Retek® Data Warehouse 10.1

Middle Tier Installation Guide

Retek

Corporate Headquarters:

Retek Inc.
Retek on the Mall
950 Nicollet Mall
Minneapolis, MN 55403

888.61.RETEK (toll free US)
+1 612 587 5000

European Headquarters:

Retek
110 Wigmore Street
London
W1U 3RW
United Kingdom

Switchboard:
+44 (0)20 7563 4600

Sales Enquiries:
+44 (0)20 7563 46 46
Fax: +44 (0)20 7563 46 10

Printed in the United States of America.

Customer Support

Customer Support hours:

Customer Support is available 7x24x365 via e-mail, phone, and Web access.

Depending on the Support option chosen by a particular client (Standard, Plus, or Premium), the times that certain services are delivered may be restricted. Severity 1 (Critical) issues are addressed on a 7x24 basis and receive continuous attention until resolved, for all clients on active maintenance.

Contact Method	Contact Information
Internet (ROCS)	www.retek.com/support Retek's secure client Web site to update and view issues
E-mail	support@retek.com
Phone	US & Canada: 1-800-61-RETEK (1-800-617-3835) World: +1 612-587-5800 EMEA: 011 44 1223 703 444 Asia Pacific: 61 425 792 927
Mail	Retek Customer Support Retek on the Mall 950 Nicollet Mall Minneapolis, MN 55403

When contacting Customer Support, please provide:

- Product version and program/module name.
- Functional and technical description of the problem (include business impact).
- Detailed step by step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.

Contents

Chapter 1 – Server and system requirements

This document describes how to install the MicroStrategy 7 products and configure the metadata repository. It includes server and system requirements, client installation, and ODBC setup.

MicroStrategy Intelligence Server

For a more comprehensive listing of MicroStrategy Intelligence Server system requirements and sizing factors, refer to the MicroStrategy 7 Intelligence Server, Web, Architect, Agent and Administrator Installation and Configuration Guide.

Software Requirements for the MicroStrategy Intelligence Server include:

Oracle Users

- Oracle 9i Client 9.0.1.1.1
- Oracle 9i (32-bit) ODBC Driver 9.0.1.0.1
- MicroStrategy Intelligence Server 7.1.6

IBM DB2 Users

- IBM DB2 Run-Time Client 7.1
- IBM DB2 (32-bit) ODBC Driver 7.1.0.4
- MicroStrategy Intelligence Server 7.1.6

Teradata

- Teradata Client for Windows 9x/NT/2000
- Teradata (32-bit) ODBC Driver 3.0.0.0
- MicroStrategy Intelligence Server 7.1.6

MicroStrategy Desktop Requirements (Administrator)

For a more comprehensive listing of MicroStrategy Desktop (Administrator) requirements and sizing factors, refer to the MicroStrategy 7 Intelligence Server, Web, Architect, Agent and Administrator Installation and Configuration Guide.

Software requirements for administrator workstations include:

Oracle Users

- Oracle 9i Client 9.0.1.1.1
- Oracle 9i (32-bit) ODBC Driver 9.0.1.0.1
- MicroStrategy Desktop and Administrator 7.1.6

IBM DB2 Users

- IBM DB2 Run-Time Client 7.1
- IBM DB2 (32-bit) ODBC Driver 7.1.0.4
- MicroStrategy Desktop and Administrator 7.1.6

Teradata

- Teradata Client for Windows 9x/NT/2000
- Teradata (32-bit) ODBC Driver 3.0.0.0
- MicroStrategy Desktop and Administrator 7.1.6

Note: Client side ODBC is only required for connecting 2-tier, or directly to the database. Administrators will only be required to connect in direct mode, in order to duplicate projects.

MicroStrategy Desktop Requirements (Users)

For a more comprehensive listing of MicroStrategy Desktop (User) requirements and sizing factors, refer to the MicroStrategy 7 Intelligence Server, Web, Architect, Agent and Administrator Installation and Configuration Guide.

Software requirements for end-user client workstations include:

- MicroStrategy 7.1.6 Desktop

Note: Client side ODBC is not required for connecting in 3-tier, or server mode. Server mode is the recommended connection method for normal users connecting through the MicroStrategy Desktop.

Chapter 2 – RDW Middle-Tier installation

This chapter provides general installation instructions and recommended configuration considerations for MicroStrategy Intelligence Server and Desktop. For step-by-step guidance, refer to the MicroStrategy 7 Intelligence Server, Web, Architect, Agent and Administrator Installation and Configuration Guide. This chapter also provides the steps necessary to connect to the RDW 10.1 Workbench Metadata Projects. We highly recommend that you follow these steps in the prescribed order.

Install Client ODBC

Installation of the database client ODBC is required for the MicroStrategy Intelligence Server and MicroStrategy Desktop administrator machines. Normal MicroStrategy Desktop users are recommended to connect three-tier, via the Intelligence Server, and will therefore not require database client ODBC.

Note: The following represents a typical client installation and may differ depending on the database and version. These are recommended steps and may vary for different environments.

Oracle Client Installation

Install the MicroStrategy certified 32-bit ODBC

The MicroStrategy certified 32-bit Oracle ODBC used with the MicroStrategy Intelligence Server is not included on the MicroStrategy 7 CD. You should use an Oracle 9.0.1 Client Software CD, or contact Oracle in order to get the certified drivers.

Certified 32-bit ODBC drivers

Certified 32-bit Client and ODBC Drivers for the Oracle 9.0.1(9i) database

Install the 32-bit Oracle9i Client and ODBC Driver 9.0.1.0.1.

1 Run setup.exe from the Oracle 9i Client Software CD.

2 Click **Next** on the welcome page to begin the installation.

3 Click **Next** to accept the default Oracle home settings.

4 Choose Custom Installation on the following screen and click **Next**.

   Note: If the installer gives you an error at this point, check that you are not installing into an Oracle home that was originally created for a different Oracle version. If this is the case, click **Previous** and give your Oracle9i home a different directory to install products in.

5 Select the following products in Oracle9i Client 9.0.1.1.1:

   - Expand Oracle Programmer, de-select all, with the exception of Oracle ODBC Driver 9.0.1.0.1

6 Click **Next**.

7 Verify that the Paths and Disk Space required are correct. Click **Next**.

8 Verify the components you have chosen and click **Install**.

9 After installation is complete, you are brought to the Net Configuration Assistant. Click **Cancel**.

10 Click **Exit** to complete the installation.

11 Restart the computer if it prompts you to do so.

TNS names file

This is a file that contains connect descriptors that map to net service names. The file can be maintained centrally or locally, for use by all or individual clients. If located on the network, copy the most recent version of the `tnsnames.ora` file locally to the following directory: `c:\<oracle home>\network\admin`. This is required locally on the MicroStrategy Intelligence server machine and any machine that would need to connect directly to the database.

For a more comprehensive description of this file, refer to the Net Services Administrator's Guide within the Oracle documentation.

Establish 32-bit ODBC system DSNs

1 From the Start menu, select Settings > Control Panel. Double-click the Administrator Tools. Double-click the Data Sources (ODBC).

2 Click on the System DSN tab.

3 Click **Add**.

4 Select the Oracle driver that was installed in the previous steps. Click **Finish**.

5 Enter a name for the DSN and a connect string for the data warehouse database. (See example below.)

6 Click **OK**.

Important: The data warehouse DSN on the Intelligence Server must be consistent with those being used on each client machine, that needs to connect directly to the database. This information is stored in the metadata for the project source, and is therefore defined once, for all users.

For example:

Retek Data Warehouse

Data Source Name: RDW10

Description: RDW10 Database

TNS Service Name: RDW10

Note: The Data Warehouse database needs to be created in order for connectivity to be established.

7 Test the ODBC Connection, by clicking **Test Connection**.

IBM DB2 Client Installation

Install the MicroStrategy certified 32-bit ODBC

The MicroStrategy certified 32-bit DB2 ODBC used with the MicroStrategy Intelligence Server is not included on the MicroStrategy 7 CD. You should use the DB2 Application Development Client version 7.1 CD, or contact IBM in order to get the certified drivers.

Certified 32-bit ODBC drivers

Certified 32-bit Client and ODBC Drivers for the DB2 7.1/7.2 database

Install the IBM DB2 Run-Time Client 7.1 and IBM DB2 (32-bit) ODBC Driver 7.1.0.4.

1. Run setup.exe from the DB2 Application Development Client version 7.1 CD.
2. Select Install on the installation dialog box.
3. Select DB2 Application Development Client and click **Next**.
4. Select Custom and click **Next**.
5. Select the following components:
   - Component Protocol

     Sub Component – TCP/IP
   - Application Development Interfaces

     Sub Components – JDBC Support, IBM enhanced Java Runtime Environment, and ODBC Support
   - Base DB2 Client Support
   - Administration and Configuration tools

     Sub Component – Client Configuration Assistant
6. Click **Next**, then click **Next** again.
7. Click **Finish** to complete the setup.
8. Restart the computer if it prompts you to do so.

Establish 32-bit ODBC system DSNs

1. From the Start menu, select Programs > IBM DB2 > Client Configuration Assistant.
2. Click **Add**.
3. Select “Search the Network”. Click **Next**.
4. Expand the “Known Systems” folder to locate the DB2 database.
5. Select the target database. Click **Next**.
6. Add any desired comment. Click **Next**.
7. Click **Finish** to complete the setup.

   Important: The data warehouse DSN on the Intelligence Server must be consistent with those being used on each client machine, that needs to connect directly to the database. This information is stored in the metadata for the project source, and is therefore defined once, for all users.

8. Test the ODBC Connection by clicking **Test**.

Bind the DB2 Utilities

1. From the Start menu, select Programs > IBM DB2 > Client Configuration Assistant.
2. Select the DB2 database (added in steps above). Click **BIND**.
3. Select “Bind DB2 Utilities” if not already selected. Click **Continue**.
4. Enter the User and Password for the metadata owner (for example, RDW10MD). Click **OK**.
5. Select only the CLI/ODBC Support. Click **OK**.
6. After Bind Results page is completed, click **Close**.
7. Click **Close** to complete binding and close the Client Configuration Assistant.

NCR Teradata Client Installation

Install the MicroStrategy certified 32-bit ODBC

The MicroStrategy certified 32-bit Teradata ODBC used with the MicroStrategy Intelligence Server is not included on the MicroStrategy 7 CD. You should use an NCR Teradata V2R5 Client Software CD, or contact NCR in order to get the certified drivers.

Certified 32-bit ODBC drivers

Certified 32-bit Client and ODBC Drivers for the NCR Teradata V2R5 database – install the 32-bit NCR Teradata Client and ODBC Driver 3.0.0.0.

1. Exit all currently running Windows programs and disable any virus protection software running on the system.
2. Uninstall all previous versions of the Teradata Client for Windows 9x/NT/2000 by clicking the Uninstall icon in your Teradata Program Group or using the Control Panel Add/Remove icon.
3. Insert the distribution CD-ROM into the CD drive, and insert the license diskette into the floppy drive. The main menu should appear.

   If the main menu does not appear, use Windows Explorer to locate the file TUF.EXE on your CD-ROM drive and double-click on it.
4. Click on the Install Product icon.
5. Select the setup language. English and Japanese are the only supported setup languages.
6. Click **Next** in the Welcome dialog.
7. Read the License Agreement. Click **Yes** if you agree to the License Agreement and want to continue with the installation.
8. Select the setup type by highlighting the desired option. Click **Next**. Use the Typical setup to install all licensed products from the CD-ROM.
9. Select the license file (license.txt) and click **Open**.
10. If you are installing from the CD-ROM, then the license file is located on the included floppy diskette, which should be in your diskette drive. (Make sure the correct diskette is in Drive A).
11. Choose a destination folder, click **Next**.
12. Select Program Folder, click **Next**.
13. At the Select Method Install window, click on ODBC. This will install the drivers needed for Teradata.
14. At the Welcome window, click **Next**.
15. Choose the destination folder and click **Next**.
16. Choose Typical install.
17. At the Select Program Folder window, click **Next**.

18 At the Start Copying Files window, click **Next**.

19 The wizard will install the components. Click **Finish**.

20 Restart the computer if it prompts you to do so.

Establish 32-bit ODBC system DSNs

1 From the Start menu, select Settings > Control Panel. Double-click the Administrator Tools. Double click the Data Sources (ODBC)

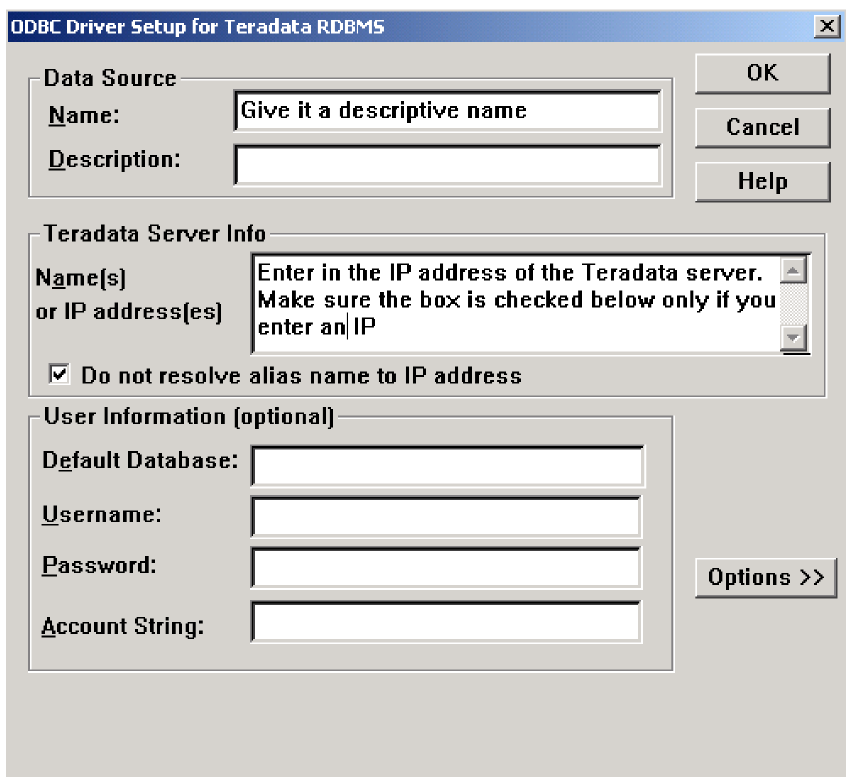
2 Click on the System DSN tab.

3 Click **Add**.

4 Choose the Teradata driver that you installed in the previous steps. Click **Finish**.

5 The setup dialog box is displayed. Enter the parameters for your respective system.

- Enter a descriptive name for the Data Source name.
- Enter the IP address in the Teradata Server Info, select the 'Do not resolve alias name to IP address' check box.

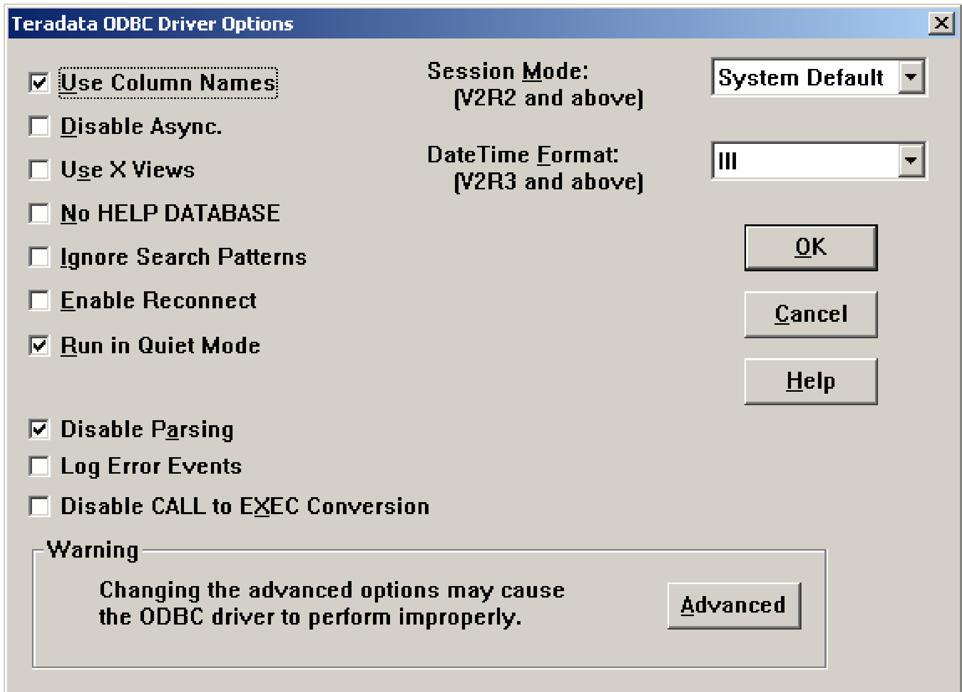


Setup dialog box

Note: ODBC setups may differ based on OS versions as well as database types

6 Select Options, and select the following check boxes:

- Use Column Names
- Run in Quiet Mode
- Disable Parsing



Teradata ODBC Driver Options dialog box

7 Click **OK**.

8 Click **OK** again.

9 Click **OK** to close the ODBC dialog box.

Important: The data warehouse DSN on the Intelligence Server must be consistent with those being used on each client machine, that needs to connect directly to the database. This information is stored in the metadata for the project source, and is therefore defined once, for all users.

Note: The Data Warehouse database needs to be created in order for connectivity to be established.

10 Test ODBC Connection by using Queryman from the Start Menu. Leave everything blank except Username and Password.

Install MicroStrategy Desktop (Administrator)

The MicroStrategy installation CD-ROM includes an easy-to-use installation program, which you must use to install MicroStrategy Desktop and Administrator.

Note: For complete step-by-step installation instructions for MicroStrategy Desktop and Administrator refer to the MicroStrategy 7 Intelligence Server, Web, Architect, Agent and Administrator Installation and Configuration Guide.

Be certain to close all applications before beginning the installation process, including the Microsoft Office Shortcut Bar, and stop all applications running as services. Also, disable any virus protection programs or disk monitoring systems before installation. This is necessary to ensure proper registration of files.

Initiate the following procedures once the database ODBC client has been installed.

Install MicroStrategy Desktop

1. Place the MicroStrategy CD in the CD-ROM drive and wait a few moments for the installation welcome window to appear automatically.
2. If the welcome window does not appear, run setup.exe from CD.
3. Enter the installation key when prompted to do so.
4. Select Typical Install.
5. Select only MicroStrategy Desktop and Administrator.
6. Click **Next**.
7. Restart computer if prompted to do so.

Configuration Wizard

Once the MicroStrategy 7 Desktop is installed, select the Configuration Wizard from the Start/Programs/MicroStrategy 7 menu.

Configure Metadata Repository

There are two possible methods for creating a new metadata repository (MicroStrategy tables). You may either:

1. Import the metadata repository (MicroStrategy tables) from the RDW 10.1 Installation CD, as outlined in the RDW 10.1 Database Installation Guide

   or

2. Use the MicroStrategy Configuration Wizard to create the new repository.

If you choose the second option, follow the steps listed below. Otherwise you may skip to the section titled Install MicroStrategy Intelligence Server on page 13.

Note: The metadata database user and password is required for this step. This user must have privileges to create tables and will own the repository.

When configuring a metadata repository, the Configuration Wizard presents you with these pages:

- Metadata Repository Configuration Tasks
- ODBC Data Source Name for Metadata Repository
- Metadata Repository and Statistics Tables Creation
- Summary

Complete the following steps to configure the metadata repository

1 Click **Next**. De-select the create statistics tables option if you wish to only create the MicroStrategy 7 metadata tables.

2 Select an existing ODBC DSN from the drop-down menu or click **New** to create a new DSN. Enter the metadata database username and password (for example rdw10md).

3 Click **Next** to proceed.

4 Select the correct database version; click **Next** to create metadata tables.

5 Refer to the Set up RDW User Permissions section of the RDW 10.1 Database Installation Guide to establish grants and synonyms for the metadata repository. **This step must be completed before you can continue.**

Set Up MicroStrategy Project Sources

Create a project source that will point to the RDW 10.1 workbenches as follows:

➲ **Navigate:** Launch MicroStrategy Desktop from Start > Programs > MicroStrategy 7 > Desktop.

1 Cancel out of the initial login screen.

2 Select Tools / Project Source Manager from the Desktop menu bar.

3 Click **Add**.

4 For 2-tier, or direct connection:

   a Enter a Project Name (for example RDW 10.1 Data Warehouse – Direct).

   b Select Direct for the connection mode.

   c Enter the ODBC DSN, RDW system username and password for metadata database system user (for example rdw101sys).

   d Click **OK**.

Note: 2-tier connection is only required for project duplication. The RDW Metadata Installation Wizard utilizes the MicroStrategy duplication process, and will require a 2-tier connection.

5 For 3-tier, or server connection: **(This step can be completed after the Intelligence Server installation.)**

   a Enter a Project Name (for example RDW 10.1 Data Warehouse – Server).

   b Select Server for the connection mode.

   c Enter the server machine name where Intelligence Server is running.

   Note: This is the machine name of the server, not the Intelligence Server definition name.

   d Click **OK**.

6. You can now log into the RDW 10.1 project source as the administrator without a password. It is recommended that a password be added to this administrator user as soon as possible.

Install RDW 10.1 Workbenches

The RDW 10.1 installation CD-ROM includes an easy-to-use installation program, which you must use to install the RDW 10.1 Workbenches. An RDW Workbench is synonymous with a MicroStrategy Project and contains all of the metadata objects (reports, metrics, etc.) for the Retek Data Warehouse.

Pre-installation Requirements:

- An existing metadata repository (MicroStrategy tables)
- A local MicroStrategy Desktop installation

You will need:

- A 2-tier (direct) connection project source. The wizard will allow you to create this during installation if one does not already exist.
- A MicroStrategy administrator login id and password for the above project source. The default login ID and password for a new MicroStrategy metadata repository is Administrator, with no password.

The RDW Metadata Installation Wizard can be found on the RDW 10.1 Installation CD in under \Install\rdw10.0\metadata\. Run setup.exe to launch the wizard.

Note: The wizard uses a MicroStrategy utility to copy, or duplicate, the RDW Workbenches. Project duplication is a lengthy process. The MicroStrategy duplication utility will estimate remaining time and periodically update the remaining time depending upon the type and number of objects it is currently processing.

Note: The first time you log into a 3-tier project, you will need to register the projects in order to see them. Refer to the Register RDW 10 Workbench Projects section below.

Important: The initial database instance, which is accessed under Administration, Database Instance Manager, will need to be updated to reflect any changes to either the default rdw10sys username or password.

Important: RDW 10.1 supports either the retail 4-5-4 or 13 period calendar. The default calendar is the retail 4-5-4. For a list of metadata objects that need to be updated in order to implement the 13 period calendar, refer to Appendix A of this document.

Important: In RDW 10.1, the Differentiator Types are hard-coded within the attribute names. Refer to Appendix B for detailed information regarding adding or modifying these attributes.

Install MicroStrategy Intelligence Server

Installation of the MicroStrategy Intelligence server requires network connectivity. For assistance with this step, refer to the Microsoft Server installation documentation. Contact your System Administrator for proper network access.

The MicroStrategy installation CD-ROM includes an easy-to-use installation program, which you must use to install MicroStrategy Intelligence Server.

Note: For complete step-by-step installation instructions for MicroStrategy Intelligence Server, refer to the MicroStrategy 7 Intelligence Server, Web, Architect, Agent and Administrator Installation and Configuration Guide.

Be certain to close all applications before beginning the installation process, including the Microsoft Office Shortcut Bar, and stop all applications running as services. Also, disable any virus protection programs or disk monitoring systems before installation. This is necessary to ensure proper registration of files.

Initiate the following procedures once the database ODBC client has been installed.

Install MicroStrategy Intelligence server

Place the MicroStrategy CD in the CD-ROM drive and wait a few moments for the installation welcome window to appear automatically.

If the welcome window does not appear, run `setup.exe` from the CD.

1. Enter the installation key when prompted to do so.
2. Select the typical install.
3. De-select all options except MicroStrategy Intelligence Server.
4. Click **Next.**
5. Restart the computer if prompted to do so.

Configuration Wizard

Once the MicroStrategy 7 Intelligence Server is installed, select the Configuration Wizard from the Start/Programs/MicroStrategy 7 menu on the Intelligence Server machine.

Configure MicroStrategy Intelligence Server Definitions

When configuring a MicroStrategy Intelligence Server Definition, the Configuration Wizard presents you with these pages.

- Connect to Metadata Repository
- User Authentication
- Create, Link, or Delete a Server Definition
- Summary

Complete the following steps to configure the MicroStrategy Intelligence Server Definitions.

1 Select MicroStrategy Intelligence Server Definitions. Click **Next**.

2 Select an existing ODBC DSN from the drop-down menu or click **New** to create a new DSN. Enter the RDW system username and password (for example rdw101sys).

3 Enter the MicroStrategy username and password that you will use to connect to the Metadata Repository. If this is the first time you are connecting to the MicroStrategy Intelligence Server, use the name “Administrator” with no password. It is recommended that you change this password later for security reasons.

Note: For complete instructions on setting up individual user accounts, refer to the User Manager section in the MicroStrategy 7 Administrator, Intelligence Server, and Web Administrator Guide.

4 Enter a Server Definition Name and select Create New Server Definition.

5 Click **Finish**.

Configure MicroStrategy Project Sources (optional)

Note: It may be useful to create project sources on the Intelligence Server machine in order to work with them directly. This is optional; the project sources can also be created in the Installing MicroStrategy Desktop (Administrator) and Installing MicroStrategy Desktop (User) sections below.

When configuring a project source, the Configuration Wizard presents you with these pages:

- Desktop Project Source Name and Connection Type
- MicroStrategy Intelligence Server Location
- Setup Project Source Security
- Summary

Complete the following steps to configure MicroStrategy project sources.

1 Select Project Sources. Click **Next**.

2 Enter a name for the Project Source. Select MicroStrategy Intelligence Server. Click **Next**.

3 Select the MicroStrategy Intelligence Server Machine Name from the drop-down box. Use the default Port number. Click **Next**.

4 Select the Standard Authentication (default). Click **Next.**

5 Click **Finish.**

6 Click **Exit** to close the Configuration Wizard.

Register RDW 10.1 Workbench Projects (3-tier connections only)

Once the RDW 10.1 Workbenches projects have been installed, they must be registered for the project source. Until the projects are registered, they may not be accessible.

Register the RDW 10.1 Workbenches Projects

➲ **Navigate:** Launch MicroStrategy Desktop from Start > Programs > MicroStrategy 7 > Desktop.

1 Log into the project source that contains the RDW 10.1 Workbenches as the Administrator, or a user with administrator privileges.

Note: For complete instructions on setting up individual user accounts, refer to the User Manager section in the MicroStrategy 7 Administrator, Intelligence Server, and Web Administrator Guide.

2 Verify that the project source is selected and choose Administration > Projects > Register projects… from the Desktop menu bar.

3 Select each of the RDW 10.1 Workbenches.

4 Click **OK**. (This may take a few minutes.)

5 You may need to restart your Intelligence Server in order for the registration to take effect.

Install MicroStrategy Desktop (User)

The MicroStrategy installation CD-ROM includes an easy-to-use installation program, which you must use to install MicroStrategy Desktop.

Note: For complete step-by-step installation instructions for MicroStrategy Desktop, refer to the MicroStrategy 7 Intelligence Server, Web, Architect, Agent and Administrator Installation and Configuration Guide.

Be certain to close all applications before beginning the installation process, including the Microsoft Office Shortcut Bar, and stop all applications running as services. Also, disable any virus protection programs or disk monitoring systems before installation. This is necessary to ensure proper registration of files.

The following procedures are necessary for application operation and database connectivity, and can be undertaken in the following order.

Note: Non-administrator MicroStrategy Desktop users will be connecting 3-tier or server connection and will not need to install the database client software

Install MicroStrategy Desktop

1. Place the MicroStrategy CD in the CD-ROM drive and wait a few moments for the installation welcome window to appear automatically.
2. If the welcome window does not appear, run setup.exe from the CD.
3. Enter the installation key when prompted to do so.
4. Select Typical Install.
5. Select only MicroStrategy Desktop.
6. Click **Next**.
7. Restart computer if you are prompted to do so.

Set up MicroStrategy Project Sources

Create a project source that will point to the RDW 10.1 workbenches as follows:

1. Ensure the project administrator has established a your user account.

   Note: For complete instructions on setting up individual user accounts, refer to the User Manager section in the MicroStrategy Administrator guide.

2. Launch Desktop from Start/Programs/MicroStrategy 7/Desktop menu.
3. Select Tools / Project Source Manager from the Desktop menu bar.
4. Click **Add**.
5. Enter a Project Name (for example RDW 10.1 Data Warehouse)
6. Select Server for the connection mode.
7. Enter the server machine name where Intelligence Server is running.

   Note: This is the machine name of the server, not the Intelligence Server definition name.

8. Click **OK**.

RDW Users, User Groups, and Security Roles

Users and user groups are pre-defined for you, with the following default privileges. These privileges are applied to all projects within a project source. These users are managed through the User Manager.

Security roles are applied to each project individually, and are managed as part of the Project Configuration.

Note: For complete step-by-step instructions for creating user accounts or security roles, refer to the User Manager section in the MicroStrategy Administrator Guide.

Users

Administrator – This is the project administrator for both MicroStrategy Desktop and RDW Web. This user bypasses all object level security.

User groups

Note: Each user account will be able to drill, sort, pivot, and change view mode in Desktop.

Retek Report Viewer – This user group has privileges to search, change user preferences, print, and run reports in both RDW web and MicroStrategy Desktop.

Retek Web Reporter – This user group inherits the Report Viewer privileges and can sort, change view mode, drill and view history in RDW web.

Retek Web Analyst – This user group inherits the Web Reporter privileges and can create new reports and delete objects in RDW web.

Retek Desktop Reporter – This user group inherits the Web Analyst privileges and a can create, save, and modify report objects, such as reports, templates, filters, and metrics, within their own profile.

System Monitors – While this group does not have any project level inherited privileges, all users in this group will have view privileges to the administration folders. These folders monitor the warehouse, connections, users, and cache settings within the repository.

System Administrator – This group inherits all of the privileges of the project administrator. Only the Administrator and Web Administrator should be part of this group.

Security roles

Administrator – This security role gives administrator privileges to a user or user group, for a given project.

Architect – This security role gives privileges to create and modify schema level objects to a user or user group, for a given project.

Power User – This security role gives privileges to create and modify public level objects, to a user or user group, for a given project.

Normal User – This security role has only the privileges defined in the user or user group. All users are defaulted to normal user unless otherwise specified.

Appendix A – Time

Time calendar (4-5-4)

RDW provides support for the retail 4-5-4 calendar. The fiscal 4-5-4 calendar is the calendar supported by RMS and other Retek applications, and is populated in RDW via an Extract from RMS. The 4-5-4 calendar is the default calendar used when viewing the time dimension via the MicroStrategy middle tier layer of RDW.

Time calendar (13 period)

The 13-Period calendar is new to this GA product and is not supported by RMS. If a client chooses to use the 13-Period calendar as opposed to the 4-5-4 calendar, the client can either provide a flat file with their 13-period time, or utilize a sample 13-period time flat file, and then ETL scripts will populate the time dimension with this file during RDW installation. Within the middle-tier application, all references to Month will need to be manually updated to Period, to comply with the 13 period nomenclature.

Note: In order to update RDW to report in 13 period time:

1 Update the time dimension tables. (For complete instructions, reference the RDW 10.1 Database Installation Guide.)

2 Within the metadata, delete the attribute Half Year, and re-name the objects referencing month.

3 Highlighting the object and pressing the delete key delete the attribute Half Year. All relationships and hierarchies are automatically updated. The table TIME_HALF_DM can also be deleted the same way. A full schema update is required after this step, which can be done from the Schema drop down menu. Only a user with administrator privileges will be able to remove attributes and perform a schema update.

4 Each metadata object can be re-named by selecting the object and pressing F2. A full schema update is required after any changes to objects within the Schema Objects folder. Only a user with administrator privileges will be able to re-name these objects and perform a schema update.

The following is a list of objects that would be re-named for 13 period time.

Object Name	Object Type
Market Measures (Last Month)	Folder
Sales (Last Month)	Folder
Month	Attribute
Last Month	Attribute
No of Months	Base Formula
Month	Expression Prompt

Object Name	Object Type
Last Month	Filter
This Month	Filter
This Month’s Days	Filter
Monthly Performance Trend (A)	Report
Cashier Monthly Performance (A)	Report
Salesperson Monthly Performance (A)	Report
Weekly Sales to Date (Loc, Month, Week) (A)	Report
Monthly Performance Trend (A)	Template
Cashier Monthly Performance (A)	Template
Salesperson Monthly Performance (A)	Template
Weekly Sales to Date (Loc, Month, Week) (A)	Template
Year, Month, Week, Day	Hierarchy
Year, Month	Hierarchy
Year, Month, Week	Hierarchy
Year, Season, Month, Week, Day	Hierarchy
% Change Sales Value vs Last Month	Metric
Sales Value (Last Month)	Metric
% Change Sales Units vs Last Month	Metric
% Change No of Sales Transactions vs Last Month	Metric
Avg Frequency per Month	Metric
Sales Units (Last Month)	Metric
No of Sales Transactions (Last Month	Metric
% of Days Out of Stock to Month	Metric
No of Months	Metric
% Change in Dead Net Cost vs Last Month	Metric
% Change in Net Cost vs Last Month	Metric
% Change Base Cost vs Last Month	Metric
% Change Market Sales Value vs Last Month	Metric
Variance No of Sales Transactions vs Last Month	Metric
% Change in Net Net Cost vs Last Month	Metric
Variance Sales Units vs Last Month	Metric
Variance Sales Value vs Last Month	Metric

Object Name	Object Type
Difference in Net Net Cost vs Last Month	Metric
Market Sales Units (Last Month)	Metric
Dead Net Cost (Last Month)	Metric
Market Sales Value (Last Month)	Metric
Market Sales Value (Month)	Metric
Difference in Net Cost vs Last Month	Metric
Difference in Base Cost vs Last Month	Metric
Difference in Dead Net Cost vs Last Month	Metric
No of Days (Month)	Metric
Net Cost (Last Month)	Metric
Avg Profit per Month	Metric
Net Net Cost (Last Month)	Metric
Base Cost (Last Month)	Metric
Avg Sales Value per Month	Metric
Month to Date	Transformation
Last Month	Transformation

Appendix B – Item differentiators

Diff Attributes

As part of the RDW install, the first five Diff Types are hard-coded, in both the DIFF_TYPE_DM look-up table and in the names of the attributes that point to them. This matches the initial set of pre-defined Diff Types that are provide within the Retek Merchandising System. This will leave the remaining Diff Types, and their corresponding attributes to be defined at the client's discretion at a later date.

The following is a list of differentiators.

DIFF_TYPE_KEY	Attribute Name
1	Size
2	Color
3	Flavor
4	Scent
5	Pattern
6	Diff 6
7	Diff 7
8	Diff 8
9	Diff 9
10	Diff 10
11	Diff 11
12	Diff 12
13	Diff 13
14	Diff 14
15	Diff 15
16	Diff 16
17	Diff 17
18	Diff 18
19	Diff 19
20	Diff 20
21	Diff 21
22	Diff 22
23	Diff 23

DIFF_TYPE_KEY	Attribute Name
24	Diff 24
25	Diff 25
26	Diff 26
27	Diff 27
28	Diff 28
29	Diff 29
30	Diff 30

With each additional Diff Type that is added to the merchandising system, the attribute name, within RDW, can be updated to more suitably match the name of the new Diff Type. This is done by completing the following steps.

Attribute Name Update:

1 Open the Schema Objects/Attributes/Differentiators folder.

2 Select the desired attribute. The first time, this will be Diff 6.

3 Press F2, and type over the existing name with the new one.

4 Once completed, perform Update Schema from the Schema drop-down menu to update the project.

Modifying Diff Types

Functionality exists within the merchandising system to modify existing diff types. This can be done by either changing description of the diff type (for example, change the diff type “Size” to “Fashion Size”) or deleting the diff type altogether.

Note: All of the possible 30 diff types have already been defined as attributes with RDW, regardless of whether they exist yet in the merchandising system. These attributes are generically named with the number corresponding to the DIFF_TYPE_KEY, as annotated in the table above.

When the description is changed within the merchandising system, the batch process will update the description column within the PROD_DIFF_TYPE_DM table to match this new description. The attribute name within the MicroStrategy project will need to be updated manually by completing the attribute name update steps above.

When deleting a diff type within the merchandising system, the batch process will update the description column within the PROD_DIFF_TYPE_DM table to ‘NULL’. The attribute name within the MicroStrategy project will need to be updated manually to the generic name corresponding to the DIFF_TYPE_KEY, by completing the attribute name update steps above. (Example, if Color was deleted, update the name of the Color attribute to DIFF 2.)