

BI4Dynamics AX Installation Manual

BI4Dynamics AX 7.0.0Document version 1.0Last update: January 2018

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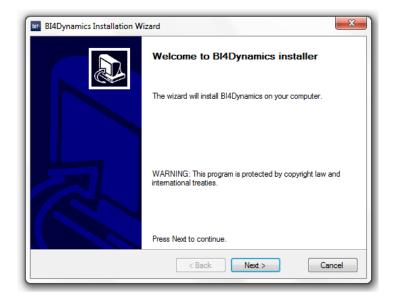
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1. INSTALL BI4DYNAMICS

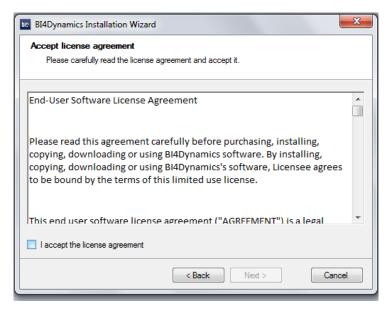
To create an AX instance inside BI4Dynamics, you must have BI4Dynamics AX installed. To do so, please follow the following steps.

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



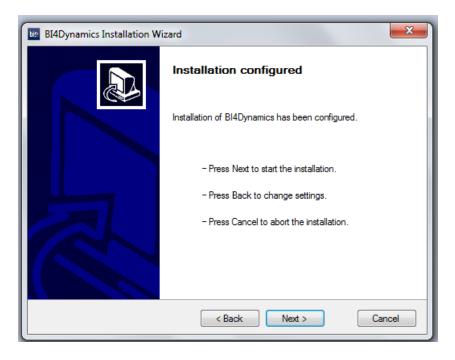
4. The installer will check for some of the prerequisites. If any of the tests fail you can click on the result to see the error. When one of the Management Objects is not installed, you should click the Install button to install those. You have to fix the problem before you rerun the test. Once all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

bis: BI4D	BI4Dynamics Installation Wizard						
Chec	<pre>c prerequisites</pre>						
PI	ease wait while installation wizard is checking program prerequisites	1					
Below i	s a list of program prerequisites:						
	Rule	Result ^					
	SQL Server	Waming					
1	SQL Analysis Server	Waming					
	SQL Server Agent	Waming					
	Operating system	Passed					
	.NET Framework	Passed					
	Shared Management Objects	Passed					
Please	review warnings in the list above.	Re-run					
	< Back Next >	Cancel					

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.

BI4Dynamics Installation Wizard	×
Installation location	
Please choose where the program should be installed	
Program will be installed in the following location:	
C:\Program Files (x86)\BI4Dynamics AX\	Change
 Create a shortcut for this program on the desktop. Create a shortcut for this program in the start menu. Disk space 	
Total space:	148 GB
Free space:	47.4 GB
<pre></pre>	Cancel

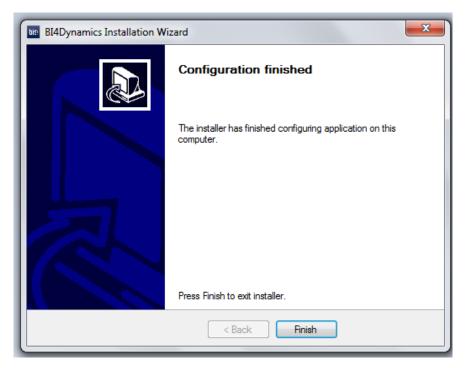
6. Confirm the configuration and begin the installation of BI4Dynamics.



7. Wait until the installation is completed.

BI4Dynamics Installation Wizard						
Configuring product Choosen application components are being configured						
Please wait while setup configures required application components. This may take a few minutes.						
Copying na File: Ribbo	ew files nControlsLibrary.dll, Directory: C:\Program Files (x86)\BI4Dynamics AX Sizv					
	< Back Next > Cancel					

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.

📠 📔 👩 🛛 Bl4Dynamics AX 6.3.0.14	411 Instance: BI4AX					-	
File Deploy Process C	Customize Stage						
Add Remove		Companies Modules	Global Dimensions	Doploy	Name Warehouse sis Database Start:		Create
Data	a Sources	Settings		Deploy So	lution	SQL Agent Job	
Instance Wizard ×							
1 Welcome	Welcome						
2 New Instance							
3 Add Data Sources	Online authentication - er	ter license key:					
4 Global Dimensions							
5 Select Companies	OR						
6 Select Modules	Offline authentication - in	port license file:					
7 Run	This process is used only if cust	omer server is not on-li	ne				
8 Congratulations	Step 1: Generate Server ID (please wait up to 30 so	conds)	Generat	te server ID			
	Step 2: Send Server ID to sales	@bi4dynamics.com					
	Step 3: Wait to receive BI4Dyn	amics license file					
	(file will be sent by our	support team)					
	Step 4: Import license file (please wait up to 30 so	conds)	In	nport			
✔ Show on startup		· Bad	k	Cancel	Next ·		

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.

	BI4Dynamics AX 5.0.0 Instance: BI	I4AX				
File 🔻 De	ploy Process Develop					
Add Re	lit move		Companies Modules Global Dimensions	 O Stage C Deploy All O Analysis Database 	Name: BI4Dynamic & Daily Start: 16-07-2016 00:00:00	Create
	Data Sources		Settings	Deploy Solution	SQL Agent Job	
Instance Wiz	ard ×					
STEP 1	Welcome	New Instance				
STEP 2	New Instance					
STEP 3	Add Data Sources	Instance properties				
STEP 4		Name:		*		
STEP 5	Select Companies	Language:	English (United States)			
STEP 6	Select Modules	SQL Authentication: SQL Server Instance:	Windows Authentication	*		
STEP 7		SQL Database Name:		*		
STEP 8		SQL Analysis Server Name		*		
		SQL Analysis Database Na	me:	*		
		SQL Database File Location	ns			
		Data:	C:\Program Files\Microsoft	SQL Server\MSSQL		
		Log:	C:\Program Files\Microsoft	SQL Server\MSSQl		
		SQL Database Collation:	SQL_Latin1_General_CP1_CI	_AI _		
		SQL Integration Service				
		SSIS Server name:	MATEJHPWKS2	Ver. 12.0		
				Refresh		

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 Bl4Dynamics 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.

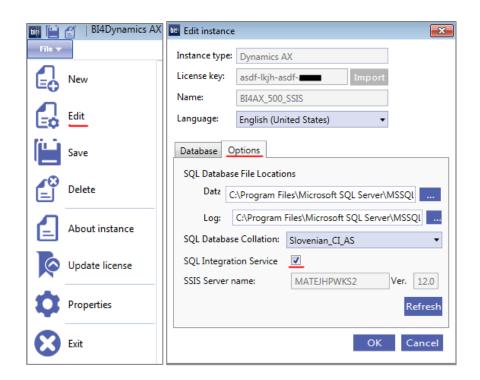
Note: We advise you use the same name as the Database name

- 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

SQL Integration Service		
SSIS Server name:	MATEJHPWKS2	Ver. 12.0
		Refresh

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



Step 3: Add Data Sources

BI4Dynamics AX 6.3.0.	1411 Instance: BI4AX_installation_manual						
File Deploy Process	Customize Stage						
Add Remove	Cascolinize Guige	Companies Modules G		♡ Stage ● Data Warehouse ☆ Analysis Database	Name: BI4Dynamic Start: 03-07-2018		
Da	ita Sources	Settings	De	ploy Solution	SQL	. Agent Job	
Instance Wizard ×							
1 Welcome	Add Data Sources						
2 New Instance	Add all AX source databases yo	u wish to analyze in BI4D)ynamics to your E	814Dynamics instan	ce.		
3 Add Data Sources <	Data source information		AX Connecto	or settings		Authentication	
4 Global Dimensions	Data Source Version: AX 2012R3	•	AX Services config	uration			Windows -> Current user
5 Select Companies	Data Source SQL Database		AX Services URL				
6 Select Modules	SQL Server Instance:	-	AX Services Port				
7 Run	Database Name:	•	Business connecto	r proxy account			
8 Congratulations	Authentication: Windows Au	thentication •	Alias				
	Azure Data source		Domain				
	Test conne	ction to Sql Database		Test connecti	on to AX Services		
				Setup A	X Languages		
	Ad	d Data Source					
	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.

	< >> Security		E-mail processing
Favorites My favorites			
- my lavolices	Setup		Inbound ports (1)
System administration	System parameters	File - 🔆 New 🗡 Delete 🌗 Activ	tivate 🕘 Deactivate
Area page	Batch group	Port name	Port name: FinancialDimensionService:
Common	Virtual company accounts	X AccountsPayableServices	Description:
Inquiries Reports	Partitions	X AccountsReceivableServices	
Periodic	a Security	✓ AifGDS	Dasic
Setup	Assign users to roles	✓ AifServices	Address
	Security roles Security privileges	✓ AppConfigServices	Adapter: NetTcp Configure
	Record level security	X AssetServices	URI: net.tcp://AOS_SERVICE_HOST/DynamicsAx/Services/FinancialDimensionService
	External roles	✓ AxClient	WSDL URI: http://AX2012R2:8101/DynamicsAx/Services/FinancialDimensionServices
	Segregation of duties	 AxManageabilityServiceGroup 	
	⊿ System	✓ BankServices	Troubleshooting
	Client performance options	✓ BIServices	
	System service accounts	BudgetServices CuesServiceGroup	
	Server configuration	CurrencyServices	
	Cluster configuration	Currencyservices DocumentHandling	
	Customer feedback options	✓ FinancialDimensionServices	······ ■ :
b Home	E-mail parameters Help system parameters	× HcmServices	
Accounts payable	Modify data types	✓ LedgerServices	
	Modify invalid conditions	× PavrollServices	
Accounts receivable	Workflow	× PurchRFQ	
General ledger	Database	✓ RetailRapidStart	
	Licensing	× RetailServices	
Budgeting	Business intelligence	✓ SharedServices	
Cost accounting	Checklists	× SMAServices	
	 Services and Application Integration Fra 	× SubledgerJournalServices	
Fixed assets	Inbound ports	✓ SysSecurityFieldAccessServiceGroup	
Cash and bank management	Outbound ports	✓ SysSecurityServices	
	Value substitution maps	✓ SysSetupServices	
Travel and expense	Web sites	X TaxServices	

- 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.

Attp://ax2012r2:8101/DynamicsAx/Services/Fina	ancialDim 🔎 🗝 🖒 <i> i</i> ax2012r2	×	
× Find: 8201	Previous Next 📝 Options 🕶		
<pre>style="document" /> - <vsdl:input <soap12:bedy="" i1:financial="" name="FinancialDimensionV <soap12:beder message=" use="literal"></vsdl:input> - <vvsdl:output literal"="" name="FinancialDimension <soap12:bdy use="></vvsdl:output> - <vvsdl:autput> - <vvsdl:fault)="" <="" <soap12:indut="" name="AifFaultFault" use="" wsdl:fault=""> - <wsdl:soutput> - <wsdl:soutput> - <wsdl:fault <="" name="AifFaultFault" use="" wsdl:fault=""> </wsdl:fault> </wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> </wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> - <wsdl:soutput> </wsdl:soutput> - <wsdl:soutput> - <wsdl:soutp< td=""><th>DimensionValidationServiceVali NalidationServiceValidateBudgo e="literal" /> rvices"> ionFocusUpdateAsync" binding=" 2012r2:8201/DynamicsAx/Services/Fii soap.org/ws/2006/02/address</th><th>dateBudgetPlanningAccountReques etPlanningAccountResponse"> tns:NetTcpBinding_DimensionFocus ices/FinancialDimensionServices"/ nancialDimensionServices<!--/wsa10;</th--><th>/></th></th></wsdl:soutp<></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></wsdl:soutput></vvsdl:fault></vvsdl:autput></pre>	DimensionValidationServiceVali NalidationServiceValidateBudgo e="literal" /> rvices"> ionFocusUpdateAsync" binding=" 2012r2:8201/DynamicsAx/Services/Fii soap.org/ws/2006/02/address	dateBudgetPlanningAccountReques etPlanningAccountResponse"> tns:NetTcpBinding_DimensionFocus ices/FinancialDimensionServices"/ nancialDimensionServices /wsa10;</th <th>/></th>	/>
<pre>- <wsdl:port ax:<br="" name="NetTcpBinding_Dimensi
<soap12:address location=" net.tcp:="">- <wsa10:endpointreference></wsa10:endpointreference></wsdl:port></pre>	2012r2:8201/DynamicsAx/Services/Fi soap.org/ws/2006/02/address > ionValueService" binding="tns:Ne 2012r2:8201/DynamicsAx/Serv	ices/FinancialDimensionServices", nancialDimensionServicesingidentity"> tTcpBinding_DimensionValueServi ices/FinancialDimensionServices",	Address>
<pre><wsa10:address>net.tcp://ax2012r2: - </wsa10:address></pre>			

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

AX Services configuration						
AX Services URL	AX2012R2					
AX Services Port	8201					
Business connector pro	Business connector proxy account					
Alias	axsvc					
Domain	nps-group.com					
Test connection to AX Services						
Save Cancel						

- 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

🏙 🔚 🔮 🛛 Bl4Dynamics AX 6.3.0	0.1411 Instance: BI4AX_installation_manual			
File Toploy Process	Customize Stage			
Remove AX201	QL2\SQL2012 2R3 S-GROUP\m	Companies Modules Global Dimensions	 O Stage ○ Data Warehouse ○ Analysis Database 	Name: BI4Dynamics Daily
D	ata Sources	Settings	Deploy Solution	SQL Agent Job
Instance Wizard ×				
1 Welcome	Global Dimensions			
2 New Instance	Financial Dimensions			
3 Add Data Sources	1 Global Financial Dimension 1	x		
4 Global Dimensions	2 Global Financial Dimension 2	x		
5 Select Companies	3 Global Financial Dimension 3	x		
6 Select Modules	4 Global Financial Dimension 4	×		
7 Run	5 Global Financial Dimension 5 6 Global Financial Dimension 6	×		
8 Congratulations	Global Financial Dimension Add new financial 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

File Deploy Process	Customize Stage						
Add Remove AX2012R	-GROUP\m	Di	Global mensions Deploy	Analysis Database	Name: Start:	BI4Dynamics M Daily	Cre
Dat	ta Sources	Settings		Deploy Solution		SQL Agent Job	
1 Welcome	Select Companies						
 New Instance Add Data Sources 	All companies						
4 Global Dimensions	BIAXSQL2\SQL2012\AX2012R3						
5 Select Companies	 Initial Partition Contoso Entertainment 	t System Brazil (BRMF)					
6 Select Modules	Contoso Retail BRA (BRRT) Contoso Consulting Brazil (BRSI)						
	Contoso Entertainment China (CNMF)						
	zzDefault Company (D Contoso Entertainmen						
	Contoso Retail FR (FRRT)						
	Contoso Consulting FF	t (FRSI)					
	Contoso Consulting G	3 (GBSI)					
	Contoso Group (GLCO)					
	Contoso Entertainmen	t System (GLMF)					
	•						

- 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.

Company Configuration						
Contoso Entertainment S	ystems (West)					
Currency Configuration:						
Local Currency:	USD 🔻					
Additional Currency:	USD 🔻					
Language ID:	en-us 🔻					
Financial Dimensions:						
Available financial dimensions:		Map to:				
Financial Dimension 1				•	×	
Financial Dimension 2				•	×	
Financial Dimension 3				•	×	
Financial Dimension 4				•	×	
Add dimension						

- 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

📑 📔 👩 🛛 BI4Dynamics AX 6.3.0).1411 Instance: BI4AX_installation_manual			-	
File Deploy Process	Customize Stage				
Remove AX2012	2L2\SQL2012 2R3 S-GROUP\m	Companies Modules Global Dimensions	 O Stage Deploy All O Analysis Database 	Name: BI4Dynamics M Daily ▼ Start: 03-07-2018 00:00:00 31	Create
D	ata Sources	Settings	Deploy Solution	SQL Agent Job	
Instance Wizard X					
1 Welcome	Select Modules				
2 New Instance	Standard Application Area	c.			
3 Add Data Sources	Fixed Assets	15			
4 Global Dimensions	🗌 📥 General Ledger				
5 Select Companies	 Inventory Payables 				
6 Select Modules	Production Project				
7 Run	Purchase Receivables				
8 Congratulations	Sales				
	Ales Forecast				
	G Sales Orders				
	🗆 📸 Shop Floor Control				
Show on startup		· Back	Cancel Next		

- 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

📑 📋 👩 🛛 BI4Dynamics AX 6.3	8.0.1411 Instance: BI4AX_installation_manual				- 0 ×
File Deploy Process	Customize Stage				
Remove AX20		Companies Modules Global	O Stage Carley Carlos	Name: BI4Dynamics 🚻 Daily	
Add - 6.3, N	IPS-GROUP\m	Companies Modules Global Dimensions	All Analysis Database	Start: 03-07-2018 00:00:00	Create
	Data Sources	Settings	Deploy Solution	SQL Agent Job	
Instance Wizard ×					
1 Welcome	Run				
2 New Instance					
3 Add Data Sources	✓ Deploy✓ Process				
4 Global Dimensions	 Auto update MetaData Automatic update 				
5 Select Companies	Name: BI4DynamicsAX	(_BI4AX_installation_m			
6 Select Modules	Frequency: Daily Start: 3.07.2018	-			
7 Run 🗸	Start: 3. 07. 2018	យ៉ា			
8 Congratulations					
✓ Show on startup		• Back	Close 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

BI4Dynamics AX 6.3	0.1411 Instance: BI4AX_installation_manual				- o >	×
File Deploy Process	Customize Stage					
Remove AX201	QL2\SQL2012 2R3 PS-GROUP\m	Companies Modules Global Dimensions	 O Stage ○ Data Warehouse ○ Analysis Database 	Name: BI4Dynamics & Daily Start: 03-07-2018 00:00:00	Create	
1	Data Sources	Settings	Deploy Solution	SQL Agent Job		
Instance Wizard ×						
1 Welcome	Congratulations					
2 New Instance	You have successfully	y finished the installati	on process.			
3 Add Data Sources	-					
4 Global Dimensions	In order to set up pre download additional					
5 Select Companies	<u>http://www.bi4dynar</u>	nics.com/installation-a	<u>x/</u>			
6 Select Modules						
7 Run						
8 Congratulations						
						2
Show on startup		· Back	Finish			

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.