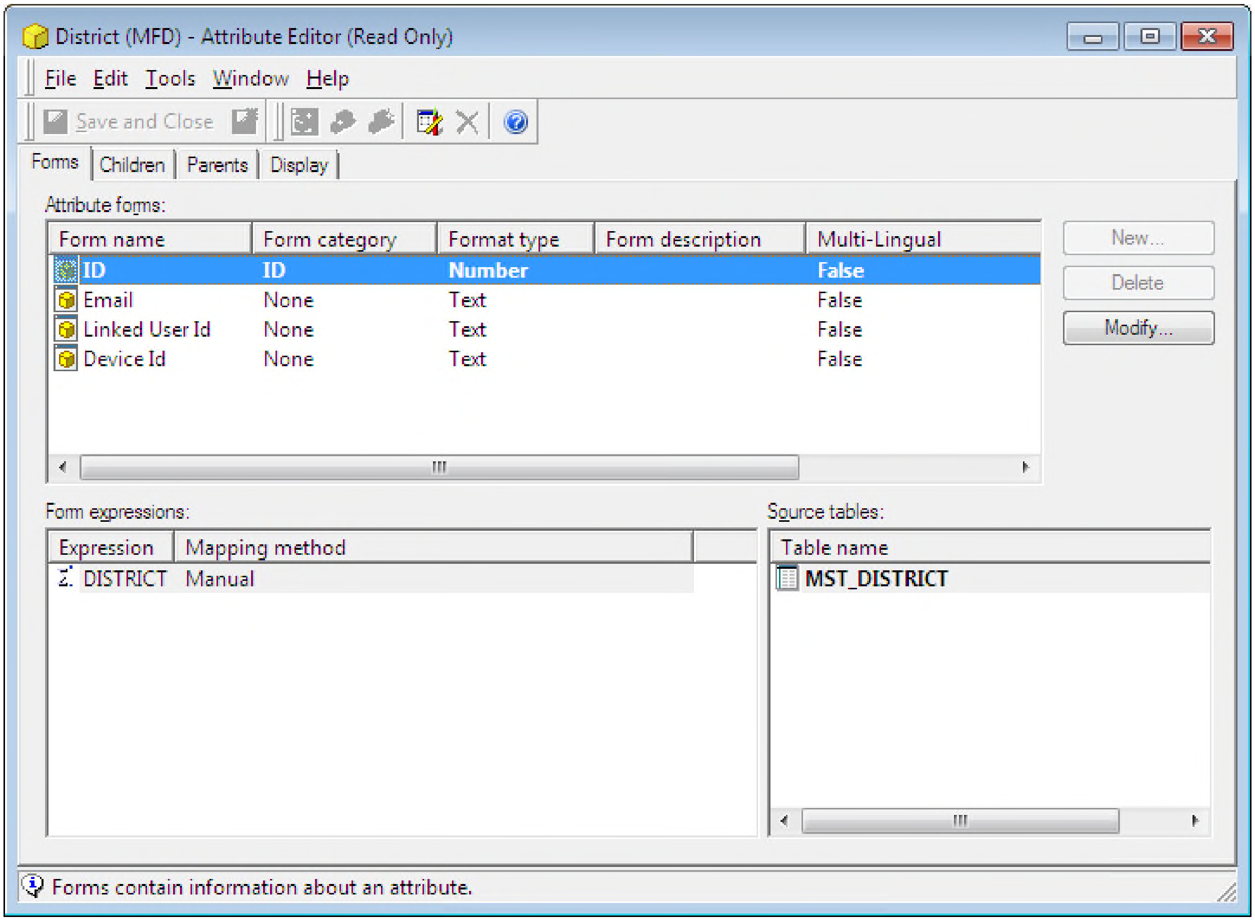
1. Log in to Desktop.
2. Navigate to the **Schema Objects > Attributes > Master File Distribution** folder.
3. Click on the **New Attribute** icon.

4. In the New Attribute Editor, create a new attribute with following attribute forms:
   - Email (map to column Email Address);
   - Linked User Id (map to column Linked_User_ID);
   - Device Id (map to column Device_ID).

See the image below for an example of an MFD attribute in the New Attribute editor.

It is strongly recommended to add the suffix, MFD, to the name of the attribute, for example District (MFD) so it won't be confused with regular attributes.

For more information about creating new attributes, consult the XBRi Project Customization guide.



Attribute forms:

Form name	Form category	Format type	Form description	Multi-Lingual
ID	ID	Number		False
Email	None	Text		False
Linked User Id	None	Text		False
Device Id	None	Text		False

Form expressions:

Expression	Mapping method
DISTRICT	Manual

Source tables:

Table name
MST_DISTRICT

Forms contain information about an attribute.

The new attribute will appear in the Project Defaults Master File Distribution page where the table keys and security filter keys are set (see Step C: Verify that key columns and security filter key attributes are correct).

Appendix A: Application Configuration

This section provides instructions on how to do additional configuration that may be required after an installation. This will depend on what each customer requires.

Ensure Security

To ensure data, system, and application security, whenever possible the Operations team should work with XBR^i customers to secure access to the servers that run the XBR^i Web Server, the MicroStrategy Intelligence Server, and the MicroStrategy Administration Desktop.

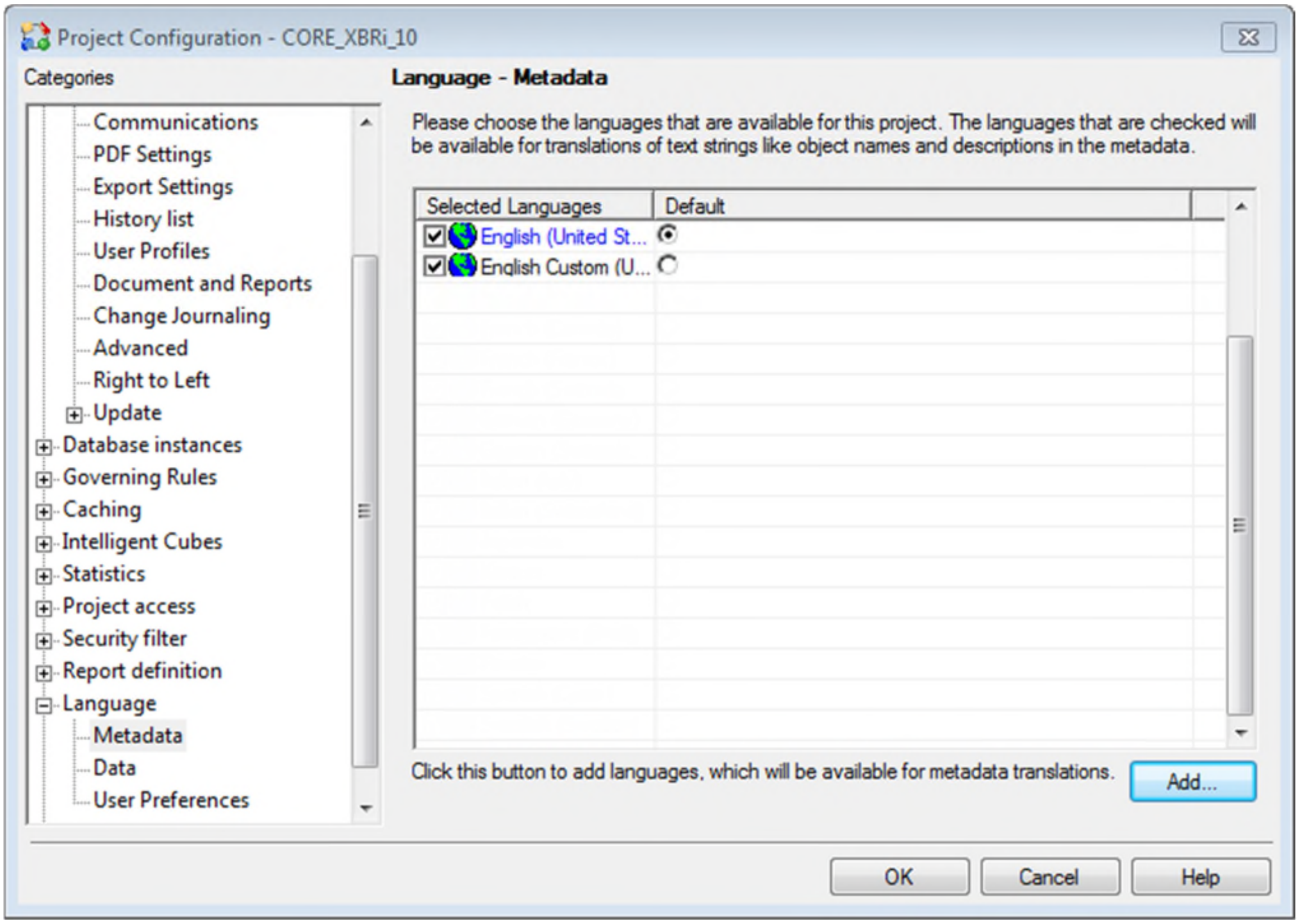
Take the following steps to ensure data security:

1. Make sure that the servers mentioned above are behind the corporate firewall.
2. Turn off Remote Desktop access to these servers when the access is not needed.

Add Customer Language Derivatives

You add customer language derivatives to customize the metadata to use customer-specific terminology.

1. Right-click on the project and select **Project Configuration** from the context menu.
2. Navigate to **Language > Metadata**.
3. The available languages are listed – in this example, English and Custom English. Both should be selected with English as the default. The Custom English will be used to display an alternative name for an object different from the core name. For example, a customer may want to use the term “Location” instead of “Store”. The core attribute should not be renamed and instead should be translated to “Location” for the Custom English language.



Project Configuration - CORE_XBRi_10

Language - Metadata

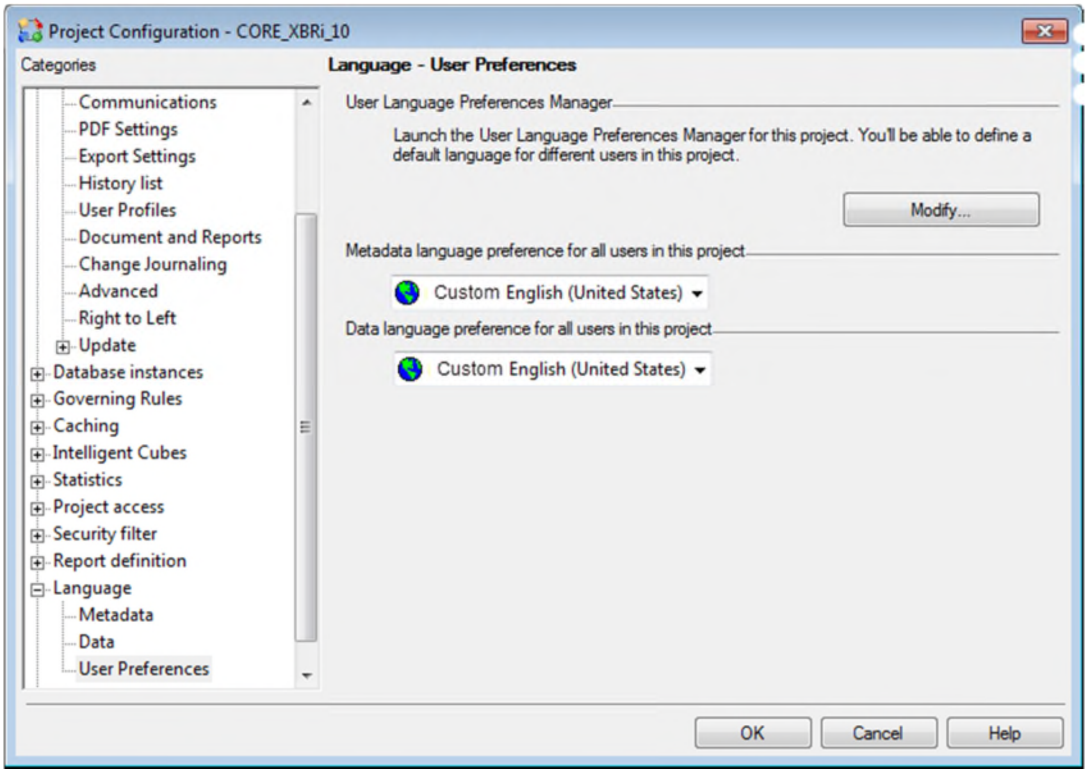
Please choose the languages that are available for this project. The languages that are checked will be available for translations of text strings like object names and descriptions in the metadata.

Selected Languages	Default
☑ English (United St...	●
☑ English Custom (U...	○

Click this button to add languages, which will be available for metadata translations.

Set Project User Language Defaults

1. Right-click on the project and select **Project Configuration** from the context menu.
2. Navigate to **Language > User Preferences.**
3. Select the new language as the Metadata language preference for all users. Click **OK** to apply the project user default Custom English (United States).



Project Configuration - CORE_XBRi_10

Language - User Preferences

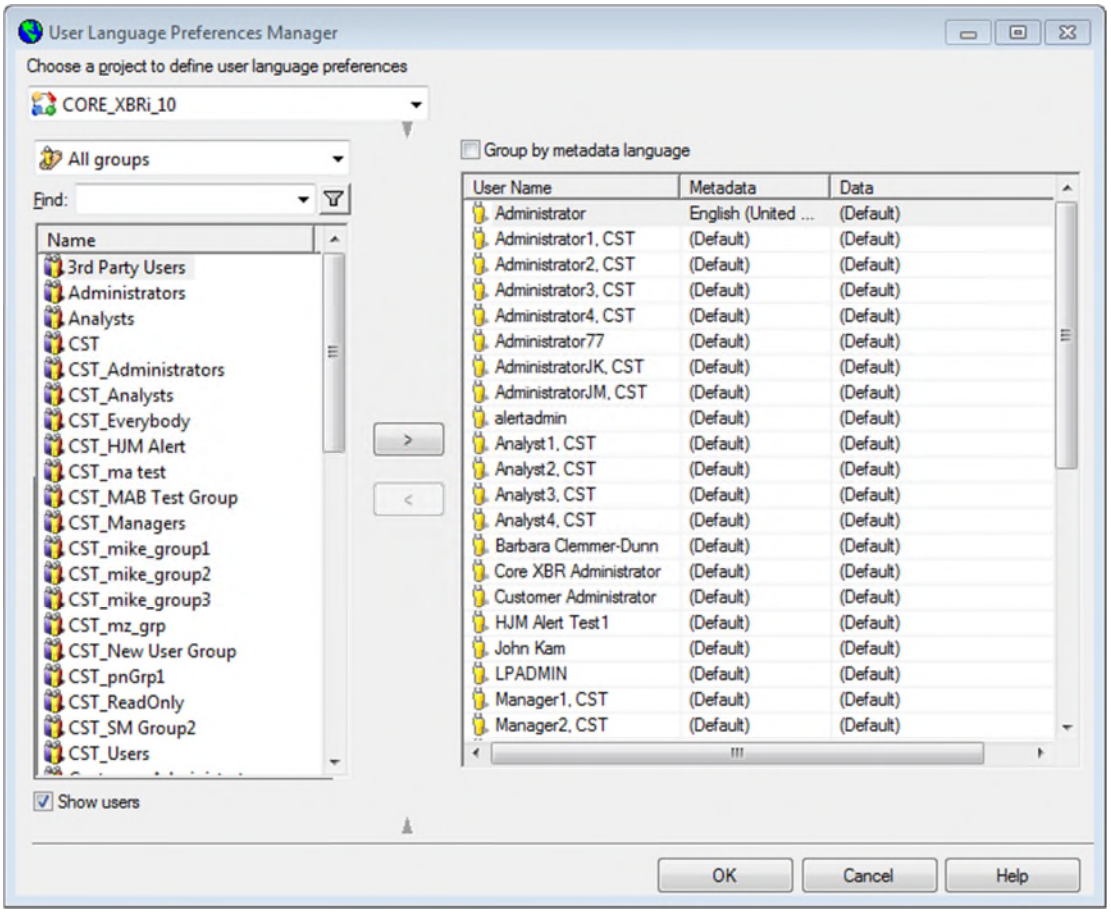
User Language Preferences Manager

Launch the User Language Preferences Manager for this project. You'll be able to define a default language for different users in this project.

Metadata language preference for all users in this project: Custom English (United States)

Data language preference for all users in this project: Custom English (United States)

4. If there were multiple languages on the previous screen, you would click the **Modify** button under the User Language Preferences Manager and assign the default language for each user. For this exercise we will assume there is one language.

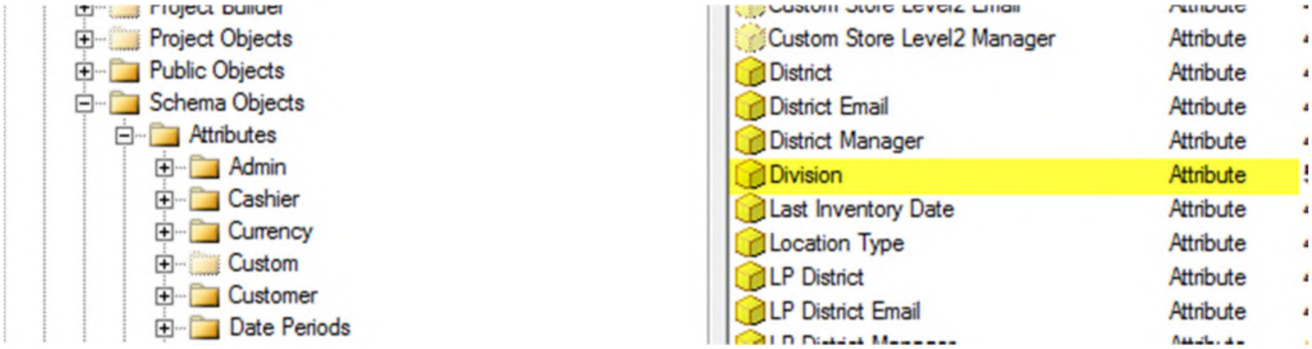


User Name	Metadata	Data
Administrator	English (United ...	(Default)
Administrator1, CST	(Default)	(Default)
Administrator2, CST	(Default)	(Default)
Administrator3, CST	(Default)	(Default)
Administrator4, CST	(Default)	(Default)
Administrator77	(Default)	(Default)
AdministratorJK, CST	(Default)	(Default)
AdministratorJM, CST	(Default)	(Default)
alertadmin	(Default)	(Default)
Analyst1, CST	(Default)	(Default)
Analyst2, CST	(Default)	(Default)
Analyst3, CST	(Default)	(Default)
Analyst4, CST	(Default)	(Default)
Barbara Clemmer-Dunn	(Default)	(Default)
Core XBR Administrator	(Default)	(Default)
Customer Administrator	(Default)	(Default)
HJM Alert Test1	(Default)	(Default)
John Kam	(Default)	(Default)
LPADMIN	(Default)	(Default)
Manager1, CST	(Default)	(Default)
Manager2, CST	(Default)	(Default)

5. Change the metadata language for the Administrator account to English (United States)

Translate Objects to Customer-Specific Naming Conventions

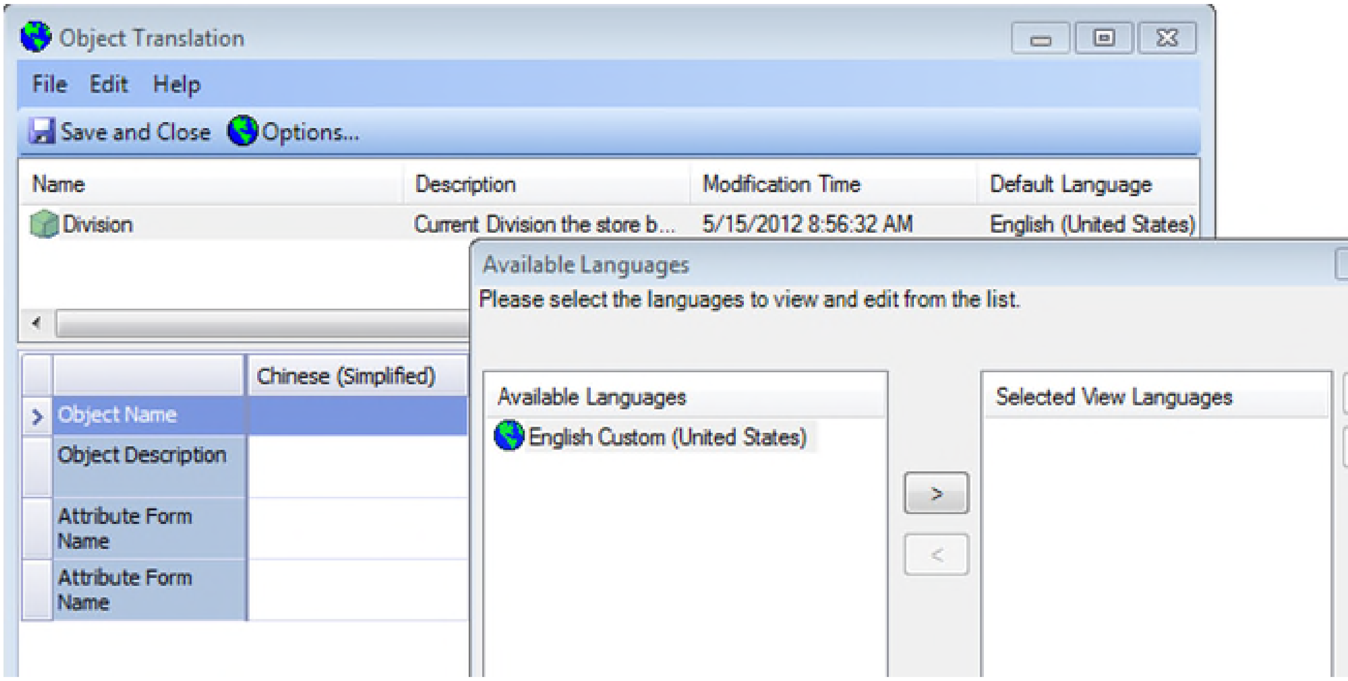
1. Open the project as Administrator. Navigate to the **Schema Objects** folder and select the first object to be translated to the customer- specific naming convention. For this exercise, we will translate the “Division” attribute to “Trading Area.”



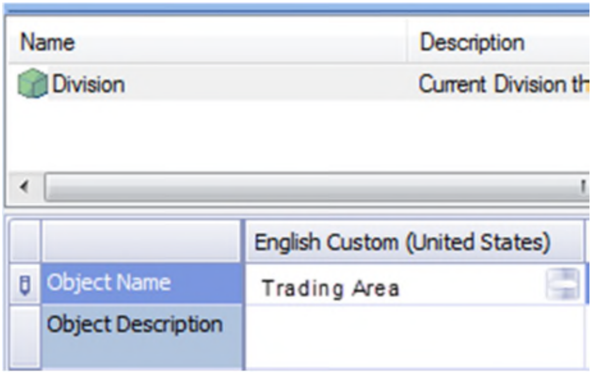
Custom Store Level2 Manager	Attribute
District	Attribute
District Email	Attribute
District Manager	Attribute
Division	Attribute
Last Inventory Date	Attribute
Location Type	Attribute
LP District	Attribute
LP District Email	Attribute

2. Navigate to the object and right-click on it. Select **Translate** then click the **Options** button.

3. Move Custom English (United States) from the **Available Languages** to the **Selected Edit Languages** list and Click **OK**.



4. Add Trading Area for the **Object Name** under \ Custom English (United States) and click on **Save and Close**.



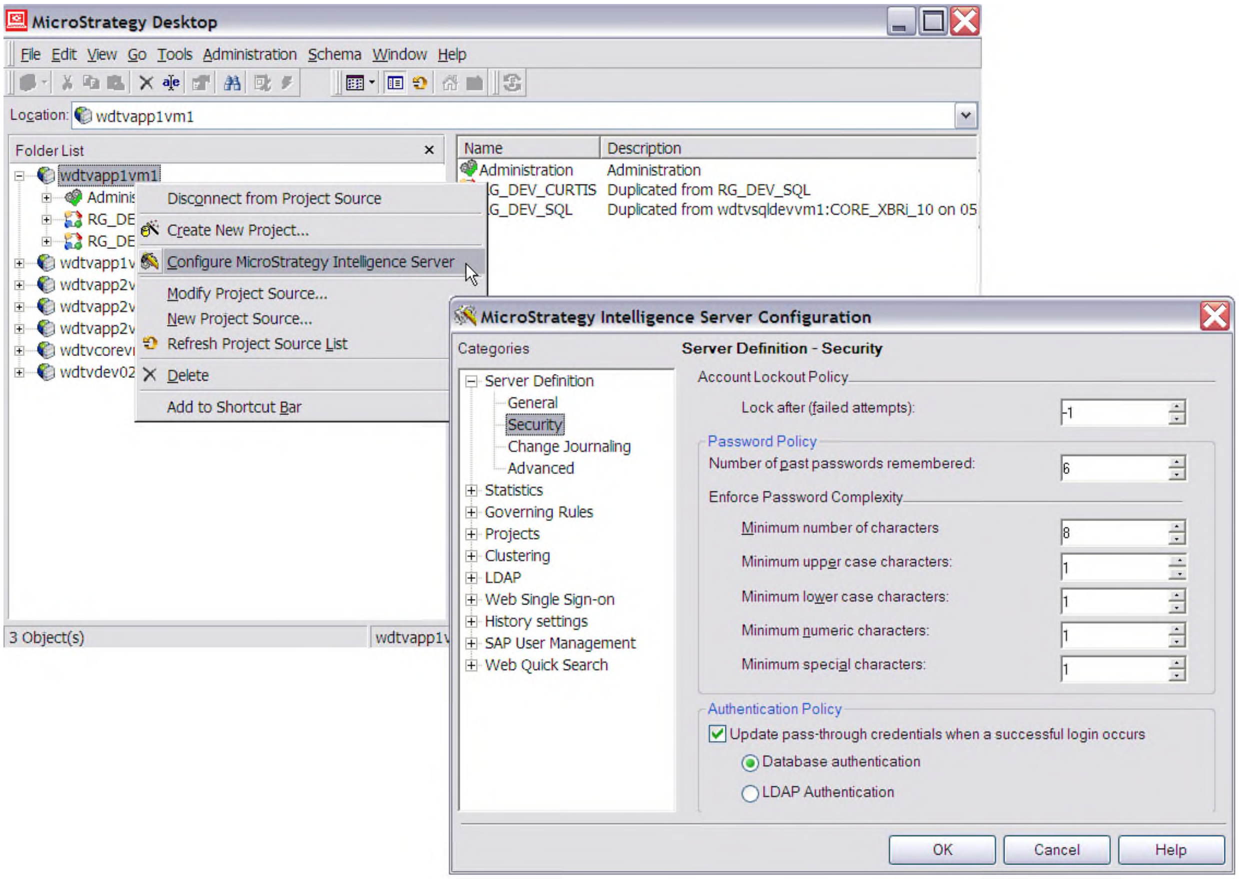
Note: You can also translate Attribute form names, object descriptions, and any additional information.

Configuring password complexity and email distribution message

Note: This applies to all customers using the Iserver on which the password complexity is configured.

To configure password complexity:

1. In the MicroStrategy Desktop, right click on the project in the Folder list and choose **Configure MicroStrategy Intelligence Server** from the context menu. This displays the MicroStrategy Intelligence Server Configuration window.
2. In the **Categories** list, expand **Server Definition** and click **Security**.
3. In the Server Definition – Security panel, enter your selections for **Account Lockout Policy** and **Password Policy**. See image below:



Name	Description
Administration	Administration
G_DEV_CURTIS	Duplicated from RG_DEV_SQL
G_DEV_SQL	Duplicated from wdtvsqldevvm1:CORE_XBRi_10 on 05

Server Definition - Security

Account Lockout Policy

Lock after (failed attempts): -1

Password Policy

Number of past passwords remembered: 6

Enforce Password Complexity

Minimum number of characters 8

Minimum upper case characters: 1

Minimum lower case characters: 1

Minimum numeric characters: 1

Minimum special characters: 1

Authentication Policy

☑ Update pass-through credentials when a successful login occurs

● Database authentication

○ LDAP Authentication

To configure the email distribution message:

The text for the new user email message is stored in the MessagesBundle.properties file on the webserver at the following location: X:\XBRi\tomcat\webapps\analytics\plugins\Help\WEB-INF\classes\resources\MessagesBundle.properties

1. Open the MessagesBundle.properties file
2. Use the following variables to configure the message: mr.20136, mr.20137, mr.20138, mr.20138, mr.20140, as in the example below:

```
mr.20136=Welcome to XBR Ingenium, \#name\#\n\n

mr.20137=Your login name is \#login\#\n

mr.20138=Your temporary password is \#password\#\n\n

mr.20139=You will be prompted to change your password upon your first login. Your new password must meet the complexity requirements\: minimum of \#len\# characters, \#uc\# uppercase letter, \#lc\# lowercase letter, \#num\# number, and \#spec\# special character.\n\n

mr.20140=You can access XBR Ingenium using the following URL\: \#url\#\n
```

Configuring Environment type—single tenant vs. multi-tenant

You configure a data warehouse environment as single tenant or multi-tenant by modifying the relevant variables. Navigate to your data warehouse database and configure the variables as indicated:

```
--set to Single tenant (update 2 rows)
UPDATE ADM_LP_VARIABLES
SET    VAR_VALUE    = 'Single'
WHERE  ORGID        = 1
  AND  SYSTEM       = '47'
  AND  VAR_NAME     = 'EnviromentType'
;
UPDATE ADM_LP_VARIABLES
SET    VAR_VALUE    = 'ABC'
WHERE  ORGID        = 1
  AND  SYSTEM       = '47'
  AND  VAR_NAME     = 'DefaultOrgCode'
;

--set to Multi-tenant (update 2 row)
UPDATE ADM_LP_VARIABLES
SET    VAR_VALUE    = 'Multi'
WHERE  ORGID        = 1
  AND  SYSTEM       = '47'
  AND  VAR_NAME     = 'EnviromentType'
;
```

Customization Manager

The Customization Manager can only be accessed by an XBR^{i} Administrator. It is used to enable or disable features (customizations) for a server installation and for each organization using the server installation.

- Customizations that are enabled for the server can be enabled or disabled for each customer.
- When customizations that are disabled by default for the customer are later enabled for the customer, they will remain disabled for each user until enabled by the customer administrator on the User Manager Feature Security tab.
- When customizations that are enabled for an organization are disabled in customization manager, they will be disabled for all of the organization's users.

To enable or disable features for a server installation:

1. Log in to XBR^{i} as an XBR^{i} Administrator.
2. Access the Customization Manager from the Admin menu.
3. From the **Apply Settings To** drop-down list, select **Global**.
4. Select the check boxes next to the features that you want enabled in the server installation and clear those that you do not want available.

To enable or disable features for an organization:

1. Log in to XBR^{i} as an XBR^{i} Administrator.
2. Access the Customization Manager from the Admin menu.
3. From the **Apply Settings To** drop-down list, select the org code of the customer.
4. Select the check boxes next to the features that you want enabled for the customer and clear those that you do not want available.

Security Encryption

Some sensitive data is encrypted during the installation process, such as account IDs and passwords. You can follow this methodology to encrypt or validate other sensitive data as needed. You execute this step after completing the Tomcat updates during installation and for the batch processes, DateSelectionBatch, lpScheduler, and translation. For other data types, replace:

username="**ENCRYPTED_USERNAME**" password="**ENCRYPTED_PASSWORD**

with the correct data type.

1. On the web server, open the Command prompt.
2. Go to the Tomcat Lib folder, e.g., TOMCAT_HOME_DIR \lib
3. Execute the following command:

```
        java -cp MRCrypto.jar com.mr.lp.crypto.MrEncrypt C:\ TOMCAT_HOME_DIR \conf\mr.key
<DBUSERNAME>    true

        java -cp MRCrypto.jar com.mr.lp.crypto.MrEncrypt C:\ TOMCAT_HOME_DIR \conf\mr.key
<DBPASSWORD >   true
```

Important: Make sure the key file location is correct for the environment.

This creates an encrypted string in the command prompt.

4. Copy the encrypted string referred to above, in the" USERNAME" and "PASSWORD," section under the "Resource name" tag of the analytics.xml and dataeditor.xml files as shown below. In addition, add the text in red below: "com.mr.lp.db.crypto.XBRiDataSourceFactory."

ANALYTICS XML FILE

```
<Resource name="POOL_NAME" auth="Container"

        type="javax.sql.DataSource" factory="com.mr.lp.db.crypto.XBRiDataSourceFactory"

        username="ENCRYPTED_USERNAME" password="ENCRYPTED_PASSWORD"
driverClassName="oracle.jdbc.driver.OracleDriver"

        url="jdbc:oracle:thin:@HOSTNAME:PORT:DB_NAME" testOnBorrow="true"

        validationQuery="select count(*) from adm_lp_properties" maxWait="1000"

        removeAbandoned="true" maxActive="30" maxIdle="10"

        removeAbandonedTimeout="60" logAbandoned="true" />
```

DATAEDITOR XML FILE

```
<Resource name="POOL_NAME" auth="Container"
```

```
          type="javax.sql.DataSource" factory="com.mr.lp.db.crypto.XBRiDataSourceFactory"

          username="ENCRYPTED_USERNAME" password="ENCRYPTED_PASSWORD"
     driverClassName="oracle.jdbc.driver.OracleDriver"

          url="jdbc:oracle:thin:@HOSTNAME:PORT:DB_NAME" testOnBorrow="true"

          validationQuery="select count(*) from adm_lp_properties" maxWait="1000"

          removeAbandoned="true" maxActive="30" maxIdle="10"

          removeAbandonedTimeout="60" logAbandoned="true" />
```

5. Restart the Apache Tomcat service.

LPADMIN Administration

The LPADMIN account is used for the external scheduler and the date selection batch process. This account uses trusted authentication and does not require a password when logging in. However, a password for the LPADMIN user must be maintained on the database. There are two steps to administering LPADMIN passwords, encrypting the password and configuring it in the ADM_LP_VARIABLES table.

To encrypt an LPADMIN password:

1. On the web server, open the Command prompt.
2. Go to the Tomcat Lib folder, e.g., TOMCAT_HOME_DIR \lib
3. Execute the following command:

```
java -cp MRCrypto.jar com.mr.lp.crypto.MrEncrypt --\conf\mr.key LPADMIN true
```

This generates the encrypted password. Copy the password so that you can paste it in the ADM_LP_VARIABLES table.

To configure the password in the ADM_LP_VARIABLES table:

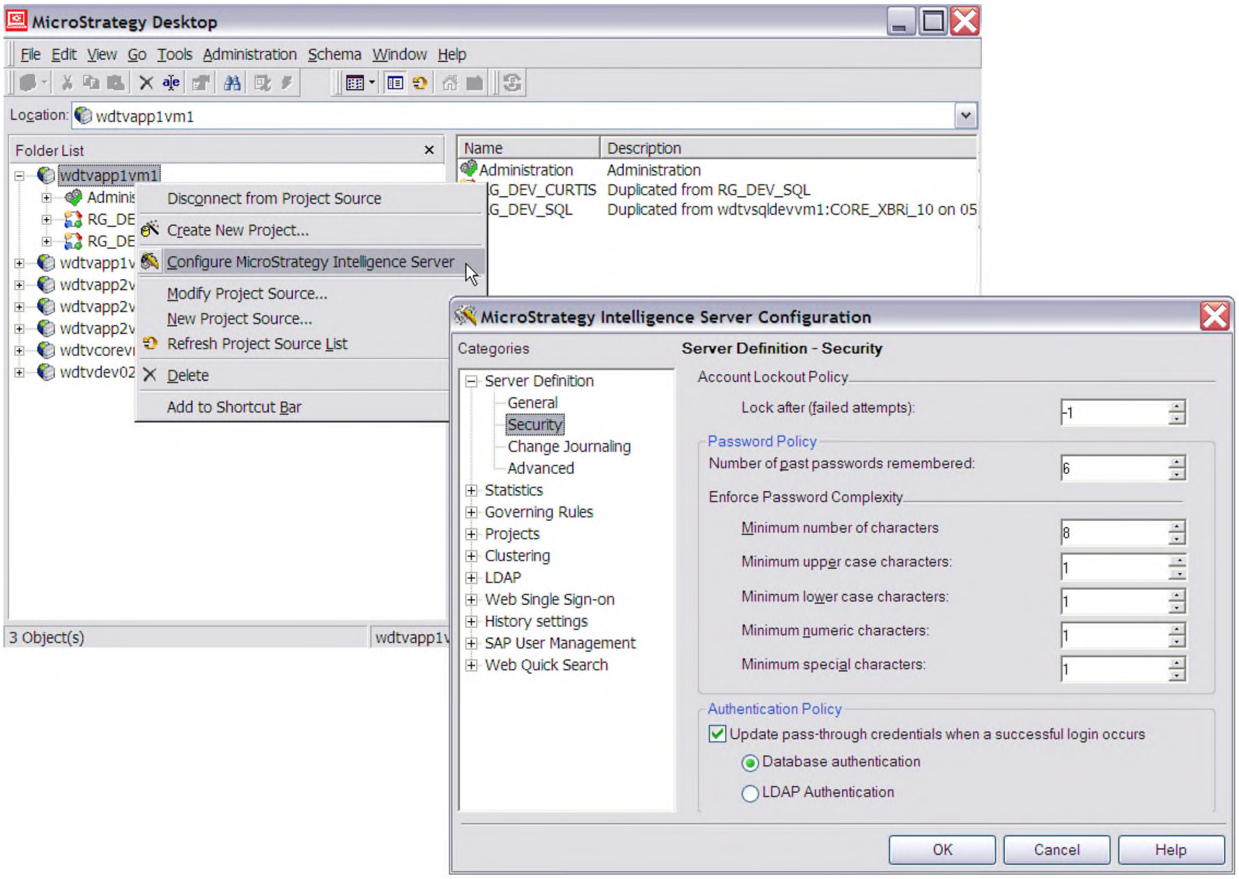
1. On the database server, use the database tool to navigate to the ADM_LP_VARIABLES table.
2. Display the table rows in editable mode.
3. Locate the ORGID of the customer for whom you are administering the password.
4. In the VAR_NAME column, locate admin.password.
5. In the adjacent VAR_VALUE field, enter the encrypted password from the MrCrypto.jar process
6. In the VAR_NAME column, locate admin.password.encrypted.
7. In the adjacent VAR_VALUE field, enter yes.

Configuring password complexity and email distribution message

Note: This applies to all customers using the Iserver on which the password complexity is configured.

To configure password complexity:

1. In the MicroStrategy Desktop, right click on the project in the Folder list and choose **Configure MicroStrategy Intelligence Server** from the context menu. This displays the MicroStrategy Intelligence Server Configuration window.
2. In the **Categories** list, expand **Server Definition** and click **Security**.
3. In the Server Definition – Security panel, enter your selections for **Account Lockout Policy** and **Password Policy**. See image below:



Server Definition - Security

Account Lockout Policy

Lock after (failed attempts): -1

Password Policy

Number of past passwords remembered: 6

Enforce Password Complexity

Minimum number of characters 8

Minimum upper case characters: 1

Minimum lower case characters: 1

Minimum numeric characters: 1

Minimum special characters: 1

Authentication Policy

☑ Update pass-through credentials when a successful login occurs

● Database authentication

○ LDAP Authentication

To configure the email distribution message:

The text for the new user email message is stored in the MessagesBundle.properties file on the webserver at the following location: X:\XBRi\tomcat\webapps\analytics\plugins\Help\WEB-INF\classes\resources\MessagesBundle.properties

1. Open the MessagesBundle.properties file
2. Use the following variables to configure the message: mr.20136, mr.20137, mr.20138, mr.20138, mr.20140, as in the example below:

```
mr.20136=Welcome to XBR Ingenium, \#name\#\n\n

mr.20137=Your login name is \#login\#\n

mr.20138=Your temporary password is \#password\#\n\n

mr.20139=You will be prompted to change your password upon your first login. Your new password must meet the complexity requirements\: minimum of \#len\# characters, \#uc\# uppercase letter, \#lc\# lowercase letter, \#num\# number, and \#spec\# special character.\n\n

mr.20140=You can access XBR Ingenium using the following URL\: \#url\#\n
```

Modifying Project Access, modifying XBR^i Security Access

Note: If you create a new proto user, you can apply it to just one customer in a multi-tenant environment, otherwise, all changes to core proto users will be applied to all customers on the Iserver.

Privileges and XBR^i Security Access should only be modified on Prototype users and the XBR^i Administrators group. But these settings should not be changed.

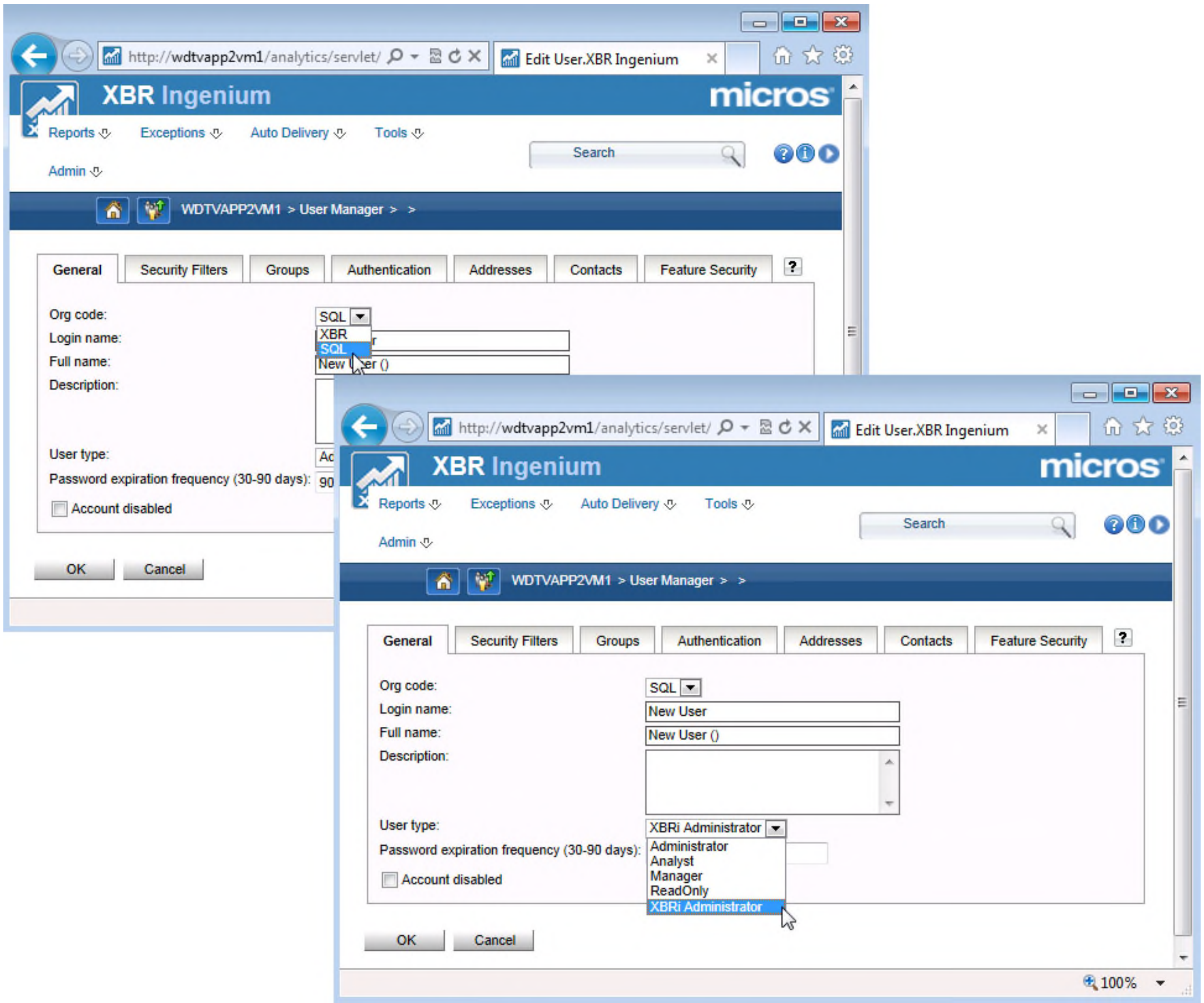
See: Create Custom Proto Users and Groups in the Project Customization guide

Creating XBR^i Administrator Users and best practices

You create a new XBR^i Administrator user in the XBR^i User Manager.

To create a new XBR^i Administrator user:

1. Log in to XBR^i as an XBR^i Administrator.
2. From the Admin menu, choose User Manager. This displays the User Manager.
3. Click the New User icon on the toolbar. This displays the User Editor.
4. On the General tab, select XBR^i Administrator from the Select a User Type drop-down list.



Org code: SQL

Login name: New User

Full name: New User ()

Description:

User type: XBRi Administrator
- Administrator
- Analyst
- Manager
- ReadOnly
- XBRi Administrator

Password expiration frequency (30-90 days): 90

□ Account disabled

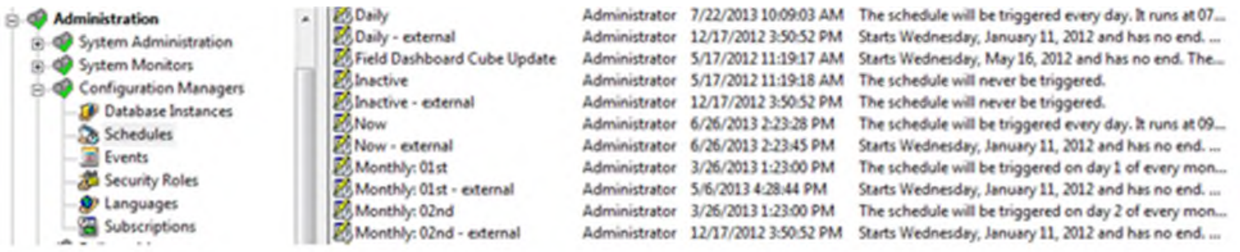
- An XBR^i Administrator can only be created by another XBR^i Administrator.

- Customers should not be given access to XBR^i Administrator users.
- Make sure that on the Features tab, whatever is enabled for the customer is enabled for the XBR^i Administrator.
- XBR^i Administrator users have access to objects outside of the project with which they are associated.
- XBR^i Administrators creating other users in User Manager should be sure to choose the correct org code and user type from the dropdowns on the General tab.

Modifying, Adding, and Troubleshooting Schedules

The XBR^i OOTB schedules provided for reports, control points, and control groups are created and maintained in the MicroStrategy Desktop. In addition, schedule data must also be maintained in the data warehouse table, MD_LP_ES_SCHEDULE table. These schedules are used to process subscriptions at a future date and time such as monthly or weekly as opposed to Run Immediately or Send Now.

The schedule data maintained in the MD_LP_ES_SCHEDULE table is just for control points and groups and only used by the External Scheduler. When these schedules are selected in a control subscription, the External Scheduler is set to poll at 1 minute intervals to look for a time match. When a match is found, it will submit the job to the Iserver. The schedule data maintained in the Desktop is for all subscription types. In the Desktop, there is a duplicate of each schedule appended with **'- external** 'that is just for control points and groups. The – external schedules correspond to the schedule maintained in the MD_LP_ES_SCHEDULE table.



Daily	Administrator	7/22/2013 10:09:03 AM	The schedule will be triggered every day. It runs at 07...
Daily - external	Administrator	12/17/2012 3:50:52 PM	Starts Wednesday, January 11, 2012 and has no end. ...
Field Dashboard Cube Update	Administrator	5/17/2012 11:19:17 AM	Starts Wednesday, May 16, 2012 and has no end. The...
Inactive	Administrator	5/17/2012 11:19:18 AM	The schedule will never be triggered.
Inactive - external	Administrator	12/17/2012 3:50:52 PM	The schedule will never be triggered.
Now	Administrator	6/26/2013 2:23:28 PM	The schedule will be triggered every day. It runs at 09...
Now - external	Administrator	6/26/2013 2:23:45 PM	Starts Wednesday, January 11, 2012 and has no end. ...
Monthly: 01st	Administrator	3/26/2013 1:23:00 PM	The schedule will be triggered on day 1 of every mon...
Monthly: 01st - external	Administrator	5/6/2013 4:28:44 PM	Starts Wednesday, January 11, 2012 and has no end. ...
Monthly: 02nd	Administrator	3/26/2013 1:23:00 PM	The schedule will be triggered on day 2 of every mon...
Monthly: 02nd - external	Administrator	12/17/2012 3:50:52 PM	Starts Wednesday, January 11, 2012 and has no end. ...

Modifying Schedules

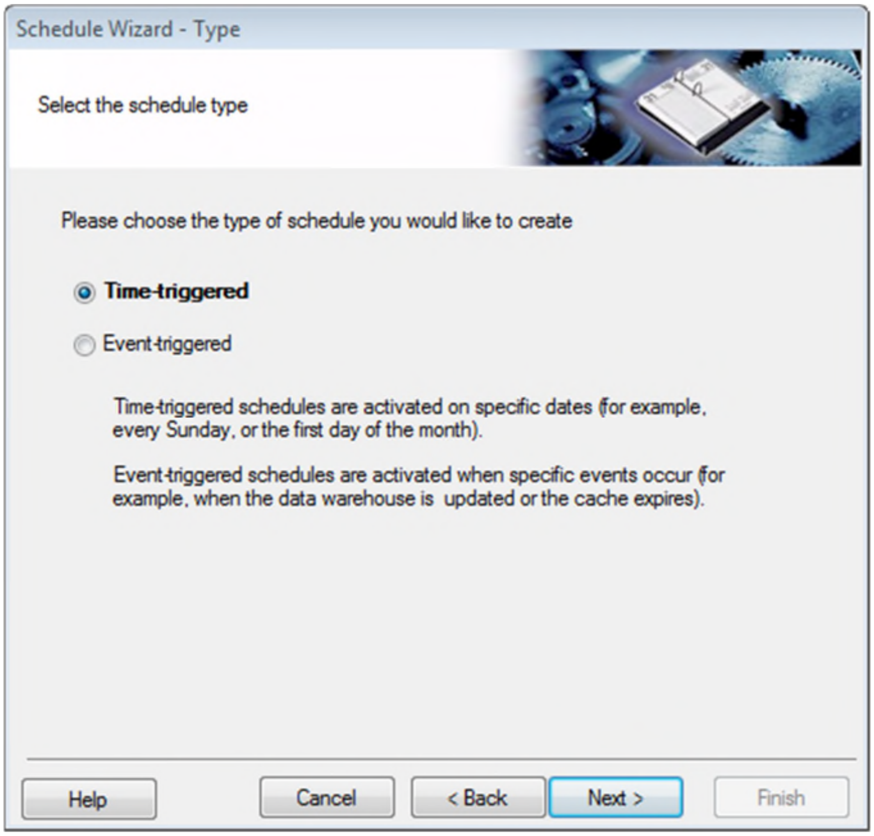
If you need to modify a schedule, for example to change the start time, you must make the same changes to the schedule time in the MD_LP_ES_SCHEDULE table in the data warehouse.

To modify a schedule in MicroStrategy Desktop:

Step 1

1. Navigate to **Administration > Configuration Managers > Schedules**.
2. In the right panel, locate the schedule you want to change, e.g., Daily. Note that there is also a Daily – external schedule.
3. Double click on the schedule that is NOT appended with –external, e.g., Daily. This displays the Schedule Wizard.

4. Click **Next**. Do not change the name in the **Name** field. If you do, you must also change the name in the corresponding - external schedule. You can modify the text in the **Description** if you want to reflect the modification. Click **Next**.
5. The **Time-triggered** option should be selected.



Schedule Wizard - Type

Select the schedule type

Please choose the type of schedule you would like to create

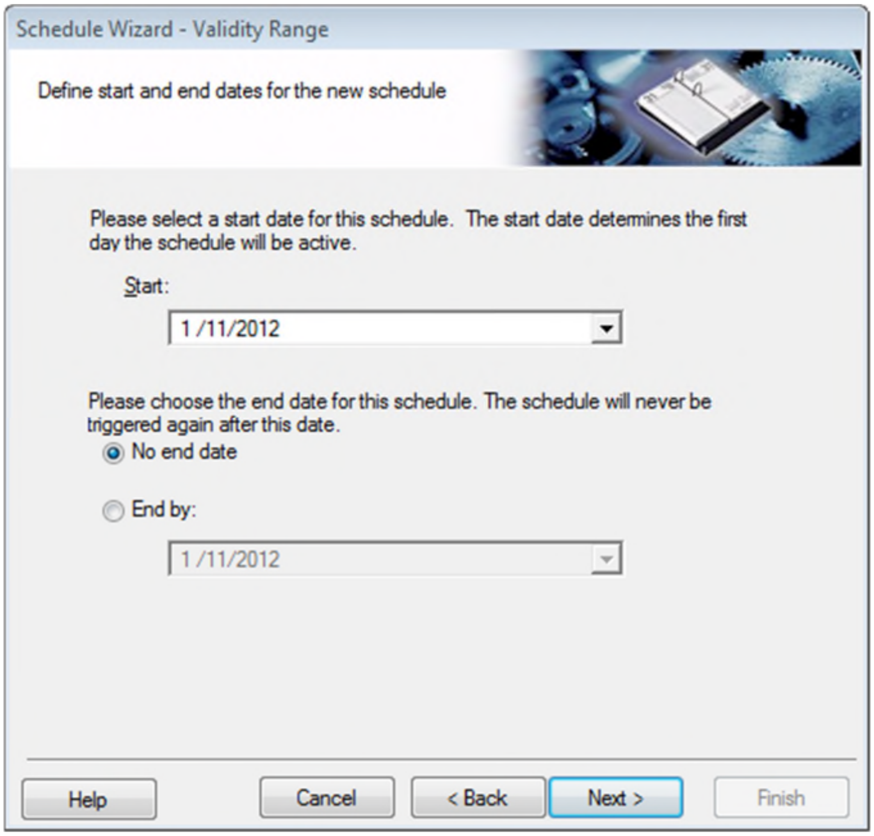
● **Time-triggered**

○ Event-triggered

Time-triggered schedules are activated on specific dates (for example, every Sunday, or the first day of the month).

Event-triggered schedules are activated when specific events occur (for example, when the data warehouse is updated or the cache expires).

6. Click **Next**. Change the start and end dates if you want, and note the changes.



Schedule Wizard - Validity Range

Define start and end dates for the new schedule

Please select a start date for this schedule. The start date determines the first day the schedule will be active.

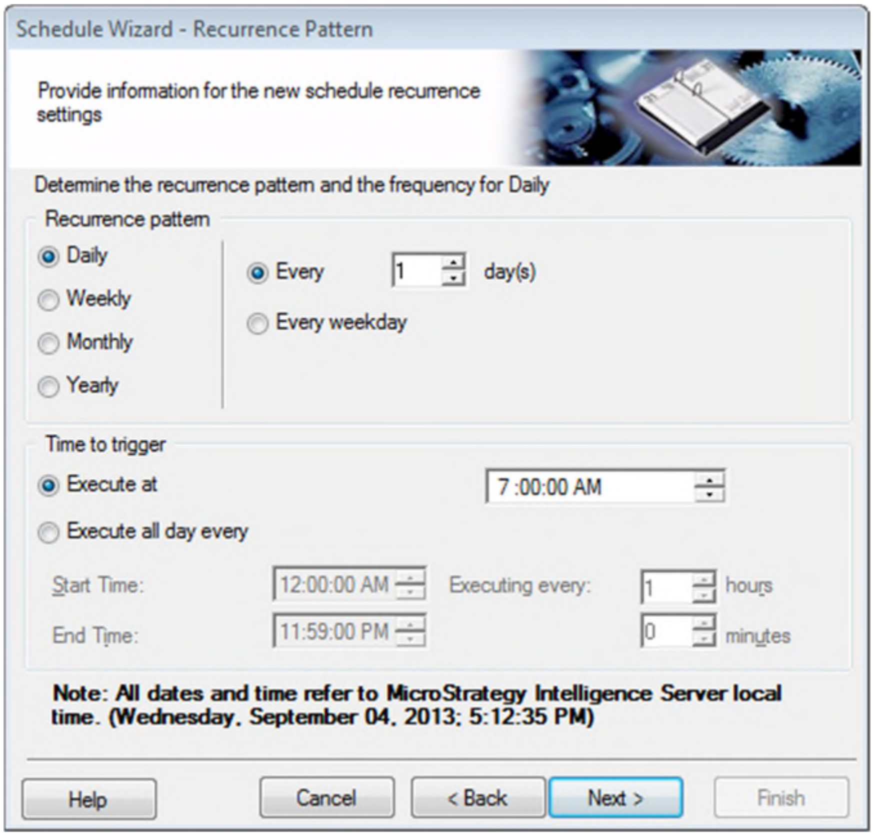
Start: 1 /11/2012

Please choose the end date for this schedule. The schedule will never be triggered again after this date.

● No end date

○ End by: 1 /11/2012

7. Click **Next**. Change the Recurrence settings if you want and note the changes.



Schedule Wizard - Recurrence Pattern

Provide information for the new schedule recurrence settings

Determine the recurrence pattern and the frequency for Daily

Recurrence pattern

● Daily
○ Weekly
○ Monthly
○ Yearly

● Every 1 day(s)

○ Every weekday

Time to trigger

● Execute at 7 :00:00 AM

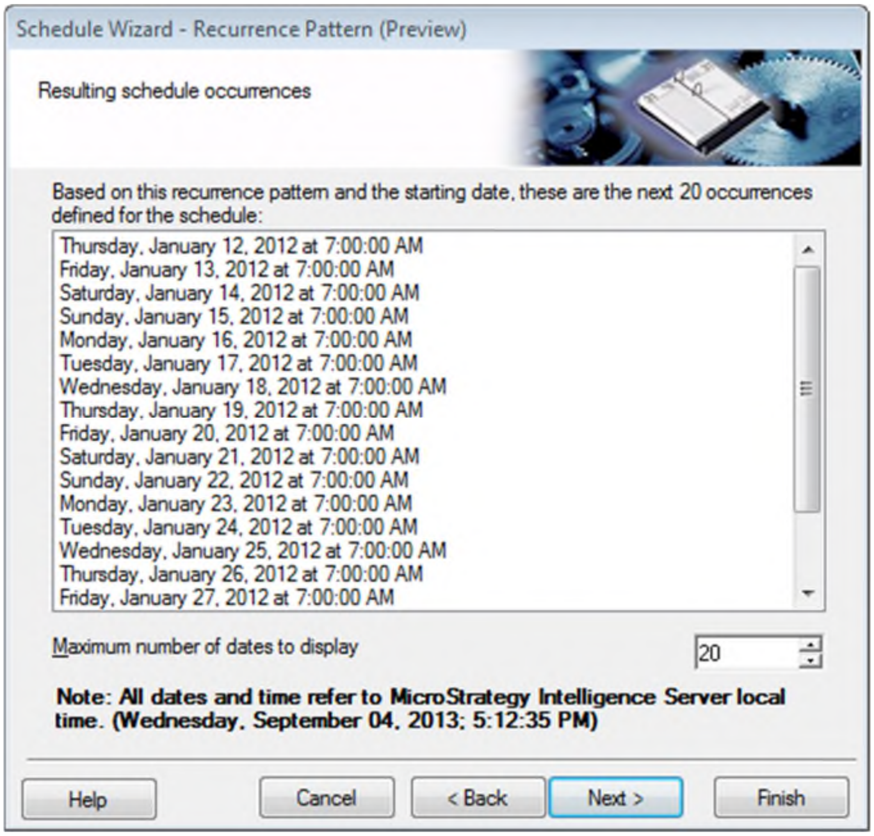
○ Execute all day every

Start Time: 12:00:00 AM Executing every: 1 hours

End Time: 11:59:00 PM 0 minutes

Note: All dates and time refer to MicroStrategy Intelligence Server local time. (Wednesday, September 04, 2013; 5:12:35 PM)

8. Click **Next**.



Schedule Wizard - Recurrence Pattern (Preview)

Resulting schedule occurences

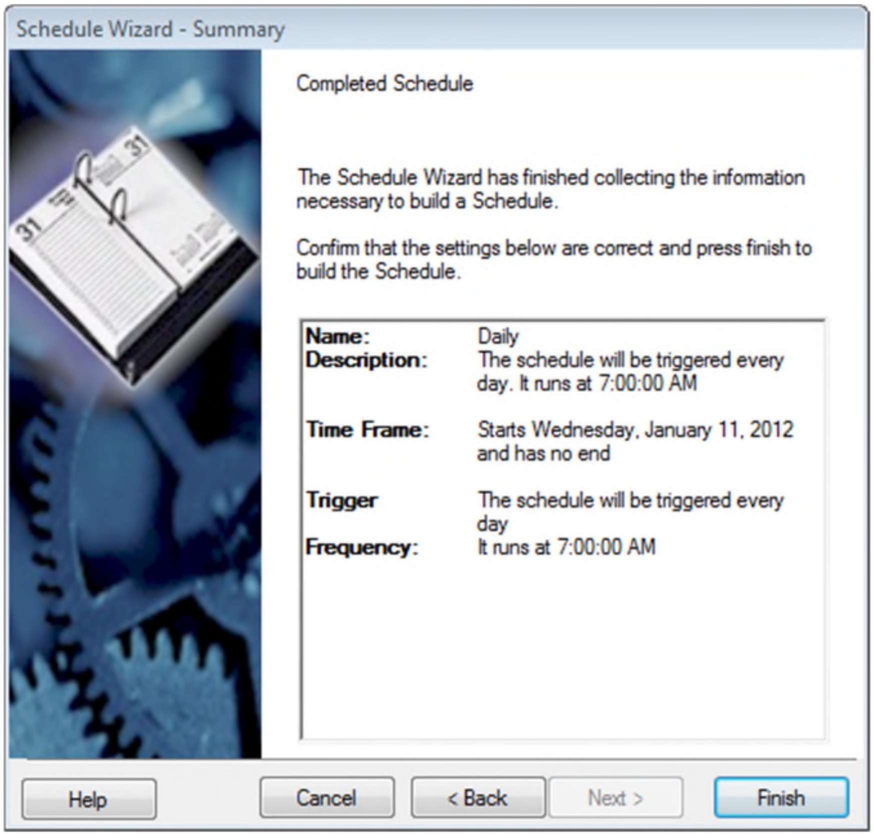
Based on this recurrence pattern and the starting date, these are the next 20 occurrences defined for the schedule:

Thursday, January 12, 2012 at 7:00:00 AM
Friday, January 13, 2012 at 7:00:00 AM
Saturday, January 14, 2012 at 7:00:00 AM
Sunday, January 15, 2012 at 7:00:00 AM
Monday, January 16, 2012 at 7:00:00 AM
Tuesday, January 17, 2012 at 7:00:00 AM
Wednesday, January 18, 2012 at 7:00:00 AM
Thursday, January 19, 2012 at 7:00:00 AM
Friday, January 20, 2012 at 7:00:00 AM
Saturday, January 21, 2012 at 7:00:00 AM
Sunday, January 22, 2012 at 7:00:00 AM
Monday, January 23, 2012 at 7:00:00 AM
Tuesday, January 24, 2012 at 7:00:00 AM
Wednesday, January 25, 2012 at 7:00:00 AM
Thursday, January 26, 2012 at 7:00:00 AM
Friday, January 27, 2012 at 7:00:00 AM

Maximum number of dates to display: 20

Note: All dates and time refer to MicroStrategy Intelligence Server local time. (Wednesday, September 04, 2013; 5:12:35 PM)

9. Click **Next**. Verify that the changes to the schedule are correct, and click **Finish**.



Schedule Wizard - Summary

Completed Schedule

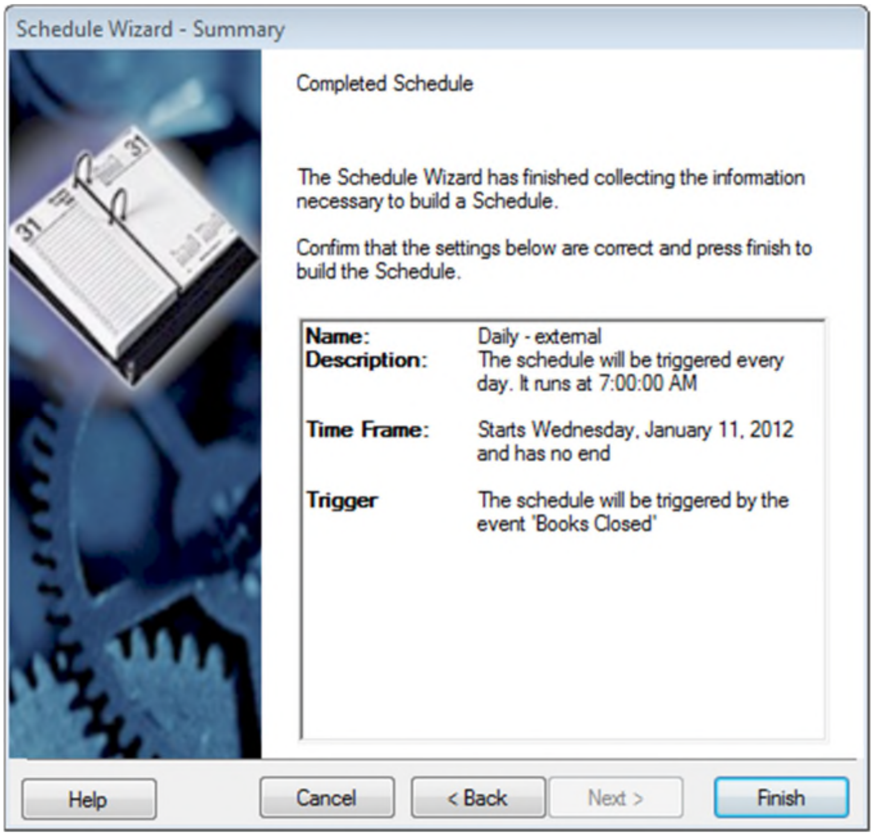
The Schedule Wizard has finished collecting the information necessary to build a Schedule.

Confirm that the settings below are correct and press finish to build the Schedule.

Name: Daily
Description: The schedule will be triggered every day. It runs at 7:00:00 AM

Time Frame: Starts Wednesday, January 11, 2012 and has no end

Trigger The schedule will be triggered every day
Frequency: It runs at 7:00:00 AM



Completed Schedule

The Schedule Wizard has finished collecting the information necessary to build a Schedule.

Confirm that the settings below are correct and press finish to build the Schedule.

Name: Daily - external
Description: The schedule will be triggered every day. It runs at 7:00:00 AM

Time Frame: Starts Wednesday, January 11, 2012 and has no end

Trigger The schedule will be triggered by the event 'Books Closed'

Note: You do not need to modify the corresponding - external schedule unless you changed the **Name** in step 4. In that case, you need to modify the name in the - external schedule. This is not recommended.

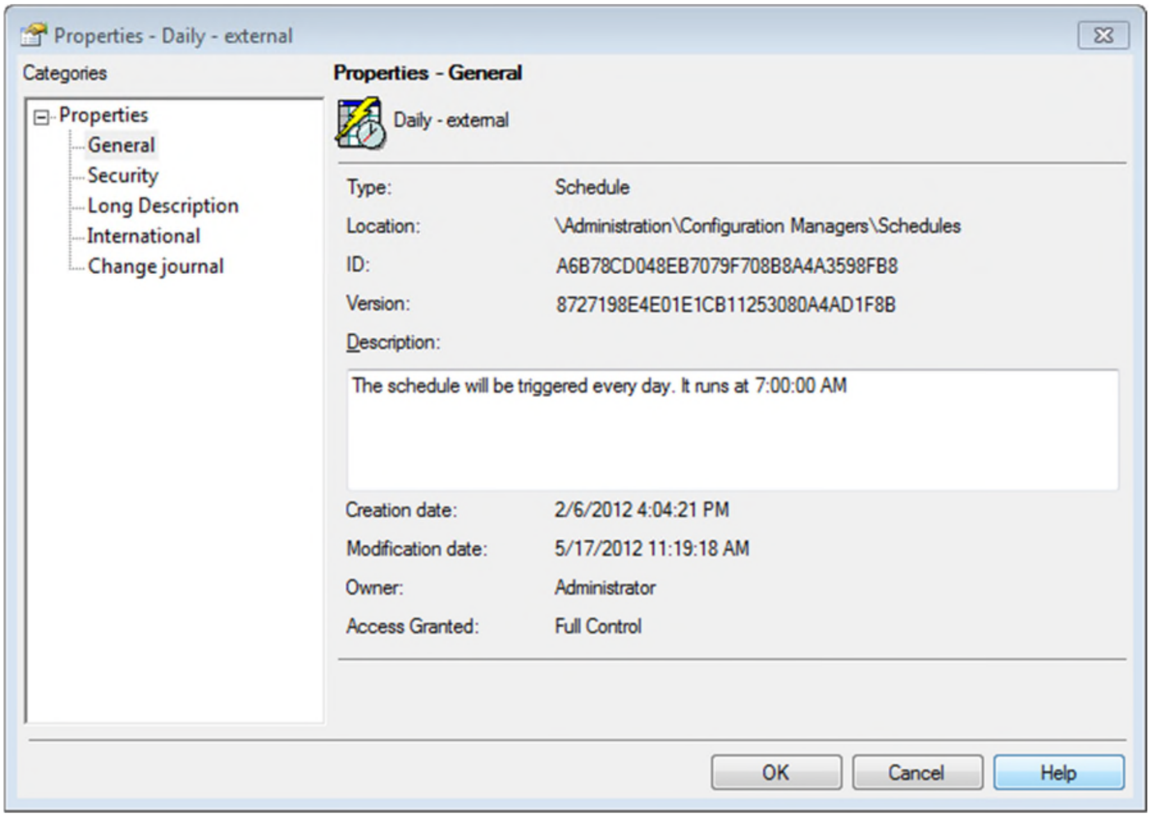
Step 2 – Schedule in Data Warehouse

After you have modified the schedule in MicroStrategy Desktop, you must look up the schedule in the data warehouse and make the same changes to it there. For example, if you modified the Daily schedule in the Desktop to start at 6 AM instead of 7 AM, you must make the same change to the Daily schedule in the data warehouse.

To locate the correct schedule in the data warehouse, you will need the ID of the - external schedule. You get this ID from the Properties window in the Desktop.

To get the external schedule ID:

1. In the MicroStrategy Desktop, navigate to **Administration > Configuration Managers > Schedules**.
2. In the right panel, locate the external schedule you changed in the Desktop and need to change in the data warehouse, e.g., Daily - external.
3. Right click on the schedule and choose **Properties** from the context menu.
4. In the Properties window, note the **ID**. This is also the ID of the schedule in the Data Warehouse.



Properties - Daily - external

Daily - external

Type: Schedule

Location: \Administration\Configuration Managers\Schedules

ID: A6B78CD048EB7079F708B8A4A3598FB8

Version: 8727198E4E01E1CB11253080A4AD1F8B

Description:

The schedule will be triggered every day. It runs at 7:00:00 AM

Creation date: 2/6/2012 4:04:21 PM

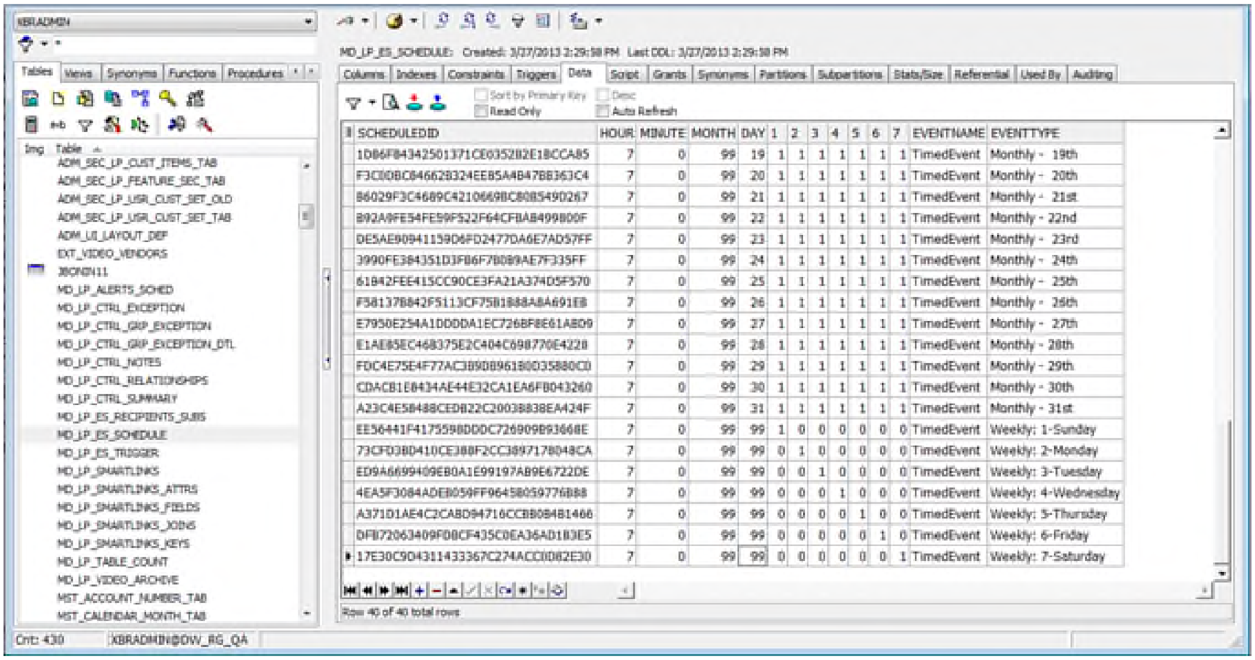
Modification date: 5/17/2012 11:19:18 AM

Owner: Administrator

Access Granted: Full Control

To modify the schedule in the data warehouse:

1. On the database server, use a database tool to navigate to the MD_LP_ES_SCHEDULE table. This table contains a row for all of the - external schedules found in MicroStrategy Desktop.
2. Display the table rows in editable mode.
3. Look for the schedule recurrence information (e.g., Daily) in the EVENTTYPE column.
4. Verify that you have the right schedule by looking in the SCHEDULEID field in that row. The ID should match the one from the Properties dialog for the - external schedule in the Desktop.



MD_LP_ES_SCHEDULE: Created: 3/27/2013 2:29:58 PM Last DDL: 3/27/2013 2:29:58 PM

SCHEDULEDID	HOUR	MINUTE	MONTH	DAY	1	2	3	4	5	6	7	EVENTNAME	EVENTTYPE
1D86F84342501371CE0352B2E18CCA85	7	0	99	19	1	1	1	1	1	1	1	TimedEvent	Monthly - 19th
F3C0DBC846628324EE85A4B47BB363C4	7	0	99	20	1	1	1	1	1	1	1	TimedEvent	Monthly - 20th
86029F3C4689C4210669BC8085490267	7	0	99	21	1	1	1	1	1	1	1	TimedEvent	Monthly - 21st
B92A9FE54FE59F522F64CFBAB499800F	7	0	99	22	1	1	1	1	1	1	1	TimedEvent	Monthly - 22nd
DE5AE90941159D6FD2477DA6E7AD57FF	7	0	99	23	1	1	1	1	1	1	1	TimedEvent	Monthly - 23rd
3990FE384351D3FB6F7B089AE7F335FF	7	0	99	24	1	1	1	1	1	1	1	TimedEvent	Monthly - 24th
61842FEE415CC90CE3FA21A374D5F570	7	0	99	25	1	1	1	1	1	1	1	TimedEvent	Monthly - 25th
F58137B842F5113CF7581888A8A691E8	7	0	99	26	1	1	1	1	1	1	1	TimedEvent	Monthly - 26th
E7950E254A1DDDDA1EC726BF8E61A8D9	7	0	99	27	1	1	1	1	1	1	1	TimedEvent	Monthly - 27th
E1AE85EC468375E2C404C698770E4228	7	0	99	28	1	1	1	1	1	1	1	TimedEvent	Monthly - 28th
FDC4E75E4F77AC3B9D8961B0D35880C0	7	0	99	29	1	1	1	1	1	1	1	TimedEvent	Monthly - 29th
CDACB1E8434AE44E32CA1EA6FB043260	7	0	99	30	1	1	1	1	1	1	1	TimedEvent	Monthly - 30th
A23C4E58488CED822C20038838EA424F	7	0	99	31	1	1	1	1	1	1	1	TimedEvent	Monthly - 31st
EE56441F4175598DDDC726909B93668E	7	0	99	99	1	0	0	0	0	0	0	TimedEvent	Weekly: 1-Sunday
73CFD380410CE388F2CC3897178048CA	7	0	99	99	0	1	0	0	0	0	0	TimedEvent	Weekly: 2-Monday
ED9A6699409EB0A1E99197AB9E6722DE	7	0	99	99	0	0	1	0	0	0	0	TimedEvent	Weekly: 3-Tuesday
4EA5F3084ADE8059FF96458059776B88	7	0	99	99	0	0	0	1	0	0	0	TimedEvent	Weekly: 4-Wednesday
A371D1AE4C2CA8D94716CCBB084B1466	7	0	99	99	0	0	0	0	1	0	0	TimedEvent	Weekly: 5-Thursday
DFB72063409F08CF435C0EA36AD1B3E5	7	0	99	99	0	0	0	0	0	1	0	TimedEvent	Weekly: 6-Friday
17E30C9D4311433367C274ACC0D82E30	7	0	99	99	0	0	0	0	0	0	1	TimedEvent	Weekly: 7-Saturday

Row 40 of 40 total rows

5. Edit the properties for the schedule record so that they match the properties for the external schedule you modified in the Desktop. For example, if you changed the start time to 6 AM from 7AM, change the value in the Hour field to 6. In addition to the Hour column, you can change the values in these fields to match the values in the schedule you modified in the Desktop:

   Minute – the number of minutes past the hour

   Month – The month in which the schedule should occur. Enter 1-12 for the months from January through February. Enter 99 if the schedule occurs in all months.

   Day – the day of the month the schedule occurs. Enter 99 if the schedule occurs in all months

   1-7 – the day of the week on which the schedule occurs, from Sunday through Saturday. Enter a 1 for each day of the week on which the schedule should occur and a 0 for each day on which it should not occur.

   EVENTNAME - TimedEvent

   EVENTTYPE – Modify the information to indicate the new time.

Creating New Schedules

If you want to create a new custom schedule that can be used for subscriptions in XBR^{i}, you need to create the schedule and a duplicate - external schedule in MicroStrategy Desktop. You also need to enter a new row for the schedule in the MD_LP_ES_SCHEDULE table in the data warehouse.

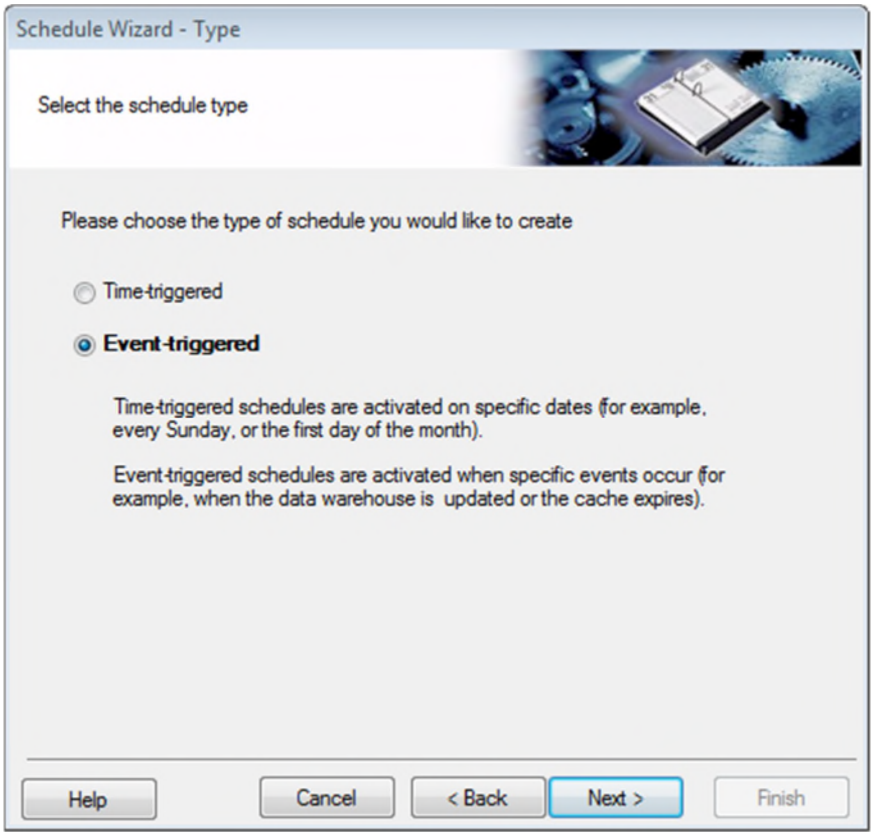
Step 1: create a new schedule in Desktop:

1. Navigate to **Administration > Configuration Managers > Schedules**.
2. From the File menu, choose **New > Schedule**, or right click in the Schedules folder and choose **New > Schedule** from the context menu. This displays the Schedule Wizard.
3. Click **Next**. Enter a name for the schedule in the **Name** field. The name should help to identify the schedule, for example, Daily. Do not append the name of the first schedule with - external. Copy the name and paste it in the **Description** box.
4. Click **Next**. Select **Time-triggered** as the schedule type.
5. Click **Next**. Select the start and end dates, and note the selections.
6. Click **Next**. Select the recurrence settings and note the selections.
7. Click Next. Change the number of dates to display if you want.
8. Click Next. Verify that the selections for the schedule are correct, and click **Finish**.

Step 2: Create a matching new - external schedule in Desktop:

Step 2 – external

1. Navigate to **Administration > Configuration Managers > Schedules**.
2. From the File menu choose **New > Schedule** or right click in the Schedules folder and choose **New > Schedule** from the context menu. This displays the Schedule Wizard.
3. Click **Next**. Enter a name for the schedule in the **Name** field. The name should be the same as the one you entered for the new schedule you just created, appended with - external, for example, Daily - external. Copy the name and paste it in the **Description** box.
4. Click **Next**.
5. The **Event Triggered** option must be selected. Important: Do not select Timed Triggered or you will get duplicate subscriptions.



Schedule Wizard - Type

Select the schedule type

Please choose the type of schedule you would like to create

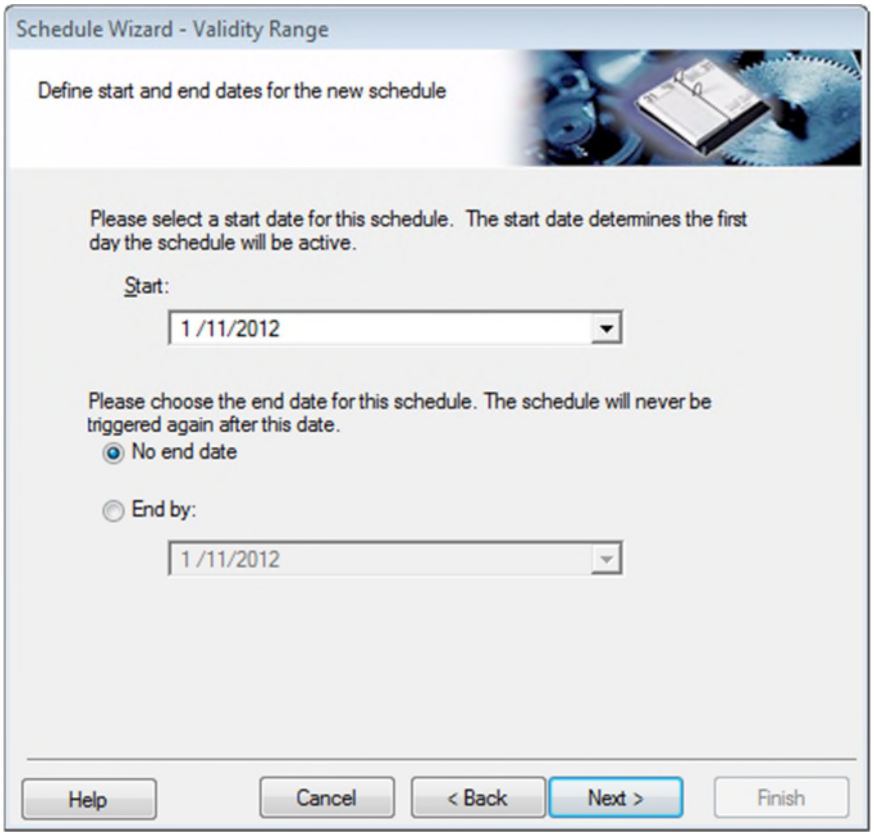
○ Time-triggered

● **Event-triggered**

Time-triggered schedules are activated on specific dates (for example, every Sunday, or the first day of the month).

Event-triggered schedules are activated when specific events occur (for example, when the data warehouse is updated or the cache expires).

6. Click Next.



Schedule Wizard - Validity Range

Define start and end dates for the new schedule

Please select a start date for this schedule. The start date determines the first day the schedule will be active.

Start:

1 /11/2012

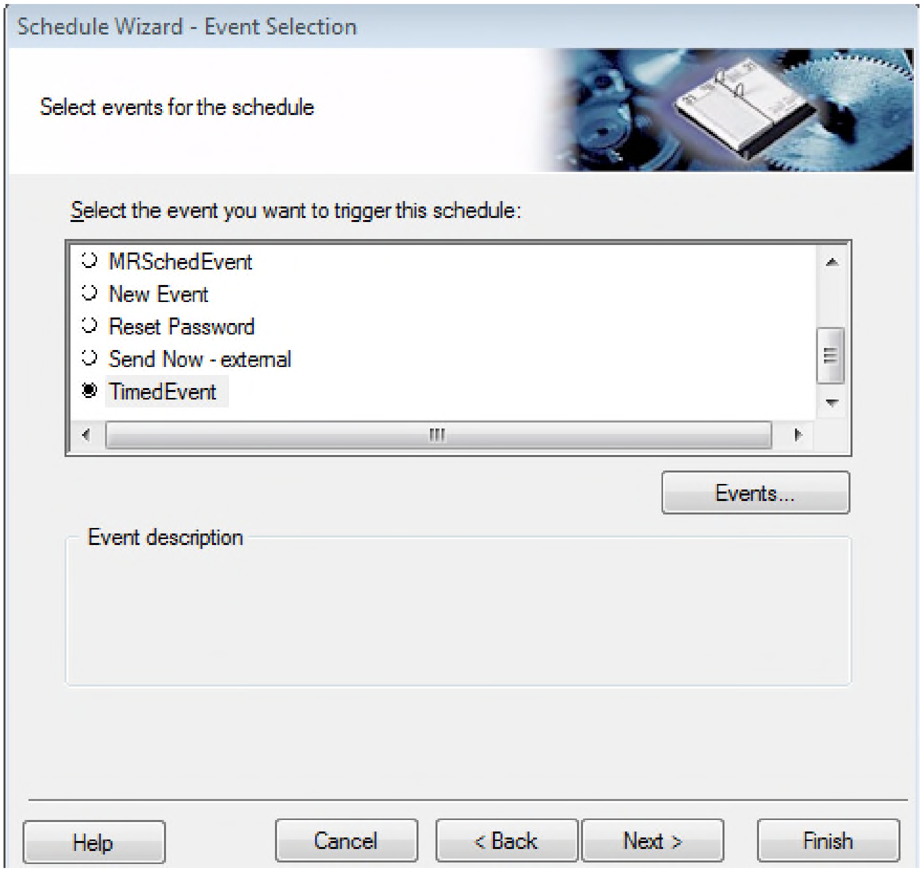
Please choose the end date for this schedule. The schedule will never be triggered again after this date.

● No end date

○ End by:

1 /11/2012

7. Click **Next**. The **TimedEvent** option should be selected



Schedule Wizard - Event Selection

Select events for the schedule

Select the event you want to trigger this schedule:

○ MRSchedEvent
○ New Event
○ Reset Password
○ Send Now - external
● TimedEvent

8. Click **Next**. Verify that the changes to the schedule are correct, and click **Finish**.

Step 3: Add a row for the - external schedule to the MD_LP_ES_SCHEDULE table in the data warehouse.

After you have created the - external schedule in MicroStrategy Desktop, you must insert a row for it in the MD_LP_ES_SCHEDULE table. This table contains a row for all of the - external schedules created in MicroStrategy Desktop. To add the correct schedule in the data warehouse, you will need the ID of the - external schedule. You get this ID from the Properties window in the Desktop.

To get the external schedule ID:

1. In the MicroStrategy Desktop, navigate to **Administration > Configuration Managers > Schedules**.
2. In the right panel, locate the external schedule you created in the Desktop, e.g., Daily - external.
3. Right click on the schedule and choose **Properties** from the context menu.
4. In the Properties window, note the **ID**. This is also the ID of the schedule in the Data Warehouse.

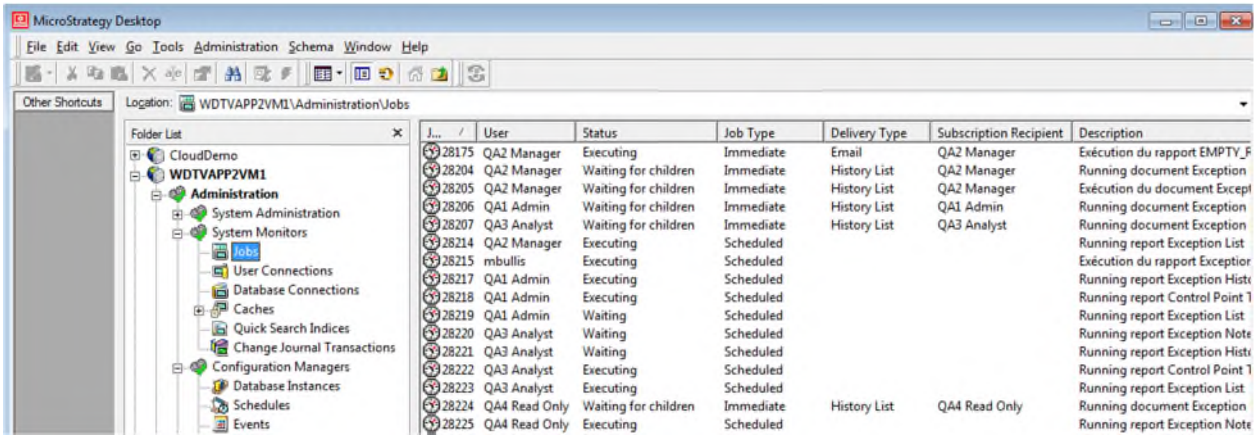
After you have the ID, you need to insert a new row in the MD_LP_ES_SCHEDULE table:

1. On the database server, use a database tool to navigate to the MD_LP_ES_SCHEDULE table. This table contains a row for all of the external schedules created in MicroStrategy Desktop.
2. Insert a new row with the ID and set up the scheduled time that matches the time of the new Time Triggered schedule you created in step 1.

Troubleshooting Schedules

You can trouble shoot control subscription failures by viewing entries in the XBRi\Tomcat\logs \stdout.log

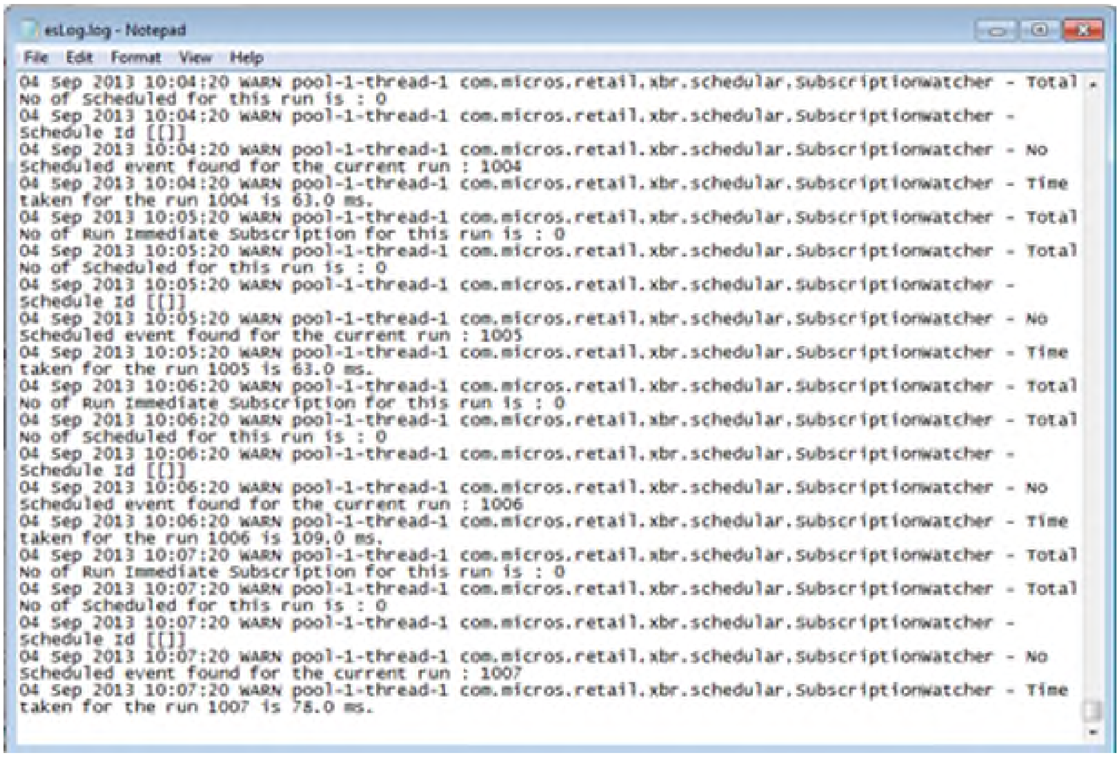
You can look at the jobs to see how the Iserver is processing reports and control point reports in MicroStrategy Desktop in the Administration > System Monitors > Jobs folder.



J... /	User	Status	Job Type	Delivery Type	Subscription Recipient	Description
28175	QA2 Manager	Executing	Immediate	Email	QA2 Manager	Exécution du rapport EMPTY_F
28204	QA2 Manager	Waiting for children	Immediate	History List	QA2 Manager	Running document Exception
28205	QA2 Manager	Waiting for children	Immediate	History List	QA2 Manager	Exécution du document Except
28206	QA1 Admin	Waiting for children	Immediate	History List	QA1 Admin	Running document Exception
28207	QA3 Analyst	Waiting for children	Immediate	History List	QA3 Analyst	Running document Exception
28214	QA2 Manager	Executing	Scheduled			Running report Exception List
28215	mbullis	Executing	Scheduled			Exécution du rapport Exceptior
28217	QA1 Admin	Executing	Scheduled			Running report Exception Histe
28218	QA1 Admin	Executing	Scheduled			Running report Control Point 1
28219	QA1 Admin	Waiting	Scheduled			Running report Exception List
28220	QA3 Analyst	Waiting	Scheduled			Running report Exception Note
28221	QA3 Analyst	Waiting	Scheduled			Running report Exception Histe
28222	QA3 Analyst	Executing	Scheduled			Running report Control Point 1
28223	QA3 Analyst	Executing	Scheduled			Running report Exception List
28224	QA4 Read Only	Waiting for children	Immediate	History List	QA4 Read Only	Running document Exception
28225	QA4 Read Only	Executing	Scheduled			Running report Exception Note

You can troubleshoot external schedule distribution failures by viewing entries in the esLog.log file located in the XBR^{i} application log folder: …XBRi\ExternalScheduler\log folder.

Sample esLog.log file



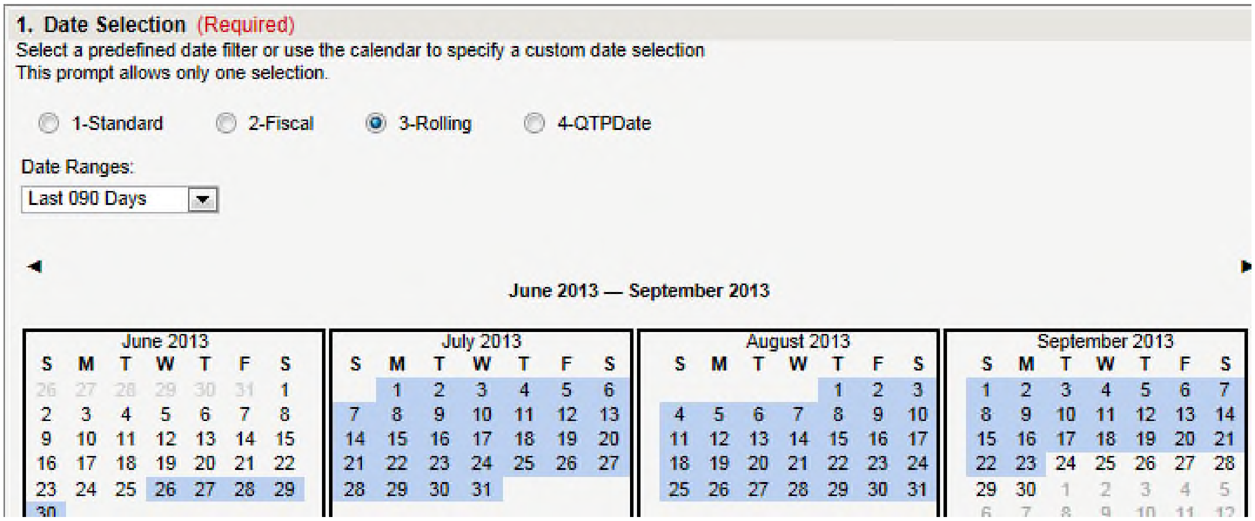
```
04 Sep 2013 10:04:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Total
No of Scheduled for this run is : 0
04 Sep 2013 10:04:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher -
Schedule Id [[]]
04 Sep 2013 10:04:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - No
Scheduled event found for the current run : 1004
04 Sep 2013 10:04:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Time
taken for the run 1004 is 63.0 ms.
04 Sep 2013 10:05:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Total
No of Run Immediate Subscription for this run is : 0
04 Sep 2013 10:05:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Total
No of Scheduled for this run is : 0
04 Sep 2013 10:05:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher -
Schedule Id [[]]
04 Sep 2013 10:05:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - No
Scheduled event found for the current run : 1005
04 Sep 2013 10:05:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Time
taken for the run 1005 is 63.0 ms.
04 Sep 2013 10:06:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Total
No of Run Immediate Subscription for this run is : 0
04 Sep 2013 10:06:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Total
No of Scheduled for this run is : 0
04 Sep 2013 10:06:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher -
Schedule Id [[]]
04 Sep 2013 10:06:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - No
Scheduled event found for the current run : 1006
04 Sep 2013 10:06:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Time
taken for the run 1006 is 109.0 ms.
04 Sep 2013 10:07:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Total
No of Run Immediate Subscription for this run is : 0
04 Sep 2013 10:07:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Total
No of Scheduled for this run is : 0
04 Sep 2013 10:07:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher -
Schedule Id [[]]
04 Sep 2013 10:07:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - No
Scheduled event found for the current run : 1007
04 Sep 2013 10:07:20 WARN pool-1-thread-1 com.micros.retail.xbr.schedular.SubscriptionWatcher - Time
taken for the run 1007 is 78.0 ms.
```

Creating New Date Prompts with Calendar Visualization

If a customer needs a date prompt for a report that includes custom dates or date ranges, you can create a new prompt using four basic steps.

1. In XBR^i, create the new custom date filters and save in a separate folder.
2. In MicroStrategy Desktop, create a search object to the folder containing the custom filters.
3. In XBR^i create the new prompt, using the search object.
4. In MicroStrategy Desktop, create a shortcut to the prompt.

In the new date prompt, options are displayed for each of the folders of date filters. When you select an option, the date filters in the corresponding folder are displayed in the drop-down list below. The calendar below shows the range of dates selected.



1. Date Selection (Required)

Select a predefined date filter or use the calendar to specify a custom date selection

This prompt allows only one selection.

○ 1-Standard ○ 2-Fiscal ● 3-Rolling ○ 4-QTPDate

Date Ranges: Last 090 Days

June 2013 — September 2013

June 2013

S	M	T	W	T	F	S
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

July 2013

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August 2013

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

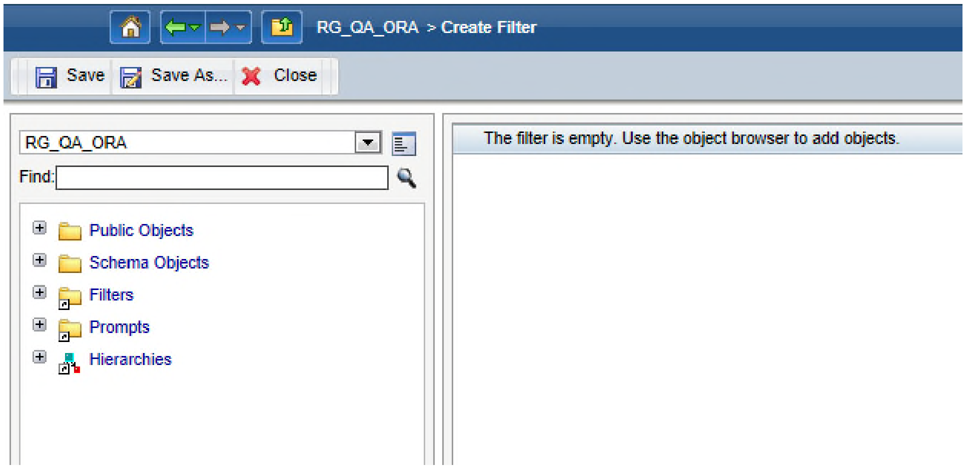
September 2013

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

IMPORTANT: The Date Selection batch process is limited to Date Day and Trans Date attributes, so only use those attributes when creating date filters.

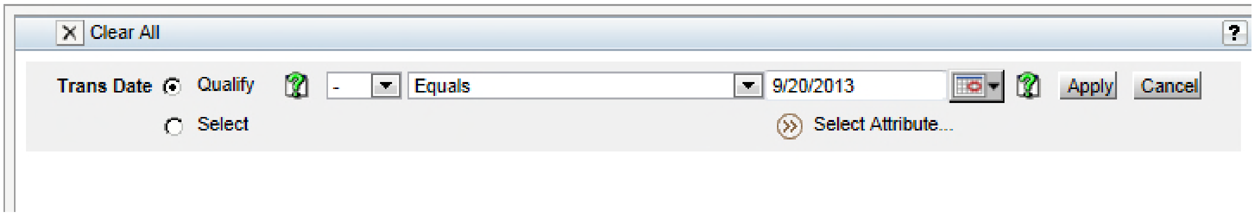
Step 1 Create the new filters

1. Log in to XBR^i as an Administrator.
2. From the Admin menu, choose **Filters**. This displays the Filters page.
3. Click the **Create** Filter icon. This displays the Create Filter editor.



The filter is empty. Use the object browser to add objects.

4. In the pane on the left, navigate to the attribute with the date data type on which you want to qualify, for example, Schema Objects > Attributes > Date Periods > Fiscal > Trans Date.
5. Right-click the attribute and select **Add to Filter**. This adds the attribute to the left pane, where you can further refine it.



Trans Date ● Qualify - Equals 9/20/2013

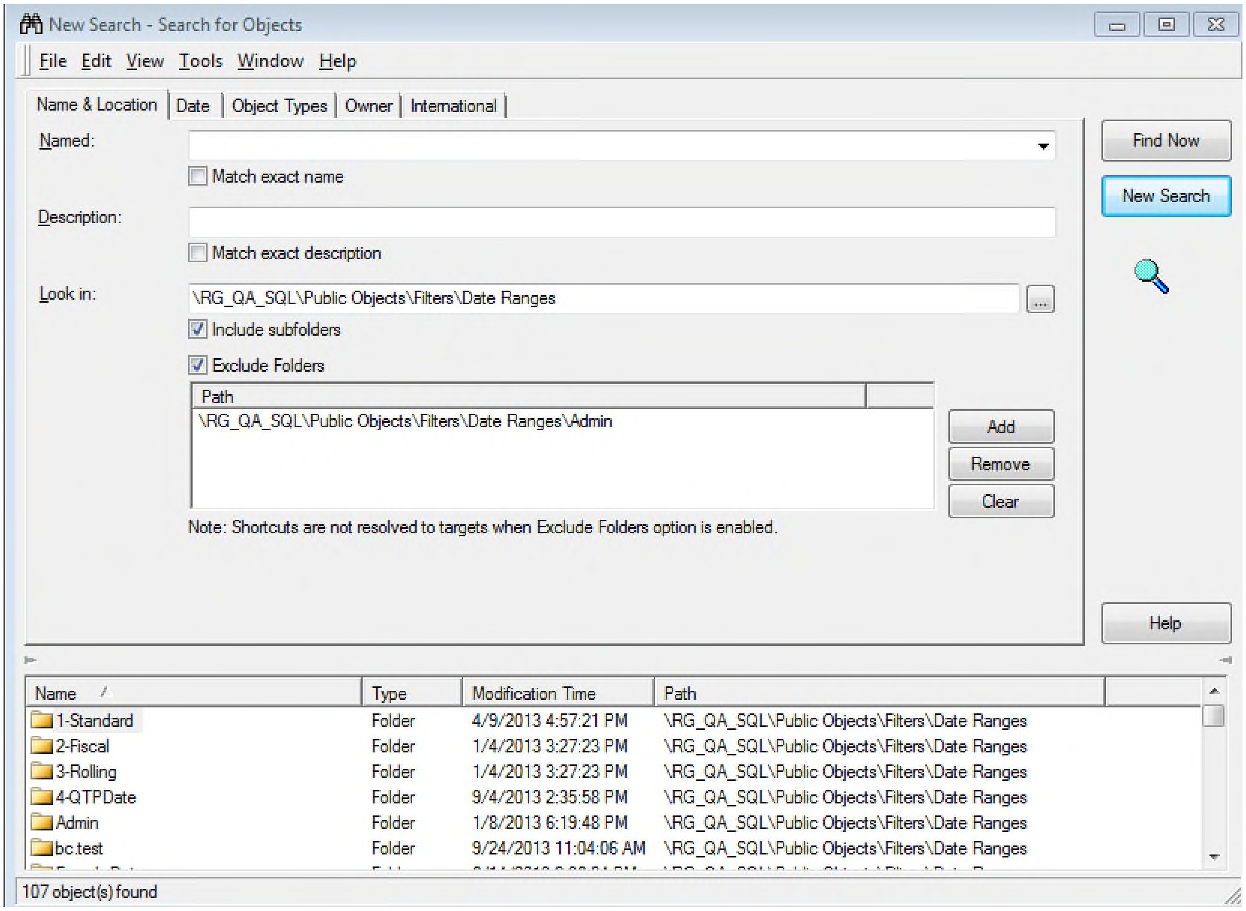
○ Select

6. Select the **Qualify** option.
7. From the first drop-down menu, select the form you want to filter data based on. This is usually **ID**.
8. From the next drop-down menu, select the operator that describes how you want to filter data. If you want to use a data range in your filter, select **Between**.
9. In the last field, enter the value(s) or click the calendar to select a date to use to qualify on the attribute form. This is the value that will be compared against the data in your data source.
   If you are using a date range in your filter, click the calendar again to select the second date. For example, if you want to filter data so the report shows results between January 1 2013 and February 12 2013, click the calendar and select January 1 2008, then click the calendar again and select February 12 2013.
10. Click the **Apply** icon ✓ to create your filtering condition.
11. Click **Save As**. The Save As dialog box opens.
12. Navigate to the folder where you want to save the filter. Enter a **Name** and **Description** for the filter, and click **OK**. Your new filter is saved. **Note:** the folder should be a subfolder of Public Objects\Filters\Date Ranges.

Repeat steps 3-12 for each date filter you want in the prompt and save them to the same folder.

Step 2 Create a search object

1. Log on to the project in the MicroStrategy Desktop.
2. Click the Search icon in the toolbar. This displays a Search for Objects dialog.
3. Enter search criteria to locate the folder of date filters you created.



Named:

□ Match exact name

Description:

□ Match exact description

Look in: \RG_QA_SQL\Public Objects\Filters\Date Ranges

☑ Include subfolders

☑ Exclude Folders

Path
\RG_QA_SQL\Public Objects\Filters\Date Ranges\Admin

Note: Shortcuts are not resolved to targets when Exclude Folders option is enabled.

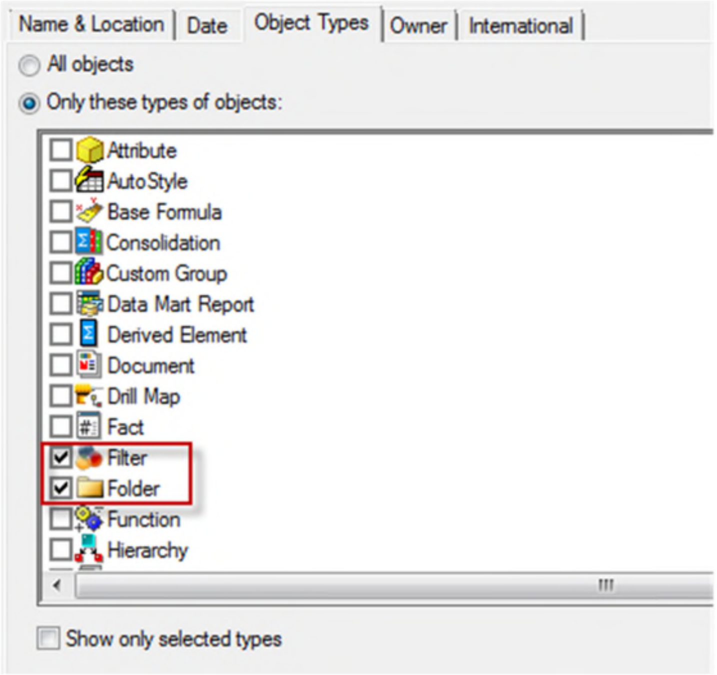
Name	Type	Modification Time	Path
1-Standard	Folder	4/9/2013 4:57:21 PM	\RG_QA_SQL\Public Objects\Filters\Date Ranges
2-Fiscal	Folder	1/4/2013 3:27:23 PM	\RG_QA_SQL\Public Objects\Filters\Date Ranges
3-Rolling	Folder	1/4/2013 3:27:23 PM	\RG_QA_SQL\Public Objects\Filters\Date Ranges
4-QTPDate	Folder	9/4/2013 2:35:58 PM	\RG_QA_SQL\Public Objects\Filters\Date Ranges
Admin	Folder	1/8/2013 6:19:48 PM	\RG_QA_SQL\Public Objects\Filters\Date Ranges
bc.test	Folder	9/24/2013 11:04:06 AM	\RG_QA_SQL\Public Objects\Filters\Date Ranges

107 object(s) found

4. In the example above, the path to the folder is specified in the **Look in** field. You can enter this path directly, or click the ellipsis button to locate the folder.

Notes:

- You check the **Include subfolders** check box to include all of the subfolders below the folder specified in the **Look in** field. If you want to exclude any of these subfolders, check the **Exclude Folders** checkbox and enter the paths to the subfolders you want to exclude in the box below.
- You can also use the options on the other tabs, such as Date and Object Types to narrow your search.



○ All objects

● Only these types of objects:

□ Attribute
□ AutoStyle
□ Base Formula
□ Consolidation
□ Custom Group
□ Data Mart Report
□ Derived Element
□ Document
□ Drill Map
□ Fact
☑ Filter
☑ Folder
□ Function
□ Hierarchy

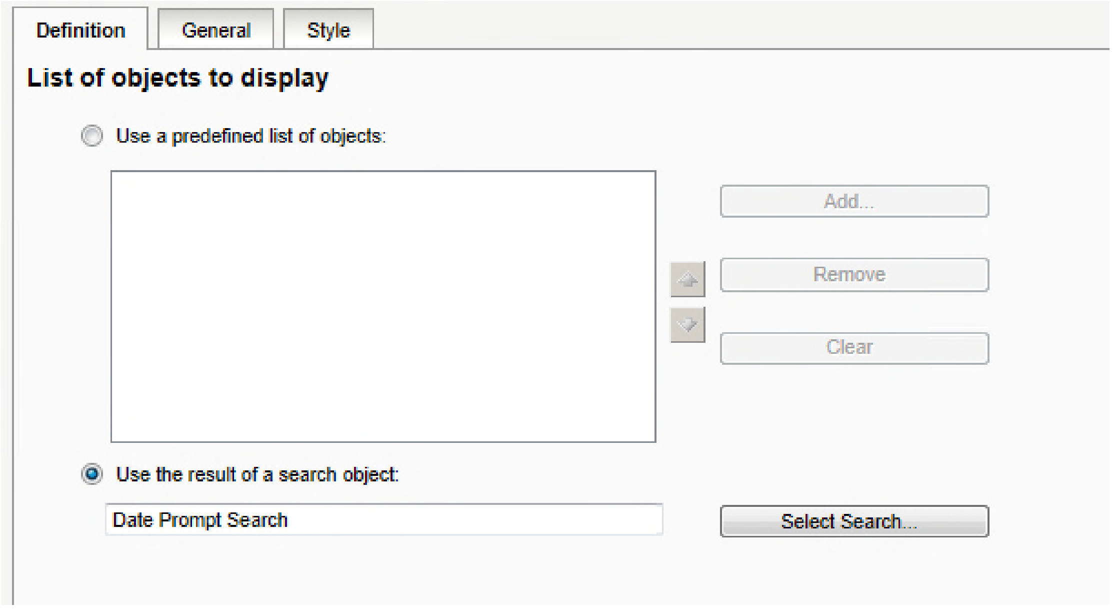
□ Show only selected types

The example above shows the Object Types tab with only **Filter** and **Folder** selected.

5. Click the **Find Now** button. The search results box will display in the lower panel with the contents of the folder you specified.
6. From the file menu choose **Save**.
7. Enter a name and location for the search object. This should be the default location for saving search objects, e.g., Public Objects\Searches. Remember the name and location, because you will use this search object in the new date prompt.
8. Click the **Save** button.

Step 3 Create a prompt

1. Log in to XBR^i as an Administrator.
2. From the Admin menu, choose **Prompts**. This displays the Prompt page.
3. Click the **Create Prompt** icon. This displays the Create Prompt page.
4. Click **Object Prompt**. This displays the New Prompt editor.
5. Select the **Use the result of a search object** option.
6. Enter the location of the search object you created in step 2, or click the **Select Search** button and look up the search object.



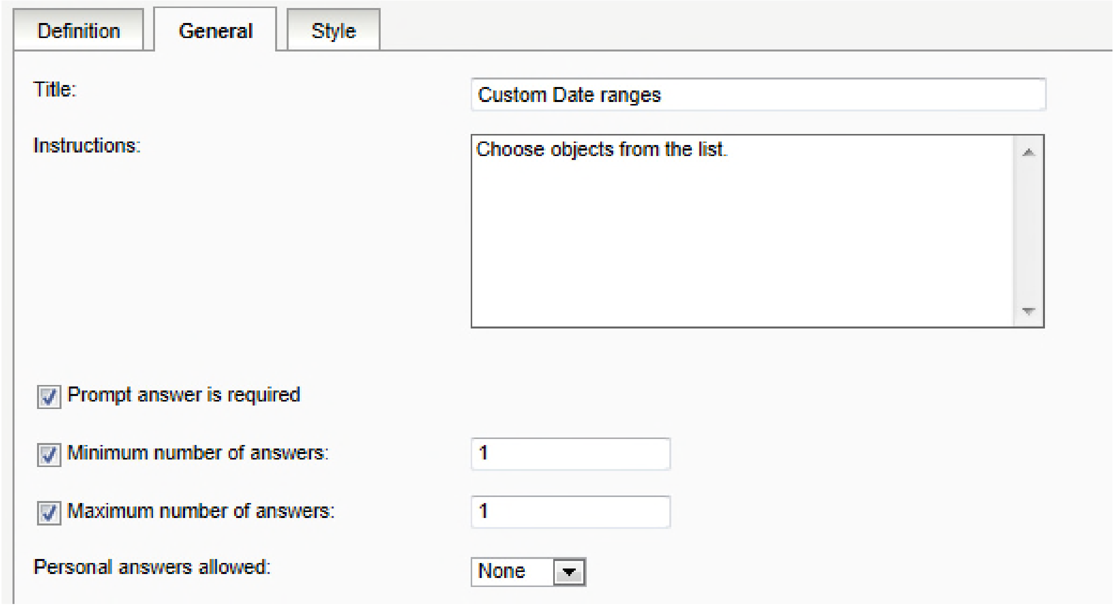
List of objects to display

○ Use a predefined list of objects:

● Use the result of a search object:

Date Prompt Search

7. Click the General tab and enter the prompt name and select prompt options.



Title: Custom Date ranges

Instructions: Choose objects from the list.

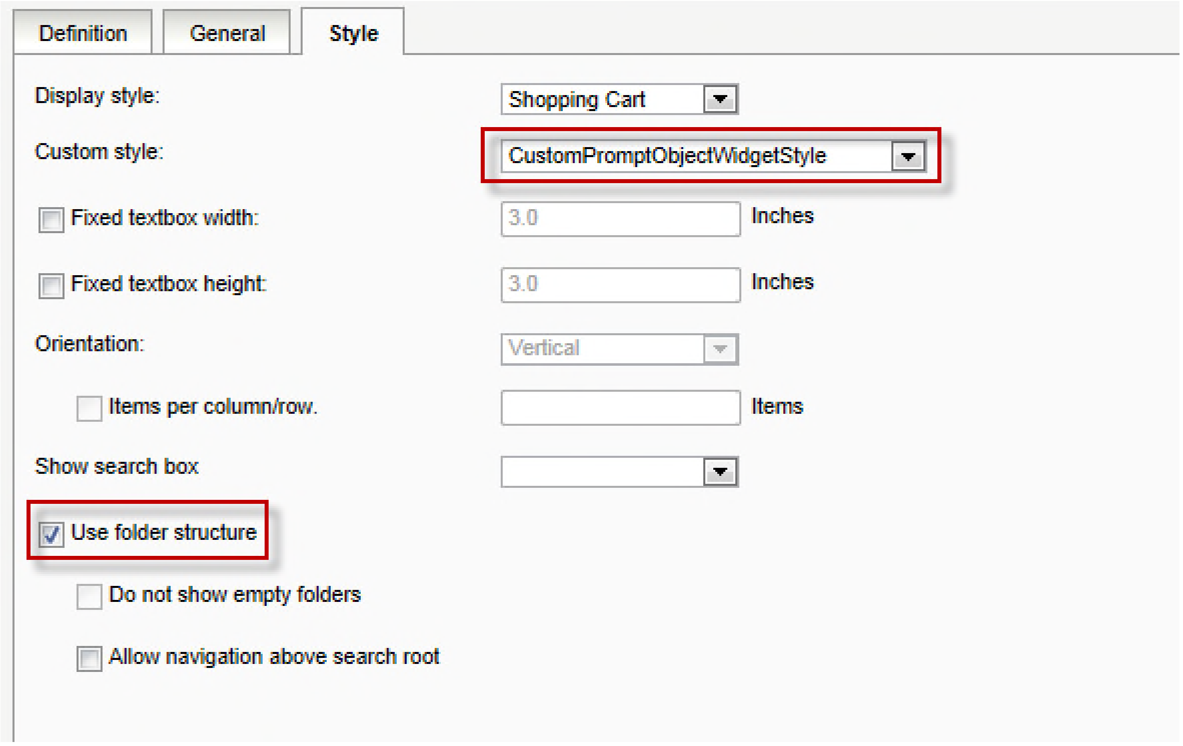
☑ Prompt answer is required

☑ Minimum number of answers: 1

☑ Maximum number of answers: 1

Personal answers allowed: None

8. Click the Style tab and select style options.
   a. In the **Custom Style** drop-down list, select CustomPromptObjectWidgetStyle.
   b. Select the **Use Folder Structure** check box.



Display style: Shopping Cart

Custom style: CustomPromptObjectWidgetStyle

□ Fixed textbox width: 3.0 Inches

□ Fixed textbox height: 3.0 Inches

Orientation: Vertical

□ Items per column/row. Items

Show search box

☑ Use folder structure

□ Do not show empty folders

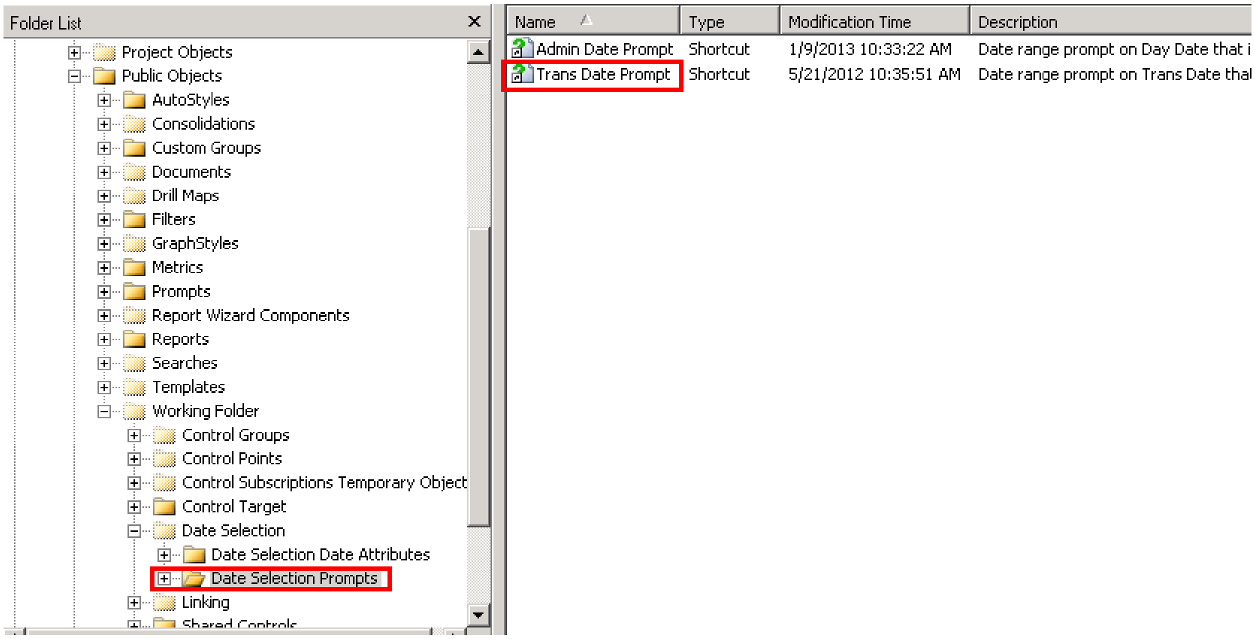
□ Allow navigation above search root

9. Click **Save** and enter a name for the prompt, and enter the default prompt folder e.g., Public Objects\Prompts.

Step 4 Create a shortcut to the prompt

1. Log on to the project in the MicroStrategy Desktop.
2. Navigate to the folder where you saved the prompt, e.g., Public Objects\Prompts.
3. In the right panel, right click on the prompt and choose **Create Shortcut**. This displays Browse for folder dialog.
4. Navigate to Public Objects\Working Folder\Date Selection\Date Selection Prompts.
5. Click **OK**. This saves the shortcut in a location where it can be processed by the Date Selection batch.

Note: When you create date selection attributes, the shortcuts are saved to the Date Selection Date Attributes folder so they can be processed by the Date Selection batch.



Name	Type	Modification Time	Description
Admin Date Prompt	Shortcut	1/9/2013 10:33:22 AM	Date range prompt on Day Date that i
Trans Date Prompt	Shortcut	5/21/2012 10:35:51 AM	Date range prompt on Trans Date that

Verification steps

The Date Selection batch process must run before the prompt is available to use. You can run this batch using the Microsoft Task Scheduler to test the prompt before the next scheduled batch is run.

To run the Date Selection batch:

1. Open the Windows Task Scheduler.
2. Click the Action menu and choose **Connect to Another Computer**.
3. Select **Another computer** and enter the web server name in the field.
4. Click **OK**.
5. In the left panel, select **Task Scheduler Library.**
6. In the top panel, locate the Date Selection process for you database type, e.g., Date Selection ORA.
7. Right click on it and choose **Run** from the context menu, or select it and choose **Run**, under **Selected Item** in the right panel.
8. The **Status** will display as Running. When the Status returns to Ready, the prompt is available to use in reports, and you can test it in XBR^{i}.

Configuring Data Purge Variables

To enhance data minimization for personal data, a purge process is now configurable for the deletion of inactive Customer, Employee and Store personal data. The application will delete data considered to be personal data in the database, such as customer and ship to names, addresses, email addresses, etc. New settings in pro_sp_variables enable this to be activated when the threshold value reaches the number of days defined. The default setting is 370 days for each:

> **CUSTOMER_INACTIVE_DAYS** - based on number of days since the transaction date that is associated with a customer number. Customer First / Last Name, Shipping Address, Email Address, Shipping First / Last Name, Phone Number, Zip code, State, Country will be deleted from transaction history.
>
> **EMPLOYEE_TERMINATED_DAYS** - based on number of days since the termination date set in the employee master file. Employee first name, last name, federal ID, and employee image data will be deleted from the employee master file.
>
> **STORE_CLOSED_DAYS** - based on number of days since the closed date in the store master file. Manager name and email address will be deleted from the store master file.

Configuring Store & Cashier/Employee/Salesperson variables- unique, used, size and Customer & SKU Master update variables

Before you do a database upgrade, you need to enter the ETL database settings for these variables in the PRO_SP_VARIABLES table.

IMPORTANT - Remember to set the variable for both VAR_VALUE and VAR_VALUE2

Cashier Unique in Chain (does not matter if cashiers float between stores) – indicated in POS Questionnaire and confirm from content of Employee Master file.

PRO_SP_VARIABLES.CASHIER_STORE.CASHIER_UNIQUE.VAR_VALUE & VAR_VALUE2

- If Cashier Number is unique in Store but not unique in Chain, set to 'N'
- If Cashier Number is unique in chain, set to 'Y'

CASHIER_SIZE

Default is 10. If the length of the cashier number in tlog and Employee Master are shorter than or equal to the default, use the default. If the cashier number is longer than the default, change cashier_size to that length.

Store Unique in Chain – indicated in POS Questionnaire and confirm from content of tlog and Store Master.

PRO_SP_VARIABLES.CASHIER_STORE.STORE_UNIQUE.VAR_VALUE & VAR_VALUE2

- If Store Number is unique in Chain, set to 'Y'.
- If Store Number is not unique in Chain, set to 'N'.
- If Store Number is not unique in Chain and is unique within division, set to 'N'.

Employee Number Used in Tlog – indicated in POS Questionnaire and confirm from content of tlog and Employee Master. This is true when an employee is the customer for a transaction and their employee number is captured and posted in the tlog

PRO_SP_VARIABLES.CASHIER_STORE.EMPNUM_USED.VAR_VALUE & VAR_VALUE2

- If employee number field in the tlog is not null for employee sales and returns, set to 'Y'.
- If employee number field is null in the tlog for employee sales & returns, set to 'N'.
- Info – the employee number in the employee master is expected to match the number in the employee number field in the tlog for employee sales and returns.

Employee Copy from Cashier – indicated in POS Questionnaire and confirm Employee Master content. Employee number refers to the identification of the employee that is posted to the tlog on transactions where the employee is the customer, not the employee number from the customer's HR system.

PRO_SP_VARIABLES.CASHIER_STORE.EMPLOYEE_COPY.VAR_VALUE & VAR_VALUE2

- If employee numbers on employee sales can be different from cashier numbers, set to N.
- When a record is added to the employee master as a 'NOF' (Not on File) from the tlog and the cashier number should be copied to the employee number field in the NOF, set to 'Y'.
- Info - This flag controls if EMPLOYEENUM and EMPLOYEEID are populated with the Cashiernum and CashierID respectively or left NULL by the Not On File procedure.

Salesperson Number Used in Tlog – indicated in POS Questionnaire and confirm from content in tlog and Employee Master.

PRO_SP_VARIABLES.CASHIER_STORE.SALESPERSONNUM_USED.VAR_VALUE & VAR_VALUE2

- If salesperson number can be populated in the tlog for sales and returns, set to 'Y'.
- If salesperson number is not in the tlog for sales & returns, set to 'N'.

Salesperson Copy from Cashier - indicated in POS Questionnaire and confirm from Employee Master content.

PRO_SP_VARIABLES.CASHIER_STORE.SALESPERSON_COPY.VAR_VALUE & VAR_VALUE2

- If salesperson numbers can be different from cashier numbers, set to N.
- If salesperson numbers are not used at all, set to N.
- If the cashier number should be copied to the salesperson number when a record is added to the employee master as a 'NOF' (Not on File) from the tlog, set to 'Y'.
- If the salesperson field in the tlog would be populated with the same number as the cashier number of the employee, then set to 'Y'.
- Info - This flag controls if SALESPERSONNUM and SALESPERSONID are populated with the Cashiernum and CashierID respectively or left NULL by the NOF procedure.

Capture Post Void Details in Tlog

PRO_SP_VARIABLES.PROACT.CAPTURE_PV_DETAILS.VAR_VALUE & VAR_VALUE2

- If Post Void transactions have the detail lines from the voided transaction, set to Y.
- If Post Void transactions do not have details, set to N.

Process No Match Return Exchange

PRO_SP_VARIABLES.NOMATCH.PROCESS_NM_RETURNEXCH.VAR_VALUE and VAR_VALUE2

- If original transaction STORE, TRANSNUM, REGNUM & DATE for returns are in tlog, then set to Y, else N.
- If customer has more than one POS and one POS captures original transaction information for returns and the other POS does not, must be discussed with project manager. If we enable Return No Match, the system will report a lot of false positives for the POS that does not capture original transaction info.

Capture Original Regnum on Returns

PRO_SP_VARIABLES.NOMATCH.CAPTURE_ORIG_REGNUM.VAR_VALUE and VAR_VALUE2

If the tlog captures the original register number for returns, set to Y, else N.

Process No Match Post Void & Cancelled

PRO_SP_VARIABLES.NOMATCH.PROCESS_NM_PVCANCEL.VAR_VALUE and VAR_VALUE2

If the tlog has Post Voids and/or Cancels, set to Y, else N.

Post Void Minutes

PRO_SP_VARIABLES.NOMATCH.PV_MINS

The number of minutes to look forward to see if a SKU in a post voided transaction was re-rung. Core default is 15.

Cancel Minutes

PRO_SP_VARIABLES.NOMATCH.CANCEL_MINS

The number of minutes to look forward to see if a SKU in a cancelled transaction was re-rung. Core default is 15.

Sales Threshold

PRO_SP_VARIABLES.XBRSTATS.SALES_THRESHOLD

The transaction total tender value for reporting 'sales less than threshold'. PM should be able to provide from customer. Core default is 5.00.

Pro SP Variables: SYSTEM / VAR_NAME	Default Setting	Customer Setting	Notes
CASHIER_STORE / CASHIER_UNIQUE	N	Y	If Unique in chain = Y
CASHIER_STORE / STORE_UNIQUE	N	Y	If Unique in chain = Y
CASHIER_STORE / EMPLOYEE_COPY	Y	Y	On NOF add, set = cashier
CASHIER_STORE / EMPNUM_USED	Y	Y	EmpNo on empsale in tlog?
CASHIER_STORE / SALESPERSON_COPY	Y	Y	On NOF add, set = cashier
CASHIER_STORE / SALESPERSONNUM_USED	Y	Y	Does Customer use? Is in tlog?
PROACT / CAPTURE_PV_DETAILS	Y	Y	PostVoid Dtl in pos_staging.dat?
NOMATCH / PROCESS_NM_RETURNEXCH	N	Y	Rtn/Exch has Store, Reg, Txn, Date?
NOMATCH / CAPTURE_ORIG_REGNUM	Y	Y	Rtn/Exch has Orig Reg?
NOMATCH / PROCESS_NM_PVCANCEL	N	Y	Post Void &/or Cancels in Tlog?
NOMATCH / PV_MINS	15	15	Min. to look for PV SKU resale
NOMATCH / CANCEL_MINS	15	15	Min. to look for Cancel SKU resale
XBRSTATS / SALESTHRESHOLD	5	5	Sales less than Threshold Value
CASHIER_SIZE	14	14	Maximum length of cashier_num field

Sales Less than Threshold Variable, Setting and Managing Threshold Groups

Sales Less Than Threshold is an edit criterion for detecting and reporting sale transactions with a non-zero tender amount below a defined threshold value.

The system default value for Sales Less Than Threshold is stored in PRO_SP_VARIABLES table with the following settings:

1. SYSTEM = ‘XBRSTATS’,
2. VAR_NAME = ‘SALES_THRESHOLD’
3. threshold value in VAR_VALUE (initially set to 5.00).

This default value should be reviewed with the customer and, if necessary, changed early in the project.

ABOUT THRESHOLD BASIS AND THRESHOLD GROUPS:

In XBR^i, sales threshold value can be set by country (threshold basis) and a multiple countries can be mapped to a single threshold value (threshold group). Threshold groups provide a single point for changing the threshold values of all the countries in the group. Countries with the same currency could logically be in the same threshold group. There is no reporting by threshold group. The threshold basis of country can be changed to another field in the Store Master, such as state or district. Multiple bases for threshold groups cannot be chosen; e.g.: calculating Sales Less Than Threshold for both Region and District is not allowed. Only one (1) threshold group basis should be implemented.

IMPLEMENTING THE COUNTRY THRESHOLD BASIS:

XBR^i offers the ability to have different thresholds for different countries. To set up threshold groups, you need to add the tables PRO_SP_THRESHOLD and PRO_SP_THRESHOLD_MAPPING to the XBR^i Data Editor, be aware of the contents of the table MST_STORE_TAB and know the customer’s countries and threshold value for each country.

These are the three tables involved in the threshold group implementation:

PRO_SP_THRESHOLD

ORGID	NUMBER (10),
THRESHOLD_ID	NUMBER (3), (maps to THRESHOLD_ID in PRO_SP_THRESHOLD_MAPPING)
THRESHOLD_NAME	VARCHAR2 (30 BYTE), (Name of Threshold Group)
THRESHOLD_VALUE	NUMBER (10,2) (threshold value for comparison to sale tender $)

PRO_SP_THRESHOLD_MAPPING

ORGID	NUMBER (10),
THRESHOLD_ID	NUMBER (3), (maps to THRESHOLD_ID in PRO_SP_THRESHOLD table)
SOURCE_VALUE	VARCHAR2 (10 BYTE) (Country code as in Store Master COUNTRY field)

MST_STORE_TAB

All other MicroStrategy store columns +

COUNTRY	(maps to SOURCE_VALUE)
THRESHOLD_ID	NUMBER(3) (THRESHOLD_VALUE from PRO_SP_THRESHOLD)

This example shows you how to set up a threshold for COUNTRY. The threshold values will be added into the PRO_SP_THRESHOLD table with a threshold ID, a group name and a threshold value. The countries will be added into the PRO_SP_THRESHOLD_MAPPING table with the country code and the corresponding threshold ID. The countries in the PRO_SP_THRESHOLD_MAPPING table must be the same country codes as in the COUNTRY field in the Store master.

In this example, we will define 2 threshold groups:

‘USD’, ID 100, threshold 4.00 and

‘Euro’, ID 200, threshold 3.76

and the countries that use those thresholds:

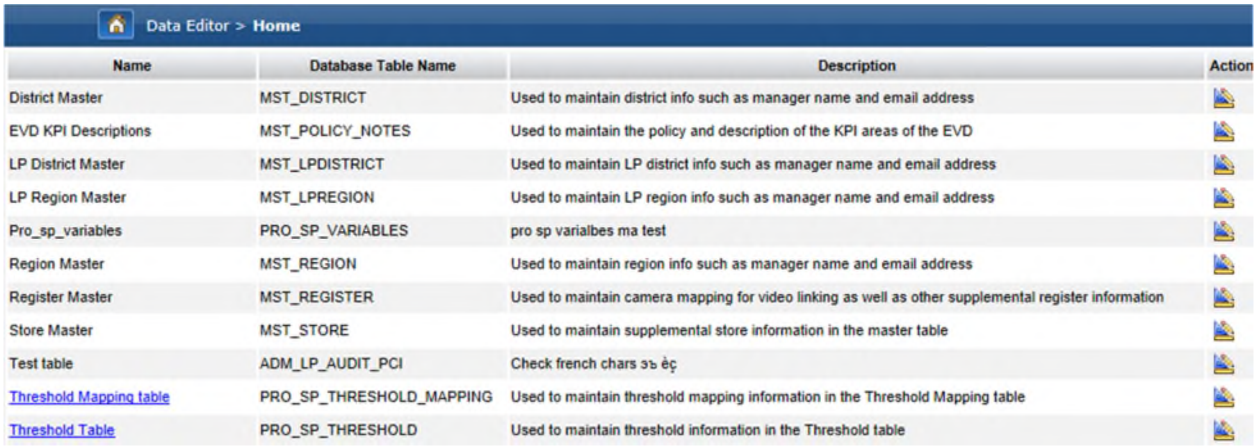
USA (United States) threshold 4.00

DEU (Germany) threshold 3.76

FRA (France) threshold 3.76

To set up a threshold group:

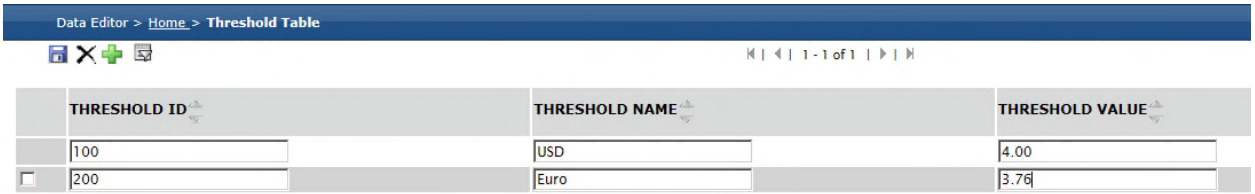
1. Log in to XBR^{i} as an XBR^{i} administrator.
2. From the Tools menu, choose **Data Editor**. This displays the Data Editor > Home page.
3. Following the procedure To Add Tables to the Data Editor, add the tables, PRO_SP_THRESHOLD_MAPPING and PRO_SP_THRESHOLD.



Data Editor > **Home**

Name	Database Table Name	Description	Action
District Master	MST_DISTRICT	Used to maintain district info such as manager name and email address	✎
EVD KPI Descriptions	MST_POLICY_NOTES	Used to maintain the policy and description of the KPI areas of the EVD	✎
LP District Master	MST_LPDISTRICT	Used to maintain LP district info such as manager name and email address	✎
LP Region Master	MST_LPREGION	Used to maintain LP region info such as manager name and email address	✎
Pro_sp_variables	PRO_SP_VARIABLES	pro sp varialbes ma test	✎
Region Master	MST_REGION	Used to maintain region info such as manager name and email address	✎
Register Master	MST_REGISTER	Used to maintain camera mapping for video linking as well as other supplemental register information	✎
Store Master	MST_STORE	Used to maintain supplemental store information in the master table	✎
Test table	ADM_LP_AUDIT_PCI	Check french chars зъ èç	✎
Threshold Mapping table	PRO_SP_THRESHOLD_MAPPING	Used to maintain threshold mapping information in the Threshold Mapping table	✎
Threshold Table	PRO_SP_THRESHOLD	Used to maintain threshold information in the Threshold table	✎

4. In the Data Editor > Home page, double click on the link for the PRO_SP_THRESHOLD table. This displays the page for the Threshold table. The example below shows the tables with the values already entered.

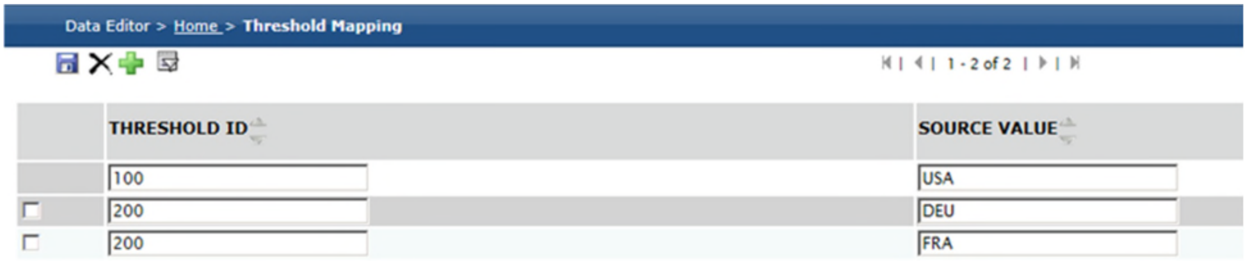


Data Editor > Home > **Threshold Table**

	THRESHOLD ID	THRESHOLD NAME	THRESHOLD VALUE
	100	USD	4.00
□	200	Euro	3.76

5. Click the ➕ icon to add a new row. Under THRESHOLD ID, enter 100, under THRESHOLD NAME, enter ‘USD’ (no quotes) and under THRESHOLD VALUE, enter 4.00.
6. Click the ➕ icon to add a new row. Under THRESHOLD ID, enter 200, under THRESHOLD NAME, enter ‘Euro’ (no quotes) and under THRESHOLD VALUE, enter 3.76.
7. If there were additional threshold values to be entered, step 3 would be repeated as needed. When you are finished, return to the Data Editor Home page.

8. In the Data Editor > Home page, double click on the link for the PRO_SP_THRESHOLD_MAPPING table. This displays the page for the Threshold Mapping table. The example below shows the tables with the values already entered.



Data Editor > Home > **Threshold Mapping**

	THRESHOLD ID	SOURCE VALUE
	100	USA
□	200	DEU
□	200	FRA

9. Click the ➕ icon to add a new row. Under THRESHOLD ID, enter 100 and under SOURCE VALUE, enter ‘USA’ (no quotes).
10. Click the ➕ icon to add a new row. Under THRESHOLD ID, enter 200 and under SOURCE VALUE, enter ‘DEU’ (no quotes).

11. Click the ➕ icon to add a new row. Under THRESHOLD ID, enter 200 and under SOURCE VALUE, enter ‘FRA’ (no quotes).
12. If there were additional countries to be entered, step 8 would be repeated as needed. When you are finished, return to the Data Editor Home page.

13. When the Store Master Update procedure (SP_MST_UPD_STORE) executes, the THRESHOLD_ID field in the Store Master will be updated by matching the COUNTRY field in the Store Master to the SOURCE_VALUE field in the PRO_SP_THRESHOLD_MAPPING table and posting the THRESHOLD_ID from PRO_SP_THRESHOLD_MAPPING to the THRESHOLD_ID in the Store Master. Continuing the example:
    a. Store 1 in the USA would have a THRESHOLD_ID of 100.
    b. Store 2 in Germany would have a THRESHOLD_ID of 200.
    c. Store 3 in France would have a THRESHOLD_ID of 200.
    d. Stores in other countries would have a NULL THRESHOLD_ID.

14. When transactions are loaded to history, the store in the transaction record is used to look up the THRESHOLD_ID on the Store Master. The THRESHOLD_ID is used to look up the threshold value on the PRO_SP_THRESHOLD table for comparison to the tender amount of SALE transactions. If a store has a NULL THRESHOLD_ID, the system default from PRO_SP_VARIABLES is used for the comparison. The threshold values for the example stores would be:
    e. Store 1 – USA – THRESHOLD_ID 100 – value 4.00.
    f. Store 2 - Germany - THRESHOLD_ID 200 – value 3.76.
    g. Store 3 - France - THRESHOLD_ID of 200 – value 3.76.
    h. Stores - other countries - THRESHOLD_ID NULL – value 5.00 (system default).

CHANGING THRESHOLD BASIS:

If the Threshold Basis or a Threshold value is changed, the change is effective for future processing; history is not changed. If you wanted to set thresholds using a different basis, such as state instead of country, the variable in procedure SP_MST_UPD_STORE (code snippet below) would need to be changed from “@vs_source_map = ‘COUNTRY’” to “@vs_source_map = ‘'STATE'”, and you would follow the procedure above to use the Data Editor to add all the distinct values for state into the threshold tables.

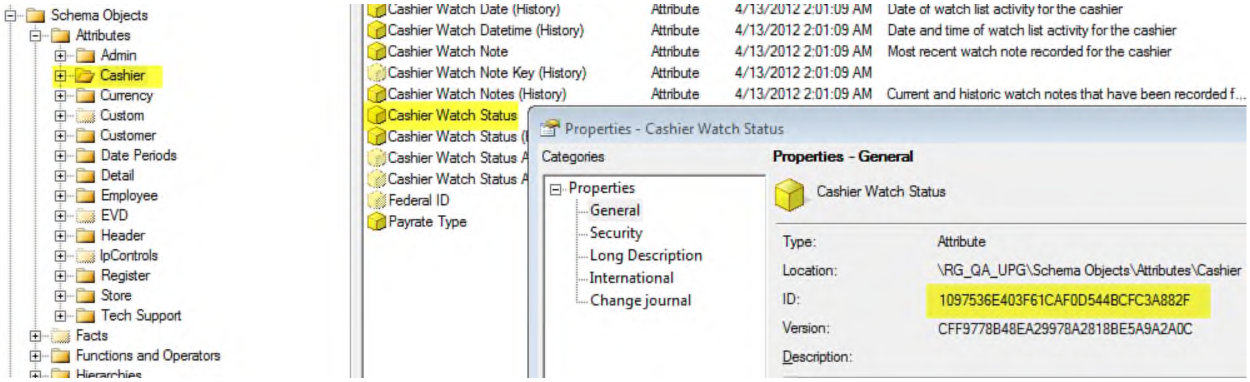
```
---- Update threshold IDs

--update MST_STORE_TAB t set threshold_id = (select threshold_id from
pro_sp_threshold_mapping where source_value=t.country);

set @vs_source_map = 'COUNTRY'

select @vs_sql = 'update MST_STORE_TAB set threshold_id = (select
threshold_id from pro_sp_threshold_mapping where
source_value=MST_STORE_TAB.'+@vs_source_map+')'
```

Configuring Store and Cashier Attributes for the Watch List

The Watch List lets XBR^i users assign a watch status to stores or cashiers that they want to monitor. You configure the store and cashier attributes for the Watch List by providing valid attribute IDs for corresponding Watch Status OBJECT_REF_NAME records in the ADM_LP_PROPERTIES table. The ID that you enter in the DSSID column is obtained from the attribute property in the MicroStrategy Desktop.

To locate the DSSID for an attribute:

1. In the MicroStrategy Desktop, navigate to the project folder > Schema Objects > Attributes.
   - To get the DSSID for the OBJECT_REF_NAME, attribute.employee-watch-status, go to the Cashier folder and locate the attribute, Cashier Watch Status.
   - To get the DSSID for the OBJECT_REF_NAME, attribute.location-watch-status, go to the Store folder and locate the attribute, Store Watch Status.
2. Right click on each attribute and choose Properties from the context menu.
3. In the Properties window for each attribute, copy the ID and save to enter in the database.



Cashier Watch Date (History)	Attribute	4/13/2012 2:01:09 AM	Date of watch list activity for the cashier
Cashier Watch Datetime (History)	Attribute	4/13/2012 2:01:09 AM	Date and time of watch list activity for the cashier
Cashier Watch Note	Attribute	4/13/2012 2:01:09 AM	Most recent watch note recorded for the cashier
Cashier Watch Note Key (History)	Attribute	4/13/2012 2:01:09 AM	
Cashier Watch Notes (History)	Attribute	4/13/2012 2:01:09 AM	Current and historic watch notes that have been recorded f...
Cashier Watch Status			
Cashier Watch Status (			
Cashier Watch Status A			
Cashier Watch Status A			
Federal ID			
Payrate Type			

Properties - Cashier Watch Status

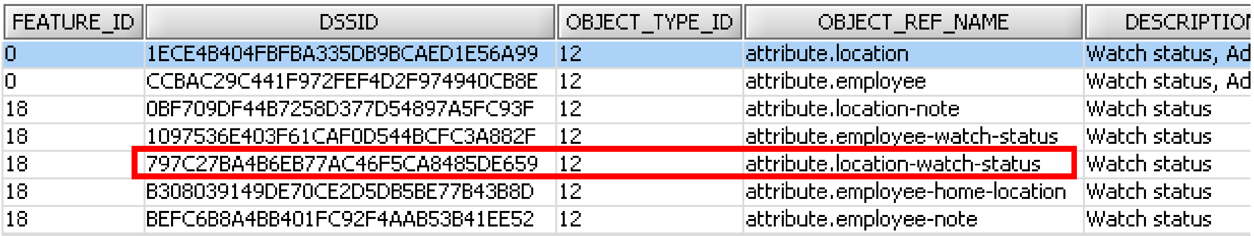
Properties - General

Cashier Watch Status

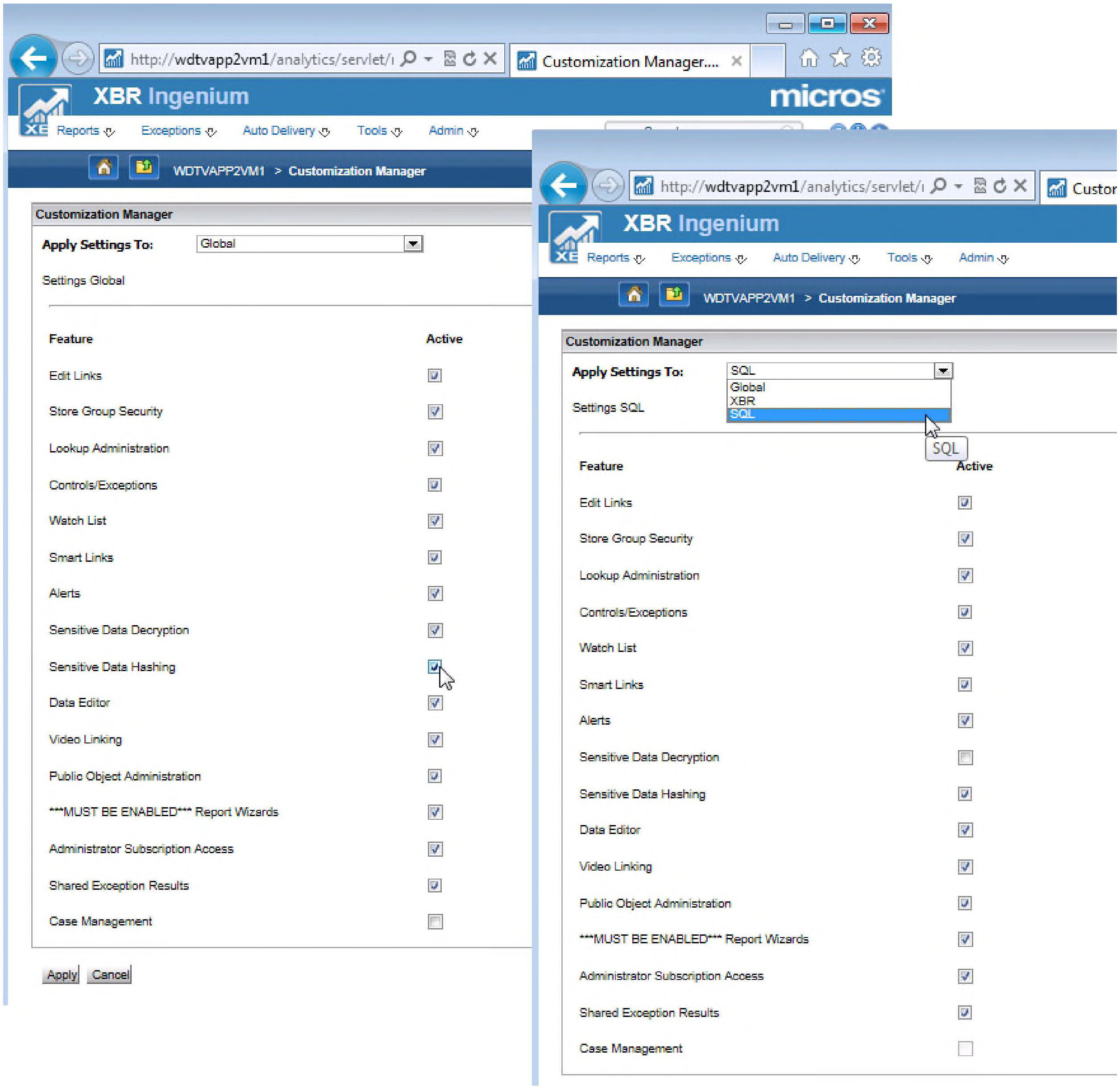
Type: Attribute
Location: \RG_QA_UPG\Schema Objects\Attributes\Cashier
ID: 1097536E403F61CAF0D544BCFC3A882F
Version: CFF9778B48EA29978A2818BE5A9A2A0C
Description:

To configure the attributes in the database:

6. On the database server, use the database tool to navigate to the ADM_LP_PROPERTIES table.
7. Display the table rows in editable mode.
8. Locate the ORGID of the customer whose project you are configuring.
9. Locate the OBJECT_REF_NAME records of the stores and cashiers you want to make available for the Watch list for that customer.
   - For cashier, the OBJECT_REF_NAME is attribute.employee-watch-status
   - For store, the OBJECT_REF_NAME is attribute.location-watch-status
10. In the DSSID column, enter the attribute IDs you copied from Desktop.



FEATURE_ID	DSSID	OBJECT_TYPE_ID	OBJECT_REF_NAME	DESCRIPTIOI
0	1ECE4B404FBFBA335DB9BCAED1E56A99	12	attribute.location	Watch status, Ad
0	CCBAC29C441F972FEF4D2F974940CB8E	12	attribute.employee	Watch status, Ad
18	0BF709DF44B7258D377D54897A5FC93F	12	attribute.location-note	Watch status
18	1097536E403F61CAF0D544BCFC3A882F	12	attribute.employee-watch-status	Watch status
18	797C27BA4B6EB77AC46F5CA8485DE659	12	attribute.location-watch-status	Watch status
18	B308039149DE70CE2D5DB5BE77B43B8D	12	attribute.employee-home-location	Watch status
18	BEFC6B8A4BB401FC92F4AAB53B41EE52	12	attribute.employee-note	Watch status



http://wdtvapp2vm1/analytics/servlet/
Customization Manager....
XBR Ingenium
micros
Reports
Exceptions
Auto Delivery
Tools
Admin
WDTVAPP2VM1 > Customization Manager
Apply
Cancel
Custor

Customization Manager

Apply Settings To: Global

Settings Global

Feature	Active
Edit Links	☑
Store Group Security	☑
Lookup Administration	☑
Controls/Exceptions	☑
Watch List	☑
Smart Links	☑
Alerts	☑
Sensitive Data Decryption	☑
Sensitive Data Hashing	☑
Data Editor	☑
Video Linking	☑
Public Object Administration	☑
MUST BE ENABLED Report Wizards	☑
Administrator Subscription Access	☑
Shared Exception Results	☑
Case Management	□

Customization Manager

Apply Settings To: SQL (Global / XBR / SQL)

Settings SQL

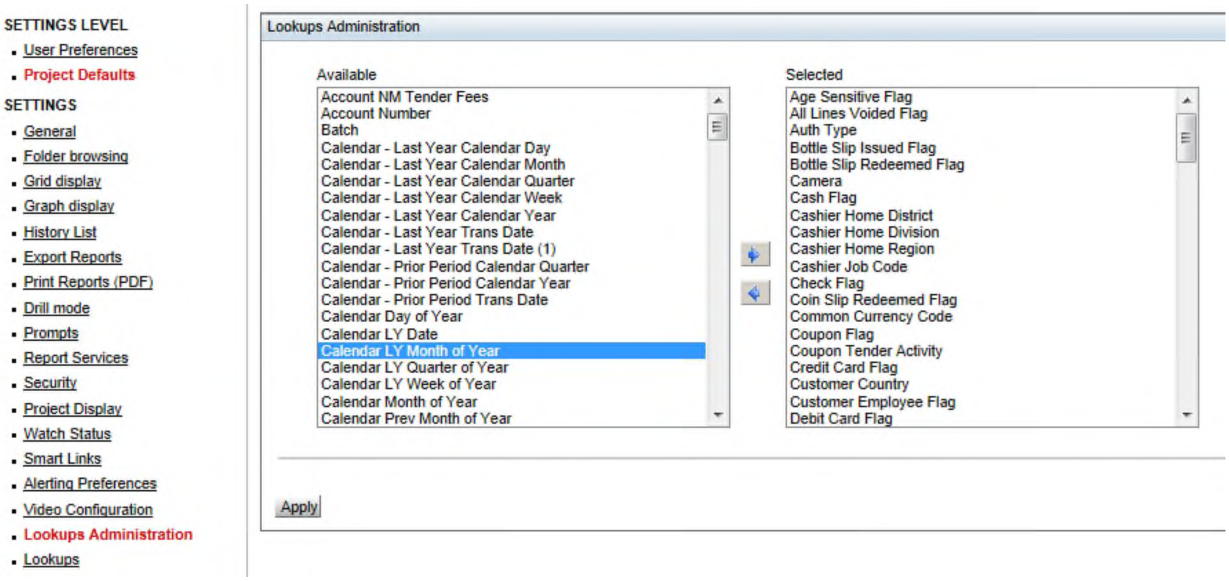
Feature	Active
Edit Links	☑
Store Group Security	☑
Lookup Administration	☑
Controls/Exceptions	☑
Watch List	☑
Smart Links	☑
Alerts	☑
Sensitive Data Decryption	□
Sensitive Data Hashing	☑
Data Editor	☑
Video Linking	☑
Public Object Administration	☑
MUST BE ENABLED Report Wizards	☑
Administrator Subscription Access	☑
Shared Exception Results	☑
Case Management	□

Enabling Attributes for Lookup Administration

Lookups are values (IDs and descriptions) for selected attributes. These values are stored in the lookup table for each attribute, and are used in reporting and for element browsing. The ID represents the stored value, i.e. - Tender Type Code or District Number, and the description represents the textual description, i.e. - Tender Type Description or District Name. The ID, description, or both may be displayed on reporting. XBR^i customer administrators have access to the Admin > Project Defaults > Lookups page, where they can create and modify lookup values for attributes. Core XBR^i administrators also have access to a Lookups Administration page where they can add attributes to the list of those available on the Lookups page.

To enable attributes for lookups:

1. Log in to XBR^i as an XBR^i administrator.
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, click **Lookups Administration**. This displays the Lookups Administration page.



SETTINGS LEVEL

- User Preferences
- Project Defaults

SETTINGS

- General
- Folder browsing
- Grid display
- Graph display
- History List
- Export Reports
- Print Reports (PDF)
- Drill mode
- Prompts
- Report Services
- Security
- Project Display
- Watch Status
- Smart Links
- Alerting Preferences
- Video Configuration
- Lookups Administration
- Lookups

Lookups Administration

Available

Account NM Tender Fees
Account Number
Batch
Calendar - Last Year Calendar Day
Calendar - Last Year Calendar Month
Calendar - Last Year Calendar Quarter
Calendar - Last Year Calendar Week
Calendar - Last Year Calendar Year
Calendar - Last Year Trans Date
Calendar - Last Year Trans Date (1)
Calendar - Prior Period Calendar Quarter
Calendar - Prior Period Calendar Year
Calendar - Prior Period Trans Date
Calendar Day of Year
Calendar LY Date
Calendar LY Month of Year
Calendar LY Quarter of Year
Calendar LY Week of Year
Calendar Month of Year
Calendar Prev Month of Year

Selected

Age Sensitive Flag
All Lines Voided Flag
Auth Type
Bottle Slip Issued Flag
Bottle Slip Redeemed Flag
Camera
Cash Flag
Cashier Home District
Cashier Home Division
Cashier Home Region
Cashier Job Code
Check Flag
Coin Slip Redeemed Flag
Common Currency Code
Coupon Flag
Coupon Tender Activity
Credit Card Flag
Customer Country
Customer Employee Flag
Debit Card Flag

4. In the Available list, select an attribute that you want to add, and click the **Add** ➡ icon. This moves it to the Selected list. Repeat this step for each attribute you want to add.
5. Click **Apply**.

Note: You can remove an attribute by selecting it in the Selected list and clicking the **Remove** ⬅ icon.

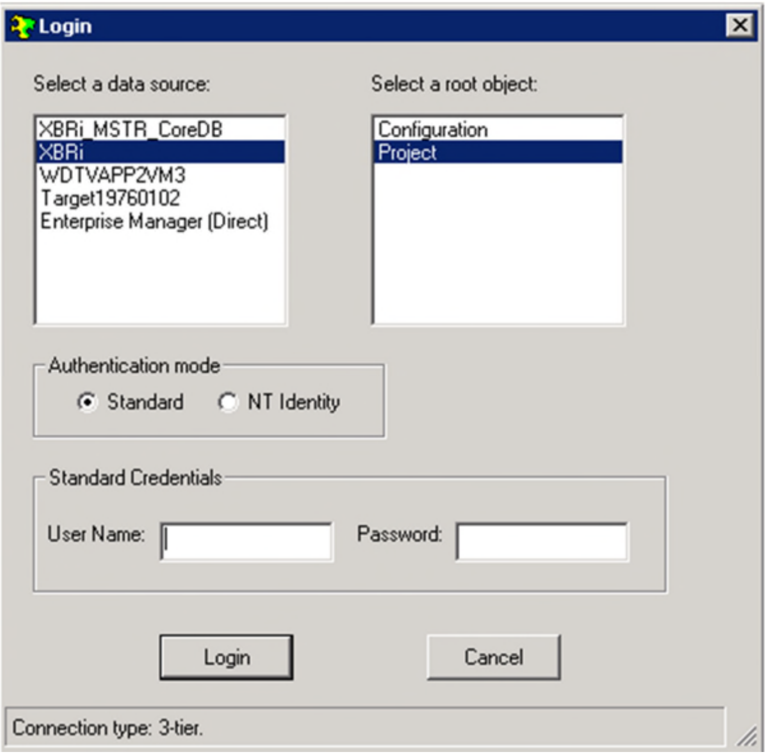
The attributes on the Selected list are available for XBR^i customer administrators when they go to the Lookups page.

Enabling Attributes for Smart Links

Smart Links in XBR^{i} are pop-up reports on attributes that are built from associated attributes. When the user hovers over an attribute in a report that has a smart link, this context-sensitive information is displayed in a pop-up. When the user moves off the attribute, the report disappears. Customer administrators have access to the Smart Links page in Admin > Project Defaults where they can create smart links for available attributes and modify existing smart links. Core XBR^{i} administrators can add attributes to those available on the Smart Links page using the MicroStrategy Extended Properties Editor.

To add attributes for smart links:

1. Open the MicroStrategy Extended Properties Editor.
2. In the Login prompt, make the following selections:



Login

Select a data source:
XBRi_MSTR_CoreDB
XBRi
WDTVAPP2VM3
Target19760102
Enterprise Manager (Direct)

Select a root object:
Configuration
Project

Authentication mode
● Standard ○ NT Identity

Standard Credentials
User Name: Password:

Login Cancel

Connection type: 3-tier.

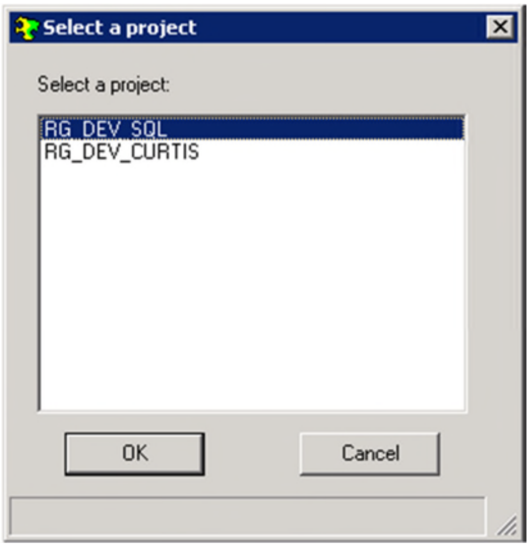
Select a data source – Select the data source of the project you are working on.

Select a root object – Select Project

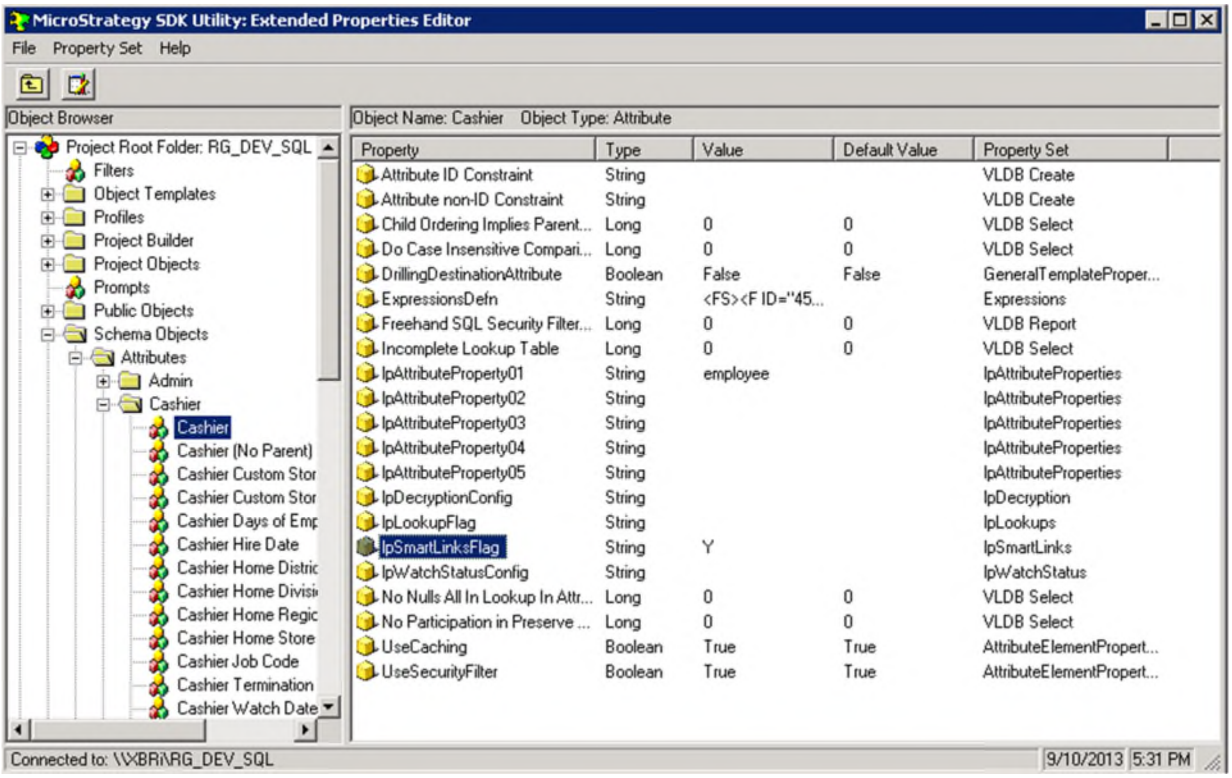
Authentication mode – Select Standard

User Name/Password – Enter your Core XBR^{i} administrator credentials

3. Click the **Login** button.



4. Select the project and click **OK**. This displays the Object Browser. Navigate to **Schema Objects > Attributes** and locate the folder of the attribute you want to enable for smart links.

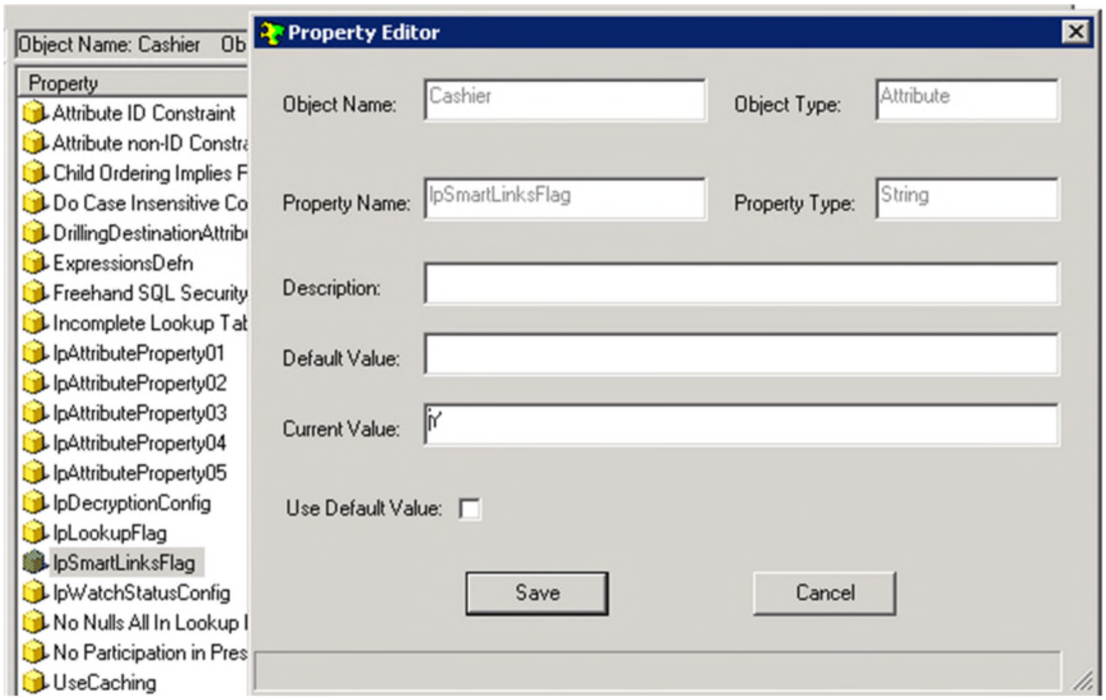


Object Name: Cashier Object Type: Attribute

Property	Type	Value	Default Value	Property Set
Attribute ID Constraint	String			VLDB Create
Attribute non-ID Constraint	String			VLDB Create
Child Ordering Implies Parent...	Long	0	0	VLDB Select
Do Case Insensitive Compari...	Long	0	0	VLDB Select
DrillingDestinationAttribute	Boolean	False	False	GeneralTemplateProper...
ExpressionsDefn	String	<FS><F ID="45...		Expressions
Freehand SQL Security Filter...	Long	0	0	VLDB Report
Incomplete Lookup Table	Long	0	0	VLDB Select
IpAttributeProperty01	String	employee		IpAttributeProperties
IpAttributeProperty02	String			IpAttributeProperties
IpAttributeProperty03	String			IpAttributeProperties
IpAttributeProperty04	String			IpAttributeProperties
IpAttributeProperty05	String			IpAttributeProperties
IpDecryptionConfig	String			IpDecryption
IpLookupFlag	String			IpLookups
IpSmartLinksFlag	String	Y		IpSmartLinks
IpWatchStatusConfig	String			IpWatchStatus
No Nulls All In Lookup In Attr...	Long	0	0	VLDB Select
No Participation in Preserve ...	Long	0	0	VLDB Select
UseCaching	Boolean	True	True	AttributeElementPropert...
UseSecurityFilter	Boolean	True	True	AttributeElementPropert...

Connected to: \\XBRI\RG_DEV_SQL 9/10/2013 5:31 PM

5. Select the attribute that you want to enable for smart links.
6. In the right panel, right click on IpsmartLinksFlag and choose Edit from the context menu. This displays the Property Editor.



Object Name: Cashier
Object Type: Attribute
Property Name: IpSmartLinksFlag
Property Type: String
Description:
Default Value:
Current Value: Y
Use Default Value: □

7. In the **Current Value** field, enter Y.

This adds the attribute to the Available Attributes list in XBRi Admin > Project Defaults > Smart Links.

Configuring Max Threads and Exceptions for Controls

Control Points are reports that track information on activity performed by a store, cashier, etc., based on a defined threshold. An example of this would be a cashier who repeatedly exceeds the threshold amount for line discounts. When you run a control point report, it will create results if the values exceed the threshold value defined in the report. Those results are called Exceptions. Core XBR^i administrators can set the number of control point reports that can run simultaneously, and the number of exceptions that can be generated by a control point report before a prompt is displayed asking if the user wants to see more exceptions.

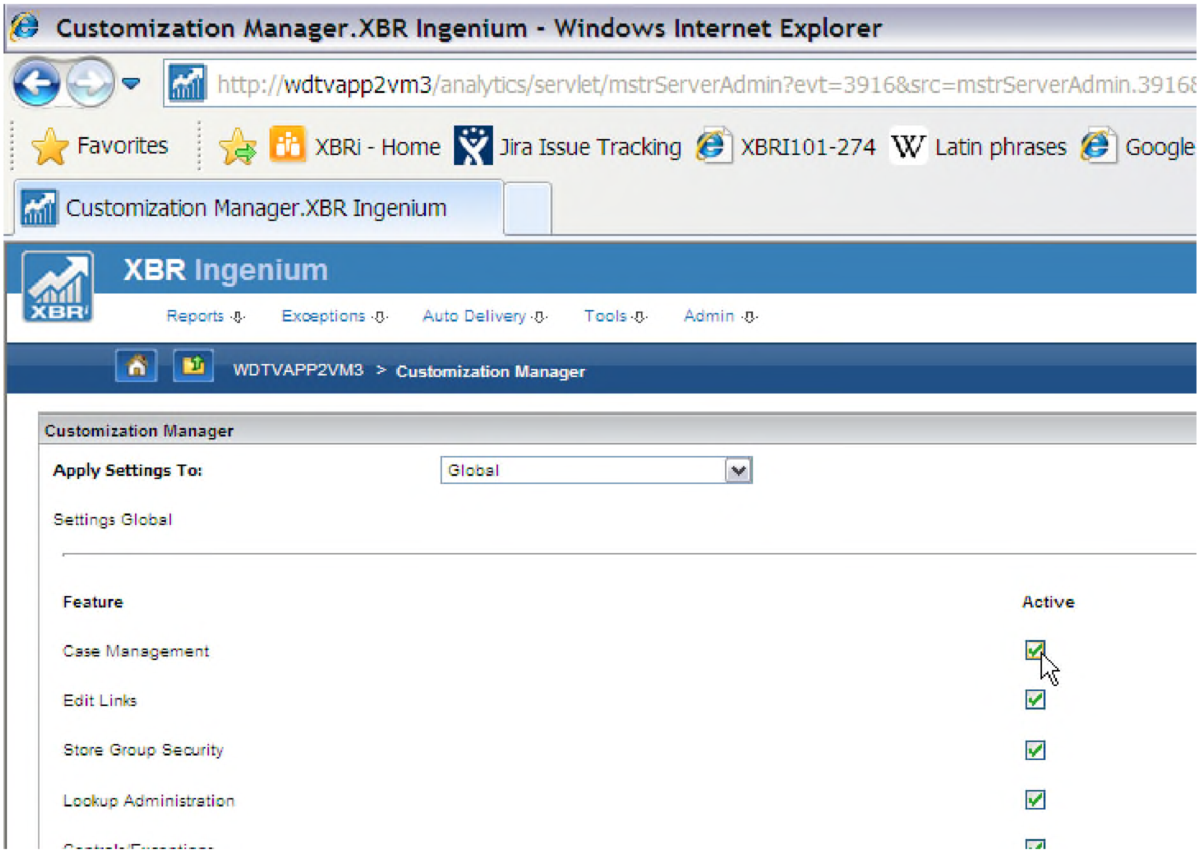
1. On the database server, use your frontend database viewer to navigate to the ADMIN_LP_VARIABLES table. You can set the parameters for the threads and exceptions allowed for controls, by organization.
2. Display the table rows in editable mode.
3. In the ORGID column locate the ID of the customer organization.
4. For the VAR_NAME, CONTROL_MAX_THREADS enter the VAR_VALUE. This is the number of control point reports that can be run simultaneously.
5. For the VAR_NAME, CONTROL_MAX_EXCEPTIONS, enter the VAR_VALUE. This is the number of exceptions that can be generated for a control point before an error message is displayed.

Enable Case Management Integration for a Customer

After running the Upgrade program the final time for Case Management configuration, you can enable case management capability for an organization.

To enable case management capability in XBR^i for an Organization:

1. Log in to XBR^i as an XBR^i Administrator user (i.e. CoreXBRAdmin).
2. From the **Admin** menu, choose **Customization Manager**.


Customization Manager.XBR Ingenium - Windows Internet Explorer
http://wdtvapp2vm3/analytics/servlet/mstrServerAdmin?evt=3916&src=mstrServerAdmin.3916
Favorites
XBRi - Home
Jira Issue Tracking
XBRI101-274
Latin phrases
Google
Customization Manager.XBR Ingenium
XBR Ingenium
XBRi
Reports
Exceptions
Auto Delivery
Tools
Admin
WDTVAPP2VM3 > Customization Manager

Customization Manager

Apply Settings To: Global

Settings Global

Feature	Active
Case Management	☑
Edit Links	☑
Store Group Security	☑
Lookup Administration	☑

3. Ensure that **Global** is selected in the **Apply Settings** dropdown
4. Place a check in the **Case Management** check box and click Apply.
5. From the **Apply Settings to** drop-down list, ensure that the customer's project is selected.
6. Place a check in the **Case Management** check box and click Apply.
7. Click **OK**.

Apply Case Management Privileges to Existing Users

Case management privileges can be granted to existing users by a customer administrator.

To give case management privileges to users:

1. Log in to XBR^i as an administrator.
2. From the Admin menu, choose **User Manager**.
3. In the User Manager, click the **Edit** icon for a group, if giving privileges to a group, or expand the group and click the **Edit** icon for a user, if giving privileges to a user.
4. In the Group or User Editor, click the **Feature Security** tab.
5. Select the check box next to **Case Management**.
6. Click **OK**.

No Match Process and Configuring No Match Variables

Introduction

The No Match process is performed using the SP_PRO_NOMATCH_RETURNEXCH and SP_PRO_NOMATCH_PVCANCEL procedures, which are run from within the SP_PRO_LOAD_HIST procedure. These procedures look for original purchase transactions related to refunds and exchanges and subsequent re-ring transactions related to post voids and cancels. Based on the results of these lookups, Match Codes are assigned.

IMPORTANT:

- The SP_PRO_NOMATCH_RETURNEXCH and SP_PRO_NOMATCH_PVCANCEL procedures cannot be used in conjunction with the SP_PRO_NOMATCH procedure. The SP_PRO_NOMATCH procedure **must** be deactivated.
- The No Match procedures do not look at the Balance tables when performing the analysis, nor reanalyze if transactions are added to history.

Enabling/Disabling procedures

The SP_PRO_NOMATCH_RETURNEXCH and SP_PRO_NOMATCH_PVCANCEL procedures can be enabled or disabled with the following entries to the SP_PRO_VARIABLES table:

system	var_name	var_value
nomatch	process_nm_pvcancel	Determines whether the SP_PRO_NOMATCH_PVCANCEL procedure is run. **Y** – procedure is run **N** (Default) – procedure is not run
nomatch	process_nm_returnexch	Determines whether the SP_ PRO_NOMATCH_RETURNEXCH procedure is run. **Y** – procedure is run **N** (Default) – procedure is not run

Configuring for original register number (regnum)

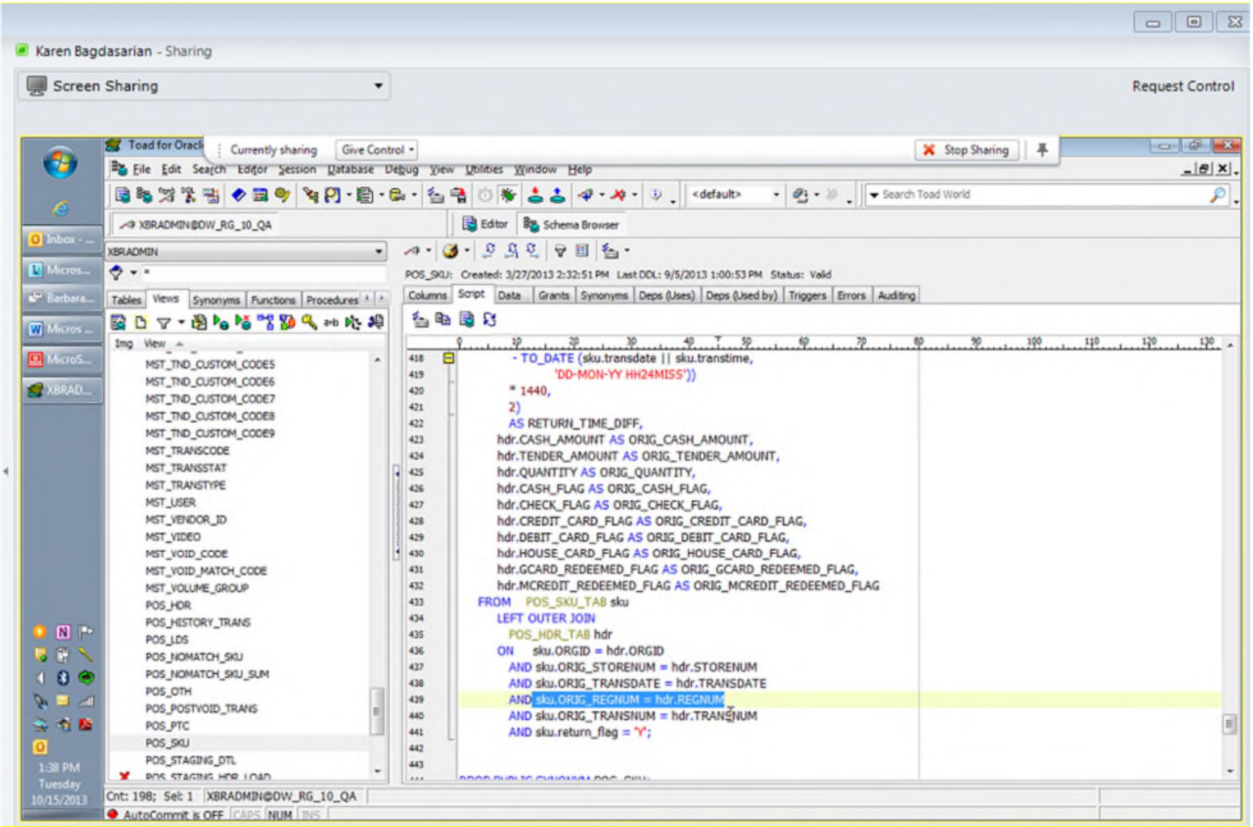
If the original register number used:

When performing a Return or Exchange lookup, if the original register number (regnum) is used, enter Y in the var_value field.

system	var_name	var_value
nomatch	capture_orig_regnum	Determines whether the original register number is used in the No Match lookups. **Y** – (Default) the original register number is used **N** – the original register number is *not* used

If the original register number is not used:

1. Enter N in the var_value field in SP_PRO_VARIABLES for SYSTEM='NOMATCH' and VAR_NAME='CAPTURE_ORIG_REGNUM'
2. Extract a copy of the DDL for the POS_SKU view and remove the line in the JOIN "AND sku.ORIG_REGNUM = hdr.REGNUM", as highlighted below:



POS_SKU: Created: 3/27/2013 2:32:51 PM Last DDL: 9/5/2013 1:00:53 PM Status: Valid

```
            - TO_DATE (sku.transdate || sku.transtime,
                    'DD-MON-YY HH24MISS'))
           * 1440,
           2)
           AS RETURN_TIME_DIFF,
        hdr.CASH_AMOUNT AS ORIG_CASH_AMOUNT,
        hdr.TENDER_AMOUNT AS ORIG_TENDER_AMOUNT,
        hdr.QUANTITY AS ORIG_QUANTITY,
        hdr.CASH_FLAG AS ORIG_CASH_FLAG,
        hdr.CHECK_FLAG AS ORIG_CHECK_FLAG,
        hdr.CREDIT_CARD_FLAG AS ORIG_CREDIT_CARD_FLAG,
        hdr.DEBIT_CARD_FLAG AS ORIG_DEBIT_CARD_FLAG,
        hdr.HOUSE_CARD_FLAG AS ORIG_HOUSE_CARD_FLAG,
        hdr.GCARD_REDEEMED_FLAG AS ORIG_GCARD_REDEEMED_FLAG,
        hdr.MCREDIT_REDEEMED_FLAG AS ORIG_MCREDIT_REDEEMED_FLAG
     FROM   POS_SKU_TAB sku
        LEFT OUTER JOIN
           POS_HDR_TAB hdr
        ON    sku.ORGID = hdr.ORGID
           AND sku.ORIG_STORENUM = hdr.STORENUM
           AND sku.ORIG_TRANSDATE = hdr.TRANSDATE
           AND sku.ORIG_REGNUM = hdr.REGNUM
           AND sku.ORIG_TRANSNUM = hdr.TRANSNUM
           AND sku.return_flag = 'Y';
```

3. Add a new row to PRO_VIEWS for the modified POS_SKU view under the customers ORGID. There are now 2 rows, the core -1001 row and the new row just added.
    - For SQL Server, you can use an insert statement
    - For Oracle, you must first compile the view and then run the command *update pro_views v set syntax = dbms_metadata.get_ddl('VIEW',v.view_name);* *commit;*
4. Set ACTIVE_FLAG='Y' and CUSTOM_FLAG='Y' on the new row
5. Set ACTIVE_FLAG='N' on the core -1001 row

Returns & Exchanges

Detail records

When you run either lookup procedure, one of the following match codes at the detail level is returned:

0 (good)	The SKU matches, the return amount is less than or equal to purchase price, and the quantity returned is less than or equal to the purchased quantity.
1 (incomplete)	One or more of the original transaction fields (orig_storenum, orig_regnum, orig_transdate, and orig_transnum) for the returned SKU record is null. (orig_regnum is only factored if capture_orig_regnum 'Y').
2 (bad)	The SKU in the return transaction is not present in the original purchase transaction or the original transaction is not found.
3 (bad)	The quantity returned is greater than the quantity in the original purchase transaction.
4 (bad)	Extended amount returned is greater than the extended amount in the original purchase transaction.

The conditions are evaluated in sequence. For example, if the SKU does not match, the match code will be 2 regardless of the amount or quantity. If the SKU matches and the quantity returned is greater than what was purchased, the match code will be 3, regardless of the return amount. Match code 4 is only used if both the SKU and quantity match, but the extended amount returned is greater than the original purchase amount.

Header Records

Header records track 'no match' returns and exchanges in a Yes, No, or Incomplete" manner. The match codes will be represented as follows:

0 (good)	All returned SKU records at the detail level have match codes of 0.
1 (incomplete)	At least one SKU record has a match code of 1 and no SKU records have a match code of 2, 3, or 4.
2 (bad)	At least one SKU record has a match code of 2, 3, or 4.

Statistics

The following summary buckets are aggregated using the logic below:

- REF_EXCH_MO_NOMATCH_COUNT - Transaction count of refund and exchange out transactions that have at least one returned SKU identified as 'no match', header match code of 2.

- REF_EXCH_MO_NOMATCH_AMOUNT- Sum of net tender amount of refund and exchange out transactions that have at least one returned SKU identified as 'no match', header match code of 2.

Cancel Transactions

Cancel transactions are evaluated to see if the SKU items in the canceled transaction were subsequently re-rung in a legitimate purchase transaction in the same store on the same day.

The number of minutes that the procedure looks forward is set by the following entry in the SP_PRO_VARIABLES table:

system	var_name	var_value
nomatch	cancel_mins	Determines how many minutes forward the procedure looks for re-rings. Default = 15

Detail records

Looking at the SKU records of SALE and EXCHANGE transactions with TRANSSTAT = 'CANCEL', VOID_CODE = 0, RETURN_FLAG = 'N', and TRAINING_FLAG = 'N', the match codes should be populated in the following manner:

0 (good)	SKU was sold in a SALE or EXCHANGE transaction with TRANSSTAT = 'COMPLETE', VOID_CODE = 0, RETURN_FLAG = 'N', and TRAINING_FLAG = 'N' within X minutes following the time of the cancel.
1 (bad)	SKU was not sold in a SALE or EXCHANGE transaction with TRANSSTAT = 'COMPLETE', VOID_CODE = 0, RETURN_FLAG = 'N', and TRAINING_FLAG = 'N' within X minutes following the time of the cancel.

Only SKU, Store, and Trans Date are included in the evaluation criteria. Register, cashier, quantity and amount are not included.

If a cancel transaction does not include SKU detail records, it cannot be evaluated by "no match."

Header Records

The match codes at the header level are populated in the following manner:

0 (good)	All cancelled SKU records at detail are populated with a match code of 0.
1 (bad)	At least one SKU record is populated with a match code of 1.

Statistics

The following summary buckets are aggregated using the logic below:

- CANCEL_NOMATCH_COUNT - Transaction count of cancel transactions that have at least one SKU record identified as 'no match', header match code of 1.
- CANCEL_NOMATCH_AMOUNT - Sum of extended amount + tax amount of cancel transactions that have at least one SKU record identified as 'no match', header match code of 1.

Post Void Transactions

Like cancels, post void transactions are evaluated to see if the SKU items in the post voided transaction were subsequently re-rung in a legitimate purchase transaction in the same store on the same date.

The number of minutes that the procedure looks forward is set by the following entry in the SP_PRO_VARIABLES table:

system	var_name	var_value
nomatch	pv_mins	Determines how many minutes forward the procedure looks for re-rings. Default = 15

Detail records

Looking at the SKU records of post void transactions (TRANSTYPE = 'POSTVOID', TRANSSTAT = 'COMPLETE', VOID_CODE = 0, RETURN_FLAG = 'N', and TRAINING_FLAG = 'N'), the match codes should be populated in the following manner:

0 (good)	SKU was sold in a SALE or EXCHANGE transaction with TRANSSTAT = 'COMPLETE', VOID_CODE = 0, RETURN_FLAG = 'N', and TRAINING_FLAG = 'N' within X minutes following the time of the post void transaction (TRANSTYPE = 'POSTVOID').
1 (bad)	SKU was not sold in a SALE or EXCHANGE transaction with TRANSSTAT = 'COMPLETE', VOID_CODE = 0, RETURN_FLAG = 'N', and TRAINING_FLAG = 'N' within X minutes following the time of the post void transaction (TRANSTYPE = 'POSTVOID').

Only SKU, Store, and Trans Date are included in the evaluation criteria. Register, cashier, quantity and amount are not included.

Header Records

The match codes at the header level are populated in the following manner:

0 (good)	All post void SKU records at detail are populated with a match code of 0.
1 (bad)	At least one post void SKU record is populated with a match code of 1.

Statistics

The following summary buckets are aggregated using the logic below:

- POSTVOID_NOMATCH_COUNT - Transaction count of post void transactions that have at least one SKU record identified as 'no match', header match code of 1.
- POSTVOID_NOMATCH_AMOUNT - Sum of extended amount + tax amount of post void transactions that have at least one SKU record identified as 'no match', header match code of 1.

Report Linking – Attribute Form Mapping

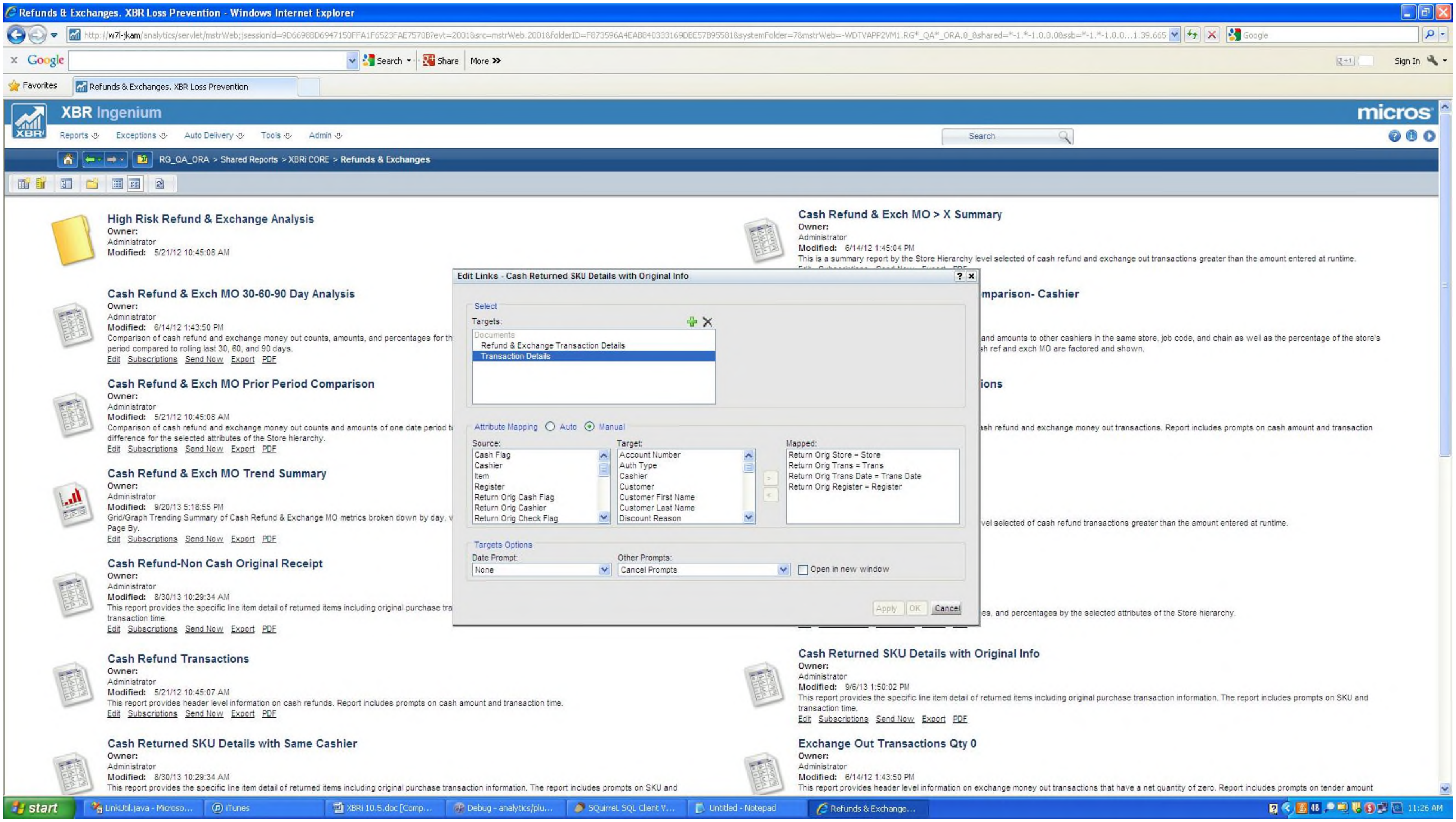
Introduction

The report linking feature in XBR^i lets users create links to relevant target reports or documents from source reports or documents. This lets them execute the related report or document by dynamically passing the selected attribute elements from the source, instead of having to run another report or document and re-enter the information. Most of the attribute linking can be done within XBR^i by customers, but there some configuration steps that can only be done by Oracle Micros administrators.

Linking attributes with different attribute form structures

There are cases in which a source attribute has different key attribute form structures than the target attribute. For example, the Cash Returned SKU Details with Original Info report lists items returned for cash. For each returned item there is an associated Return Orig Trans attribute with a single key attribute form: #. The attribute form # provides the Transaction ID of the transaction in which the item was sold. For each returned item, users may want to link to the Transaction Details document to view detailed information concerning the original sale.

XBR^i Link Editor



Edit Links - Cash Returned SKU Details with Original Info

Select

Targets:

Documents
- Refund & Exchange Transaction Details
- Transaction Details

Attribute Mapping ○ Auto ● Manual

Source:	Target:	Mapped:
Cash Flag	Account Number	Return Orig Store = Store
Cashier	Auth Type	Return Orig Trans = Trans
Item	Cashier	Return Orig Trans Date = Trans Date
Register	Customer	Return Orig Register = Register
Return Orig Cash Flag	Customer First Name	
Return Orig Cashier	Customer Last Name	
Return Orig Check Flag	Discount Reason	

Targets Options

Date Prompt: None

Other Prompts: Cancel Prompts

□ Open in new window

Apply OK Cancel

High Risk Refund & Exchange Analysis
Owner:
Administrator
Modified: 5/21/12 10:45:08 AM

Cash Refund & Exch MO 30-60-90 Day Analysis
Owner:
Administrator
Modified: 6/14/12 1:43:50 PM
Comparison of cash refund and exchange money out counts, amounts, and percentages for th
period compared to rolling last 30, 60, and 90 days.
Edit Subscriptions Send Now Export PDF

Cash Refund & Exch MO Prior Period Comparison
Owner:
Administrator
Modified: 5/21/12 10:45:08 AM
Comparison of cash refund and exchange money out counts and amounts of one date period t
difference for the selected attributes of the Store hierarchy.
Edit Subscriptions Send Now Export PDF

Cash Refund & Exch MO Trend Summary
Owner:
Administrator
Modified: 9/20/13 5:18:55 PM
Grid/Graph Trending Summary of Cash Refund & Exchange MO metrics broken down by day, v
Page By.
Edit Subscriptions Send Now Export PDF

Cash Refund-Non Cash Original Receipt
Owner:
Administrator
Modified: 8/30/13 10:29:34 AM
This report provides the specific line item detail of returned items including original purchase tra
transaction time.
Edit Subscriptions Send Now Export PDF

Cash Refund Transactions
Owner:
Administrator
Modified: 5/21/12 10:45:07 AM
This report provides header level information on cash refunds. Report includes prompts on cash amount and transaction time.
Edit Subscriptions Send Now Export PDF

Cash Returned SKU Details with Same Cashier
Owner:
Administrator
Modified: 8/30/13 10:29:34 AM
This report provides the specific line item detail of returned items including original purchase transaction information. The report includes prompts on SKU and

Cash Refund & Exch MO > X Summary
Owner:
Administrator
Modified: 6/14/12 1:45:04 PM
This is a summary report by the Store Hierarchy level selected of cash refund and exchange out transactions greater than the amount entered at runtime.

mparison- Cashier
and amounts to other cashiers in the same store, job code, and chain as well as the percentage of the store's
sh ref and exch MO are factored and shown.

ions
ash refund and exchange money out transactions. Report includes prompts on cash amount and transaction

vel selected of cash refund transactions greater than the amount entered at runtime.

es, and percentages by the selected attributes of the Store hierarchy.

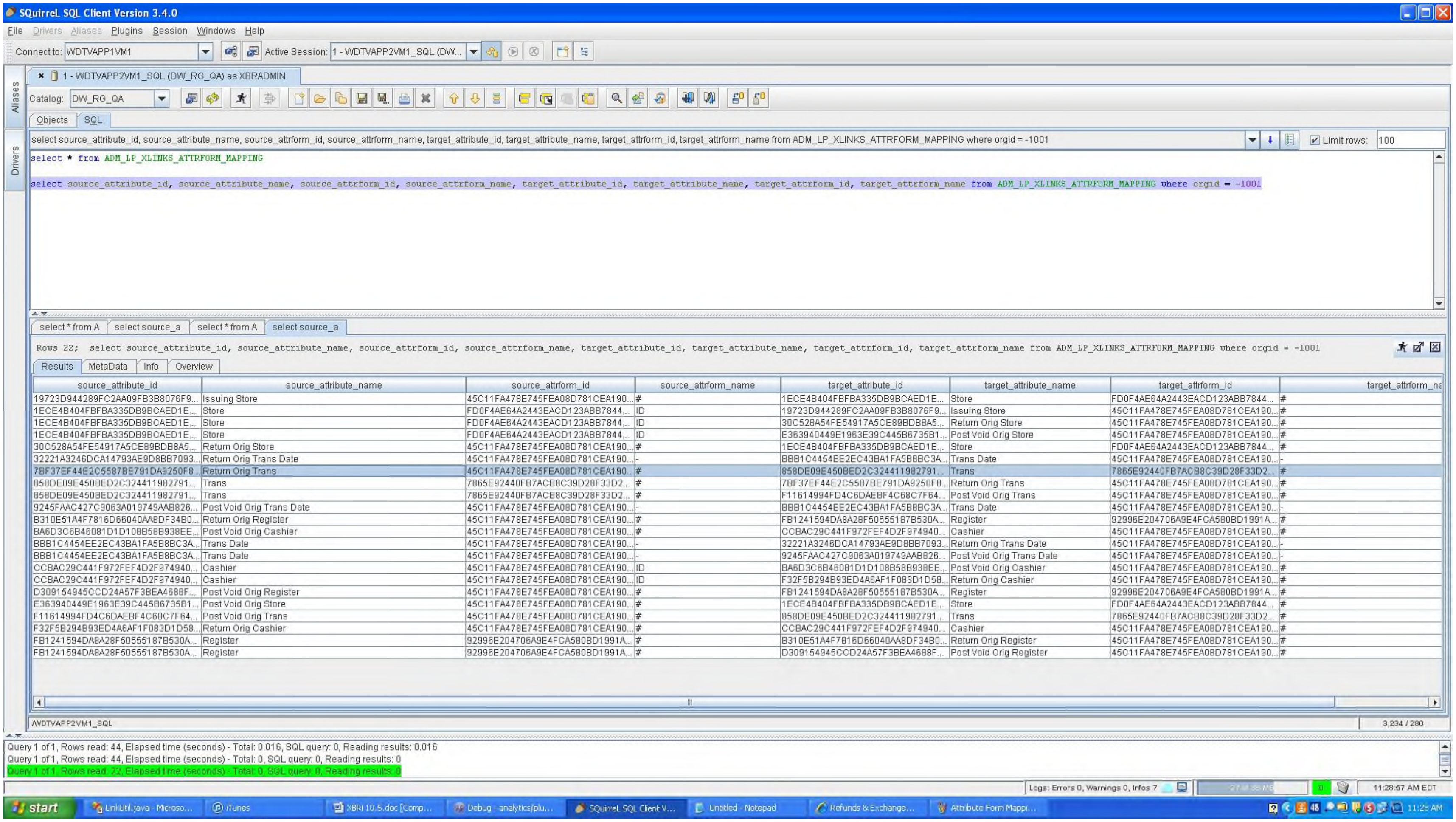
Cash Returned SKU Details with Original Info
Owner:
Administrator
Modified: 9/6/13 1:50:02 PM
This report provides the specific line item detail of returned items including original purchase transaction information. The report includes prompts on SKU and transaction time.
Edit Subscriptions Send Now Export PDF

Exchange Out Transactions Qty 0
Owner:
Administrator
Modified: 6/14/12 1:43:50 PM
This report provides header level information on exchange money out transactions that have a net quantity of zero. Report includes prompts on tender amount

However, the Trans attribute in Transaction Details has six key attribute forms (Version, #, Register, Trans Time, Trans date, Store ID).

The ADM_LP_XLINKS_ATTRFORM_MAPPING table provides a mechanism with which to specify how the value of Return Orig Trans's key attribute form # is mapped to a key attribute form in the Trans attribute.

ADM_LP_XLINKS_ATTRFORM_MAPPING table



```
select * from ADM_LP_XLINKS_ATTRFORM_MAPPING

select source_attribute_id, source_attribute_name, source_attrform_id, source_attrform_name, target_attribute_id, target_attribute_name, target_attrform_id, target_attrform_name from ADM_LP_XLINKS_ATTRFORM_MAPPING where orgid = -1001
```

Rows 22; select source_attribute_id, source_attribute_name, source_attrform_id, source_attrform_name, target_attribute_id, target_attribute_name, target_attrform_id, target_attrform_name from ADM_LP_XLINKS_ATTRFORM_MAPPING where orgid = -1001

source_attribute_id	source_attribute_name	source_attrform_id	source_attrform_name	target_attribute_id	target_attribute_name	target_attrform_id	target_attrform_na
19723D944289FC2AA09FB3B8076F9...	Issuing Store	45C11FA478E745FEA08D781CEA190...	#	1ECE4B404FBFBA335DB9BCAED1E...	Store	FD0F4AE64A2443EACD123ABB7844...	#
1ECE4B404FBFBA335DB9BCAED1E...	Store	FD0F4AE64A2443EACD123ABB7844...	ID	19723D944289FC2AA09FB3B8076F9...	Issuing Store	45C11FA478E745FEA08D781CEA190...	#
1ECE4B404FBFBA335DB9BCAED1E...	Store	FD0F4AE64A2443EACD123ABB7844...	ID	30C528A54FE54917A5CE89BDB8A5...	Return Orig Store	45C11FA478E745FEA08D781CEA190...	#
1ECE4B404FBFBA335DB9BCAED1E...	Store	FD0F4AE64A2443EACD123ABB7844...	ID	E363940449E1963E39C445B6735B1...	Post Void Orig Store	45C11FA478E745FEA08D781CEA190...	#
30C528A54FE54917A5CE89BDB8A5...	Return Orig Store	45C11FA478E745FEA08D781CEA190...	#	1ECE4B404FBFBA335DB9BCAED1E...	Store	FD0F4AE64A2443EACD123ABB7844...	#
32221A3246DCA14793AE9D8BB7093...	Return Orig Trans Date	45C11FA478E745FEA08D781CEA190...	-	BBB1C4454EE2EC43BA1FA5B8BC3A...	Trans Date	45C11FA478E745FEA08D781CEA190...	-
7BF37EF44E2C5587BE791DA9250F8...	Return Orig Trans	45C11FA478E745FEA08D781CEA190...	#	858DE09E450BED2C324411982791...	Trans	7865E92440FB7ACB8C39D28F33D2...	#
858DE09E450BED2C324411982791...	Trans	7865E92440FB7ACB8C39D28F33D2...	#	7BF37EF44E2C5587BE791DA9250F8...	Return Orig Trans	45C11FA478E745FEA08D781CEA190...	#
858DE09E450BED2C324411982791...	Trans	7865E92440FB7ACB8C39D28F33D2...	#	F11614994FD4C6DAEBF4C68C7F64...	Post Void Orig Trans	45C11FA478E745FEA08D781CEA190...	#
9245FAAC427C9063A019749AAB826...	Post Void Orig Trans Date	45C11FA478E745FEA08D781CEA190...	-	BBB1C4454EE2EC43BA1FA5B8BC3A...	Trans Date	45C11FA478E745FEA08D781CEA190...	-
B310E51A4F7816D66040AA8DF34B0...	Return Orig Register	45C11FA478E745FEA08D781CEA190...	#	FB1241594DA8A28F50555187B530A...	Register	92996E204706A9E4FCA580BD1991A...	#
BA6D3C6B46081D1D108B58B938EE...	Post Void Orig Cashier	45C11FA478E745FEA08D781CEA190...	#	CCBAC29C441F972FEF4D2F974940...	Cashier	45C11FA478E745FEA08D781CEA190...	#
BBB1C4454EE2EC43BA1FA5B8BC3A...	Trans Date	45C11FA478E745FEA08D781CEA190...	-	32221A3246DCA14793AE9D8BB7093...	Return Orig Trans Date	45C11FA478E745FEA08D781CEA190...	-
BBB1C4454EE2EC43BA1FA5B8BC3A...	Trans Date	45C11FA478E745FEA08D781CEA190...	-	9245FAAC427C9063A019749AAB826...	Post Void Orig Trans Date	45C11FA478E745FEA08D781CEA190...	-
CCBAC29C441F972FEF4D2F974940...	Cashier	45C11FA478E745FEA08D781CEA190...	ID	BA6D3C6B46081D1D108B58B938EE...	Post Void Orig Cashier	45C11FA478E745FEA08D781CEA190...	#
CCBAC29C441F972FEF4D2F974940...	Cashier	45C11FA478E745FEA08D781CEA190...	ID	F32F5B294B93ED4A6AF1F083D1D58...	Return Orig Cashier	45C11FA478E745FEA08D781CEA190...	#
D309154945CCD24A57F3BEA4688F...	Post Void Orig Register	45C11FA478E745FEA08D781CEA190...	#	FB1241594DA8A28F50555187B530A...	Register	92996E204706A9E4FCA580BD1991A...	#
E363940449E1963E39C445B6735B1...	Post Void Orig Store	45C11FA478E745FEA08D781CEA190...	#	1ECE4B404FBFBA335DB9BCAED1E...	Store	FD0F4AE64A2443EACD123ABB7844...	#
F11614994FD4C6DAEBF4C68C7F64...	Post Void Orig Trans	45C11FA478E745FEA08D781CEA190...	#	858DE09E450BED2C324411982791...	Trans	7865E92440FB7ACB8C39D28F33D2...	#
F32F5B294B93ED4A6AF1F083D1D58...	Return Orig Cashier	45C11FA478E745FEA08D781CEA190...	#	CCBAC29C441F972FEF4D2F974940...	Cashier	45C11FA478E745FEA08D781CEA190...	#
FB1241594DA8A28F50555187B530A...	Register	92996E204706A9E4FCA580BD1991A...	#	B310E51A4F7816D66040AA8DF34B0...	Return Orig Register	45C11FA478E745FEA08D781CEA190...	#
FB1241594DA8A28F50555187B530A...	Register	92996E204706A9E4FCA580BD1991A...	#	D309154945CCD24A57F3BEA4688F...	Post Void Orig Register	45C11FA478E745FEA08D781CEA190...	#

```
Query 1 of 1, Rows read: 44, Elapsed time (seconds) - Total: 0.016, SQL query: 0, Reading results: 0.016
Query 1 of 1, Rows read: 44, Elapsed time (seconds) - Total: 0, SQL query: 0, Reading results: 0
Query 1 of 1, Rows read: 22, Elapsed time (seconds) - Total: 0, SQL query: 0, Reading results: 0
```

ADM_LP_XLINKS_ATTRFORM_MAPPING can also be used to support customers if their applications require linking from source attributes to target attributes that have different key attribute form structures.

Link Maintenance Interval

XBR currently supports preserving some, but not all report attribute link definitions. The scenario below is an example of link definitions that are supported.

Example: Supported link preservation

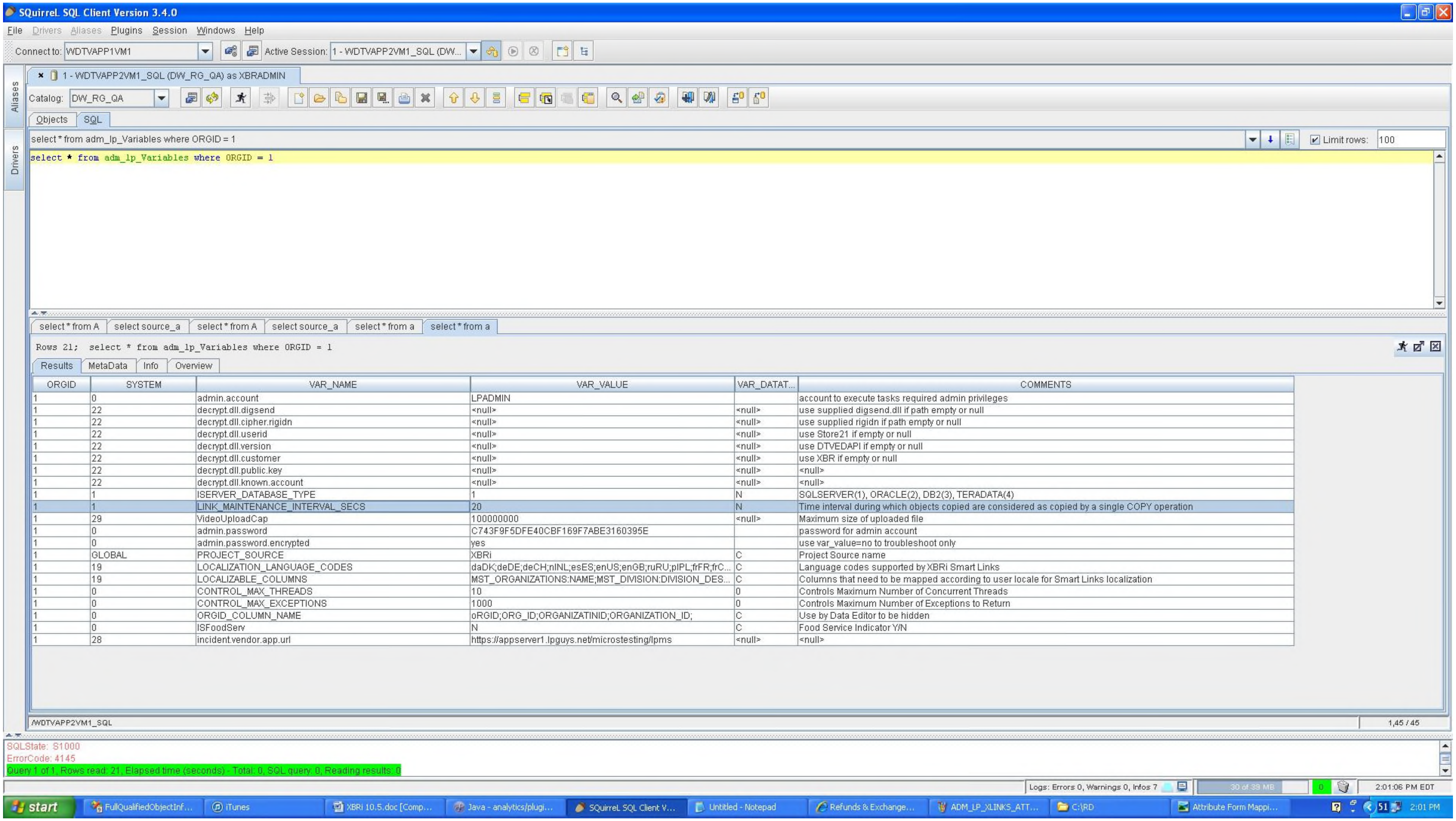
Suppose there are two folders, A1 and B1, under the XBR^i Core folder. Also suppose that under folder A1 there is a subfolder A2 that has two reports, Report1 and Report2, with a link definition defined from Report1 to Report2. If users make a copy of folder A2 (together with its content) into folder B1, XBR^i can preserve the link definition from the new copy of Report1 to the new copy of Report2 independently of whether the folder is copied in XBR^i or MicroStrategy Desktop.

XBR^i currently supports link preservation as described in the scenario above. However, there are many ways users may copy folders in XBR^i. Furthermore, it is impossible for the XBR^i development team to modify MicroStrategy Desktop to capture folder copy events that happen in XBR^i. To achieve Link Preservation, XBR^i implements a Link Maintenance Interval, e.g., every 20 seconds. Reports or documents copied within the Link Maintenance Interval are considered copies made by a single folder copy operation.

The default interval value of 20 seconds is chosen because it is long enough so that a report folder copying operation will likely complete in that time interval, but short enough so that it is very unlikely that two report folder copying operations would take place within that time interval.

You can adjust the value of the Link Maintenance Interval by modifying the LINK_MAINTENANCE_INTERVAL_SECS row in the adm_lp_Variables table:

adm_lp_Variables table


SQuirreL SQL Client Version 3.4.0
File Drivers Aliases Plugins Session Windows Help
Connect to: WDTVAPP1VM1
Active Session: 1 - WDTVAPP2VM1_SQL (DW...
1 - WDTVAPP2VM1_SQL (DW_RG_QA) as XBRADMIN
Catalog: DW_RG_QA
Objects SQL
Limit rows: 100
select * from A | select source_a | select * from A | select source_a | select * from a | select * from a
Results MetaData Info Overview
/WDTVAPP2VM1_SQL
1,45 / 45
Logs: Errors 0, Warnings 0, Infos 7
30 of 39 MB
2:01:06 PM EDT
start

```
select * from adm_lp_Variables where ORGID = 1
```

Rows 21; select * from adm_lp_Variables where ORGID = 1

ORGID	SYSTEM	VAR_NAME	VAR_VALUE	VAR_DATAT...	COMMENTS
1	0	admin.account	LPADMIN		account to execute tasks required admin privileges
1	22	decrypt.dll.digsend	<null>	<null>	use supplied digsend.dll if path empty or null
1	22	decrypt.dll.cipher.rigidn	<null>	<null>	use supplied rigidn if path empty or null
1	22	decrypt.dll.userid	<null>	<null>	use Store21 if empty or null
1	22	decrypt.dll.version	<null>	<null>	use DTVEDAPI if empty or null
1	22	decrypt.dll.customer	<null>	<null>	use XBR if empty or null
1	22	decrypt.dll.public.key	<null>	<null>	<null>
1	22	decrypt.dll.known.account	<null>	<null>	<null>
1	1	ISERVER_DATABASE_TYPE	1	N	SQLSERVER(1), ORACLE(2), DB2(3), TERADATA(4)
1	1	LINK_MAINTENANCE_INTERVAL_SECS	20	N	Time interval during which objects copied are considered as copied by a single COPY operation
1	29	VideoUploadCap	100000000	<null>	Maximum size of uploaded file
1	0	admin.password	C743F9F5DFE40CBF169F7ABE3160395E		password for admin account
1	0	admin.password.encrypted	yes		use var_value=no to troubleshoot only
1	GLOBAL	PROJECT_SOURCE	XBRi	C	Project Source name
1	19	LOCALIZATION_LANGUAGE_CODES	daDK;deDE;deCH;nlNL;esES;enUS;enGB;ruRU;plPL;frFR;frC...	C	Language codes supported by XBRi Smart Links
1	19	LOCALIZABLE_COLUMNS	MST_ORGANIZATIONS:NAME;MST_DIVISION:DIVISION_DES...	C	Columns that need to be mapped according to user locale for Smart Links localization
1	0	CONTROL_MAX_THREADS	10	0	Controls Maximum Number of Concurrent Threads
1	0	CONTROL_MAX_EXCEPTIONS	1000	0	Controls Maximum Number of Exceptions to Return
1	0	ORGID_COLUMN_NAME	oRGID;ORG_ID;ORGANIZATINID;ORGANIZATION_ID;	C	Use by Data Editor to be hidden
1	0	ISFoodServ	N	C	Food Service Indicator Y/N
1	28	incident.vendor.app.url	https://appserver1.lpguys.net/microstesting/lpms	<null>	<null>

```
SQLState:  S1000
ErrorCode: 4145
Query 1 of 1, Rows read: 21, Elapsed time (seconds) - Total: 0, SQL query: 0, Reading results: 0
```

Video Linking Configuration

The video linking feature in XBR^i allows users to retrieve the digital video that corresponds to one or more transactions. Video vendors provide the video services to customers that are used to record transactions at the point of sale and to display selected video at a later time.

Code for supported video vendors is included in the SP_PRO_VIDEO procedure that is invoked when user clicks on a video link in the video queue. The video queue is in the document that is displayed when a user clicks on the Video Link command in the Tools menu or toolbar in a report in which one or more rows with video-enabled attributes are selected. If the customer is using a non-supported vendor, the code for that vendor can be added to the SP_PRO_VIDEO procedure.

There are several other steps for configuring video linking, including associating cameras with registers, specifying attributes for video linking, and configuring the ID of the document that is displayed when the user clicks on the Video Link command.

Before you begin, get the following information from either the customer or the video vendor:

- Code for the SP_PRO_VIDEO procedure, if the vendor is not supported by XBR^i
- Values for the MST_REGISTER_TAB table: DEVICE_STRING, VIDEO_FLAG, VIDEO_VENDOR and SITECODE (optional if web-based video)

Step 1: Add a new vendor to SP_PRO_VIDEO

IMPORTANT: Supported video vendors are already included in the SP_PRO_VIDEO procedure. You do not need to complete this step if the vendor appears on the supported vendors list, but this list is subject to change. Check with the account manager or database administrator to see if a vendor has been added.

XBR^i supported video vendors

- 3VR
- American Dynamics (Intellex)
- Arrowsight Security
- AT (Advanced Technology) Video
- ClickIt
- Clinton Electronics
- Dedicated Micros

- Exacq Technologies
- FireKing (Image Vault)
- FocusMicro
- Genetec
- i3 International
- Kalatel
- Milestone Systems
- Mirasys
- NICE Systems
- Tyco/Sensormatic

Note: The video script is launched when the user clicks on the video link in XBR^i

To add a video vendor:

1. Get the SP_PRO_VIDEO procedure from your database Procedures folder and the code specific to the vendor. In this example the vendor is CLINTON.
2. Add an IF statement to existing code for the new vendor. **Note:** IF statements begin around line 200 to 250.
   For example, if the vendor is Clinton

   ```
   if upper (@vs_video_vendor)='CLINTON'

   goto CLINTON
   ```

3. Add the CLINTON code block, just before the GETOUT: label. You can search for this label and create the code block just prior to this label. The code block must begin with the new label, which is defined by the GOTO target of the IF statement entered above. The label is the GOTO name ended by a colon : The end of the block must be the statement "GOTO GETOUT". Those are the only standard requirements for this procedure, the code between the label CLINTON: and "GOTO GETOUT" is supplied by the video vendor

Example: SP_PRO_VIDEO script

```
CLINTON:
```

```
-- d:\video\video.exe -s192.168.10.112 -c1 -d10042001 -b17:47:00 -e17:47:30 -uUSERID -pPASSWORD

-- Video parameters:

-- -s - store from mst_register_tab where storenum=pn_storenum

-- -c - camera number from MST_REGISTER_TAB where

-- storenum=pn_storenum and regnum=pn_regnum

-- -d - date (mmddccyy) passed pdt_transdate

-- -b - beginning time (hh:mm:ss) passed ps_start_time

-- -e - ending time (hh:mm:ss) passed ps_end_time

-- Uses a dash before the parameter letter

-- Note the space between parameters in the command line

-- store and camera already retrieved in beginning

-- add storenum


                SELECT @vs_video_vendor= VIDEO_VENDOR, @vs_sitecode = SITECODE,@vs_camera = DEVICE_STRING

                  FROM MST_REGISTER_TAB

                WHERE STORENUM = @vn_storenum

                    AND REGNUM = @pn_regnum

--                  AND ORGID = @pn_orgid
```

```
        select @vs_string = @vs_string + '-s ' + @vs_sitecode + ' '
        select @vs_string = @vs_string + '-c ' + @vs_camera + ' '

        if @pdt_transdate is not null
        select @vs_string = @vs_string + '-d ' + convert(varchar(12), convert(smalldatetime, @pdt_transdate, 101)) + ' '

        if @ps_start_time is not null
        select @vs_string = @vs_string + '-b ' + @ps_start_time + ' '

        if @ps_end_time is not null
        select @vs_string = @vs_string + '-e ' + convert(varchar(10), @ps_end_time) + ' '

        -- User Name
        select @temp_var = 'user'

SELECT @temp_var = VAR_VALUE
         FROM PRO_SP_VARIABLES
         WHERE SYSTEM = @vs_video_vendor
                AND var_name = 'USERNAME'
 --             AND system_orgid = @pn_orgid

        if @temp_var is not null
        select @vs_string = @vs_string + ' -u ' + @temp_var

        -- Password
        select @temp_var = 'user'

SELECT @temp_var = VAR_VALUE
             FROM PRO_SP_VARIABLES
 WHERE SYSTEM = @vs_video_vendor
                AND var_name = 'PASSWORD'
 --             AND system_orgid = @pn_orgid

        if @temp_var is not null
        select @vs_string = @vs_string + ' -p ' + @temp_var
```

```
GOTO GETOUT
```

Step 2: Set variables in PRO_SP_VARIABLES

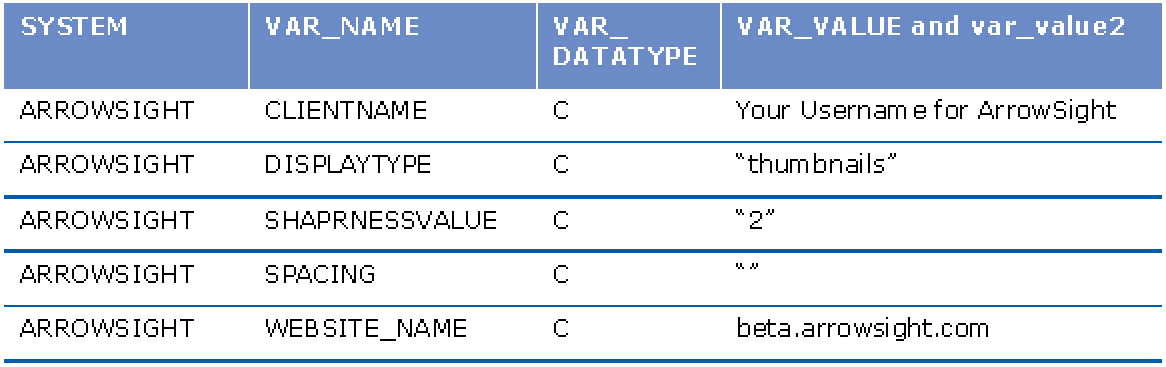
Several video vendors require specific information, such as usernames and passwords, in order to use their services. This general information is held within the PRO_SP_VARIABLES table in the XBR Database. These variables must be set before video vendor services can be used.

In addition to the vendor-specific variables, there are a few general variables that may need to be configured. They are:

PROACT	**REGRECEIPT**
PROACT VIDEO	VIDEO_VENDOR
PROACT VIDEO	SECONDS PRIOR
PROACT VIDEO	SECONDS AFTER
PROACT VIDEO	LENGTH

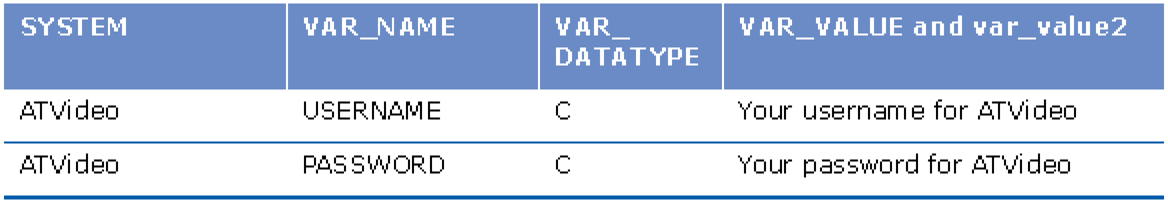
The variables that need to be set depend on your video vendor. The following tables detail the information each video vendor requires. Modify these rows with your information. If no table exists for your supported video vendor, no configuration of the PRO_SP_VARIABLES table is necessary.

Arrowsight



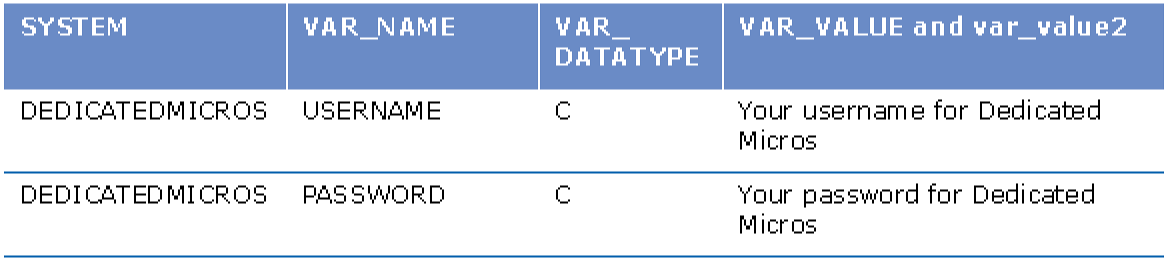
SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
ARROWSIGHT	CLIENTNAME	C	Your Username for ArrowSight
ARROWSIGHT	DISPLAYTYPE	C	“thumbnails”
ARROWSIGHT	SHAPRNESSVALUE	C	“2”
ARROWSIGHT	SPACING	C	“ ”
ARROWSIGHT	WEBSITE_NAME	C	beta.arrowsight.com

ATVideo



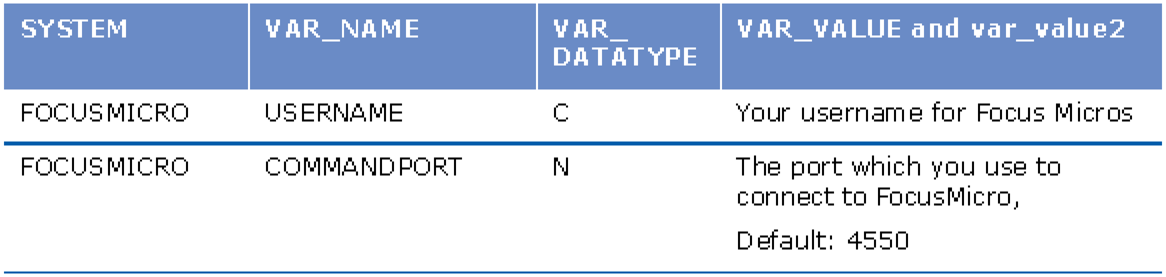
SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
ATVideo	USERNAME	C	Your username for ATVideo
ATVideo	PASSWORD	C	Your password for ATVideo

Dedicated Micros

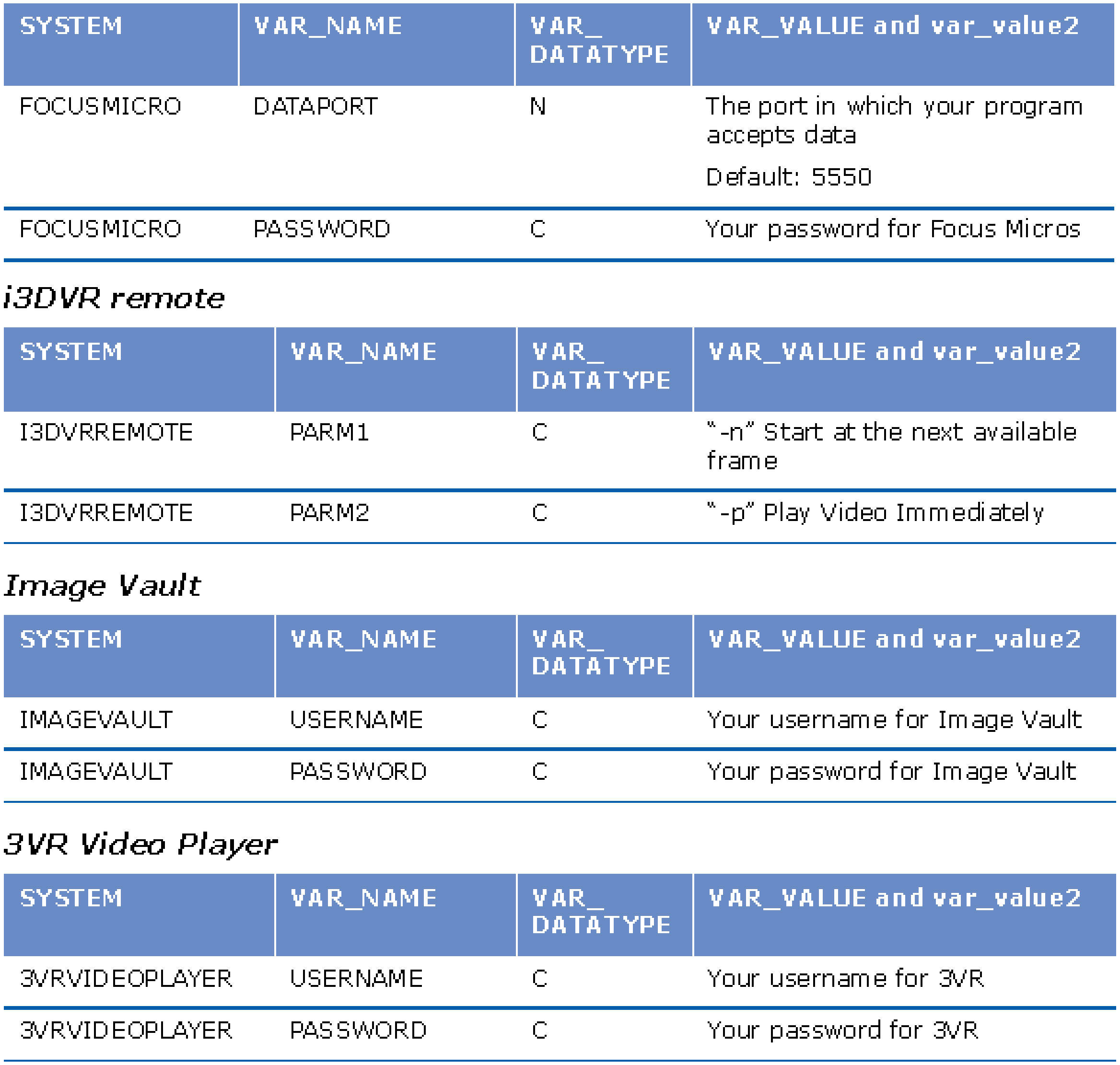


SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
DEDICATEDMICROS	USERNAME	C	Your username for Dedicated Micros
DEDICATEDMICROS	PASSWORD	C	Your password for Dedicated Micros

FocusMicro



SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
FOCUSMICRO	USERNAME	C	Your username for Focus Micros
FOCUSMICRO	COMMANDPORT	N	The port which you use to connect to FocusMicro, Default: 4550



SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
FOCUSMICRO	DATAPORT	N	The port in which your program accepts data Default: 5550
FOCUSMICRO	PASSWORD	C	Your password for Focus Micros

i3DVR remote

SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
I3DVRREMOTE	PARM1	C	“-n” Start at the next available frame
I3DVRREMOTE	PARM2	C	“-p” Play Video Immediately

Image Vault

SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
IMAGEVAULT	USERNAME	C	Your username for Image Vault
IMAGEVAULT	PASSWORD	C	Your password for Image Vault

3VR Video Player

SYSTEM	VAR_NAME	VAR_ DATATYPE	VAR_VALUE and var_value2
3VRVIDEOPLAYER	USERNAME	C	Your username for 3VR
3VRVIDEOPLAYER	PASSWORD	C	Your password for 3VR

Step 3: Configure cameras and registers

The MST_REGISTER_TAB table stores information that maps cameras to registers. You need to get the following information from the customer of video vendor to enter into this table: Values for the MST_REGISTER_TAB table:

DEVICE_STRING – the camera number

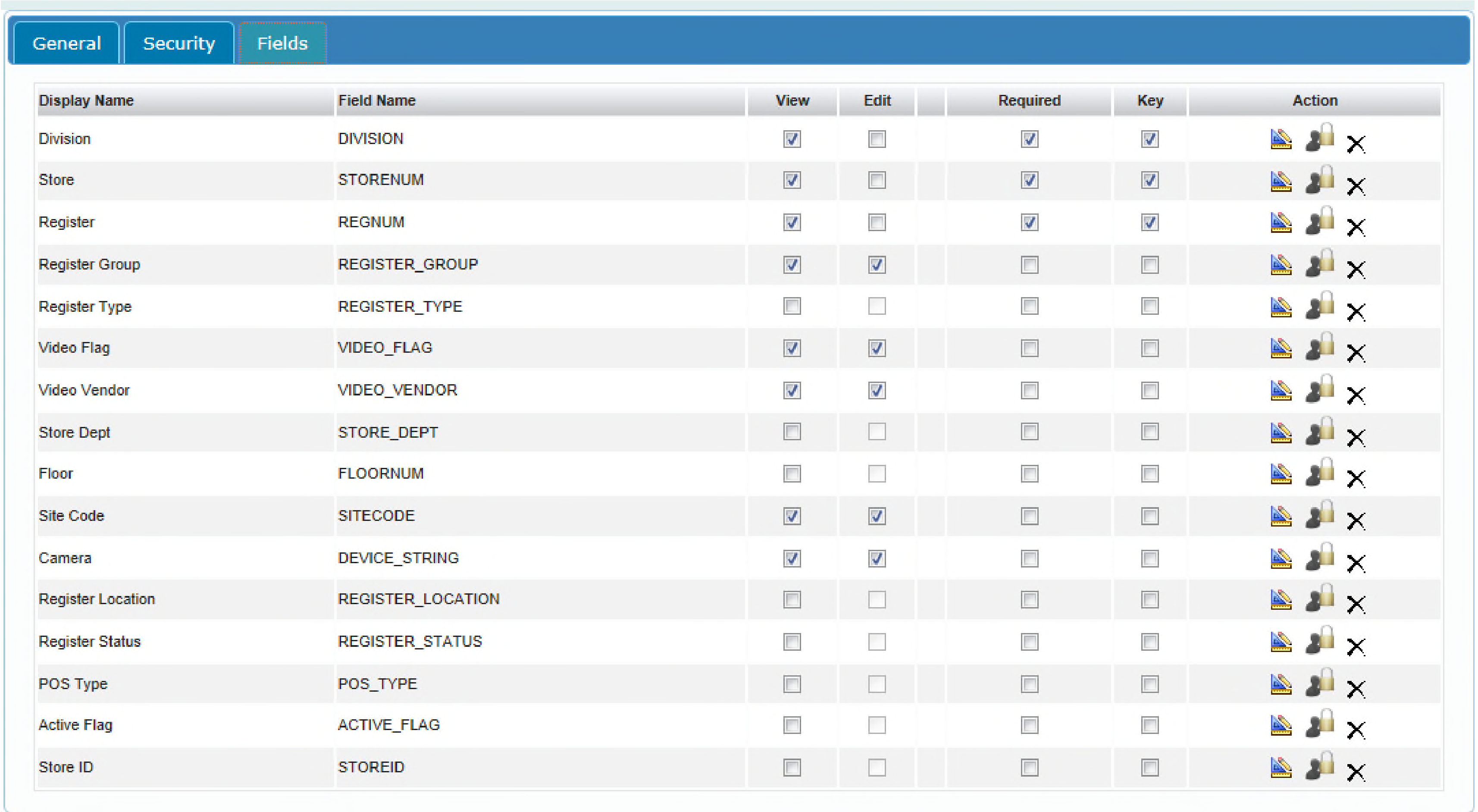
ACTIVE_FL – Indicates whether the video for the register in enabled, yes (Y) or no (N)

VIDEO_VENDOR – the video vendor directs the application to call the appropriate video viewer for this store/register combination.

SITECODE (optional if web-based video) – The IP address for the store's video system

To configure cameras and registers:

1. Log in to XBR^i as a core XBR^i administrator.
2. From the Tools menu, choose **Data Editor**. This displays the Data Editor > Home page.
3. Click on the **Edit** icon in the Action column for the MST_REGISTER_TAB table.
4. Click the **Fields** tab.



Display Name	Field Name	View	Edit		Required	Key	Action
Division	DIVISION	☑	□		☑	☑	✎ 🔒 ✕
Store	STORENUM	☑	□		☑	☑	✎ 🔒 ✕
Register	REGNUM	☑	□		☑	☑	✎ 🔒 ✕
Register Group	REGISTER_GROUP	☑	☑		□	□	✎ 🔒 ✕
Register Type	REGISTER_TYPE	□	□		□	□	✎ 🔒 ✕
Video Flag	VIDEO_FLAG	☑	☑		□	□	✎ 🔒 ✕
Video Vendor	VIDEO_VENDOR	☑	☑		□	□	✎ 🔒 ✕
Store Dept	STORE_DEPT	□	□		□	□	✎ 🔒 ✕
Floor	FLOORNUM	□	□		□	□	✎ 🔒 ✕
Site Code	SITECODE	☑	☑		□	□	✎ 🔒 ✕
Camera	DEVICE_STRING	☑	☑		□	□	✎ 🔒 ✕
Register Location	REGISTER_LOCATION	□	□		□	□	✎ 🔒 ✕
Register Status	REGISTER_STATUS	□	□		□	□	✎ 🔒 ✕
POS Type	POS_TYPE	□	□		□	□	✎ 🔒 ✕
Active Flag	ACTIVE_FLAG	□	□		□	□	✎ 🔒 ✕
Store ID	STOREID	□	□		□	□	✎ 🔒 ✕

5. For each of these fields: MST_REGISTER_TAB table: DEVICE_STRING, VIDEO_FLAG, VIDEO_VENDOR and SITECODE, click the **Edit** icon ✎ in the field row and enter the values provided by the customer or video vendor.

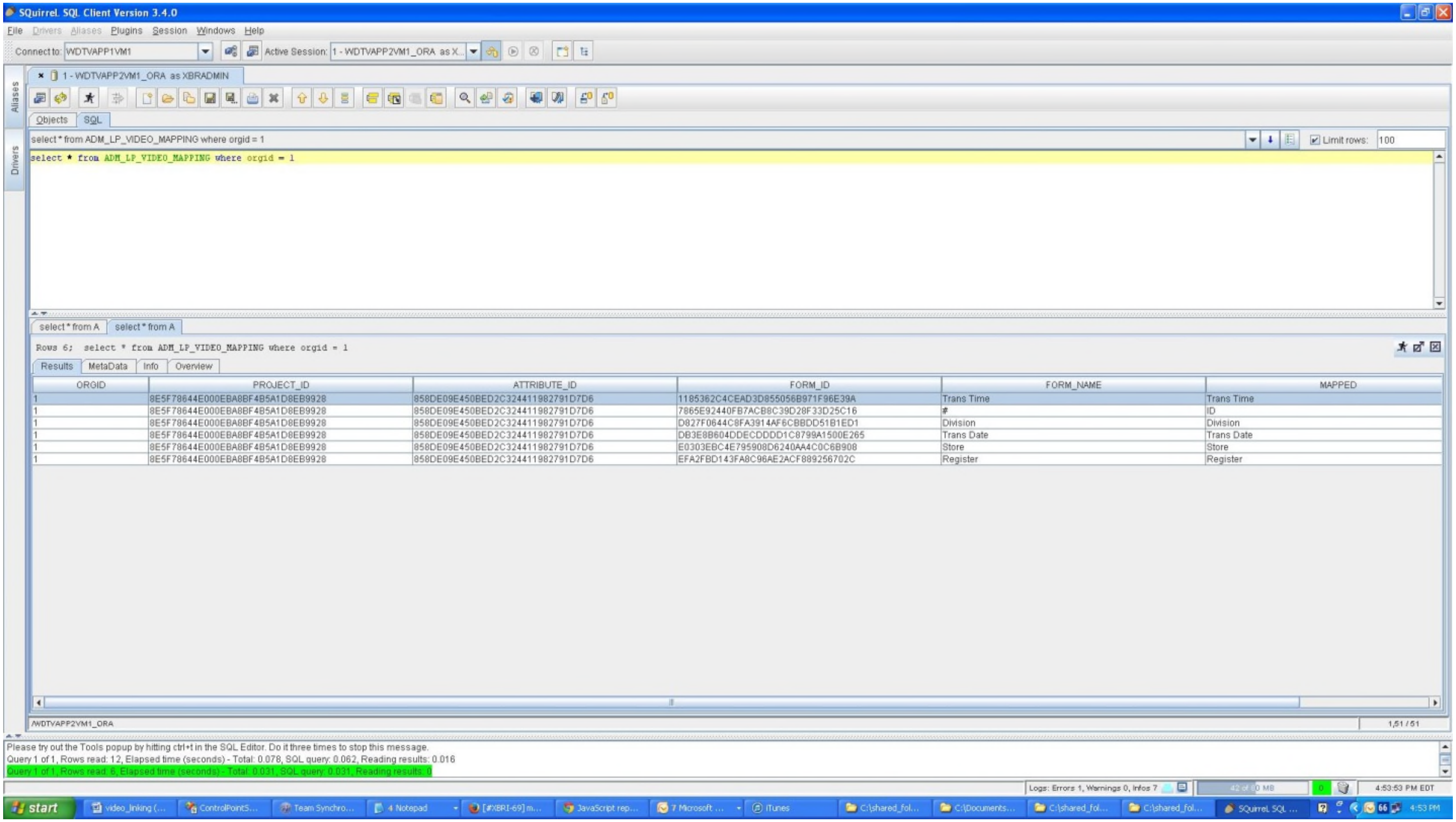
Step 4: Configure the attributes for video linking

You configure the core attributes that are to be enabled for video linking (e.g., Register, Trans Time) and any additional attributes that the customer wants enabled for video linking in the ADM_LP_VIDEO_ MAPPING table. When you select a report with video enabled, the Video link in the report Tools menu or toolbar is enabled.

To configure attributes for video linking:

1. On the database server, use a database tool to navigate to the ADM_LP_VIDEO_MAPPING table.
2. Enter values in the required fields, as in the examples below:

Example 1: Core video attribute mapping



SQuirrel SQL Client Version 3.4.0
File Drivers Aliases Plugins Session Windows Help
Connect to: WDTVAPP1VM1
Active Session: 1 - WDTVAPP2VM1_ORA as X...
1 - WDTVAPP2VM1_ORA as XBRADMIN
Objects SQL
Limit rows: 100
select * from A
select * from A
Results MetaData Info Overview

```
select * from ADM_LP_VIDEO_MAPPING where orgid = 1
```

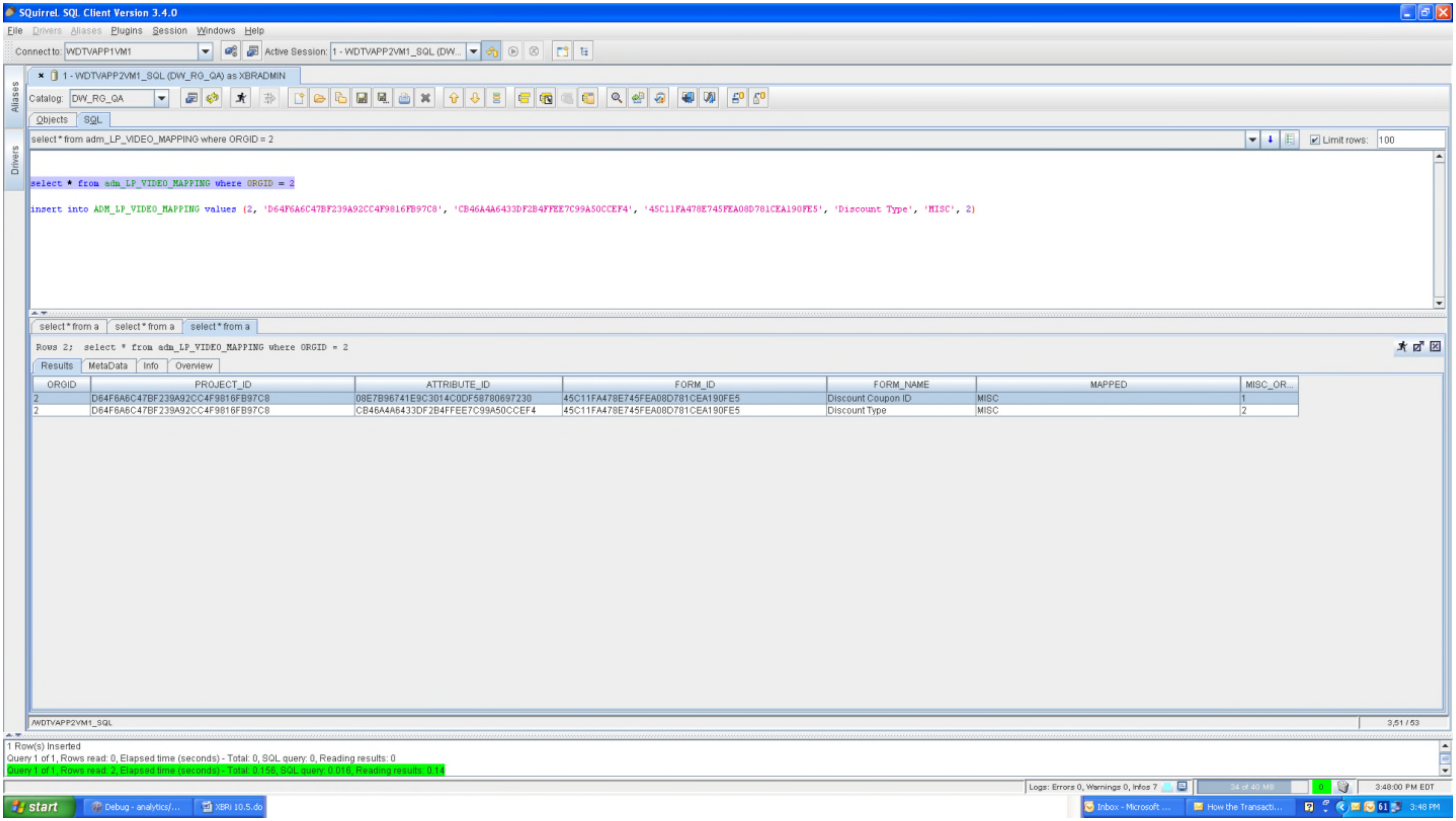
Rows 6; select * from ADM_LP_VIDEO_MAPPING where orgid = 1

ORGID	PROJECT_ID	ATTRIBUTE_ID	FORM_ID	FORM_NAME	MAPPED
1	8E5F78644E000EBA8BF4B5A1D8EB9928	858DE09E450BED2C324411982791D7D6	1185362C4CEAD3D855056B971F96E39A	Trans Time	Trans Time
1	8E5F78644E000EBA8BF4B5A1D8EB9928	858DE09E450BED2C324411982791D7D6	7865E92440FB7ACB8C39D28F33D25C16	#	ID
1	8E5F78644E000EBA8BF4B5A1D8EB9928	858DE09E450BED2C324411982791D7D6	D827F0644C8FA3914AF6CBBDD51B1ED1	Division	Division
1	8E5F78644E000EBA8BF4B5A1D8EB9928	858DE09E450BED2C324411982791D7D6	DB3E8B604DDECDDDD1C8799A1500E265	Trans Date	Trans Date
1	8E5F78644E000EBA8BF4B5A1D8EB9928	858DE09E450BED2C324411982791D7D6	E0303EBC4E795908D6240AA4C0C6B908	Store	Store
1	8E5F78644E000EBA8BF4B5A1D8EB9928	858DE09E450BED2C324411982791D7D6	EFA2FBD143FA8C96AE2ACF889256702C	Register	Register

```
Please try out the Tools popup by hitting ctrl+t in the SQL Editor. Do it three times to stop this message.
Query 1 of 1, Rows read: 12, Elapsed time (seconds) - Total: 0.078, SQL query: 0.062, Reading results: 0.016
Query 1 of 1, Rows read: 6, Elapsed time (seconds) - Total: 0.031, SQL query: 0.031, Reading results: 0
```

Core attribute mapping describes the attribute(s) and their associated forms that a report or document needs to have in order for video linking to b enabled.

Example 2: custom video attribute mapping



```
select * from adm_LP_VIDEO_MAPPING where ORGID = 2
```

```
select * from adm_LP_VIDEO_MAPPING where ORGID = 2

insert into ADM_LP_VIDEO_MAPPING values (2, 'D64F6A6C47BF239A92CC4F9816FB97C8', 'CB46A4A6433DF2B4FFEE7C99A50CCEF4', '45C11FA478E745FEA08D781CEA190FE5', 'Discount Type', 'MISC', 2)
```

```
Rows 2;  select * from adm_LP_VIDEO_MAPPING where ORGID = 2
```

ORGID	PROJECT_ID	ATTRIBUTE_ID	FORM_ID	FORM_NAME	MAPPED	MISC_OR...
2	D64F6A6C47BF239A92CC4F9816FB97C8	08E7B96741E9C3014C0DF58780697230	45C11FA478E745FEA08D781CEA190FE5	Discount Coupon ID	MISC	1
2	D64F6A6C47BF239A92CC4F9816FB97C8	CB46A4A6433DF2B4FFEE7C99A50CCEF4	45C11FA478E745FEA08D781CEA190FE5	Discount Type	MISC	2

```
1 Row(s) Inserted
Query 1 of 1, Rows read: 0, Elapsed time (seconds) - Total: 0, SQL query: 0, Reading results: 0
Query 1 of 1, Rows read: 2, Elapsed time (seconds) - Total: 0.156, SQL query: 0.016, Reading results: 0.14
```

If customers want to incorporate additional attribute values to be used by the SP_PRO_VIDEO procedure to calculate video invocation parameters, they can also use the ADM_LP_VIDEO_MAPPING table. Notice that the MAPPED field must be MISC and that the MISC_OR field must be specified (e.g., 1, 2).

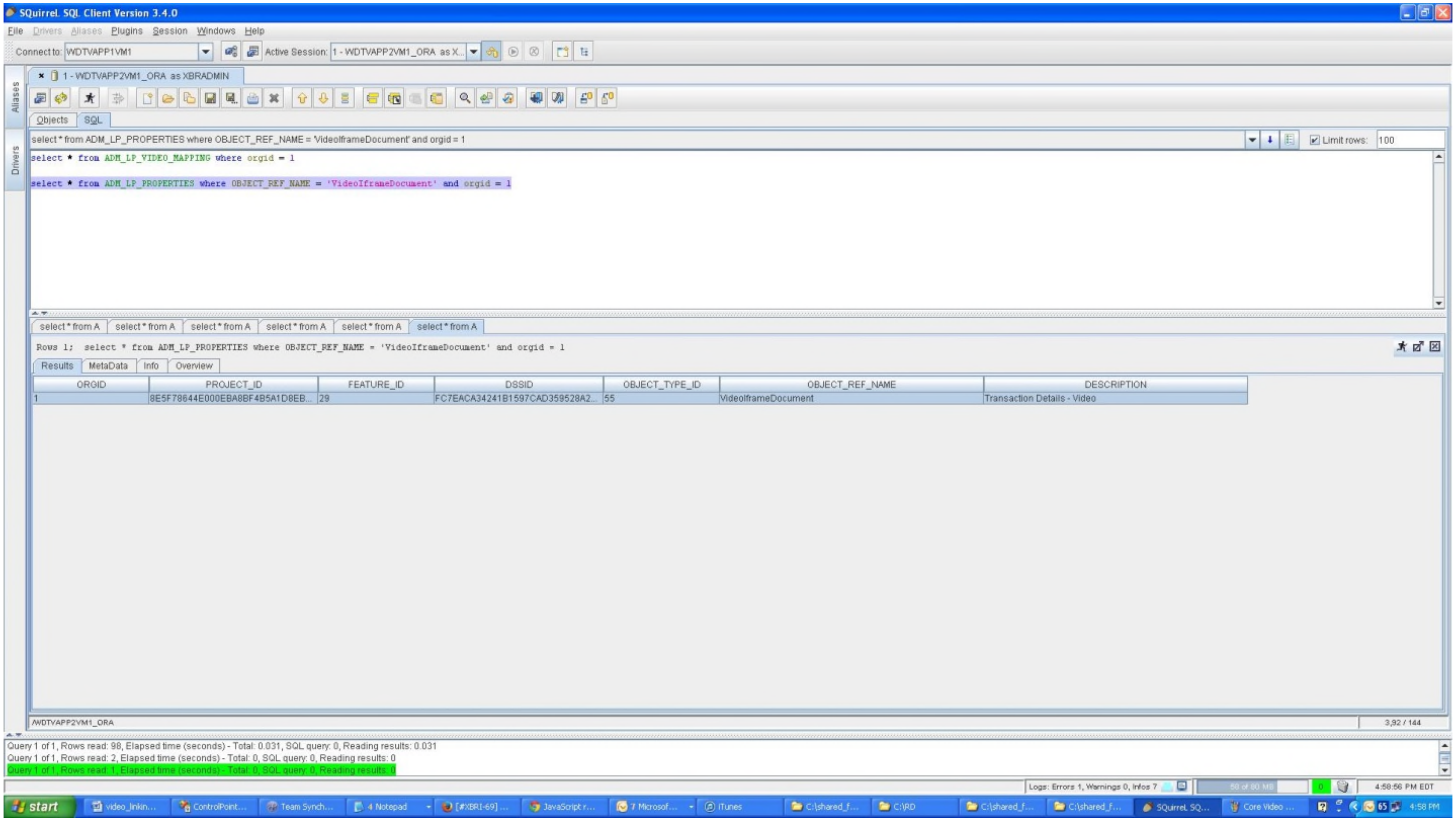
Step 5: Configure the video link document

Clicking the Video link displays a document with the transactions in the report and links to video of the transactions and to the video archive. You configure this document in the ADM_LP_PROPERTIES table.

To configure the video link document:

1. On the database server, use a database tool to navigate to the ADM_LP_PROPERTIES table.
2. Enter values in the required fields, as in the example below:

Example : Configuring the video document ID



SQuirreL SQL Client Version 3.4.0
File Drivers Aliases Plugins Session Windows Help
Connect to: WDTVAPP1VM1
Active Session: 1 - WDTVAPP2VM1_ORA as X...
1 - WDTVAPP2VM1_ORA as XBRADMIN
Objects
SQL
Limit rows: 100
Aliases
Drivers
select * from A
Results
MetaData
Info
Overview
/WDTVAPP2VM1_ORA

```
select * from ADM_LP_PROPERTIES where OBJECT_REF_NAME = 'VideoIframeDocument' and orgid = 1
```

```
select * from ADM_LP_VIDEO_MAPPING where orgid = 1

select * from ADM_LP_PROPERTIES where OBJECT_REF_NAME = 'VideoIframeDocument' and orgid = 1
```

```
Rows 1;  select * from ADM_LP_PROPERTIES where OBJECT_REF_NAME = 'VideoIframeDocument' and orgid = 1
```

ORGID	PROJECT_ID	FEATURE_ID	DSSID	OBJECT_TYPE_ID	OBJECT_REF_NAME	DESCRIPTION
1	8E5F78644E000EBA8BF4B5A1D8EB...	29	FC7EACA34241B1597CAD359528A2...	55	VideoIframeDocument	Transaction Details - Video

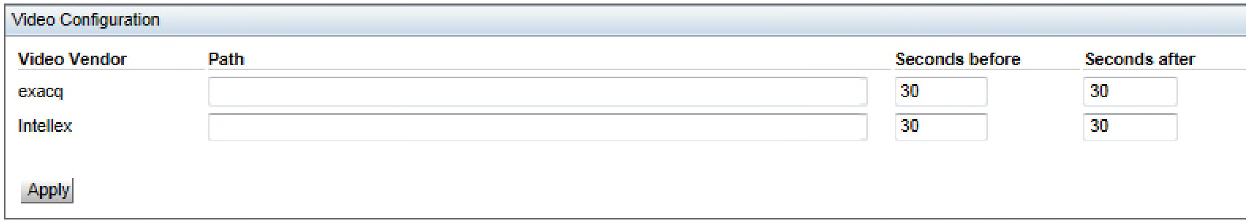
```
Query 1 of 1, Rows read: 98, Elapsed time (seconds) - Total: 0.031, SQL query: 0, Reading results: 0.031
Query 1 of 1, Rows read: 2, Elapsed time (seconds) - Total: 0, SQL query: 0, Reading results: 0
Query 1 of 1, Rows read: 1, Elapsed time (seconds) - Total: 0, SQL query: 0, Reading results: 0
```

Step 6: Enter the path to the video vendor in Project Defaults

The Video Configuration Defaults page lets you modify the local paths to the executable files of the video viewers used when executing video links. You can also specify the number of seconds before and after the transaction to be included in the video.

To set video linking project defaults:

1. From the Admin menu, choose Project Defaults.
2. Under Settings, click Video Configuration. This displays the Video Configuration page:



Video Configuration

Video Vendor	Path	Seconds before	Seconds after
exacq		30	30
Intellex		30	30

3. Edit the Path for the Video Vendor if necessary. This sets the local path to the video viewer used when executing a video link.
4. Change the number of Seconds Before or Seconds After defaults if necessary. This determines the default number of seconds before and after the transaction time when generating the start and end times in the Video Queue.
5. Click **Apply**. This applies the information and saves it to the ADM_LP_VIDEOCONFIG table.

Recall Data for Users and Employees

If requested, you can recall personal data for users and employees from the XBRi database using the SQL queries below.

Note: This applies to Hospitality Implementations only.

To search for employee details in SQL:

```
select * from table(xbri_pii.extract_employee_pii([options]));
```

For example, to search for employees with:

-- First name containing 'rac':

```
select * from
table(xbri_pii.extract_employee_pii(v_firstname=>'rac'));
```

-- Last name containing 'art':

```
select * from
table(xbri_pii.extract_employee_pii(v_lastname=>'art'));
```

-- First name containing 'rac' and lastname containing 'art':

```
 select * from
table(xbri_pii.extract_employee_pii(v_firstname=>'rac',
v_lastname=>'art'));
```

All options available are:

```
-- n_orgid (NUMBER)

-- v_cashiernum (TEXT)

-- n_storenum (NUMBER)

-- n_division (NUMBER)

-- v_employeenum (NUMBER)

-- v_firstname (TEXT)

-- v_lastname (TEXT)
```

To search for user details in SQL:

```
select * from table(xbri_pii.extract_user_pii([options]));
```

For example, to search for users with:

-- Name containing 'rac':

```
select * from table(xbri_pii.extract_user_pii(v_name=>'rac'));
```

-- Login containing 'art':

```
select * from table(xbri_pii.extract_user_pii(v_login=>'art'));
```

All options available are:

```
-- n_orgid NUMBER default null,

-- v_name NVARCHAR2 default null,

-- v_login VARCHAR2 default null
```

Troubleshooting

Configuring database type—Oracle vs. SQL Server

The database type is populated during the database installation or upgrade procedure. You can verify that the correct database is specified by going to the ADM_LP_VARIABLES table and looking at the value in line 9, VAR_VALUE. This should be 1 for SQL or 2 for Oracle.

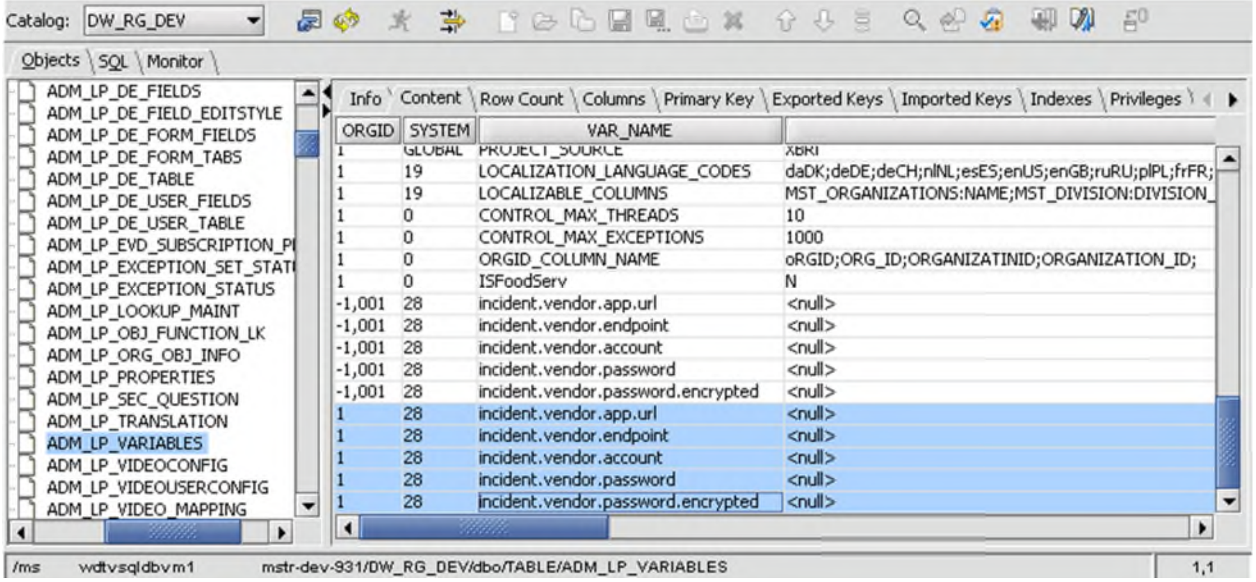
Validate Case Management Connection Settings in the Data Warehouse

To verify value configuration for case management in the data warehouse:

1. On the data warehouse server, go to your front-end database tool.

2. Locate the database instance of your project.

3. Under the tables folder, locate ADM_LP_Variables.



Catalog: DW_RG_DEV

ORGID	SYSTEM	VAR_NAME	
1	GLOBAL	PROJECT_SOURCE	XBRI
1	19	LOCALIZATION_LANGUAGE_CODES	daDK;deDE;deCH;nlNL;esES;enUS;enGB;ruRU;plPL;frFR;
1	19	LOCALIZABLE_COLUMNS	MST_ORGANIZATIONS:NAME;MST_DIVISION:DIVISION_
1	0	CONTROL_MAX_THREADS	10
1	0	CONTROL_MAX_EXCEPTIONS	1000
1	0	ORGID_COLUMN_NAME	oRGID;ORG_ID;ORGANIZATINID;ORGANIZATION_ID;
1	0	ISFoodServ	N
-1,001	28	incident.vendor.app.url	<null>
-1,001	28	incident.vendor.endpoint	<null>
-1,001	28	incident.vendor.account	<null>
-1,001	28	incident.vendor.password	<null>
-1,001	28	incident.vendor.password.encrypted	<null>
1	28	incident.vendor.app.url	<null>
1	28	incident.vendor.endpoint	<null>
1	28	incident.vendor.account	<null>
1	28	incident.vendor.password	<null>
1	28	incident.vendor.password.encrypted	<null>

/ms wdtvsqldbvm1 mstr-dev-931/DW_RG_DEV/dbo/TABLE/ADM_LP_VARIABLES 1,1

4. For the rows with the ORGID of the customer, SYSTEM 28, and VAR_NAME beginning with incident., ensure that the values are correct:

   Incident.vendor.app.url = https://appserver1.lpguys.net/microstesting/lpms

   Incident.vendor.endpoint = https://appserver1.lpguys.net/microstesting/lpms/webservice/dataservice.asmx

Incident.vendor.account = userName

Incident.vendor.password = userPassword (encryption via mr.key with {tomcat}/lib/MrCrypto.jar)

Incident.vendor.password.encrypted = true/false

Appendix B: XBR Ingenium Mobile Configuration

You can install the XBR Ingenium app on an iPad or an Android tablet. The app for iPad is available from the Apple App Store and the app for Android is available from the Google play app store. The steps that follow directly show how the customer can install the app on their mobile device. Prior to installing the device, ORACLE must set up the Apple or Android device to connect the XBR^i Mobile Server and generate the URL for the device, as described in the sections that follow.

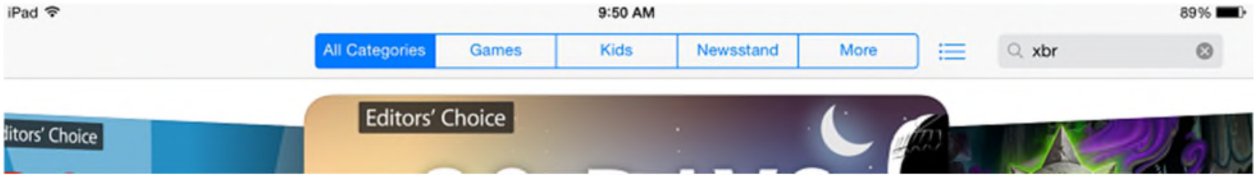
Adding the XBR Ingenium app for iPad:

Before you begin: locate the e-mail from your customer administrator that contains the URL for the XBR^i Mobile Server.

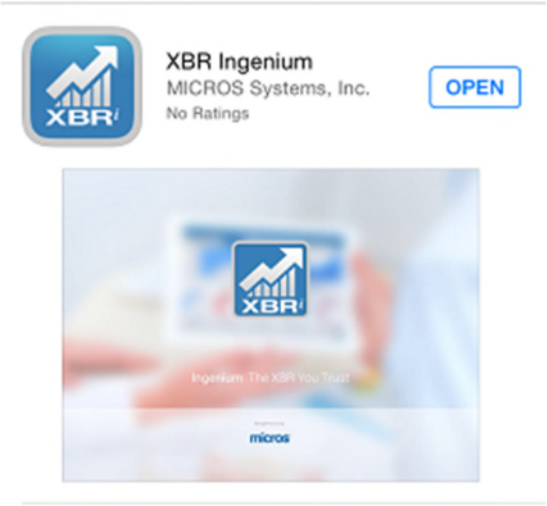
You can download XBR Mobile app for iPad directly from Apple App Store. Follow the steps below to download and log in to the app:

1. On the iPad, tap the App Store icon.

2. In the Search field, enter XBR (not case sensitive) and tap **Search** on the keyboard.



3. Tap the **OPEN** link.



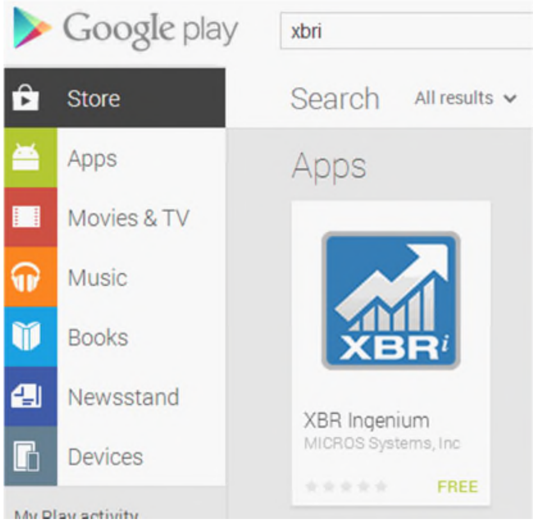
4. At this point, if you have not already, sign in to the Apple App Store.
5. The XBR Ingenium app icon appears on your tablet when it has finished installing.
6. Open the e-mail from your customer administrator that contains the URL for the XBR^i Mobile Server and copy the URL to the Notes app, which will convert the long URL to a link.
7. Tap the link to connect to XBR^i Mobile Server.
8. Follow the rest of the instructions in **Step 2: Configure the URL on the iPad** in the section: Generate the URL for the Mobile iPad in this guide.

This logs you in to the XBR^i mobile app. Hereafter, when you click the XBR Ingenium icon, the saved credentials are used and you will not need to re-enter them.

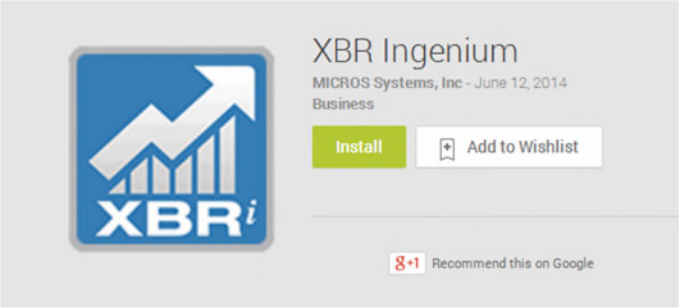
Adding the XBR Ingenium app for Android:

Before you begin: locate the e-mail from your customer administrator that contains the URL for the XBR^i Mobile Server.

1. On the Android tablet, open the web browser.
2. In the address bar enter: https://play.google.com. This takes you to the Google Play app store.
3. In the Search field, enter XBRi (not case sensitive).



4. Click on the XBR Ingenium app icon.


XBRi
XBR Ingenium
MICROS Systems, Inc - June 12, 2014
Business
Install
Add to Wishlist
g+1 Recommend this on Google

5. Click **Install**. At this point, if you have not already, sign in to the Google Play Store app.
6. In the next prompt, check that the device is correct, and click **Install**.
7. Click **OK**. The XBR Ingenium app icon appears on your tablet when it has finished installing.
8. Open the e-mail from your customer administrator that contains the URL for the XBR^i Mobile Server and tap on the link.
9. Follow the rest of the instructions in **Step 2: Configure the URL on the Android Tablet** in the section: Generate the URL for the Android Tablet in this guide.

This logs you in to the XBR^i mobile app. Hereafter, when you click the XBR^i Ingenium icon, the saved credentials are used and you will not need to re-enter them.

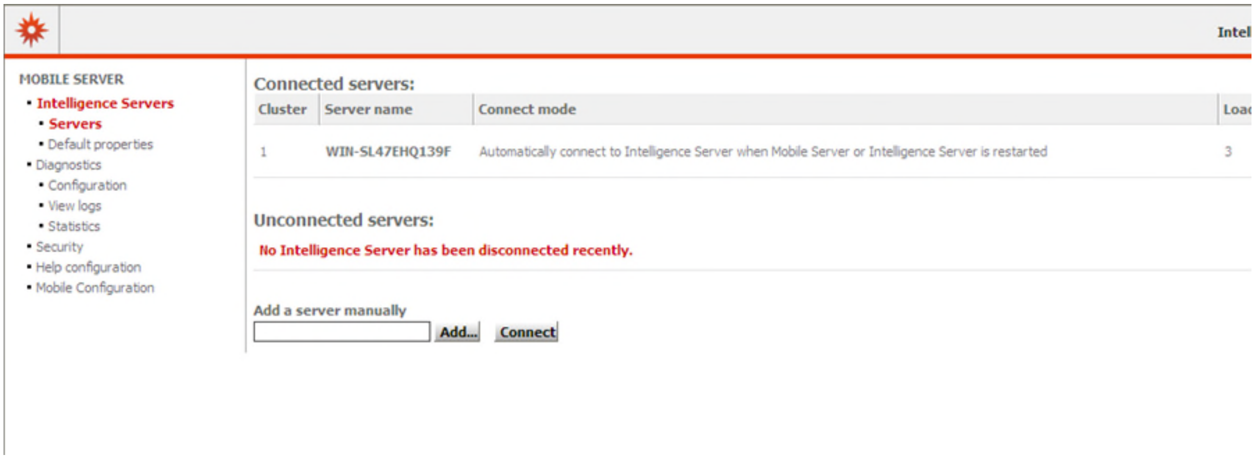
Setting up an iPad to connect to XBR^i Mobile Server

1. From your desktop or laptop computer, open your internet browser.
2. Enter the link to your Web DNS on the XBR^i mobile server:

   http://Your_Web_DNS_Name/analyticsMobile/servlet/mstrWebAdmin

   example: http://xbrirgdemo.micros-retail.com/analyticsMobile/servlet/mstrWebAdmin

   This displays the Mobile Configuration page:



Connected servers:

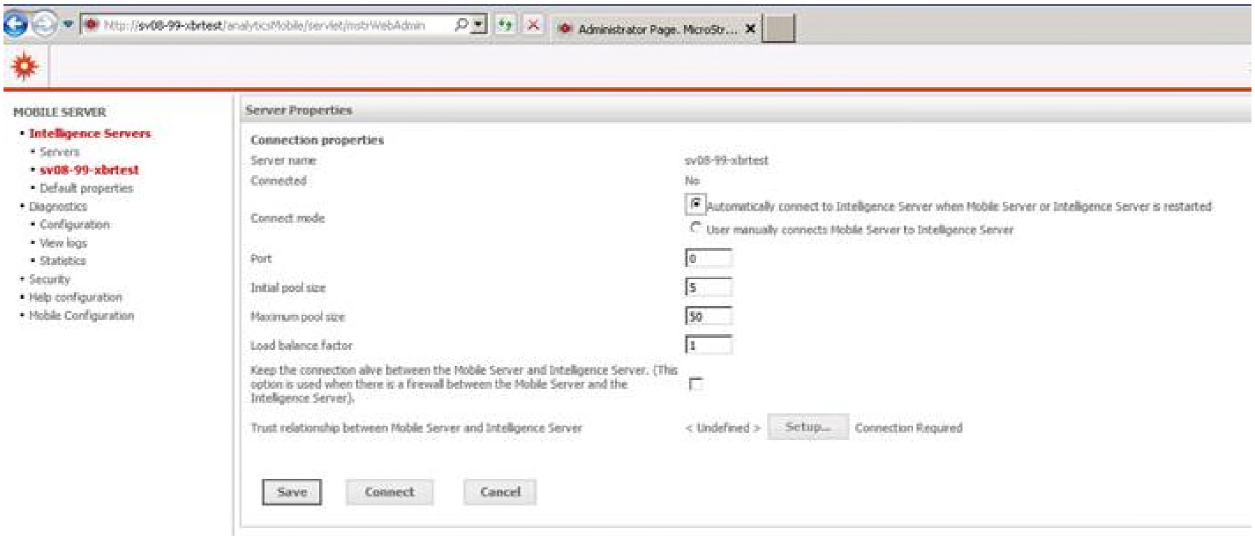
Cluster	Server name	Connect mode	Loa
1	WIN-SL47EHQ139F	Automatically connect to Intelligence Server when Mobile Server or Intelligence Server is restarted	3

Unconnected servers:

No Intelligence Server has been disconnected recently.

Add a server manually

3. If the Intelligence Server is disconnected, enter your Intelligence Server name in the box labeled “Add a server manually” and click connect.
4. Set up Trusted Connection
   a. Click the properties icon to the right of the page.



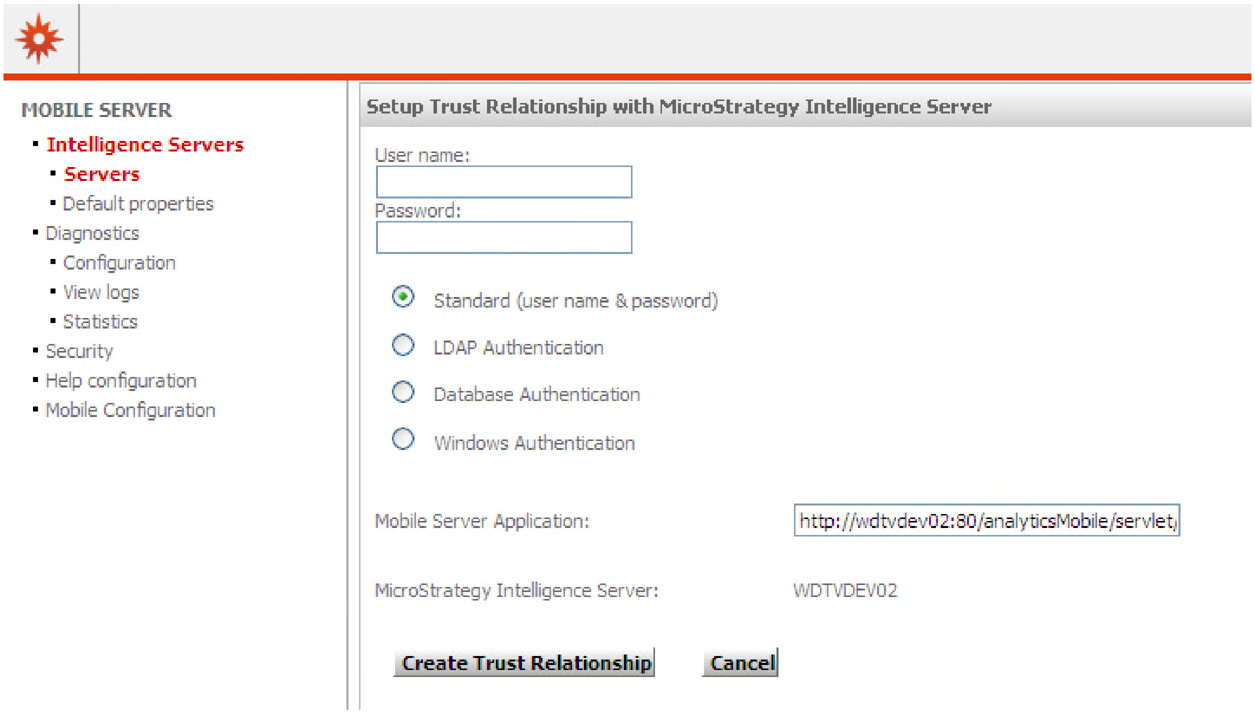
Server Properties

Connection properties

Server name	sv08-99-xbrtest
Connected	No
Connect mode	● Automatically connect to Intelligence Server when Mobile Server or Intelligence Server is restarted ○ User manually connects Mobile Server to Intelligence Server
Port	0
Initial pool size	5
Maximum pool size	50
Load balance factor	1
Keep the connection alive between the Mobile Server and Intelligence Server. (This option is used when there is a firewall between the Mobile Server and the Intelligence Server).	□
Trust relationship between Mobile Server and Intelligence Server	< Undefined > Setup... Connection Required

   b. Ensure “Automatically connect to Iserver when Mobile Server or Intelligence Server is restarted” is selected

c. Click on the **Setup** button in the Server Properties panel.



Setup Trust Relationship with MicroStrategy Intelligence Server

User name:

Password:

● Standard (user name & password)

○ LDAP Authentication

○ Database Authentication

○ Windows Authentication

Mobile Server Application: http://wdtvdev02:80/analyticsMobile/servlet/

MicroStrategy Intelligence Server: WDTVDEV02

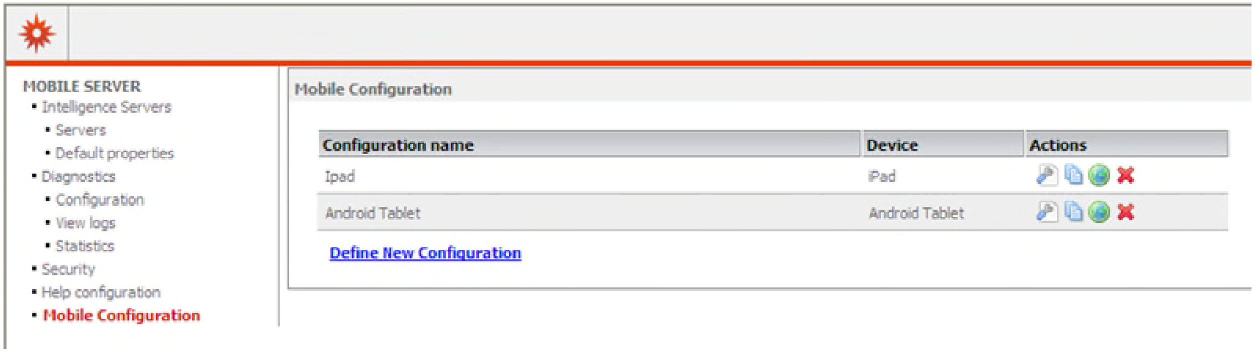
a. Select the **Standard (user name and password)** option.

b. Enter the MicroStrategy Administrator **User Name** and **Password**.

c. Enter the URL of the **Web Server Application**.

d. Click **Create Trust Relationship**.

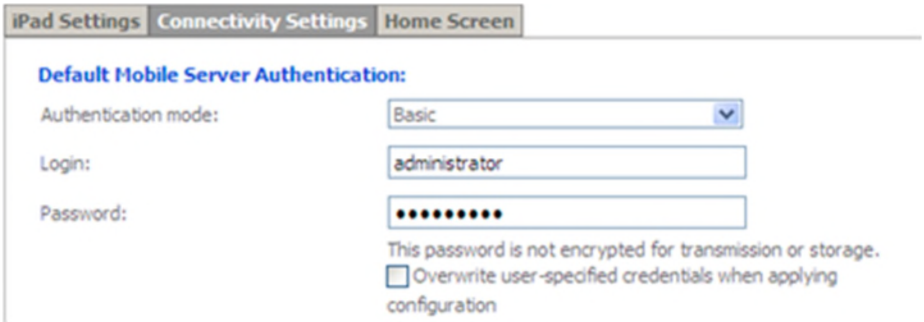
5. Verify that the Connection properties are OK and click **Save**.
6. Select **Mobile Configuration** from the left panel.



Mobile Configuration

Configuration name	Device	Actions
Ipad	iPad	✎ ⧉ ● ✖
Android Tablet	Android Tablet	✎ ⧉ ● ✖

7. For the iPad configuration, click the **Modify** icon ✎ under **Actions**.
8. Click the **Connectivity Settings** tab and enter these settings:



Default Mobile Server Authentication:

Authentication mode: Basic

Login: administrator

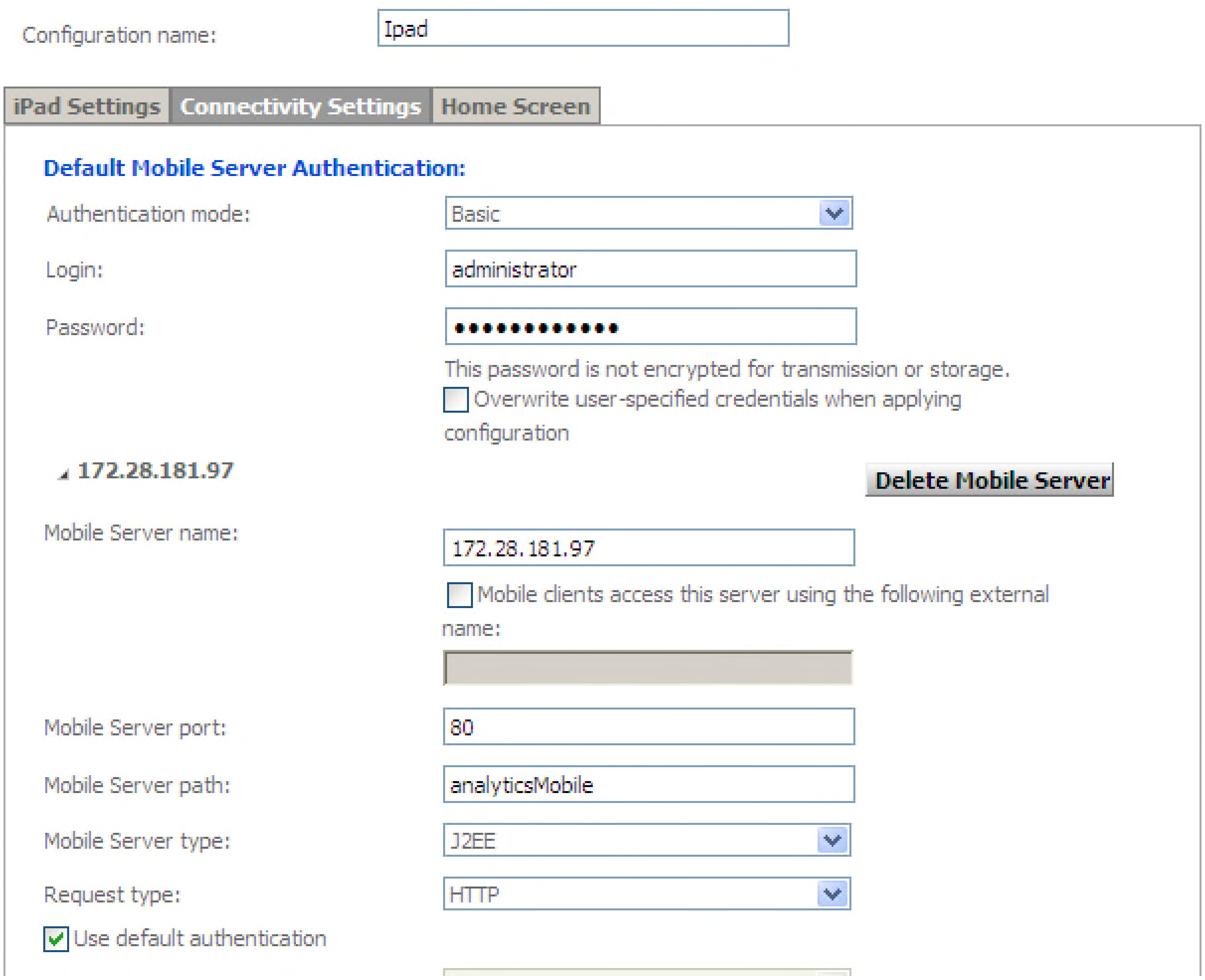
Password: •••••••••

This password is not encrypted for transmission or storage.

□ Overwrite user-specified credentials when applying configuration

Password – Enter administrator password.

9. Click the **Configure New Mobile Server** button and enter these settings:



Configuration name: Ipad

Default Mobile Server Authentication:

Authentication mode: Basic

Login: administrator

Password: ••••••••••••

This password is not encrypted for transmission or storage.

□ Overwrite user-specified credentials when applying configuration

172.28.181.97

Mobile Server name: 172.28.181.97

□ Mobile clients access this server using the following external name:

Mobile Server port: 80

Mobile Server path: analyticsMobile

Mobile Server type: J2EE

Request type: HTTP

☑ Use default authentication

Mobile Server name - Web DNS Name, i.e. xbrirgdemo.micros-retail.com

Mobile Server port – 80

Mobile Server path - analyticsMobile

Mobile Server type - J2EE

Request Type - HTTP

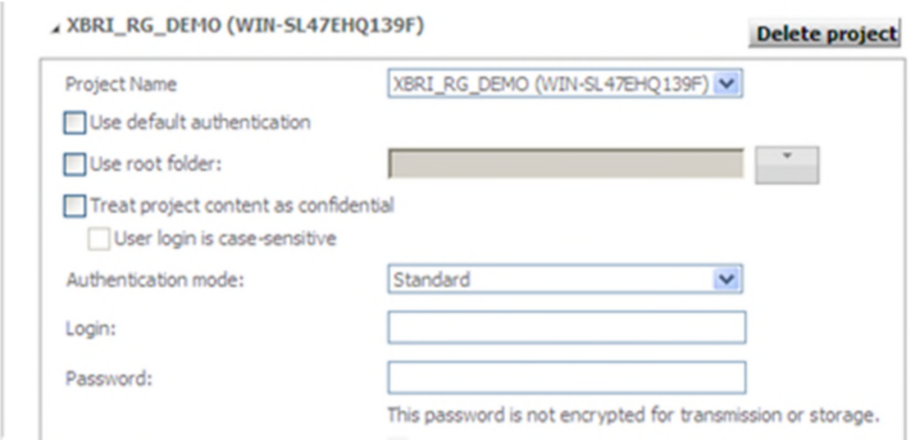
Use Default Authentication Mode – Select check box.

Authentication Mode – Standard

Login – Leave blank.

Password – Leave blank.

10. Click the **Configure New Project** button and enter these settings.



XBRI_RG_DEMO (WIN-SL47EHQ139F)

Project Name: XBRI_RG_DEMO (WIN-SL47EHQ139F)

□ Use default authentication

□ Use root folder:

□ Treat project content as confidential

□ User login is case-sensitive

Authentication mode: Standard

Login:

Password:

This password is not encrypted for transmission or storage.

Project Name - Select the project name from drop-down list.

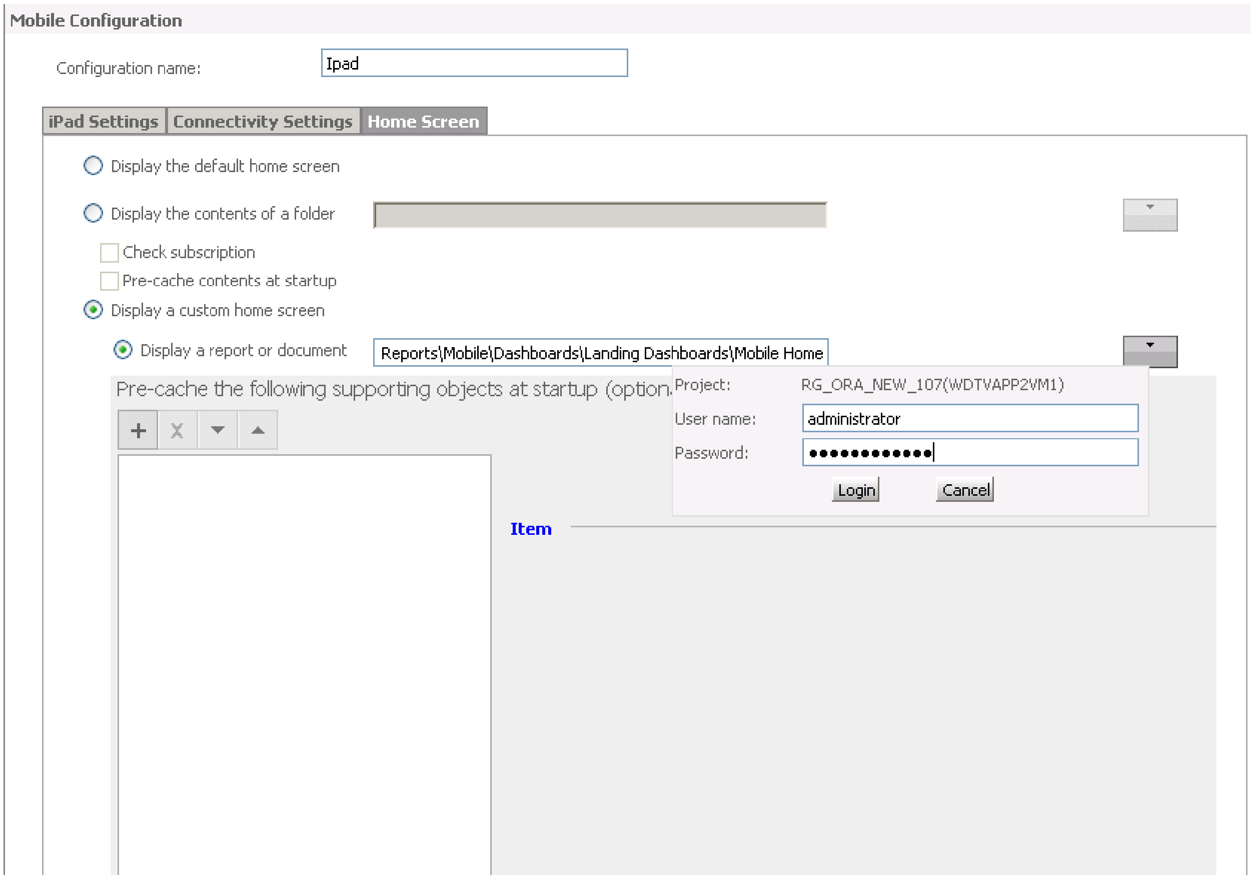
Use Default Authentication – Clear the check box.

Authentication Mode – Standard

Login – Leave blank.

Password – Leave blank.

11. In Desktop, unhide the Mobile folder temporarily.
12. Click the **Home Screen** tab and select **Display a custom home screen**.
13. Click the **Security credentials** button to the right of the document input box and enter the credentials for the administrator account.
14. Browse to folder: Public Objects\Shared Reports\Mobile\Dashboards\Landing Dashboards and select the Mobile Home document



Mobile Configuration

Configuration name: Ipad

○ Display the default home screen

○ Display the contents of a folder

□ Check subscription

□ Pre-cache contents at startup

● Display a custom home screen

● Display a report or document Reports\Mobile\Dashboards\Landing Dashboards\Mobile Home

Pre-cache the following supporting objects at startup (option

Project: RG_ORA_NEW_107(WDTVAPP2VM1)

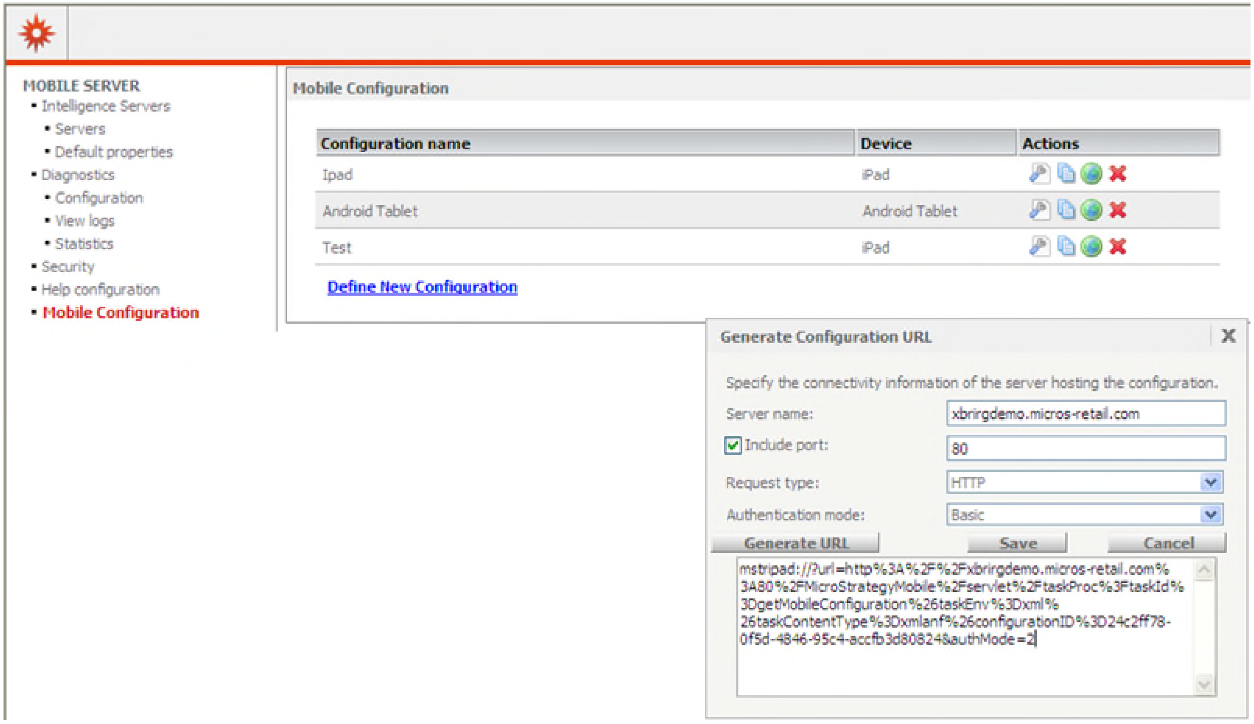
User name: administrator

Password: ●●●●●●●●●●●●

15. In Desktop, hide the Mobile folder again.
16. Click **Save.** This returns you to the Mobile Configuration page.

Generate the URL for the Mobile iPad

From the Mobile Configuration start page, you need to generate the URL for the iPad that has installed the XBR^i mobile app. Then you send the URL to the user, who will use the link to log on to the mobile server.



Mobile Configuration

Configuration name	Device	Actions
Ipad	iPad	
Android Tablet	Android Tablet	
Test	iPad	

Define New Configuration

Generate Configuration URL

Specify the connectivity information of the server hosting the configuration.

Server name: xbrirgdemo.micros-retail.com

☑ Include port: 80

Request type: HTTP

Authentication mode: Basic

```
mstripad://?url=http%3A%2F%2Fxbrirgdemo.micros-retail.com%
3A80%2FMicroStrategyMobile%2Fservlet%2FtaskProc%3FtaskId%
3DgetMobileConfiguration%26taskEnv%3Dxml%
26taskContentType%3Dxmlanf%26configurationID%3D24c2ff78-
0f5d-4846-95c4-accfb3d80824&authMode=2
```

Step 1: Generate and send the URL

1. Select the Generate URL 🌐 icon under **Actions** for your configuration.
2. In the Generate Configuration URL dialog box, select **Basic** from the **Authentication Mode** drop-down list.
3. Click the **Generate URL** button.
4. In the text box below, change the first 4 characters from “mstr” to “xbri”, then select the entire URL, copy it, and paste it into an email message. Send the message to the iPad user with the XBR^i Ingenium Mobile app installed.

Step 2: Configure the URL on the iPad

1. On the iPad, open the e-mail and copy the URL to the Notes app, which will convert the long URL to a link.
2. Tap the link to connect to XBR^i Mobile Server.
3. Enter your XBR^i login credentials, with your User Name prefixed by your customer code and an underscore; e.g., for user JSmith and customer XYZ, enter xyz_jsmith. Enter your usual XBR^i password.

4. Either tap the **GO** button on the virtual keyboard, or shrink the keyboard and click **OK** on the login prompt.

   This logs you in to the XBRi mobile app. Hereafter, when you click the XBR^{i} Ingenium icon, the saved credentials are used and you will not need to re-enter them.

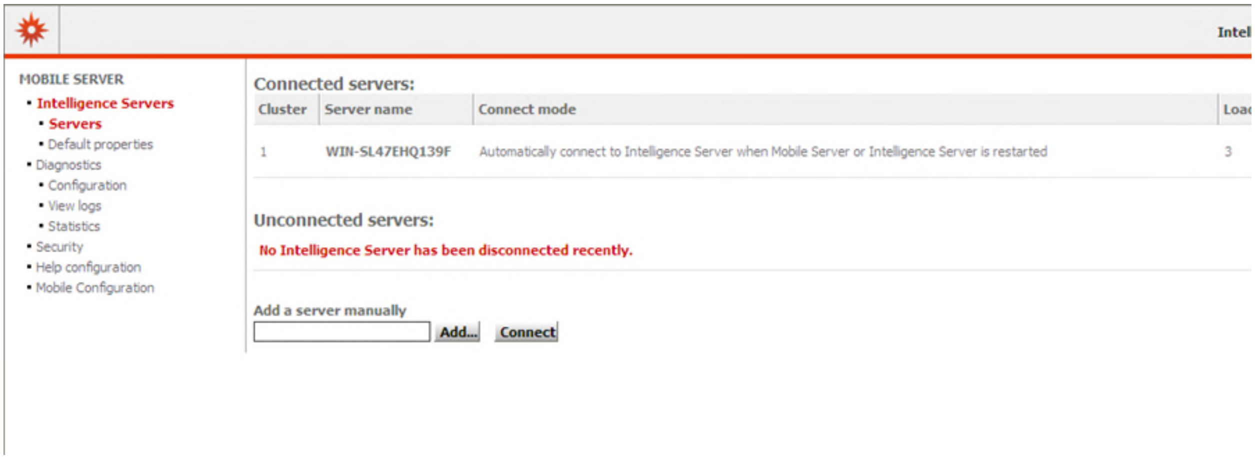
Setting up an Android Tablet to connect to XBR^i Mobile Server

1. From your desktop or laptop computer, open your internet browser.
2. Enter the link to your Web DNS on the XBR^i mobile server:

   http://Your_Web_DNS_Name/analyticsMobile/servlet/mstrWebAdmin

   example: http://xbrirgdemo.micros-retail.com/analyticsMobile/servlet/mstrWebAdmin

   This displays the Mobile Configuration page:



Connected servers:

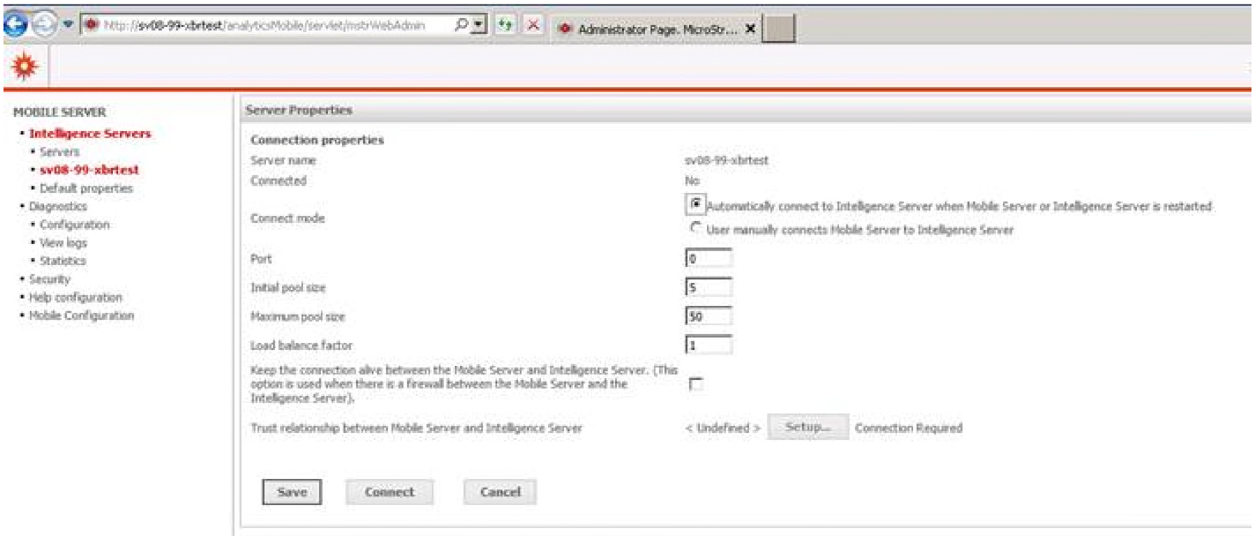
Cluster	Server name	Connect mode	Loa
1	WIN-SL47EHQ139F	Automatically connect to Intelligence Server when Mobile Server or Intelligence Server is restarted	3

Unconnected servers:

No Intelligence Server has been disconnected recently.

Add a server manually

3. If the Intelligence Server is disconnected, enter your Intelligence Server name in the box labeled “Add a server manually” and click connect.
4. Set up Trusted Connection
   d. Click the properties icon to the right of the page.



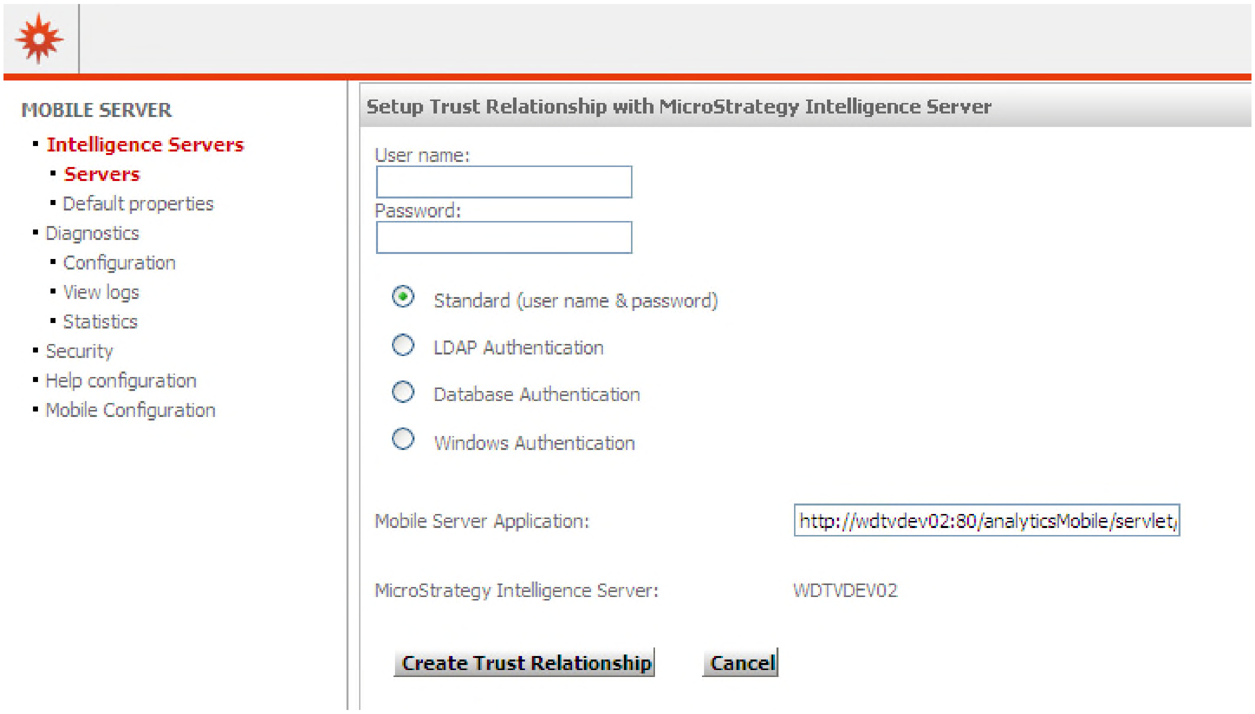
Server Properties

Connection properties

Server name	sv08-99-xbrtest
Connected	No
Connect mode	● Automatically connect to Intelligence Server when Mobile Server or Intelligence Server is restarted ○ User manually connects Mobile Server to Intelligence Server
Port	0
Initial pool size	5
Maximum pool size	50
Load balance factor	1
Keep the connection alive between the Mobile Server and Intelligence Server. (This option is used when there is a firewall between the Mobile Server and the Intelligence Server).	□
Trust relationship between Mobile Server and Intelligence Server	< Undefined > Setup... Connection Required

e. Ensure “Automatically connect to Iserver when Mobile Server or Intelligence Server is restarted” is selected

f. Click on the **Setup** button in the Server Properties panel.



Setup Trust Relationship with MicroStrategy Intelligence Server

User name:

Password:

● Standard (user name & password)

○ LDAP Authentication

○ Database Authentication

○ Windows Authentication

Mobile Server Application: http://wdtvdev02:80/analyticsMobile/servlet/

MicroStrategy Intelligence Server: WDTVDEV02

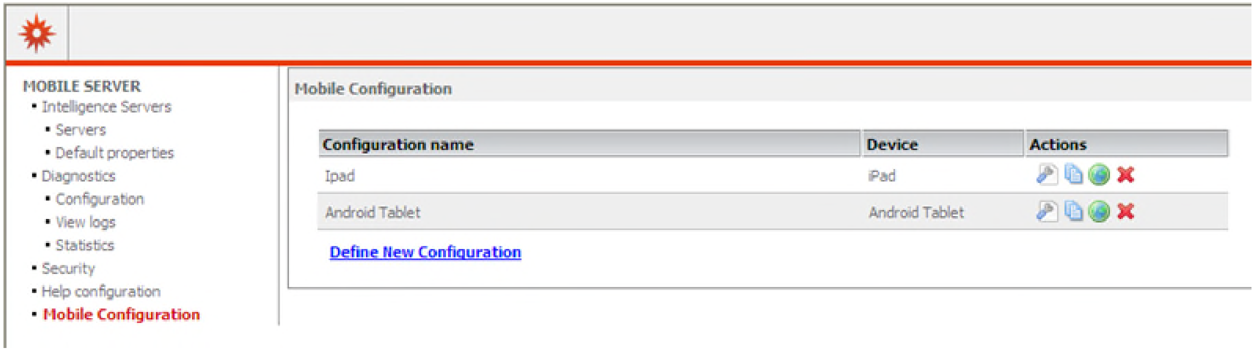
e. Select the **Standard (user name and password)** option.

f. Enter the MicroStrategy Administrator **User Name** and **Password**.

g. Enter the URL of the **Web Server Application**.

h. Click **Create Trust Relationship**.

5. Verify that the Connection properties are OK and click **Save**.
6. Select **Mobile Configuration** from the left panel

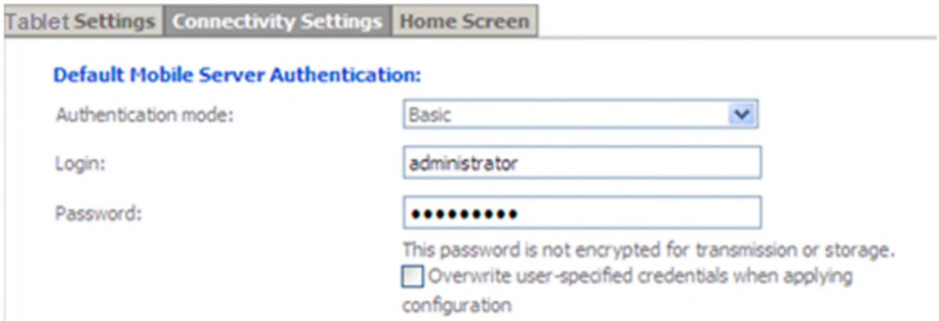


Mobile Configuration

Configuration name	Device	Actions
Ipad	iPad	🔧 ⧉ 🌐 ✖
Android Tablet	Android Tablet	🔧 ⧉ 🌐 ✖

7. For the Android Tablet configuration, click the **Modify** icon under **Actions**.

8. Click the **Connectivity Settings** tab and enter these settings:



Default Mobile Server Authentication:

Authentication mode: Basic

Login: administrator

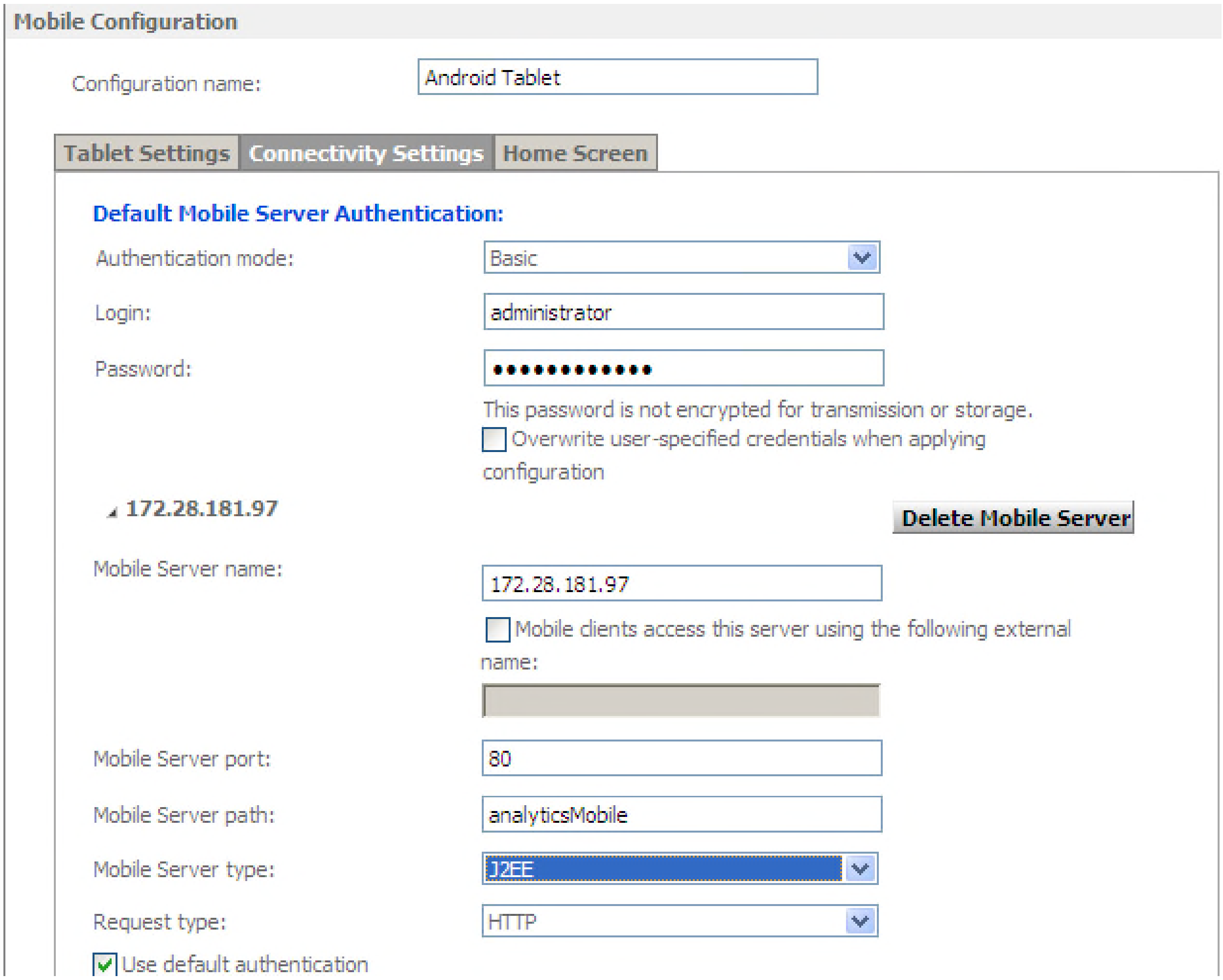
Password: •••••••••

This password is not encrypted for transmission or storage.

□ Overwrite user-specified credentials when applying configuration

Password – Enter administrator password.

9. Click the **Configure New Mobile Server** button and enter these settings:



Mobile Configuration

Configuration name: Android Tablet

Default Mobile Server Authentication:

Authentication mode: Basic

Login: administrator

Password: •••••••••••••

This password is not encrypted for transmission or storage.

□ Overwrite user-specified credentials when applying configuration

172.28.181.97

Mobile Server name: 172.28.181.97

□ Mobile clients access this server using the following external name:

Mobile Server port: 80

Mobile Server path: analyticsMobile

Mobile Server type: J2EE

Request type: HTTP

☑ Use default authentication

Mobile Server name - Web DNS Name, i.e. xbrirgdemo.micros-retail.com

Mobile Server port – 80

Mobile Server path - analyticsMobile

Mobile Server type - J2EE

Request Type - HTTP

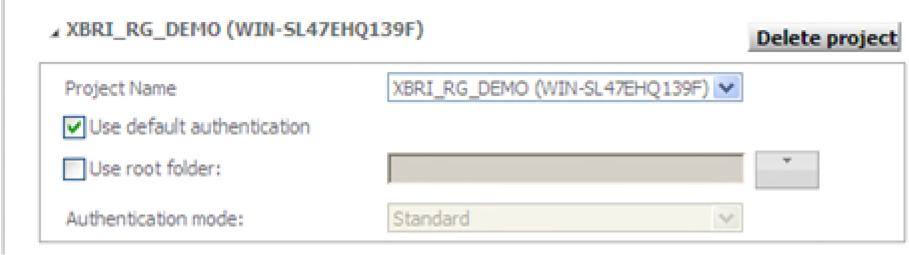
Use Default Authentication Mode – Select check box.

Authentication Mode – Basic

Login – Enter your XBR^i User Name prefixed by your customer code and an underscore; e.g., for user JSmith and customer XYZ, enter xyz_jsmith.

Password – Enter your XBR^i password.

10. Click the **Configure New Project** button and enter these settings:



XBRI_RG_DEMO (WIN-SL47EHQ139F)

Delete project

Project Name: XBRI_RG_DEMO (WIN-SL47EHQ139F)

☑ Use default authentication

□ Use root folder:

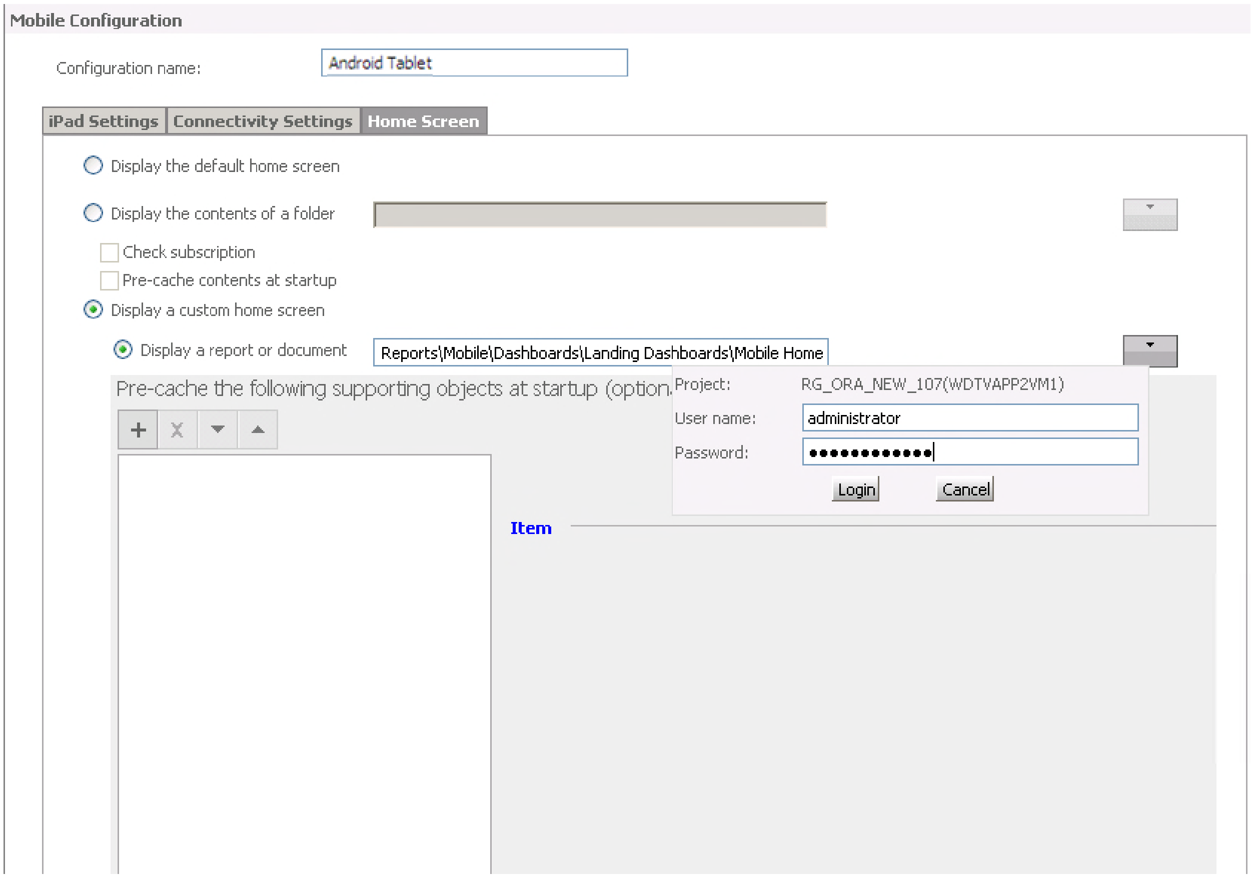
Authentication mode: Standard

Project Name - Select the project name from drop-down list.

Use Default Authentication – Clear the check box.

Authentication Mode – Standard

11. In Desktop, unhide the Mobile folder temporarily.
12. Click the **Home Screen** tab and select **Display a custom home screen**.
13. Click the **Security credentials** button to the right of the document input box and enter the credentials for the administrator account.
14. Browse to folder: Public Objects\Shared Reports\Mobile\Dashboards\Landing Dashboards and select the Mobile Home document



Mobile Configuration

Configuration name: Android Tablet

○ Display the default home screen

○ Display the contents of a folder

□ Check subscription

□ Pre-cache contents at startup

● Display a custom home screen

● Display a report or document: Reports\Mobile\Dashboards\Landing Dashboards\Mobile Home

Pre-cache the following supporting objects at startup (option

Project: RG_ORA_NEW_107(WDTVAPP2VM1)

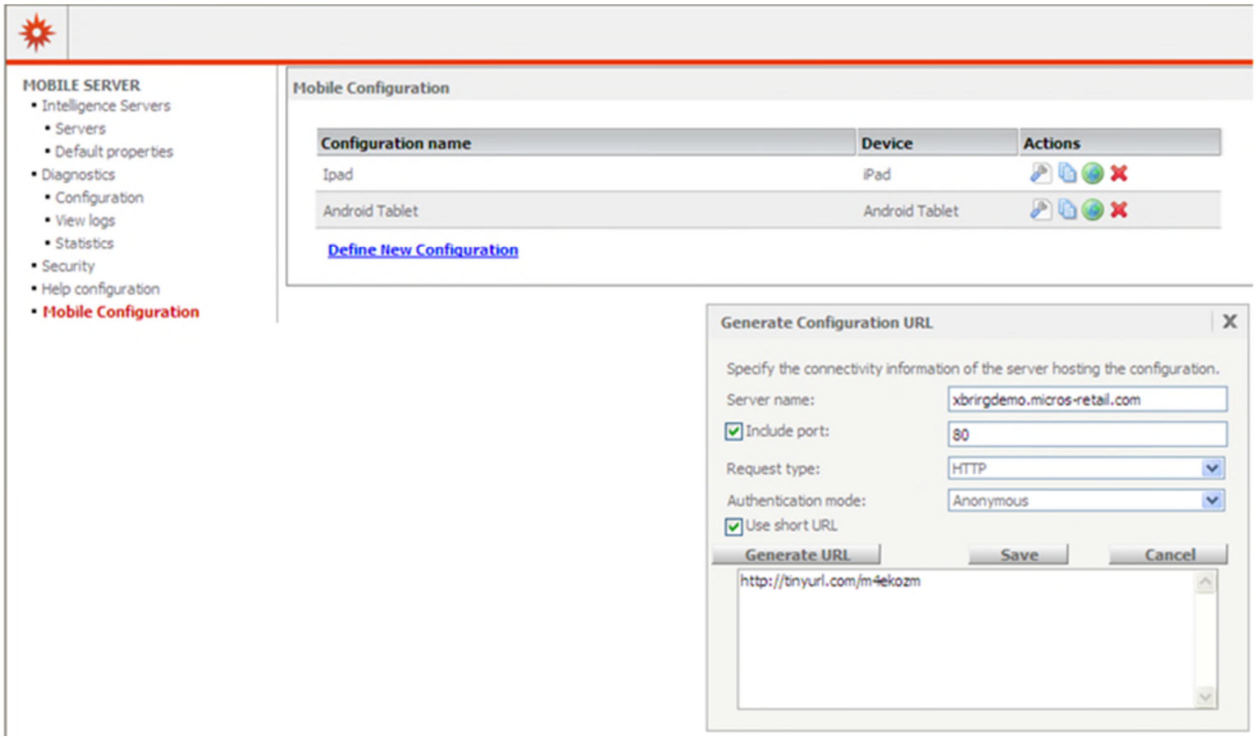
User name: administrator

Password: ●●●●●●●●●●●●

15. In Desktop, hide the Mobile folder again.
16. Click **Save.** This returns you to the Mobile Configuration page.

Generate the URL for the Android Tablet

From the Mobile Configuration start page, you need to generate the URL for the Android Tablet that has installed the XBR^i mobile app. Then you send the URL to the user, who will use the link to log on to the mobile server.



Configuration name	Device	Actions
Ipad	iPad	
Android Tablet	Android Tablet	

Generate Configuration URL

Specify the connectivity information of the server hosting the configuration.

Server name: xbrirgdemo.micros-retail.com

☑ Include port: 80

Request type: HTTP

Authentication mode: Anonymous

☑ Use short URL

http://tinyurl.com/m4ekozm

Step 1: Generate and send the URL

1. Select the Generate URL 🌐 icon under **Actions** for your configuration.
2. In the Generate Configuration URL dialog box, select **Anonymous** from the **Authentication Mode** drop-down list.
3. Select the **Use short URL** check box,
4. Click the **Generate URL** button.
5. In the text box below, select the entire URL, copy it, and paste it into an email message. Send the message to the Android Tablet user with the XBR^i Ingenium Mobile app installed.

Step 2: Configure the URL on the Android Tablet

Note: The XBR Ingenium app must be installed on the Android tablet to complete this step. See: Adding the XBR Ingenium app for Android for steps to download the app to your Android tablet.

1. On the Android tablet, open the e-mail and tap the link to connect to XBR^i Mobile Server.

2. Enter your XBR^i login credentials, with your User Name prefixed by your customer code and an underscore; e.g., for user JSmith and customer XYZ, enter xyz_jsmith. Enter your usual XBR^i password.
3. Either tap the **GO** button on the virtual keyboard, or shrink the keyboard and click **OK** on the login prompt.

   This logs you in to the XBR^i mobile app. Hereafter, when you click the XBR^i Ingenium icon, the saved credentials are used and you will not need to re-enter them.

Troubleshooting

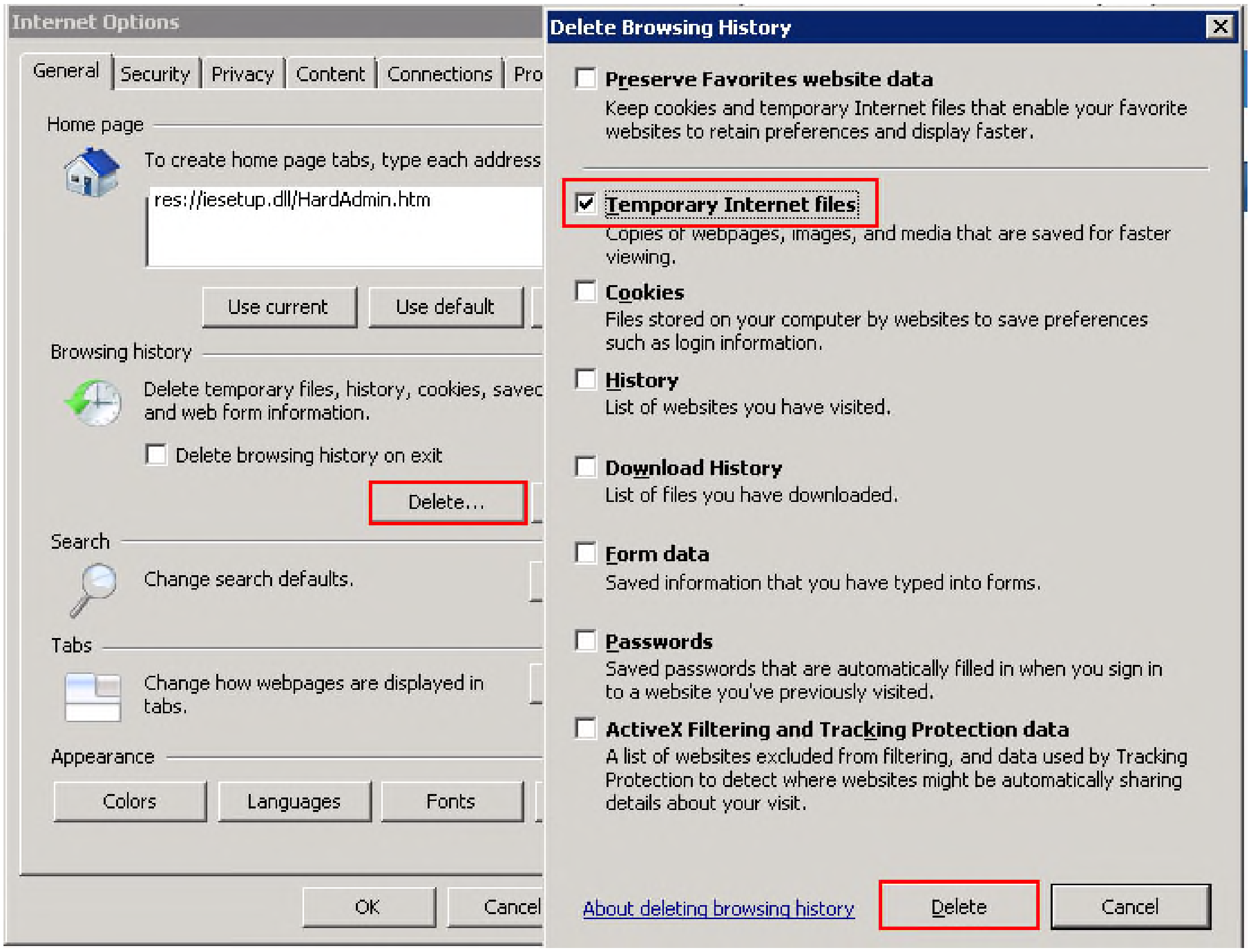
Dates Display Incorrectly in a Linked Report

If, after installation, the customer edits a link to a report, sets the date prompt to Prompt User and applys the change, when they run the linked report, and select a different date range, the dates do not display properly.

This problem has occurred with Internet Explorer 9.

To correct this problem:

1. Open Internet Explorer 9.
2. Clear the browser cache of temporary internet files, as in the example below:



To create home page tabs, type each address

res://iesetup.dll/HardAdmin.htm

Delete temporary files, history, cookies, savec and web form information.

□ Delete browsing history on exit

Change search defaults.

Change how webpages are displayed in tabs.

□ **Preserve Favorites website data**
Keep cookies and temporary Internet files that enable your favorite websites to retain preferences and display faster.

☑ **Temporary Internet files**
Copies of webpages, images, and media that are saved for faster viewing.

□ **Cookies**
Files stored on your computer by websites to save preferences such as login information.

□ **History**
List of websites you have visited.

□ **Download History**
List of files you have downloaded.

□ **Form data**
Saved information that you have typed into forms.

□ **Passwords**
Saved passwords that are automatically filled in when you sign in to a website you've previously visited.

□ **ActiveX Filtering and Tracking Protection data**
A list of websites excluded from filtering, and data used by Tracking Protection to detect where websites might be automatically sharing details about your visit.

3. From the Tools menu, choose **Compatibility View Settings.**
4. De-select the **Display intranet sites in Compatibility View** check box.

To: List Does not Populate

If, after installation, the customer administrator attempts to create Email subscriptions or Control Point Subscriptions and the **To:** list does not populate, you can perform one of the following tasks to correct the problem:

From the Desktop:

Under Administration, select Delivery Managers. Then select Contacts and refresh it.

If this is still an issue, then:

In the Database Server:

Run this query on the Metadata database to find the disconnect between user and contacts:

```
Select DSSMDUSRACCT.LOGIN as ACCOUNT, DSSCSCONTACT.LOGIN as CONTACT
from DSSMDUSRACCT inner join DSSCSCONTACT on DSSMDUSRACCT.OBJECT_ID=
DSSCSCONTACT.MSTRUSER_ID
where DSSCSCONTACT.CONTACT_TYPE = 1
```

In the MicroStrategy Integrity Manager:

1. Launch MicroStrategy Desktop and log in to the target 3-tier project source.
2. Go to **menu > Administration > User Management > User Manager Integrity Checker**.
3. Select all three options and click **Start**. The window will display the search result.
4. Click **Fix** if an error is found.

New Users Do not Receive E-mails

If your new users are not receiving e-mails with login and password information after their accounts are set up by the administrator, you may have the **Always Use Smart Host** option checked in the Device Editor and the Smart Host is not accessible. Perform these steps to correct the problem:

1. Log in to MicroStrategy Desktop.
2. Click on **XBR^i** (project Source) and click on **Administration.**
3. Navigate to **Delivery Managers > Devices**.
4. Right click on generic email and select Edit from the context menu.
5. If the **Always Use Smart Host** option is selected, clear the check box.

Smart Links Do Not Work

If some of the Smart Links that are set to be active after a new install or upgrade do not activate, you must re-apply the settings for those smart links in Projects.

1. Log in to XBR^i as the Customer Administrator
2. From the Admin menu, choose **Project Defaults**.
3. Under Settings, choose **Smart Links**.
4. Select the attribute category under the Smart Links list and click the **Edit** ab| icon. This displays a Smart Links editor.
5. In the **Selected** box, highlight the smart link that is not working and click the **Edit** ab| icon.
6. If necessary, edit any fields that need to be changed, and then click OK.
7. Click the **Apply** button.

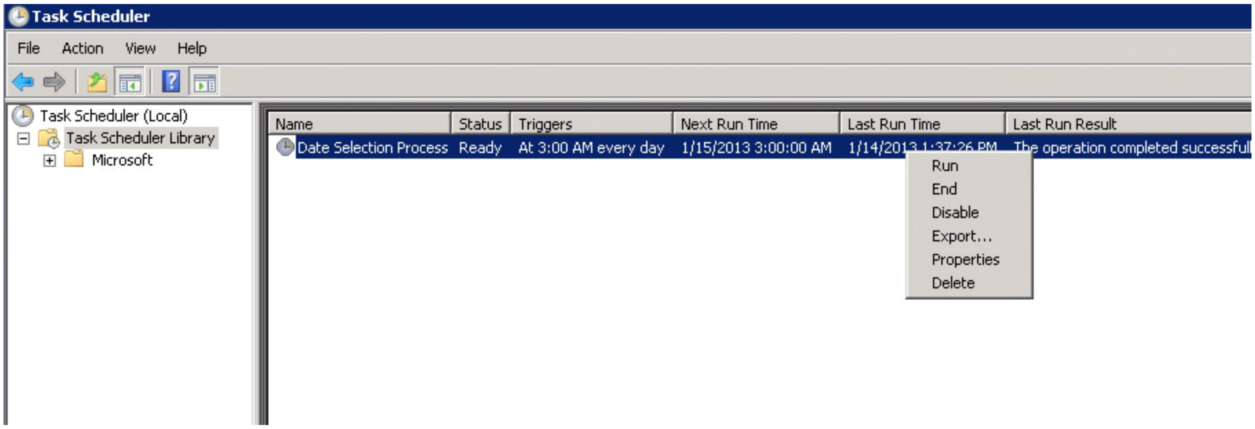
Once you select Apply, the smart link should now work in the reports. Repeat the steps for any other smart links that you need to activate.

Calendar Visualization in Date Selection Prompts are Displaying Incorrect Dates or no Dates

If you run a report, document or control point and notice that the selected dates on the calendar visualization are out of date (for example, if you select Yesterday and the calendar displays the day before yesterday), it is likely that the date selection batch process did not run overnight as scheduled. To solve this problem, run the date selection batch process in the Windows Task Scheduler manually and check the authentication used to run the daily scheduled task.

To manually run the date selection batch process:

1. Log into the Windows server and open the Task Scheduler.



Name	Status	Triggers	Next Run Time	Last Run Time	Last Run Result
Date Selection Process	Ready	At 3:00 AM every day	1/15/2013 3:00:00 AM	1/14/2013 1:37:26 PM	The operation completed successfull

2. Click on the **Task Scheduler Library** folder .
3. Right click on the **Date Selection Process** task.
4. Click **Run** from the context menu.

Linking from the Control Points Exception Dashboard does not work

This problem may occur after an Oracle new installation or upgrade.

To fix broken linking from the Control Points Exception Dashboard:

1. Navigate to the Oracle Database.
2. Insert the following into ADM_LP_VARIABLES:

   (ORGID,SYSTEM,VAR_NAME,VAR_VALUE,VAR_DATATYPE,COMMENTS) VALUES (-1001,'2','link.execution.oracle.edd.masked.format','yyyy-MM-dd',null,null)

3. Re-start Tomcat.

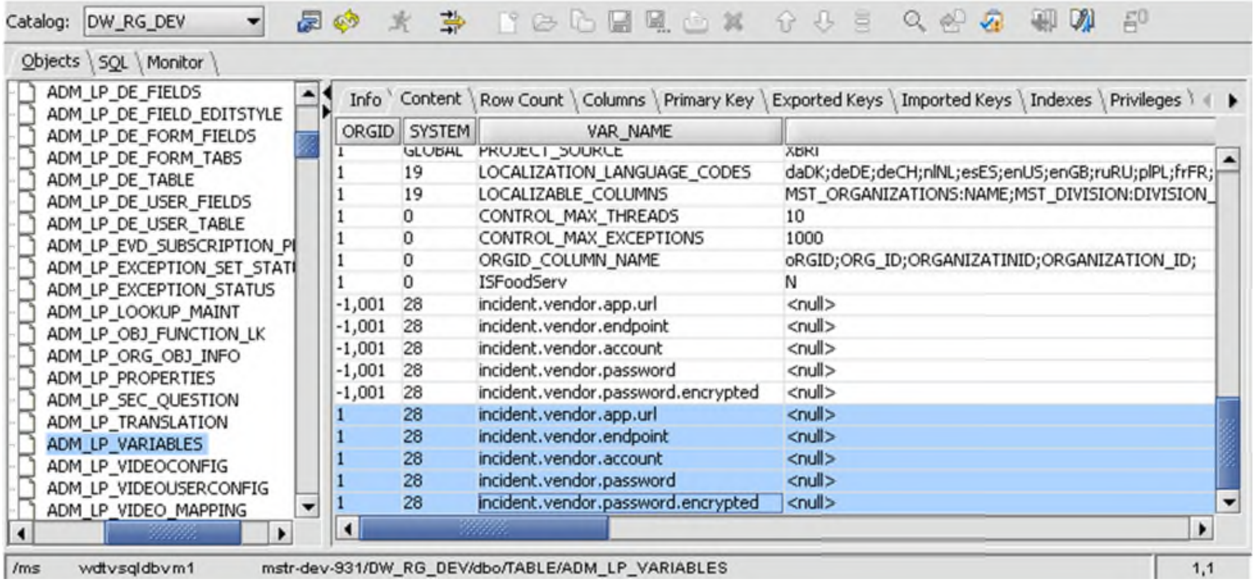
Validate Case Management Connection Settings in the Data Warehouse

To verify value configuration for case management in the data warehouse:

1. On the data warehouse server, go to your front-end database tool.

2. Locate the database instance of your project.

3. Under the tables folder, locate ADM_LP_Variables.



ADM_LP_DE_FIELDS
ADM_LP_DE_FIELD_EDITSTYLE
ADM_LP_DE_FORM_FIELDS
ADM_LP_DE_FORM_TABS
ADM_LP_DE_TABLE
ADM_LP_DE_USER_FIELDS
ADM_LP_DE_USER_TABLE
ADM_LP_EVD_SUBSCRIPTION_PI
ADM_LP_EXCEPTION_SET_STATI
ADM_LP_EXCEPTION_STATUS
ADM_LP_LOOKUP_MAINT
ADM_LP_OBJ_FUNCTION_LK
ADM_LP_ORG_OBJ_INFO
ADM_LP_PROPERTIES
ADM_LP_SEC_QUESTION
ADM_LP_TRANSLATION
ADM_LP_VARIABLES
ADM_LP_VIDEOCONFIG
ADM_LP_VIDEOUSERCONFIG
ADM_LP_VIDEO_MAPPING

ORGID	SYSTEM	VAR_NAME	
1	GLOBAL	PROJECT_SOURCE	XBRI
1	19	LOCALIZATION_LANGUAGE_CODES	daDK;deDE;deCH;nlNL;esES;enUS;enGB;ruRU;plPL;frFR;
1	19	LOCALIZABLE_COLUMNS	MST_ORGANIZATIONS:NAME;MST_DIVISION:DIVISION_
1	0	CONTROL_MAX_THREADS	10
1	0	CONTROL_MAX_EXCEPTIONS	1000
1	0	ORGID_COLUMN_NAME	oRGID;ORG_ID;ORGANIZATINID;ORGANIZATION_ID;
1	0	ISFoodServ	N
-1,001	28	incident.vendor.app.url	<null>
-1,001	28	incident.vendor.endpoint	<null>
-1,001	28	incident.vendor.account	<null>
-1,001	28	incident.vendor.password	<null>
-1,001	28	incident.vendor.password.encrypted	<null>
1	28	incident.vendor.app.url	<null>
1	28	incident.vendor.endpoint	<null>
1	28	incident.vendor.account	<null>
1	28	incident.vendor.password	<null>
1	28	incident.vendor.password.encrypted	<null>

/ms wdtvsqldbvm1 mstr-dev-931/DW_RG_DEV/dbo/TABLE/ADM_LP_VARIABLES 1,1

4. For the rows with the ORGID of the customer, SYSTEM 28, and VAR_NAME beginning with incident., ensure that the values are correct:

   Incident.vendor.app.url = https://appserver1.lpguys.net/microstesting/lpms

Incident.vendor.endpoint = https://appserver1.lpguys.net/microstesting/lpms/webservice/dataservice.asmx

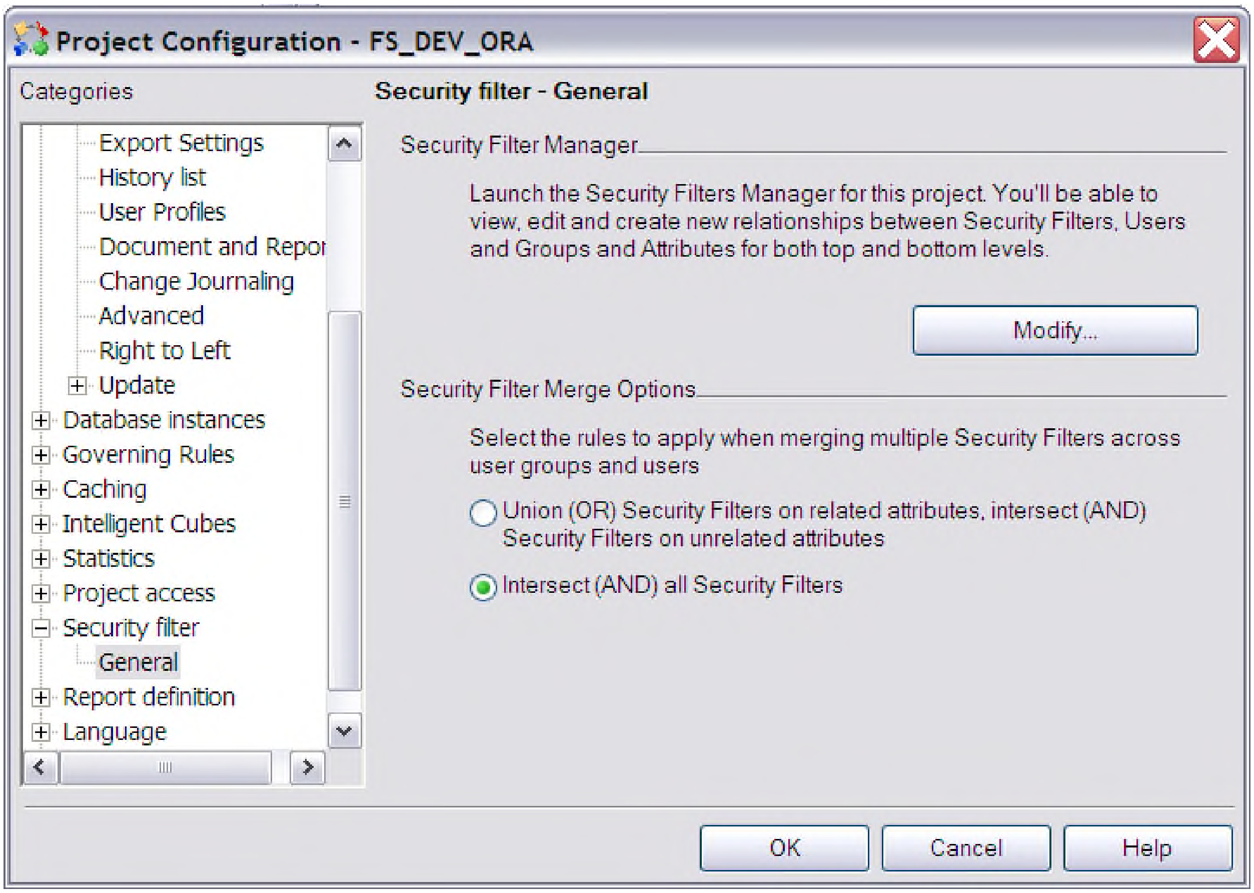
Incident.vendor.account = userName

Incident.vendor.password = userPassword (encryption via mr.key with {tomcat}/lib/MrCrypto.jar)

Incident.vendor.password.encrypted = true/false

Security Filter Merge Option for Food Service Project Must Be Set to AND

If the Security Filter Merge option is set to OR for a Food Service project, the store group security filter will be ineffective. To solve this problem, ensure that the Security Filter Merge option is set to AND, as in the illustration below:



Security filter - General

Security Filter Manager

Launch the Security Filters Manager for this project. You'll be able to view, edit and create new relationships between Security Filters, Users and Groups and Attributes for both top and bottom levels.

Security Filter Merge Options

Select the rules to apply when merging multiple Security Filters across user groups and users

○ Union (OR) Security Filters on related attributes, intersect (AND) Security Filters on unrelated attributes

● Intersect (AND) all Security Filters

Video Link Does Not Connect Successfully with Certain JRE Versions

If customers run into an issue with video linking and certain JRE versions, it is recommended that they upgrade to the latest JRE version (certified up to version 55).

Customers who are running an earlier version of XBR^i (prior to 10.7) and run into this issue should upgrade to the latest JRE version. They should also add the Analytics Web Server to the Exception Site list in the java control panel.

1. To Add URLs to the Exception Site list:
   Go to the Java Control Panel (On Windows Click Start and then Configure Java)
2. Click on the Security tab
3. Click on the Edit Site List button
4. Click Add in the Exception Site List window

JRE version 21 is not compatible with any version of XBR^i.

Gauges and Line Graphs Do Not Display on Activity Dashboards

After installation, the gauges and line graphs do not populate on the Activity dashboards until you select a block in the heat map. This affects the Void Activity and Discount Activity dashboards for Food & Beverage installations, and the Refund Activity, Void Activity, and Discount Activity dashboards for Retail installations. This problem occurs in the XBR^i application and in the XBR Ingenium app for iPad and Android. In order to have the dashboards show the gauges and graphs for each tab for future run times, you can select the heat map defaults for each tab and save them.

To correct this problem, for each dashboard:

1. Log in as a core XBR Administrator.
2. Run the dashboard.
3. Click on an area of the heat map to populate it. For example in the Discount Activity dashboard, click on a District in the heat map.
4. Move to the next tab, for example, Location in an F&B Discount Activity dashboard, and click on an area of the heat map to populate it.
5. Do the previous step for any remaining tabs, for example, Revenue Center in an F&B Discount Activity dashboard.
6. Click **Save** from the toolbar.
7. Click **OK**.