bi4dynamics
Transforming your data into knowledge

BI4Dynamics AX Installation Manual

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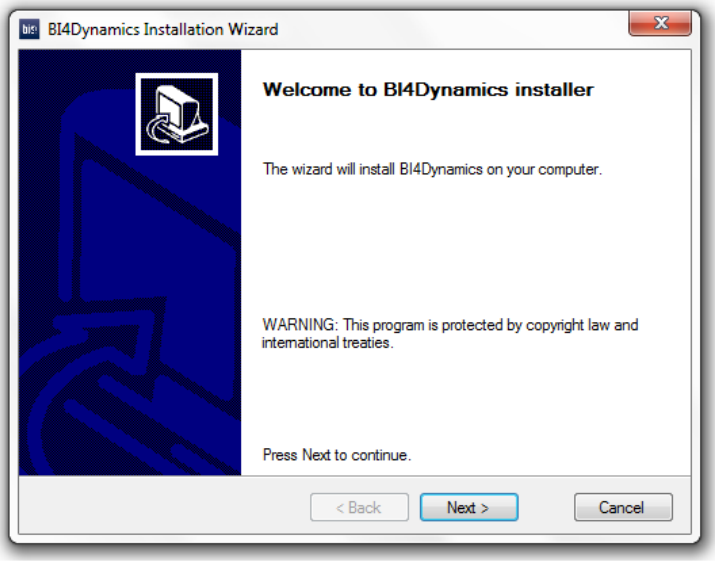
1. INSTALL BI4DYNAMICS

To create an AX instance inside BI4Dynamics, you must have BI4Dynamics AX installed. To do so, please follow the following steps.

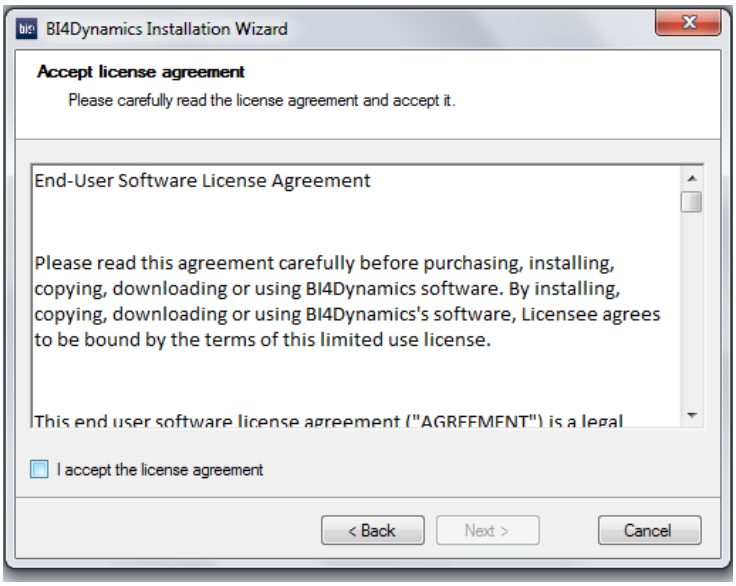
Important: BI4Dynamics must be installed on the server where the instance will be deployed.

1. Double click BI4DynamicsAX.exe to start the installation
   Note: the name of the file varies on the version your using.

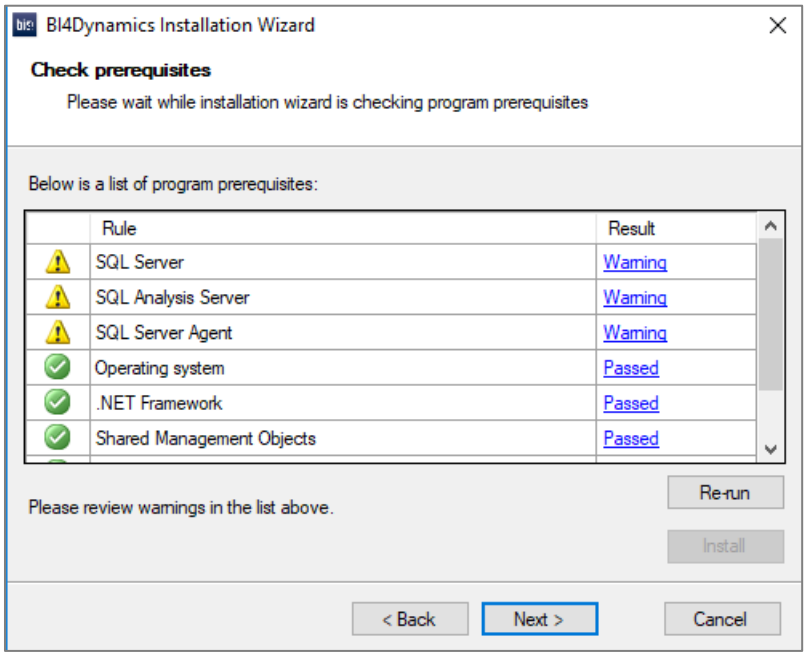
2. Follow the instructions on the screen.



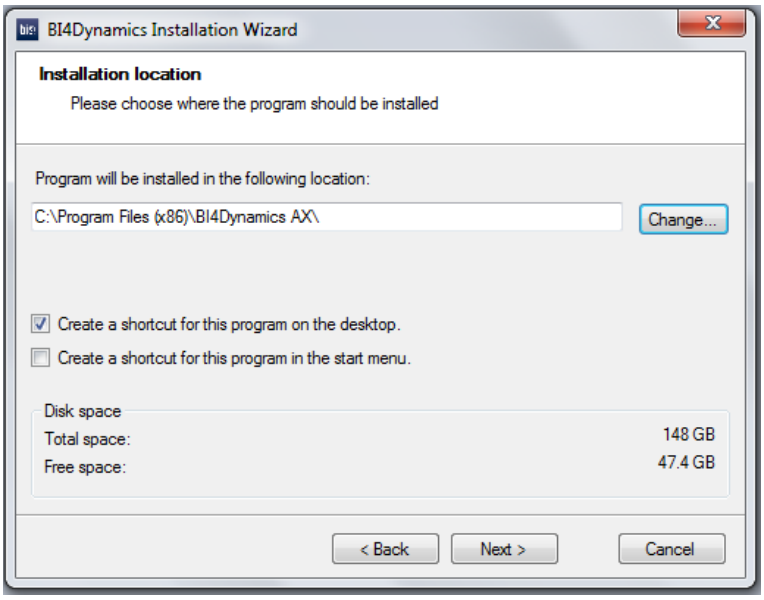
3. Accept the license agreement



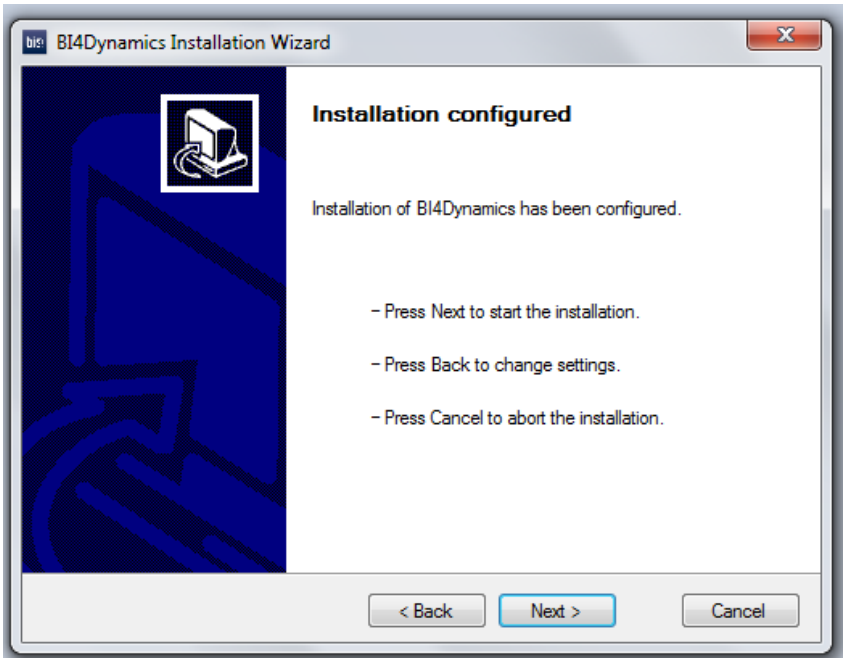
4. The installer will check for some of the prerequisites. If any of the tests fail you can click on the result to see the error. When one of the Management Objects is not installed, you should click the Install button to install those. You have to fix the problem before you rerun the test. Once all the tests are successfully completed you can continue with the installation.



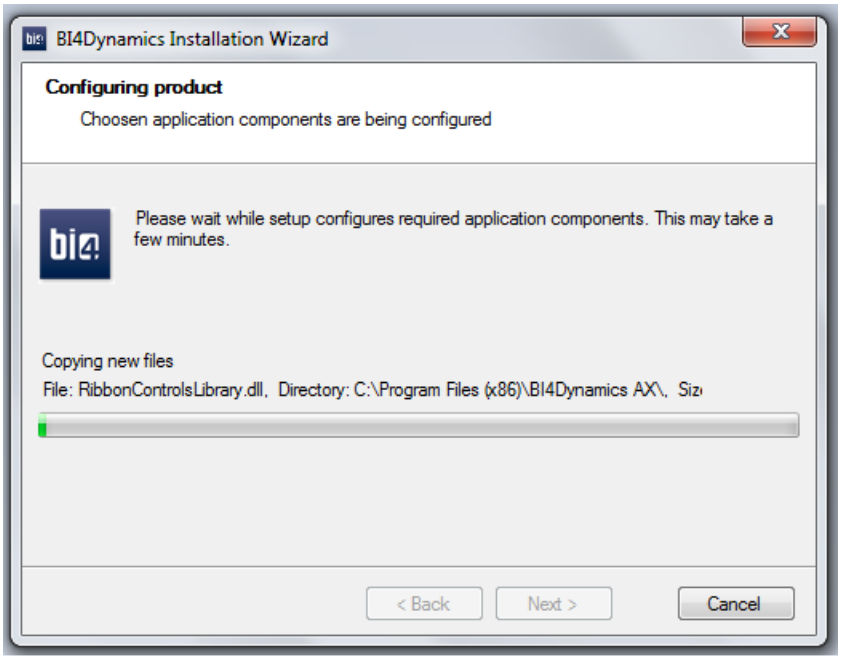
5. Select the folder where you would like to install BI4Dynamics. You can choose to create a shortcut on the desktop or in the start menu.



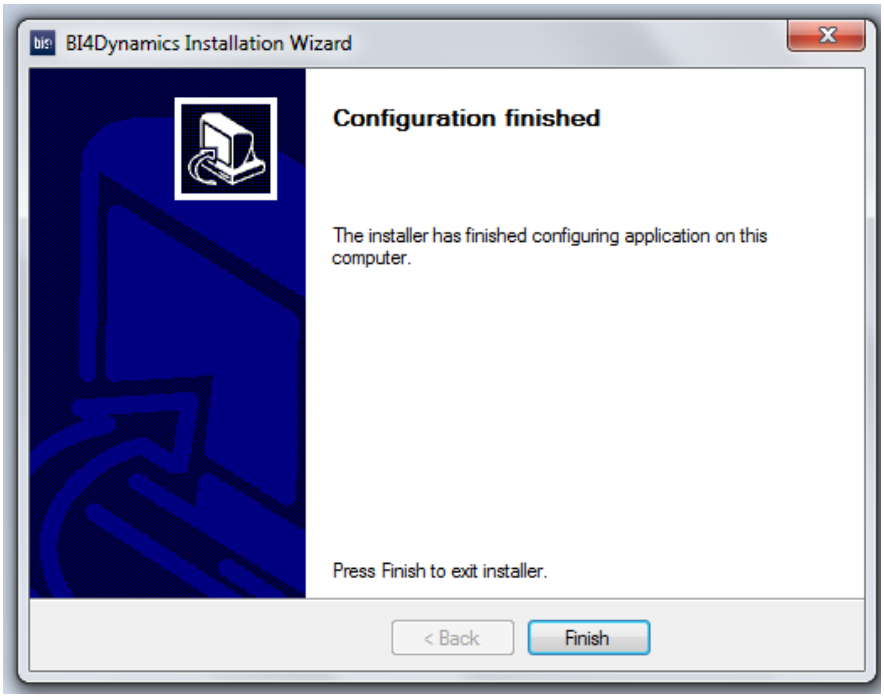
6. Confirm the configuration and begin the installation of BI4Dynamics.



7. Wait until the installation is completed.



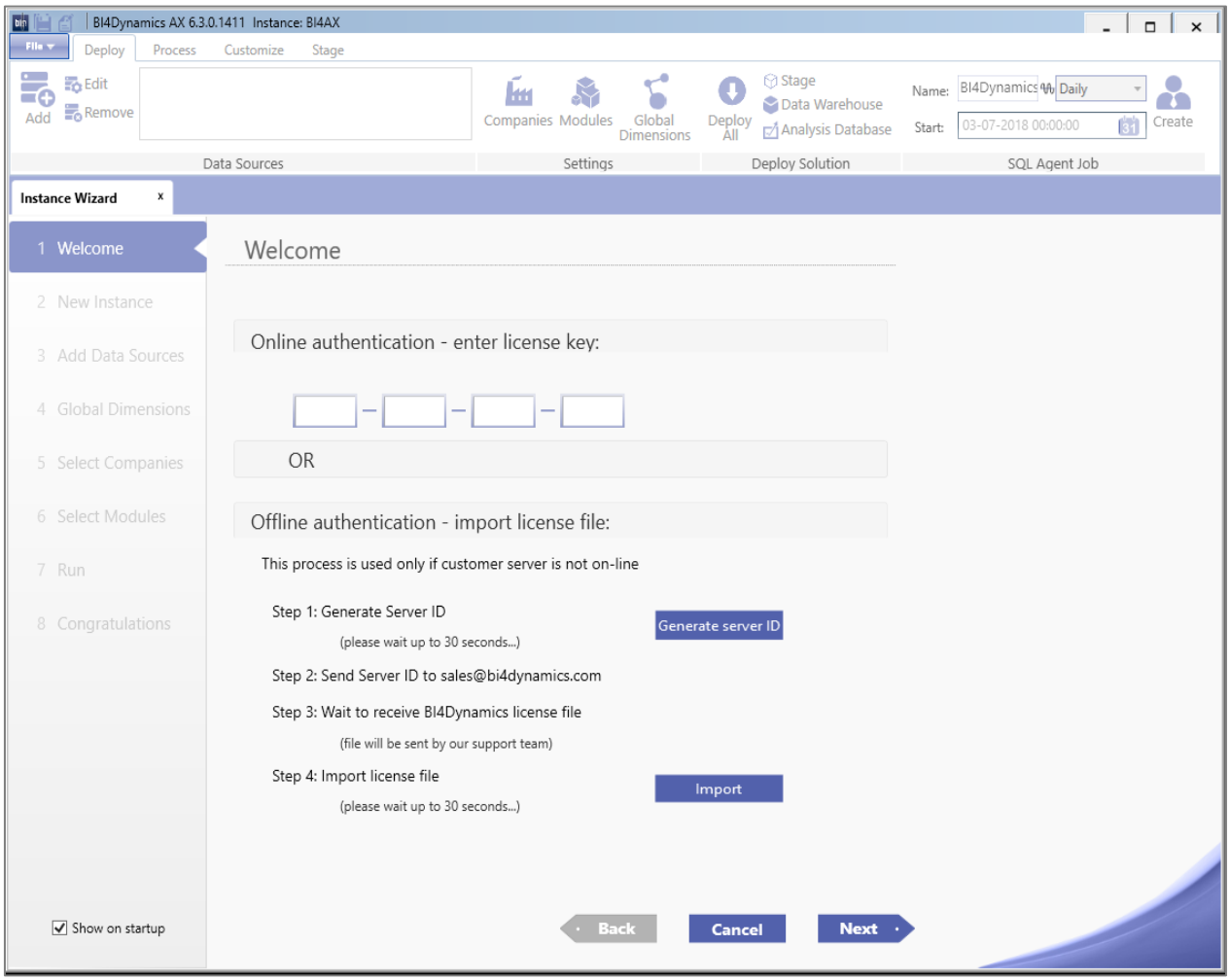
8. Click finish after the installation is completed.



2. CREATE A NEW INSTANCE IN BI4DYNAMICS

IMPORTANT: BI4Dynamics team can help you with this process. If you need any help, please contact your local BI4Dynamics partner or BI4Dynamics support team at support@bi4dynamics.com.

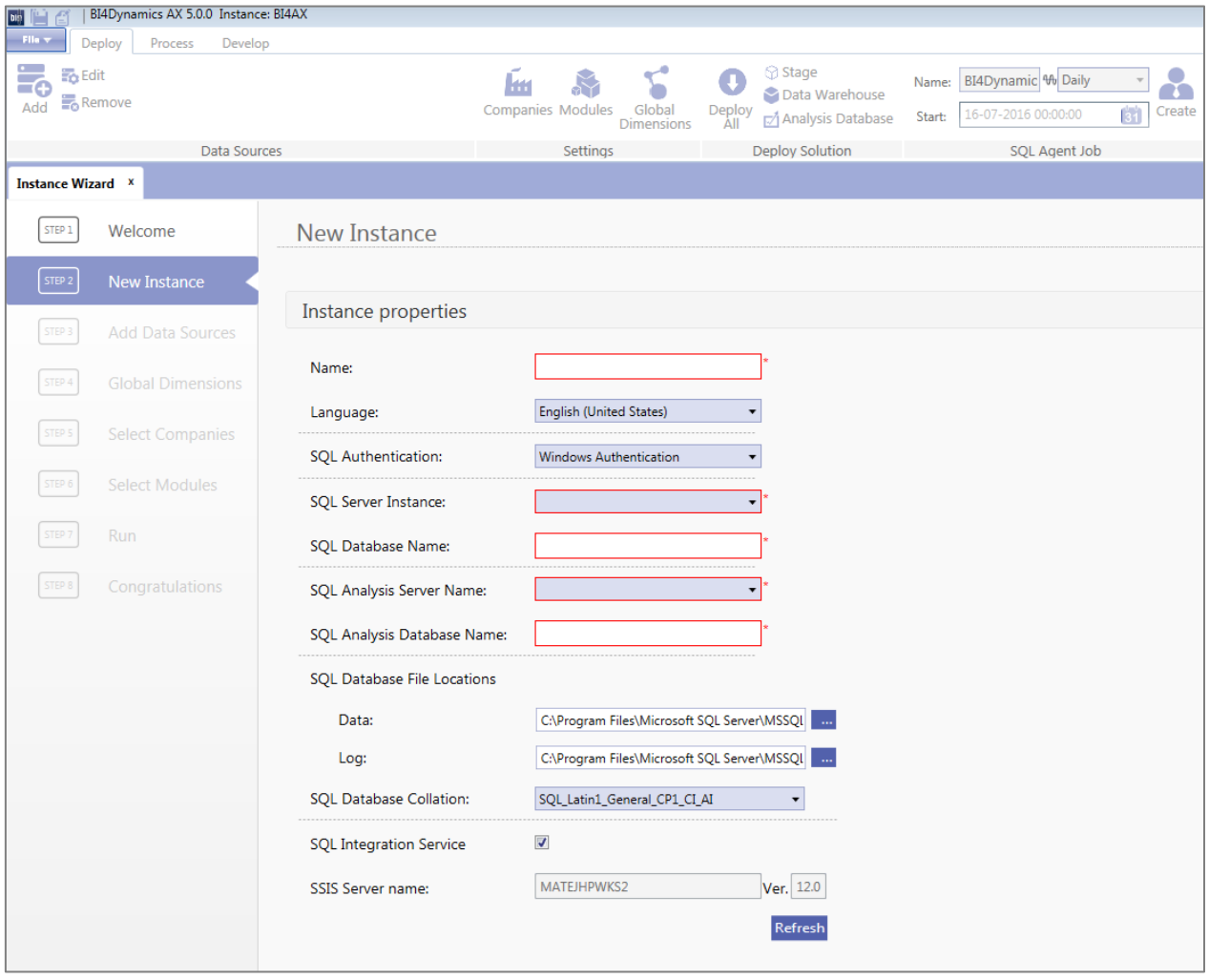
1. Click the Start button. Then type BI4Dynamics > BI4Dynamics AX
   Note: BI4Dynamics should always run as an administrator.
2. The Instance Wizard helps you create the instance. Please follow the instructions.
   Note: If the Instance Wizard doesn't automatically start go to File > New to start the Instance Wizard.



Step 1: Enter License

1. First you need to enter your License Key. The available modules, the amount of data sources you can add and the amount of companies you can analyze will depend on the license key you will enter. The License Key is not case sensitive.
2. For BI4Dynamics to be able to validate the License Key an internet connection is needed. (Port 80)
3. If the License Key is not accepted and you are certain that you wrote it correctly, please contact your supplier.
   Note: You can also import the Key when you press the Import button.

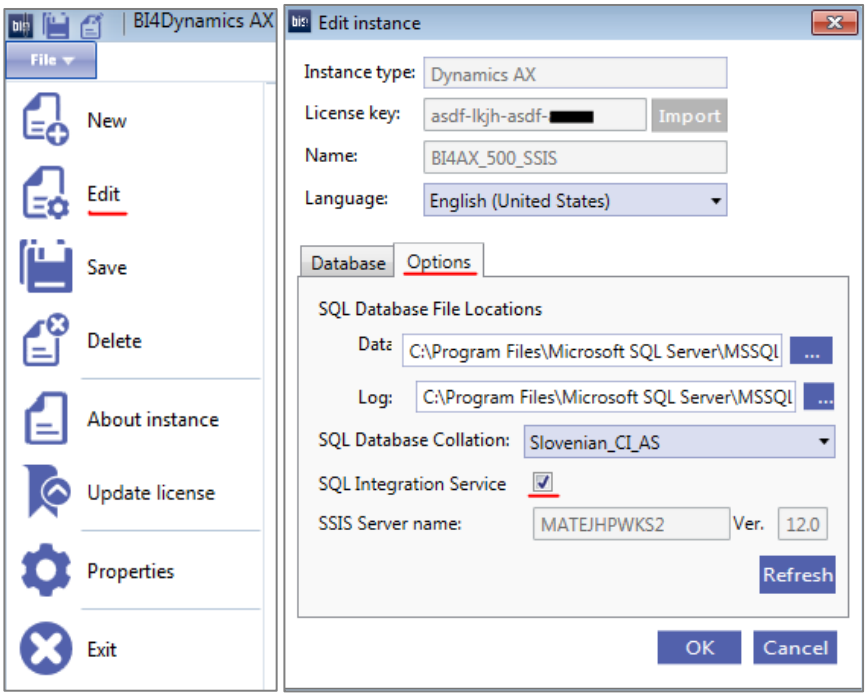
Step 2: New Instance



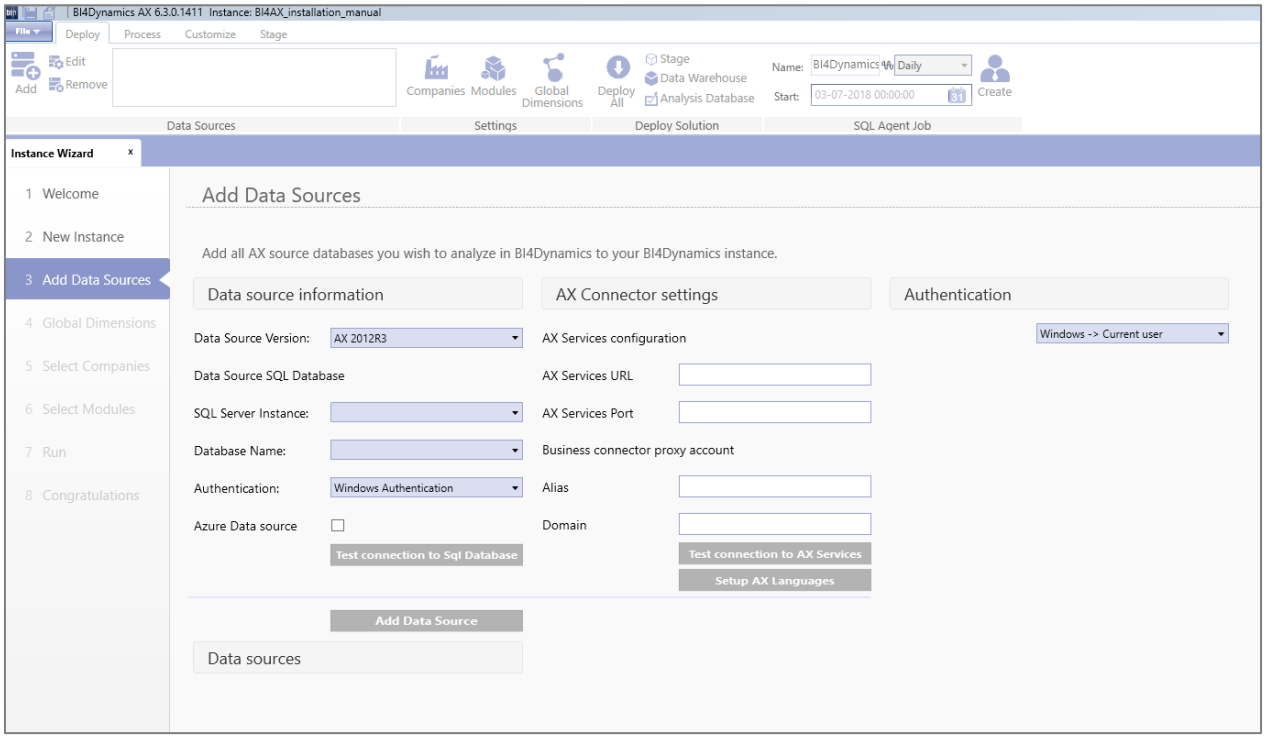
1. Type the Name of the Instance.
   Note: Use only alphanumeric characters and underscores
2. Select the Language in which the solution will be deployed.
3. Select the SQL Server Instance where you want the BI4Dynamics Data Warehouse to be deployed.
4. Type in the Database Name of the BI4Dynamics Data Warehouse you would like to deploy
   Note: Use the same name as the instance, regarding the same rules.
5. Select the type of Authentication you would like to use: Windows or SQL Server (If you choose SQL Server you need to provide a user name and a password).
6. Select the Analysis Server where you want the BI4Dynamics OLAP cubes to be deployed.
7. Type in the Analysis Database Name you want to use for the BI4Dynamics OLAP cubes.
   Note: We advise you use the same name as the Database name
8. Select the SQL Database Collation of the BI4Dynamics Data Warehouse.
9. Option to process Data Warehouse using SQL Server Integration Services.

User interface should automatically detect SSIS Server name and version

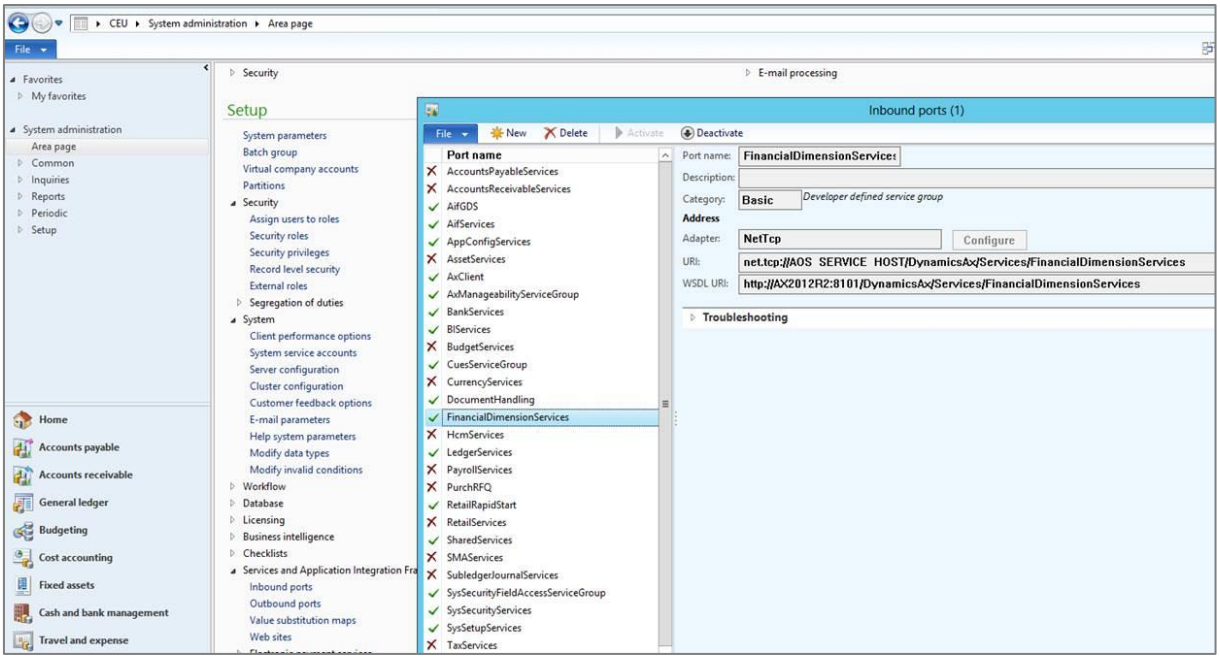
Processing with SQL Server Integration services can always be turned on/off by editing the property in the instance menu (File → Edit → Options)


BI4Dynamics AX
File
New
Edit
Save
Delete
About instance
Update license
Properties
Exit
Edit instance
Instance type:
Dynamics AX
License key:
asdf-lkjh-asdf-
Import
Name:
BI4AX_500_SSIS
Language:
English (United States)
Database
Options
SQL Database File Locations
Data:
C:\Program Files\Microsoft SQL Server\MSSQL
Log:
C:\Program Files\Microsoft SQL Server\MSSQL
SQL Database Collation:
Slovenian_CI_AS
SQL Integration Service
SSIS Server name:
MATEJHPWKS2
Ver.
12.0
Refresh
OK
Cancel

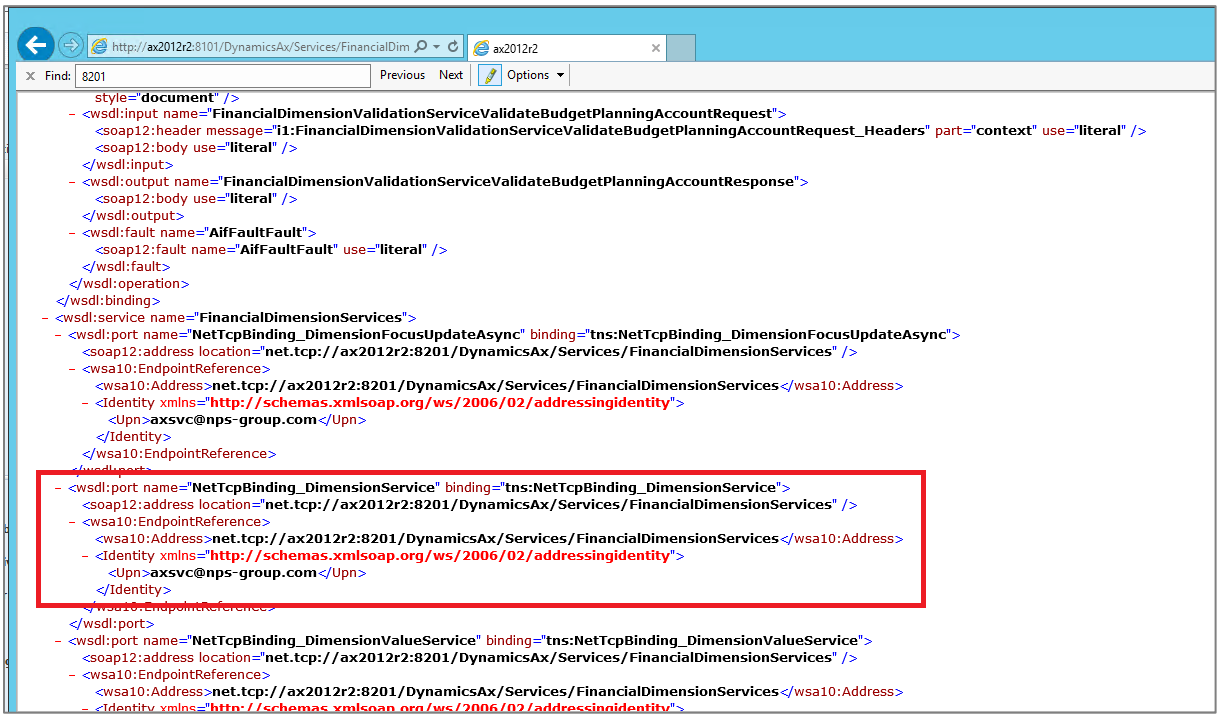
Step 3: Add Data Sources



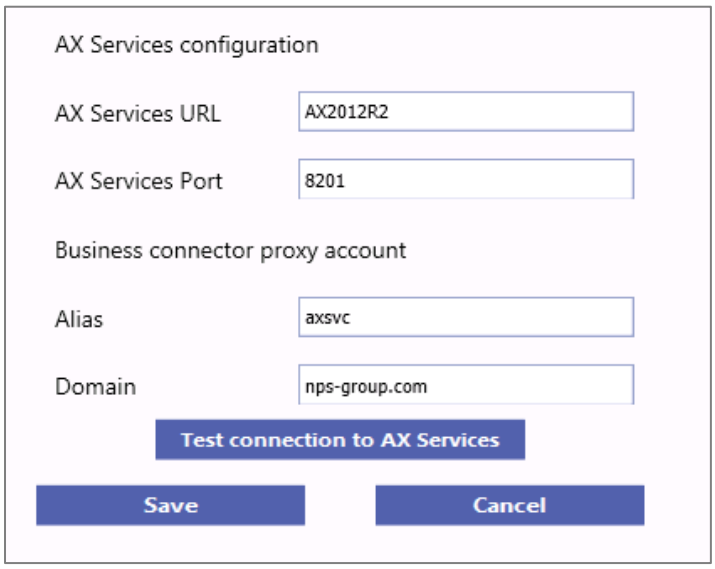
1. Select the Data Source Version of the AX database.
2. Select the SQL Server Instance, where the AX database is located.
3. Select the Database Name of the AX database.
4. Choose Authentication type: Windows or SQL Server (with SQL server authentication you also need to provide your user name and password).
5. Check Azure Data Source if you are using Azure (hosted service)
6. Test the connection to the SQL database. If the connection is not successful you need to change your settings.
7. If your Data Source Version is AX2012 or higher you could connect to AX services and/or Business Connector.



8. Open Microsoft Dynamics AX.
9. Enable (Activate button) the financial dimensions services service and copy the WSDL URL
10. Use the WSDL URL in your browser.

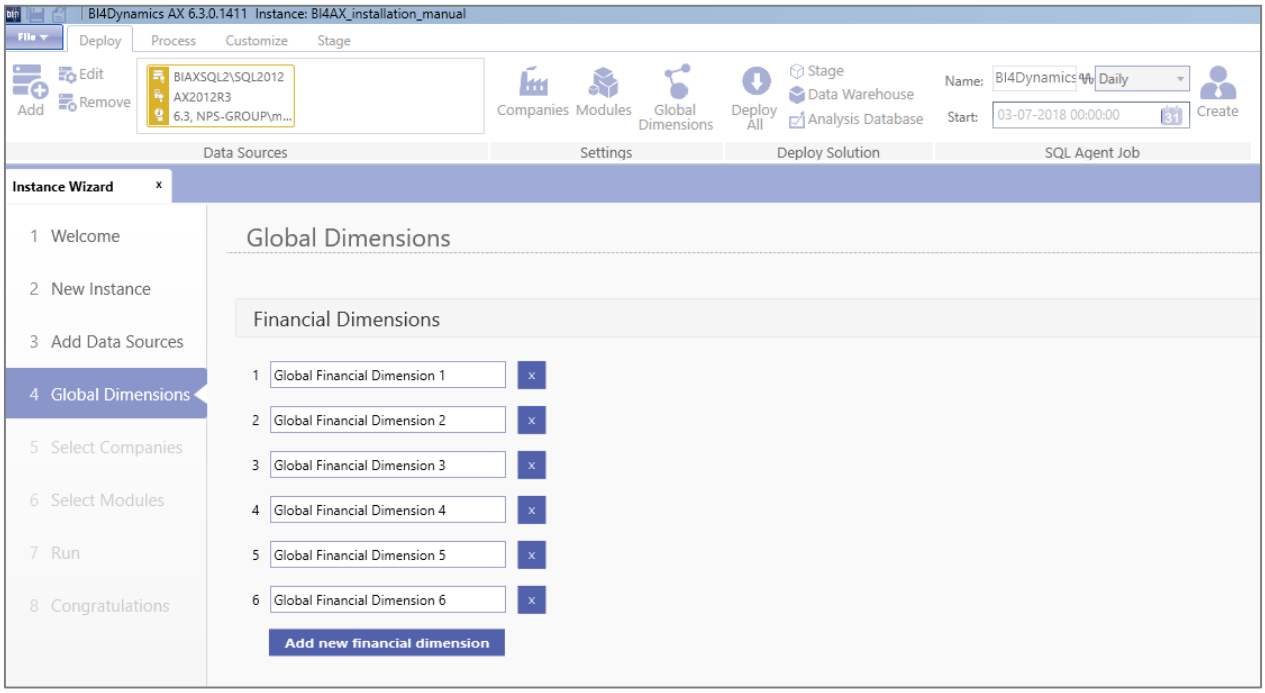


11. Extract the port number and (in address location) and Business Connector account (upn) from the WSD in your browser.



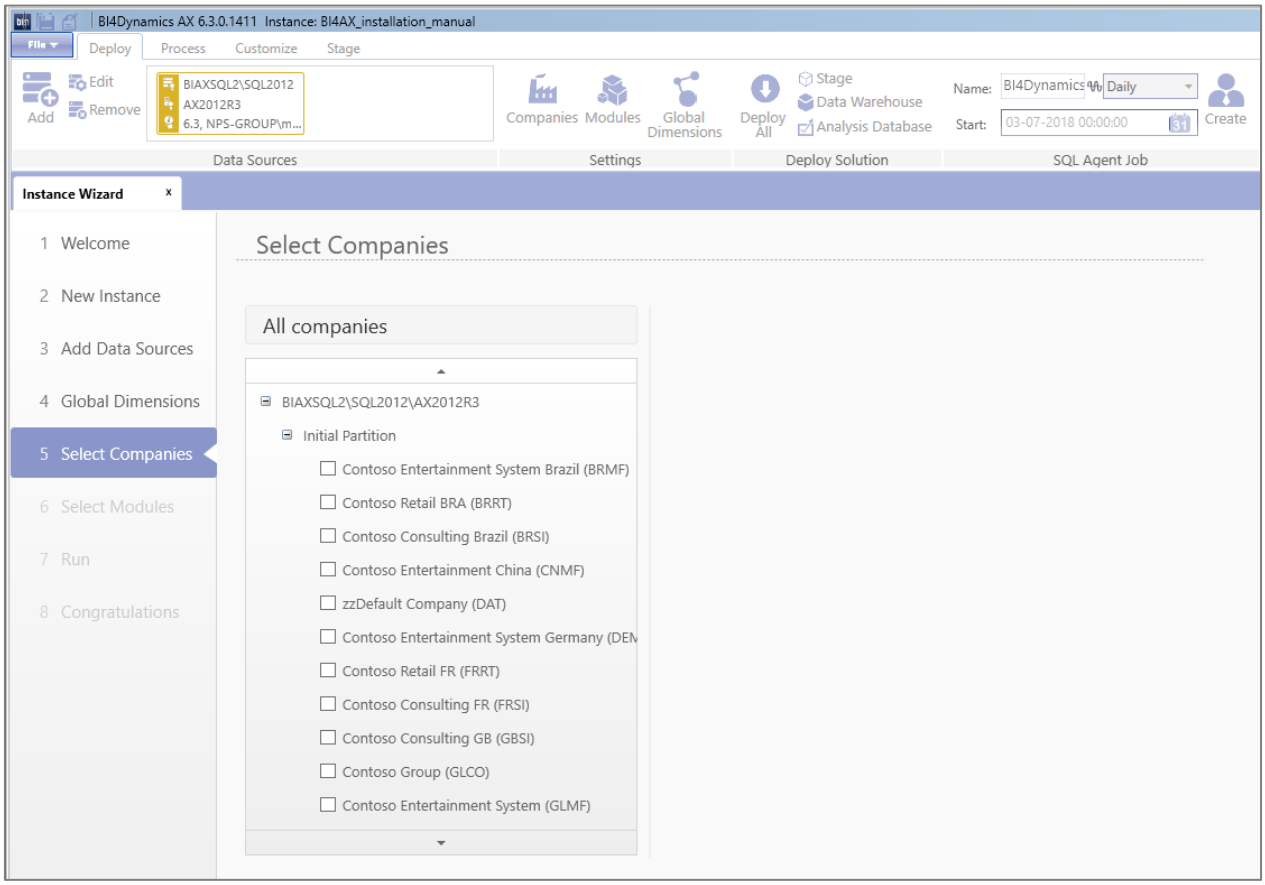
12. Fill in the setting in the settings of the DataSource in BI4Dynamics
13. When finished press the Add Data Source button.

Step 4: Global dimension

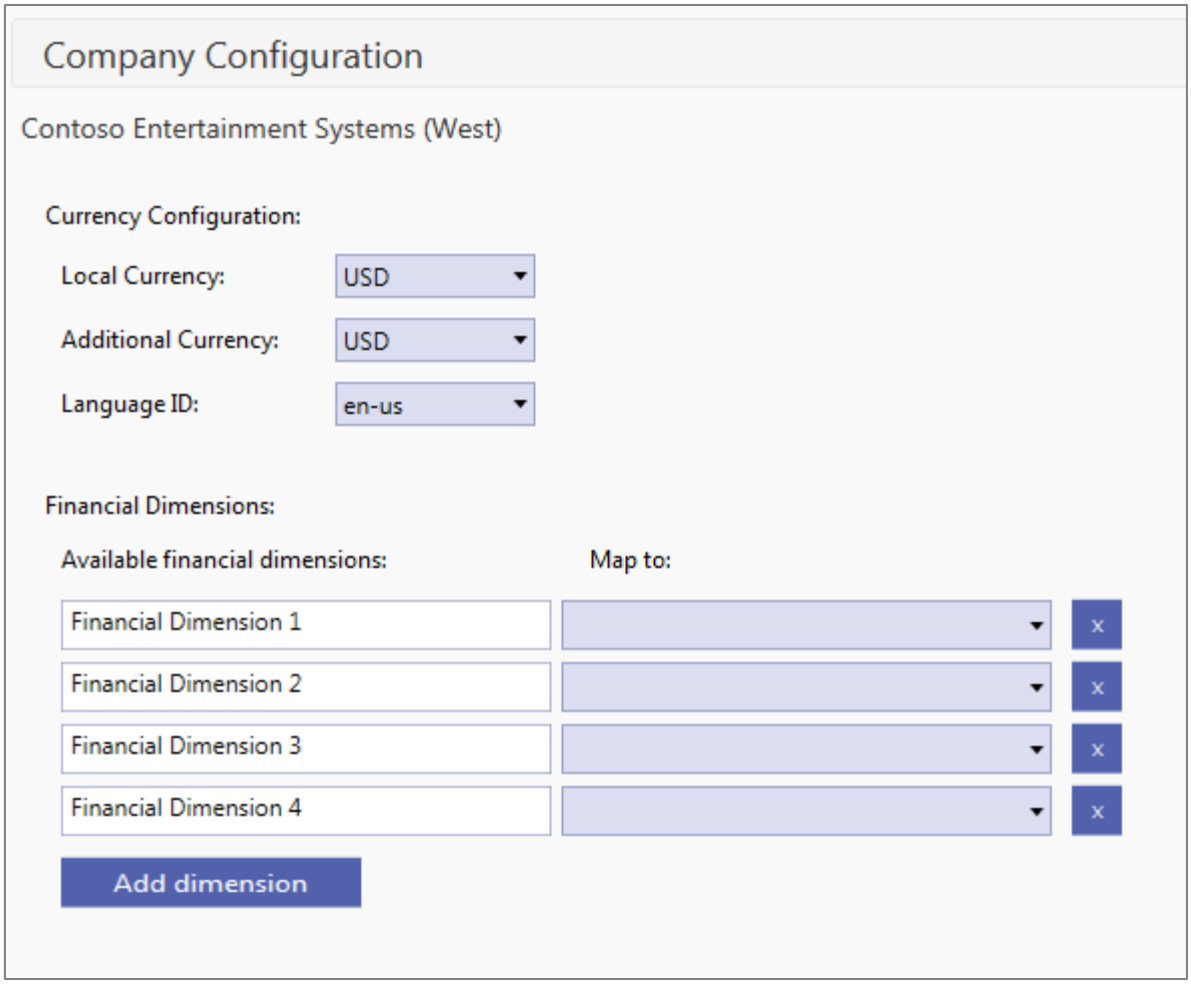


1. You can change the Name of the Global Financial Dimensions. The name you choose will be the name of the dimension in the Database and in the OLAP Cubes.
2. You can add additional Dimensions.
3. You can delete Dimensions which are not needed.

Step 5: Select Companies

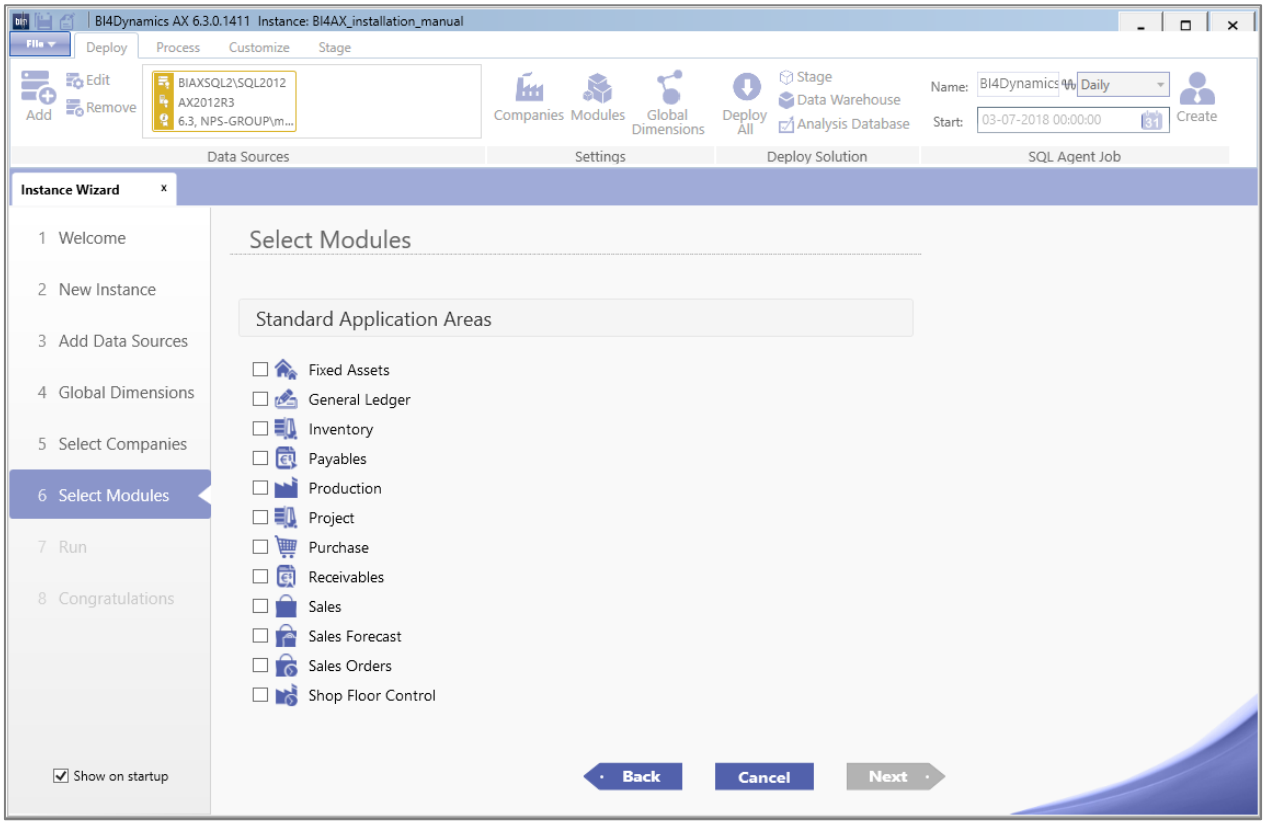


1. From the list of companies, select the ones you want to include in your instance.
2. Then you need to configure the settings for each selected company.



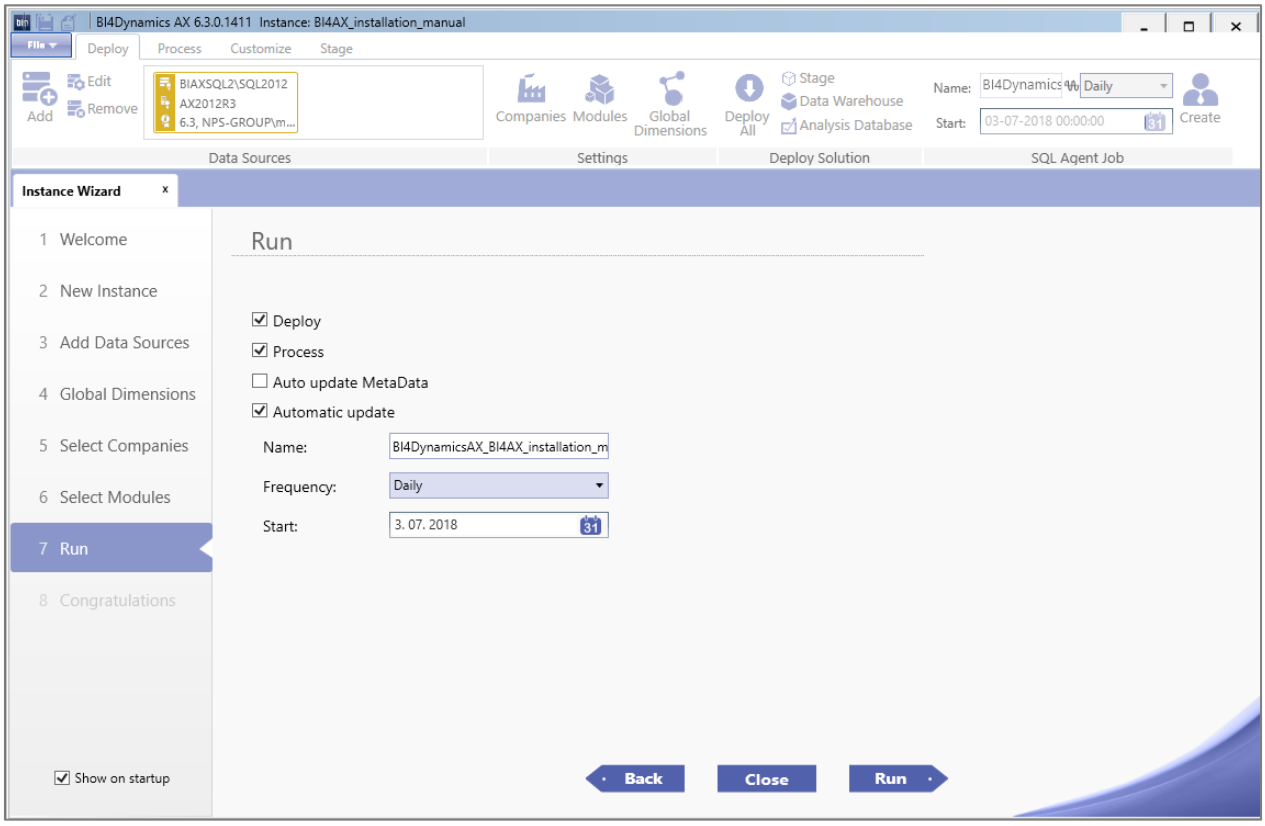
3. Select the Local Currency. This is the currency that is used by the selected company.
4. Select the Additional Currency. This is the currency that is selected by the customer / user.
5. Language ID which translates description of the item in dim.Item table
6. Connect the Financial Dimension of the selected Company to a Global Financial Dimension that is defined by us.
7. You could add an additional dimension or remove one. This will not influence the defined Global Dimensions or the Dimensions in the Source Database. If you add additional Dimensions to the Global Dimensions already defined in the previous step these cannot be linked and will be useless.

Step 6: Select Modules



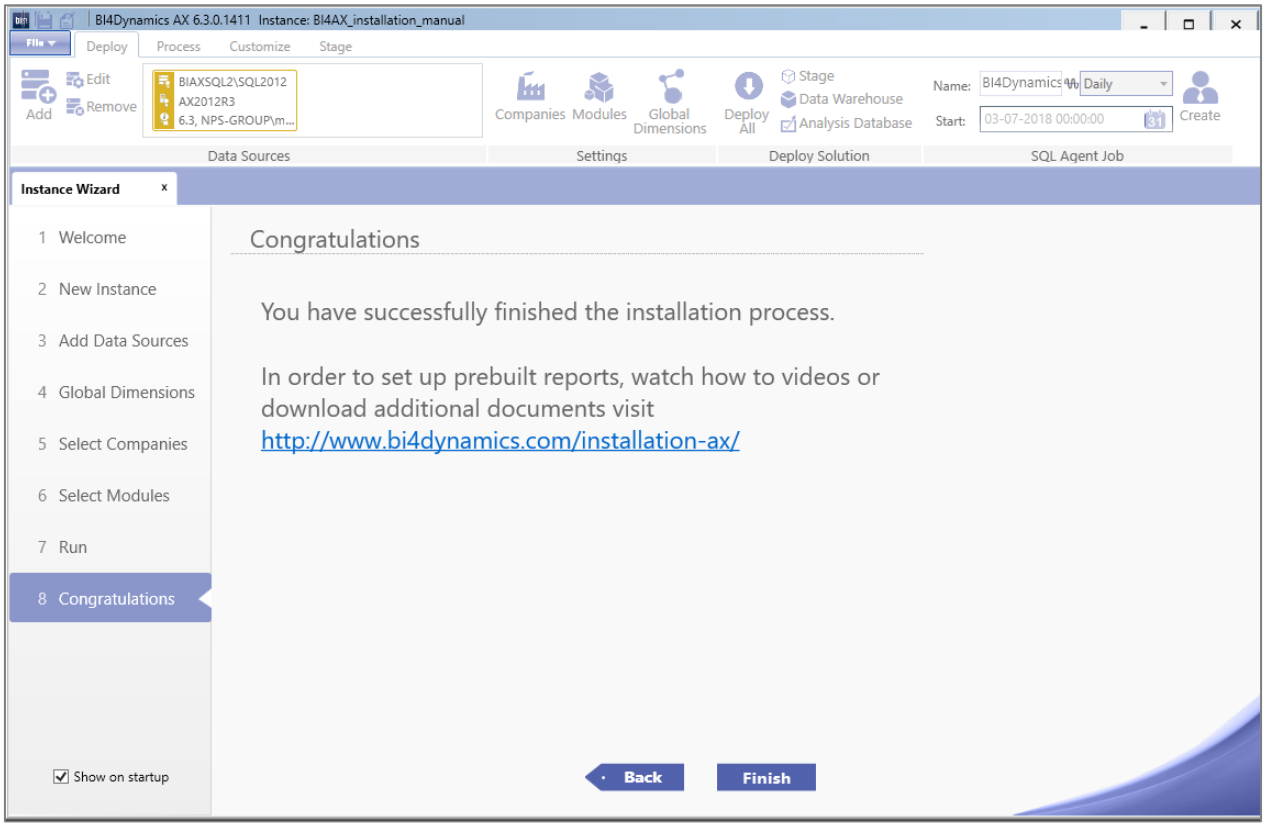
1. Select the modules you want to install.
2. The modules that are available depends on the license purchased.
   Note: Click on the name of the module for more information.

Step 7: Run



1. Choose Deploy and Process.
2. Type the name of the SQL Job.
3. Select the frequency of the SQL Job.
4. Select the start date of the SQL Job.
5. Click the run button.

Step 8 Completion



The Data Warehouse is successfully deployed and processed.

If you do not need customization, you are now ready to connect the reports to SQL data warehouse or SSAS cubes. If you do need some custom scripts, now is the time to proceed with Customization Manual.