Digital Analytics Installation and Configuration Guide

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Overview

Digital Analytics is an e-automate application that assists in performing statistical analysis on information stored in your e-automate database. Digital Analytics collects existing contract data from your e-automate database and re-organizes it into a separate database with a structure conducive to statistical analysis. The Digital Analytics database structure is designed to organize your contract data in a manner that makes statistical analysis easier and more comprehensive.

The installation can be performed on any client workstation from which you wish to control Digital Analytics as long as the Windows account has SQL Server admin privileges. In order to be able to install Digital Analytics properly you must log in to Windows using an account with SQL Server admin privileges. When you run the installer you must make sure you run as administrator. The installation process performs the following basic steps:

- Creates a config file that stores the configuration settings provided by the installer.

The Digital Analytics installer installs several different components on your machine that are required for Digital Analytics to work properly. The following components are installed:

- **Configuration utility**: Automatically creates the Digital Analytics database if it is not already created.
- **Digital Analytics database**: Database that is created from the data you have in your e-automate database but is more conducive to statistical analysis. The Digital Analytics database has the same SQL instance as the live e-automate database and the same name as the live database with *Analytics* as the suffix.
- **Data process utility**: Extracts information from the live e-automate database and populates (incrementally) the analytics database. This utility must be executed from a Windows account that has SQL access (read/write) to the e-automate database.
- **Windows service utility**: Automatically executes the data process utility. This service is configured as part of the installation process.
- **Digital Analytics specific reports**: The .rpt files used for the reports in the e-automate Reports Console are placed in the standard location. Several analytics based reports are added to the reports console in e-automate.
- **Digital Analytics specific e-views**: Several analytics views are added to e-views.
- **Config file**: A config file is created where the configuration settings provided by the installer are stored.

In addition to the components list above, the installer also creates the installation folder and places the installed files in that folder, and creates the shortcuts of your choosing for the Digital Analytics Data Process utility.

The da_Configure utility is launched as the last step of the installation process. The da_Configure utility automatically creates the Digital Analytics database if the digital analytics database does not already exist. The database creation process may not be complete when the installer is complete, however, you may close the installer when prompted. If the installer runs into any of the following issues, a dialogue displays informing of the problem.

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- If the company for which you want to create a Digital Analytics database does not exist.
- If the base schema version (7.6.5. 8.0, et cetera) cannot be determined.
- If a Digital Analytics database has already been created for the specified company.

In order for analytics to work properly you must be running SQL Server 2005 or later. If you are running e-automate 7.6.5 you must have the latest eviews.exe file in your e-automate folder for e-views to work properly.

The installer will copy the reports to the standard, default location, c:\program files\e-automate\reports, on the workstation on which the installer is run or a location of your choosing. If you normally store report definitions on a shared folder, you may specify that location during the installation process. This ensures that everyone you want to have access to the reports will have access. The installer also adds a new Windows Service, Digital Analytics Data Process. The Digital Analytics Data Process service automatically executes the Digital Analytics Data Process utility using the parameters specified during the installation. This service can manage only one e-automate/analytics database combination. If you have multiple e-automate database for which you want to create analytics databases, you must execute the Digital Analytics Process manually for each database.

Digital Analytics and Acsellerate Installation and Integration

The Acsellerate application is an analytics tool, much like Digital Analytics, that provides statistical analysis on information in your e-automate database. Acsellerate provides this information in a number of dashboards. Each dashboard provides an at-a-glance view of different areas of e-automate through different types of charts and graphs as well as simplified information lists. The Acsellerate dashboards eliminate the need to run countless reports that would take weeks to sift through to get the information you need. With the ability to view this information so easily, you are able to see, in a matter of seconds, how well or poorly your company is doing in any given area and where you need to improve over any given period of time.

You must have Digital Analytics in order to use Acsellerate. This is because the information displayed in the Acsellerate dashboards is pulled from the data in the Digital Analytics database. The Digital Analytics database is created from the information you currently have in your live e-automate database. The data is created and stored on your local server.

If you are integrating with Acsellerate, our add-on specialist will assist in the installation of Digital Analytics and the Acsellerate Toolset. Once you have purchased the Digital Analytics/Acesellerate integration, you will receive an email from our Add-on Specialist, Kade Jansson. This email outlines what you need to do to begin the Digital Analytics/Acsellerate implementation process. You will, first, need to make an appointment with Kade for a time when you are available to begin the installation and integration process. Each appointment is for a 60 minute time slot. The email instructs you on how to make an appointment.

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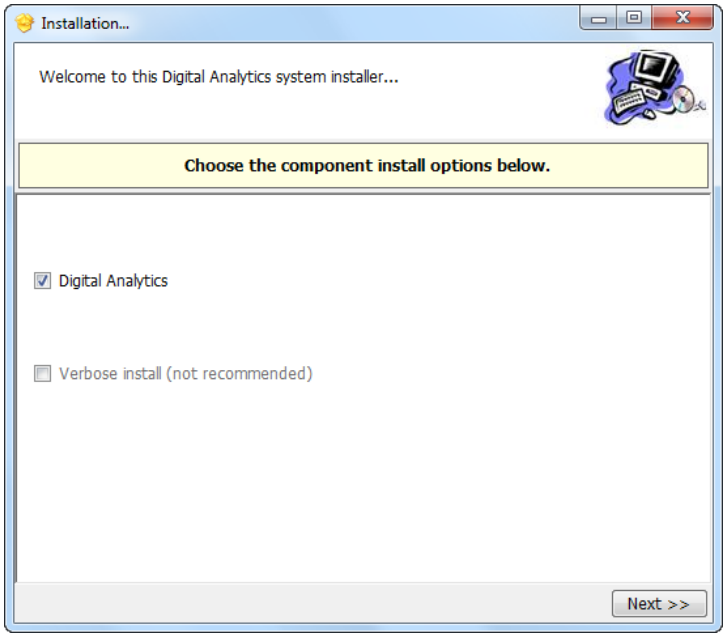
First Time Digital Analytics Installation

If you are installing Digital Analytics for the first time, use the instructions in this topic to install Digital Analytics. If you are integrating with Acsellerate, our add-on specialist will assist you in the installation. See the **Digital Analytics and Acsellerate Installation and Integration** topic above. If you are installing only Digital Analytics, do the following.

1. Locate where you saved the *DigitalAnalyticsSetup.exe* installation file.
2. To make sure you are running the installer as an admin, right-click on the .exe file and select **Run as administrator** to launch the Digital Analytics installer.



3. In the **Choose the component install options below** window, check the **Digital Analytics** checkbox.
4. If you want the installer to list every single file that copies to your computer with the Digital Analytics installation and provide a more detailed account of the installation, also check the **Verbose install (not recommended)**. You must have both the **e-info website** and the **Verbose install (not recommended)** checkboxes checked in order to execute the verbose installation.
   Note: The Verbose installation takes significantly more time to execute than the regular installation. This is due to the amount of extra information the Verbose installation provides.
5. Click [**Next>>**]. The following window displays.

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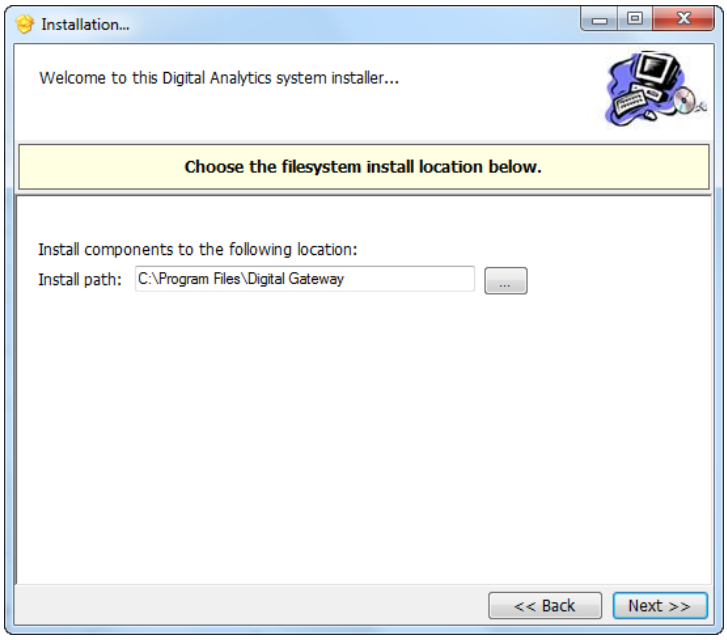
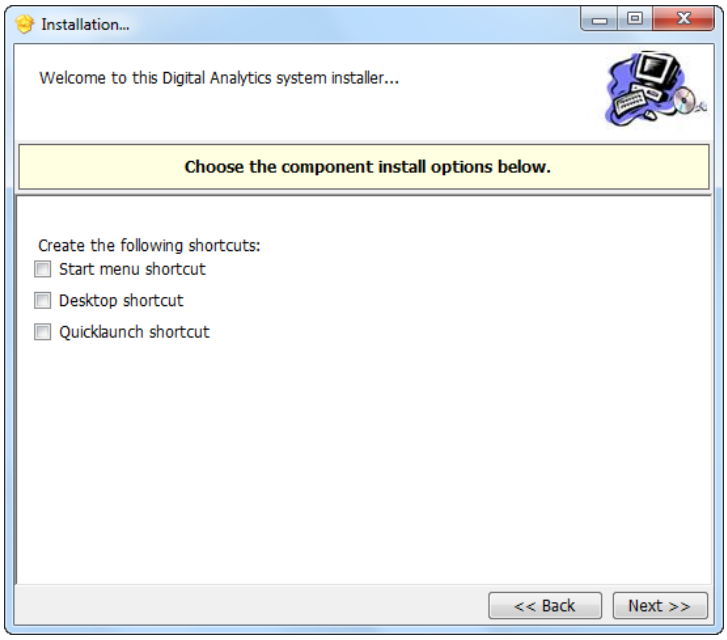


6. The default location where the installation files will be stored is displayed in the **Install path** field. If you want to select a different location than the one displayed, click [**...**] and navigate your network to select a different location.

7. With the install path selected click [**Next>>**]. The following window displays.



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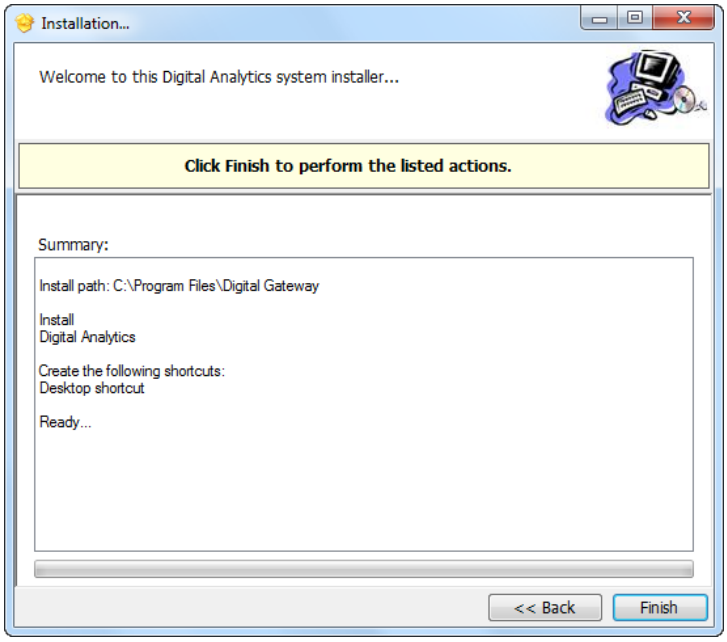
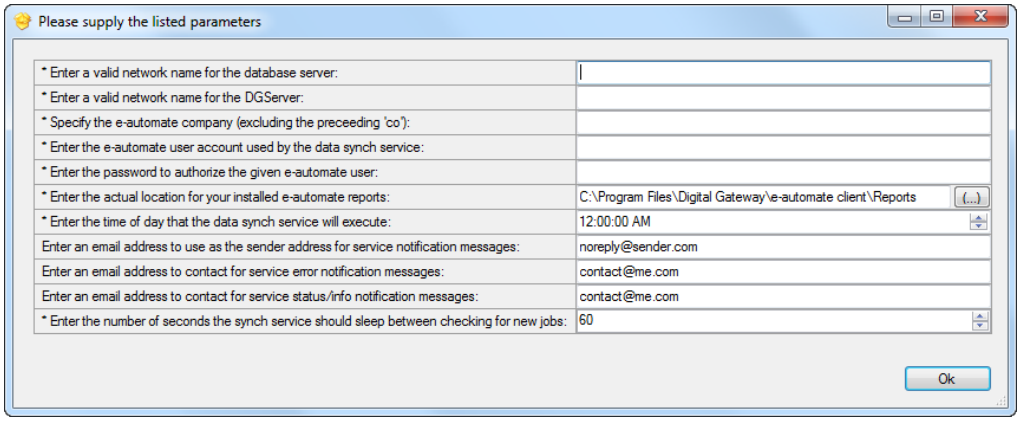
8. Check the checkboxes next to the following desired installation options.
   Start menu shortcut: When checked, a shortcut is placed on your Start menu.
   Desktop shortcut: When checked, a shortcut is placed on your desktop.
   Quicklaunch shortcut: When checked, a shortcut is placed on you Quicklaunch menu.

9. Click [**Next>>**]. The following window displays.



10. Click [**Finish**]. The **End user license agreement** window displays.

11. Click [**Accept**]. The **Please supply the listed parameters** window displays.



12. Enter the appropriate information in the following fields.

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- **Enter a valid network name for the database server**: Name of the network where your e-automate database is located.
- **Enter a valid network name for the DGServer**: Name of the machine where the dgserver is running.
- **Specify the e-automate company database (excluding the proceeding 'co')**: Name of the e-automate database for which you will be creating an analytics database.
- **Enter the e-automate user account used by the data sync service**: e-automate username.
- **Enter the password to authorize the given e-automate user**: e-automate password.
- **Enter the actual location for your installed e-automate reports**: Location where your e-automate reports are saved. The default location is displayed.
- **Enter the time of day that the data sync service will execute**: Time of day you want the analytics database to sync with your e-automate database.
- **Enter an email address to use as the sender address for service notification messages**: email address to which you want service notification sent.
- **Enter an email address to contact for service error notification messages**: email address to which you want error notification sent.
- **Enter an email address to contact for service status/info notification messages**: email address to which you want status/info notification sent.
- **Enter the number of seconds the sync service should sleep between checking for new jobs**: Controls how frequently the service will check to determine whether the Digital Analytics Data Process utility should be run.

13. Click [**OK**]. The installation is complete. The da_Configure utility opens the splash screen with a dialogue that displays the Digital Analytics database details. The dialogue displays the following details.
    e-automate SQL server: SQL server on which your e-automate database is located.
    e-automate Database Name: Name of the e-automate database or company for which you are creating a Digital Analytics database.
    Analytics Database Name: Name of the Digital Analytics database that was created from your e-automate database.
    Note: The default name is the name of the e-automate database with the word *Analytics* attached to the end. For example, if your database name is *CoSample*, the default Digital Analytics database name is *CoSampleAnalytics*
    Analytics SQL Server: SQL server on which the Analytics database is located.
14. Click [**OK**] to run the da_Configure utility and configure your Digital Analytics database. This may take a significant amount of time depending on the size of your e-automate database.
    Note: If you do not want to run the da_Configure utility at this time you may bypass this step by clicking [**Cancel**]. You will have to configure the analytics database before you can use Analytics reports and views. See the **Configure Digital Analytics** topic below.
15. A dialogue displays informing you the Digital Analytics database for the identified company has been created. Click [**OK**].
16. Click [**Close**] to exit the installer. You will now see the **Digital Analytics Configure** and **Digital Analytics Data Process** applications in your programs list under Digital Gateway as well as any shortcuts you selected during the installation process.

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Updating Digital Analytics

If you are updating Digital Analytics from a previous version, use the instructions in this topic. If you are integrating with Acsellerate, our add-on specialist will assist you in the installation. See the **Digital Analytics and Acsellerate Installation and Integration** topic above.

The new Digital Analytics installer is designed to handle uninstalling the previous version of Digital Analytics before installing the new version. If, however, this is the first time you are using this new installer on a client machine that has a previous version of Digital Analytics installed, you cannot use the new installer to uninstall the old version of Digital Analytics. The old version of Digital Analytics must be uninstalled manually before you can install the new version.

The most reliable method for determining whether or not Digital Analytics must be manually uninstalled is to see if Digital Analytics is listed in the Programs list on your computer. How to access the Control Panel varies depending on which version of Windows you are using. From the Control Panel you can then access a list of Programs that are installed on your computer. If Digital Analytics is listed you must uninstall it manually from the program list.

Determining if Manual Uninstall is Necessary

Before you update to the new version of Digital Analytics, you must determine whether or not you need to manually uninstall the previous version.

To determine whether or you need to manually uninstall the previous version of Digital Analytics, do the following.

1. Locate the Programs List or the Uninstall Programs feature via the Control Panel. How to access the Control Panel varies depending on which version of Windows you are using. If you are using Windows 7, from your Start menu select **Control Panel**. The Control Panel opens.
    - If your Control Panel is set to be viewed by Category, Click on **Uninstall a program** under the **Programs** category.

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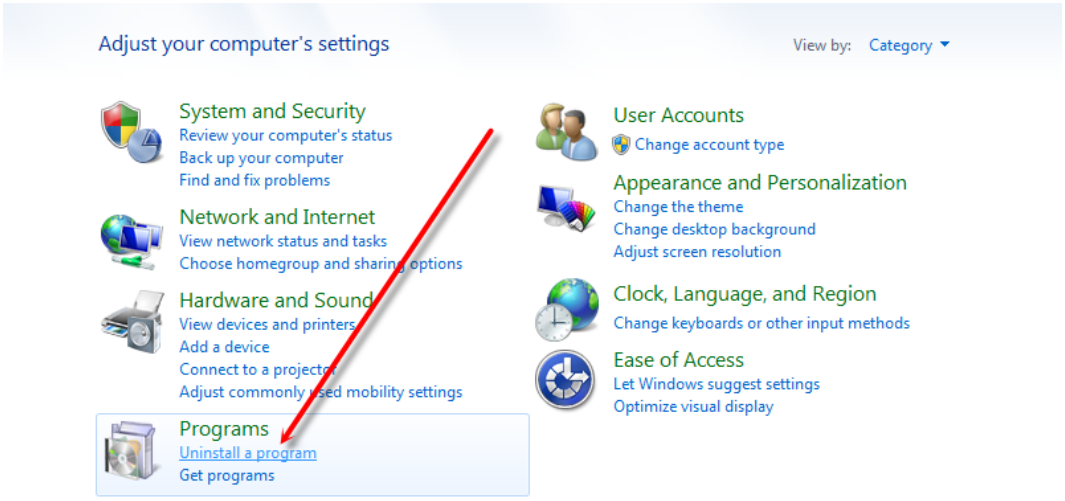
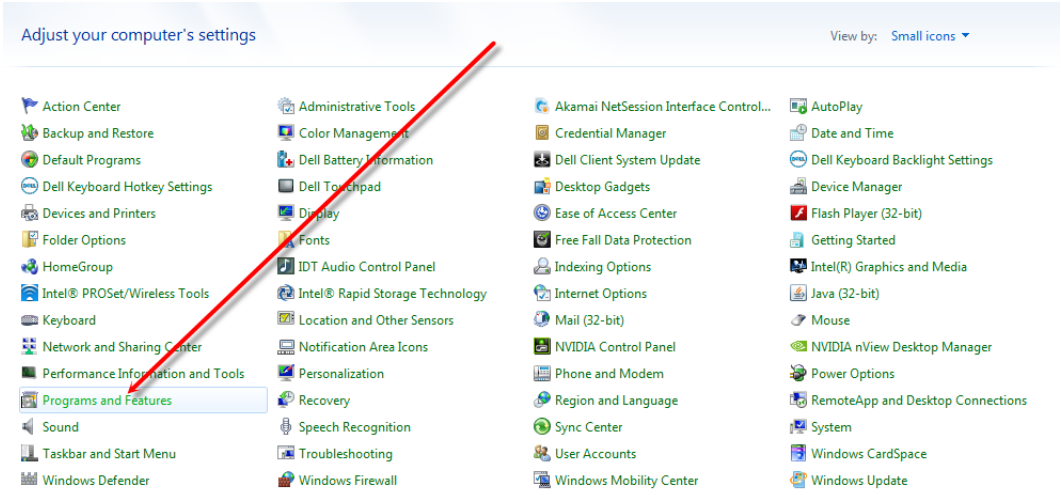


- If your Control Panel is set to be viewed by icons (large or small), click on **Programs and Features**.



The program list displays

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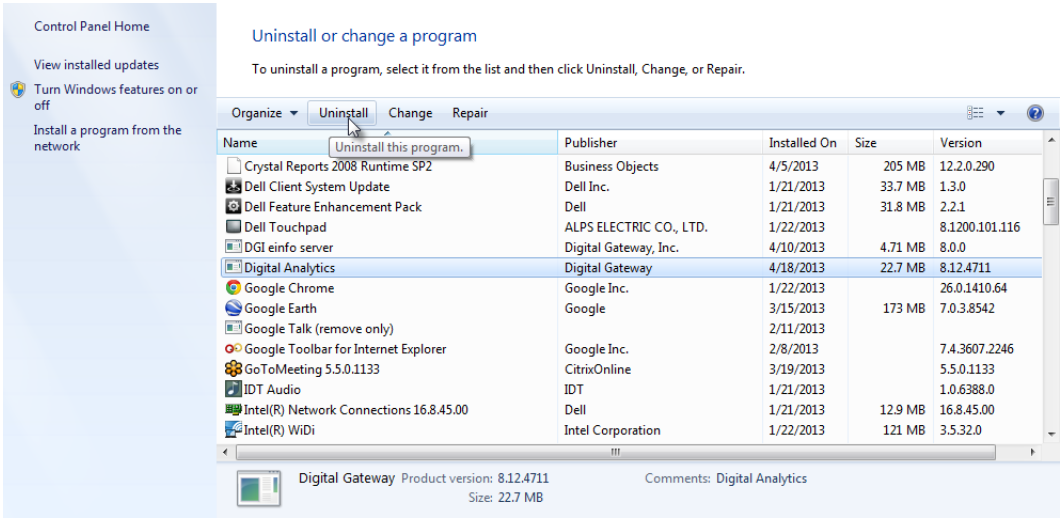

2. Scroll through the list of programs. If Digital Analytics is listed, select *Digital Analytics* and click **Uninstall**. Click [**Yes**] in the verification dialogue that displays. Digital Analytics will uninstall.
3. Close the program list window.
4. If you had to manually uninstall the previous version of Digital Analytics, follow the directions in the **Updating Digital Analytics after Manual Uninstall** topic to install the latest version of Digital Analytics.
   If you did not have to uninstall the previous version of Digital Analytics, follow the directions in the **Updating Digital Analytics without Manual Uninstall** topic below.

Updating Digital Analytics after Manual Uninstall

If you had to manually uninstall the previous version of Digital Analytics, the installation process is basically the same as if you are installing Digital Analytics for the first time. The only difference is that at the end of the installation process you will not have to configure the Analytics database as it has been done previously. At the end of the installation process a dialogue will display informing you the database has already been created. For directions on installing Digital Analytics after you manually uninstalled the previous version, see the **First Time Installation** topic above.

Updating Digital Analytics without Manual Uninstall

If it was not necessary for you to manually uninstall the previous version of Digital Analytics, use the instructions in this topic to update Digital Analytics to the latest version. Do the following.

1. Locate where you saved the *DigitalAnalyticsSetup.exe* installation file.
2. To make sure you are running the installer as an admin, right-click on the .exe file and select **Run as administrator** to launch the Digital Analytics installer.

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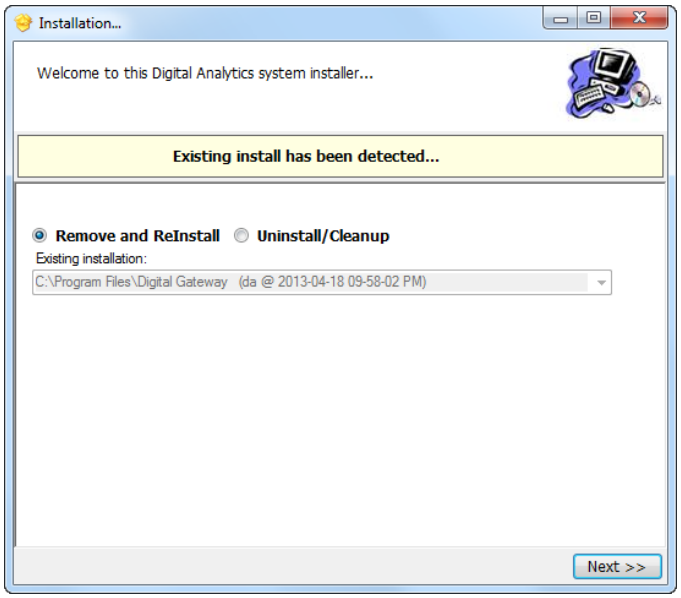

You can choose whether you want to remove the previous version and install the new version or just uninstall the previous version only.

3. Do one of the following.
   - To remove the previous version and then install the latest version, do the following.
     a. Select **Remove and Reinstall**. The **Existing installation** field displays the location where the previous version is installed.
     b. Click [**Next>>**]. The following window displays.

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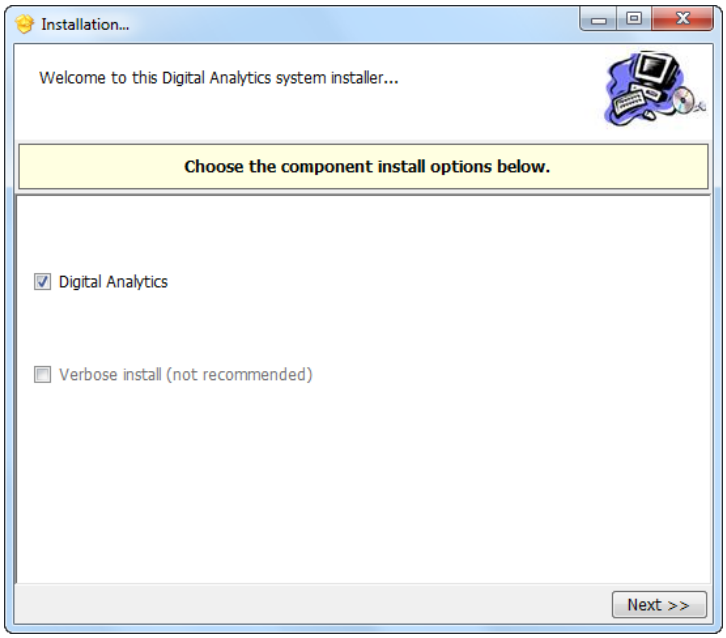

c. In the **Choose the component install options below** window, check the **Digital Analytics** checkbox.
d. If you want the installer to list every single file that copies to your computer with the Digital Analytics installation and provide a more detailed account of the installation, also check the **Verbose install (not recommended)**. You must have both the **e-info website** and the **Verbose install (not recommended)** checkboxes checked in order to execute the verbose installation.
   Note: The Verbose installation takes significantly more time to execute than the regular installation. This is due to the amount of extra information the Verbose installation provides.
e. Click [**Next>>**]. The following window displays.

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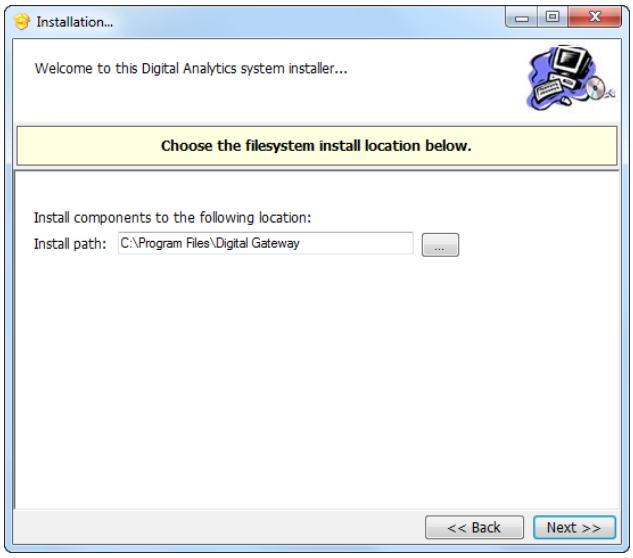
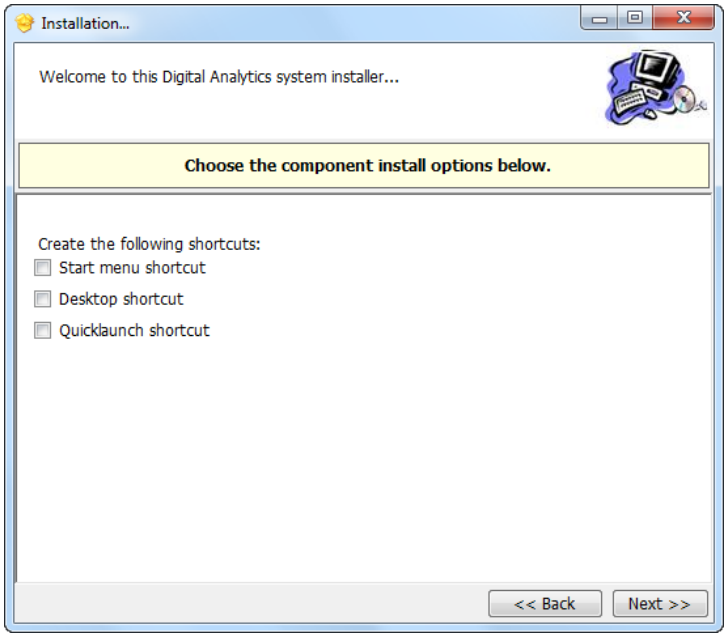


f. The default location where the installation files will be stored is displayed in the **Install path** field. If you want to select a different location than the one displayed, click [**...**] and navigate your network to select a different location.

g. With the install path selected click [**Next>>**]. The following window displays.



h. Check the checkboxes next to the following desired installation options.
Start menu shortcut: When checked, a shortcut is placed on your Start menu.
Desktop shortcut: When checked, a shortcut is placed on your desktop.
Quicklaunch shortcut: When checked, a shortcut is placed on you Quicklaunch menu.

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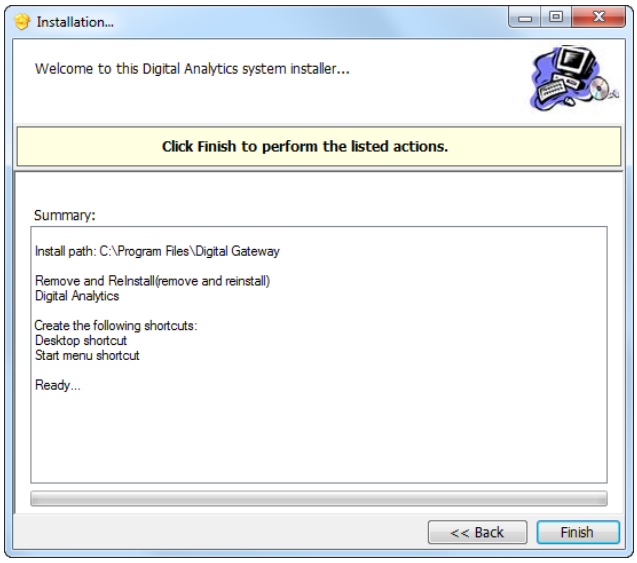
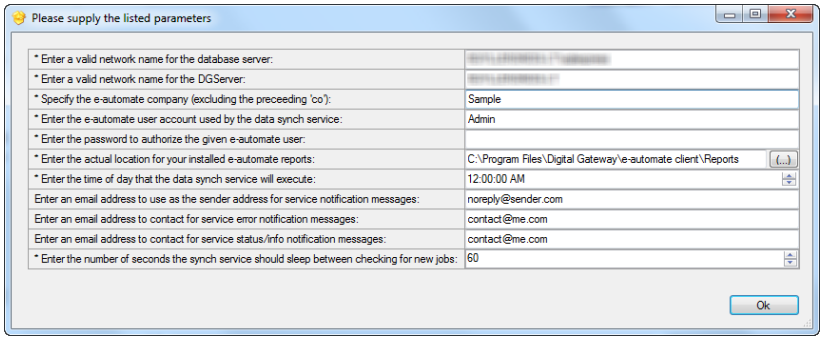
i. Click [**Next>>**]. The following window displays.



j. Click [**Finish**]. The **End user license agreement** window displays.

k. Click [**Accept**]. The **Please supply the listed parameters** window displays with the parameters that the previous Digital Analytics version was using minus the password.



l. If necessary, enter the appropriate information in the following fields.
Enter a valid network name for the database server: Name of the network where your e-automate database is located.
Enter a valid network name for the DGServer: Name of the machine where the dgserver is running.
Specify the e-automate company database (excluding the proceeding 'co'): Name of the e-automate database for which you will be creating an analytics database.
Enter the e-automate user account used by the data sync service: e-automate username.
Enter the password to authorize the given e-automate user: e-automate password.

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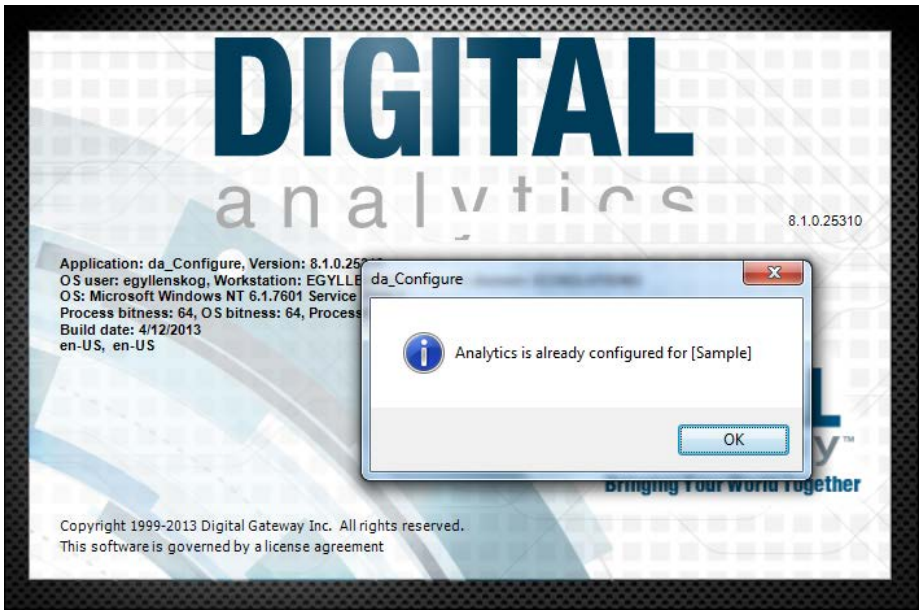
Enter the actual location for your installed e-automate reports: Location where your e-automate reports are saved. The default location is displayed.
Enter the time of day that the data sync service will execute: Time of day you want the analytics database to sync with your e-automate database.
Enter an email address to use as the sender address for service notification messages: email address to which you want service notification sent.
Enter an email address to contact for service error notification messages: email address to which you want error notification sent.
Enter an email address to contact for service status/info notification messages: email address to which you want status/info notification sent.
Enter the number of seconds the sync service should sleep between checking for new jobs: Controls how frequently the service will check to determine whether the Digital Analytics Data Process utility should be run.

m. Click [**OK**]. The previous Digital Analytics version is uninstalled and the installation of the latest version is complete. The da_Configure utility opens the splash screen with a dialogue that informs you the Digital Analytics database has already been created for the selected company database.



n. Click [**OK**] in the dialogue and click [**Close**] to exit the installer.

- To uninstall the previous version without installing the latest version, do the following.
  a. Select **Uninstall/Cleanup**.

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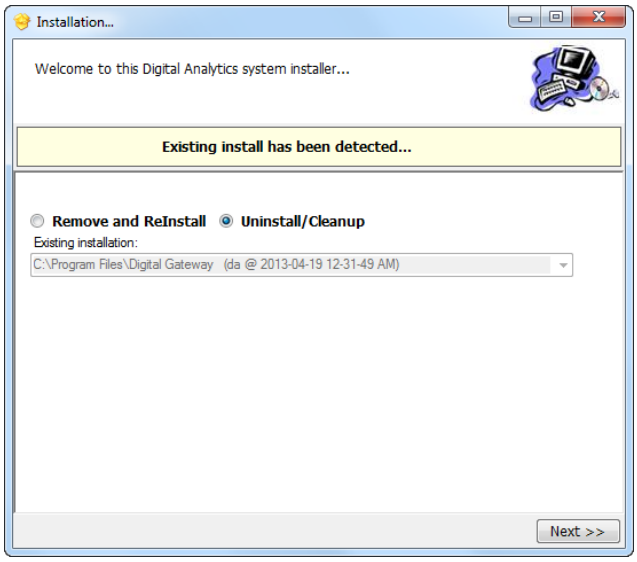
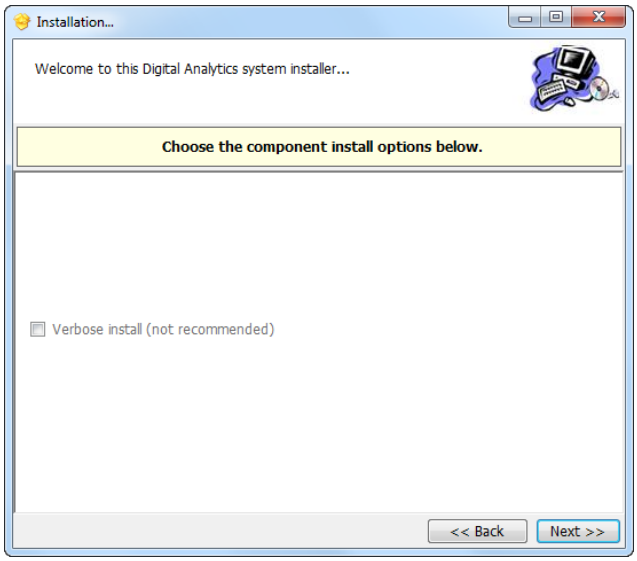


b. Click [**Next>>**]. The following window displays.



c. If you want the installer to list every single file that will be removed from your computer during the uninstallation and provide a more detailed account of the uninstallation, check the **Verbose install (not recommended)**.
Note: The Verbose uninstallation takes significantly more time to execute than the regular uninstallation. This is due to the amount of extra information the Verbose uninstallation provides.

d. Click [**Next>>**]. The following window displays.

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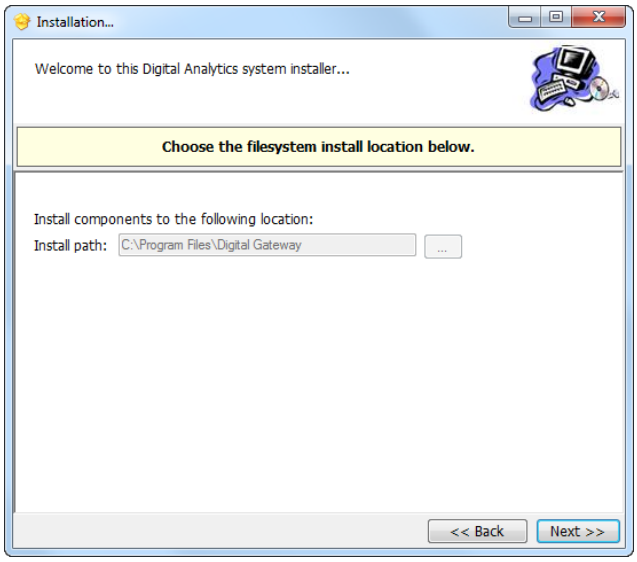
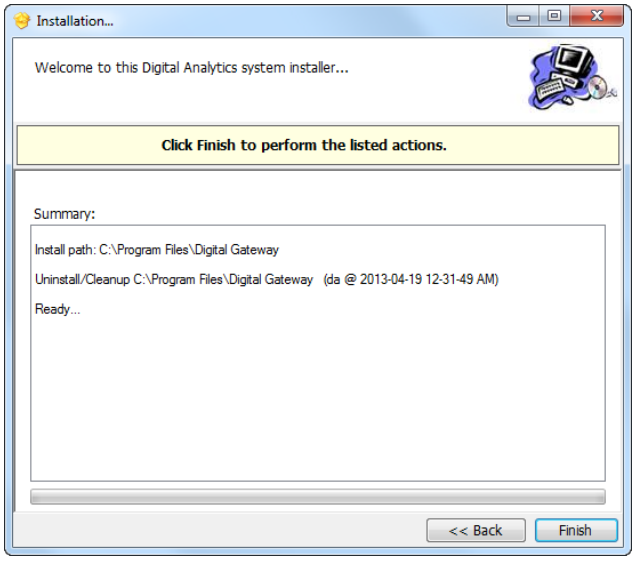


The location where the installation files are stored is displayed in the **Install path** field.

e. Click [**Next>>**]. The following window displays



f. Click [**Finish**]. Digital Analytics has been uninstalled. The following window displays.

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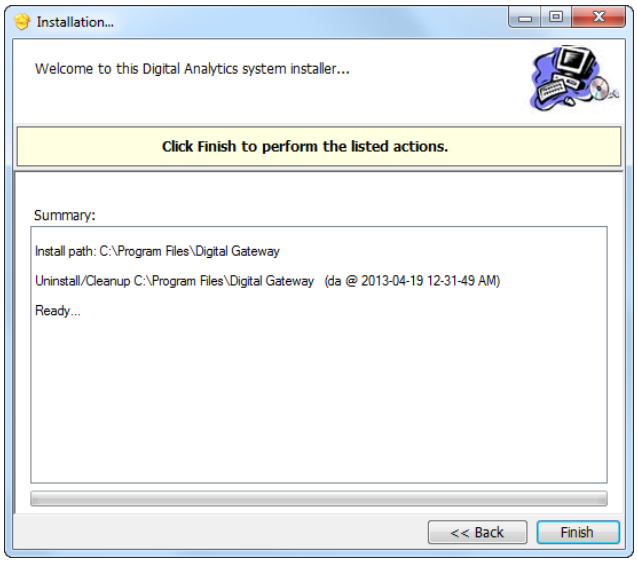

g. Click [**Close**] to exit the installer.

Entering License Info

Digital Analytics includes a substantial amount of analysis data by default; however, you may enable additional data components with an optional license. The option components available with this option license are:

- Meter Reading/Collection Metrics
- Machines in Field (MIF) Metrics
- Service Call Metrics

If you have purchased a license, you can enter it now or you can enter it later via the Digital Analytics utility.

To enter license information do the following:

1. From within the Digital Analytics Configuration tool, locate the database for which you want to enter license settings.
2. Right-click the desired database. The **Enter Admin Password** window displays.

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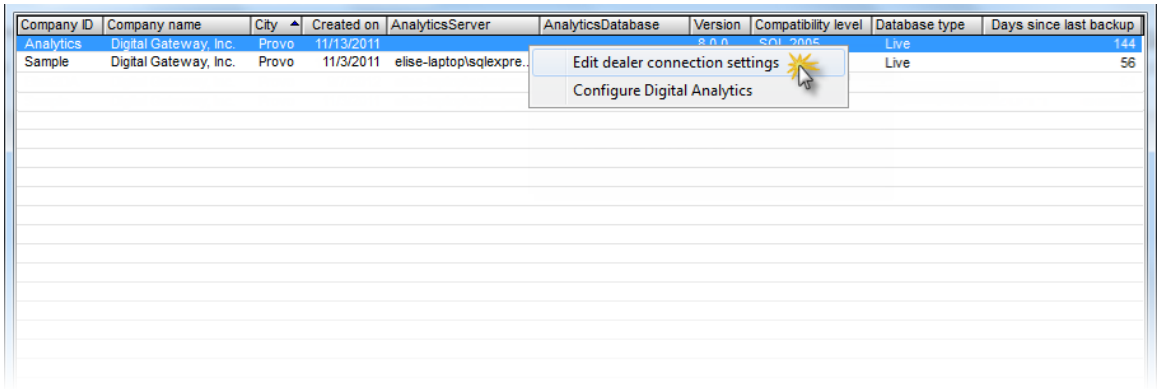
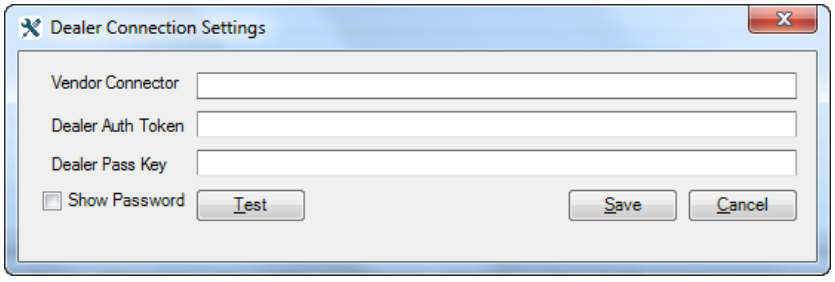
3. If you have an Admin password set for this database, enter the password in the provided field and click [**OK**]. If you do not have a password, simply click [**OK**]. The right-click menu displays.



4. Select **Edit dealer connection settings**. The **Dealer Connection Settings** window displays.



5. Enter the appropriate information in the provided fields. You should have been given this information in when you purchased the license.
6. If you would like the Dealer Pass Key characters to show, check the **Show Password** checkbox. Otherwise, when left unchecked, the Dealer Pass Key characters will display as asterisks.
7. After you have entered the license information, click [**Test**] to verify the information you entered. If the information is correct, **OK** displays next to the **Test** button.

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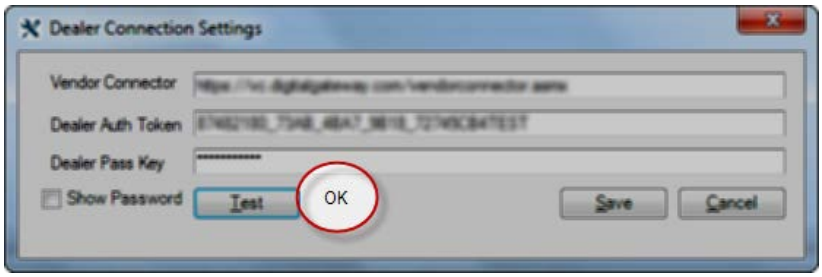

8. Click [**Save**] to save the license information.

Digital Analytics Configuration Utility

You use the Digital Analytics Configuration utility to create, delete, and manage analytics databases as well as the optional data component license. The Digital Analytics Configuration utility must be executed from a Windows account that has SQL Admin rights. The utility displays a window with columns identifying the location and name of all configured analytics database. All actions performed in the Digital Analytics Configuration utility are done using right-click functionality; all tasks are performed by right-clicking on a database and selecting the task from the menu that displays. When you right-click on any row displayed in the window, a password window displays. Enter the password (if any) click OK. There is a delay before the popup menu is actually displayed; this is normal. Note that the contents of the popup menu will differ depending on whether an analytics database has been configured for that e-automate database or not.

Configure Digital Analytics

To begin you must first create or configure the digital analytics database from the original e-automate database. If you have more than one database you must configure a digital analytics database for each e-automate database. Digital Analytics databases are created using the Digital Analytics Configure tool which can be accessed through the shortcut that is added to your desktop upon installation.

The Digital Analytics Configure tool utilizes right-click functionality; all tasks are performed by right clicking on a database and selecting the task from the menu that displays. If you have never created a Digital Analytics database for an e-automate database the right-click menu displays only two options, **Edit dealer connection settings** and **Configure Digital Analytics**.

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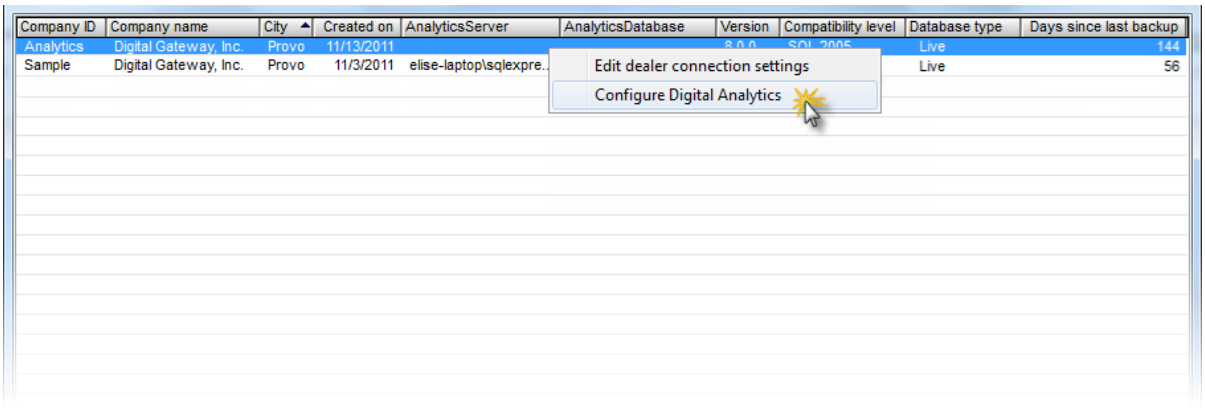
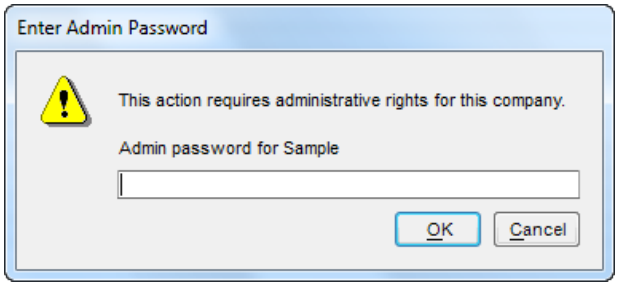


To configure or create a Digital Analytics database, do the following.

1. Verify all e-automate users are offline.
2. Double-click on the **Digital Analytics Configure** icon located on the your desktop. The Digital Analytics Profile window opens.
3. Very your profile or add a new profile by clicking the pencil icon and click [**OK**]. The Digital Analytics Configure tool opens.
4. Select the e-automate database for which you want to configure a digital analytics database and right-click. The **Enter Admin Password** window displays.



5. Enter the admin password for the selected database and click [**OK**]. The right-click menu displays.
   Note: If you do not have an admin password, simply click [**OK**].
6. Select **Configure Digital Analytics**. The **a-Configure: Digital Analytics Server** window displays. This window verifies the e-automate database for which you are creating an analytics database, the server on which you are creating the analytics database, and provides the name of the new analytics database. Click [**OK**] to configure the analytics database.

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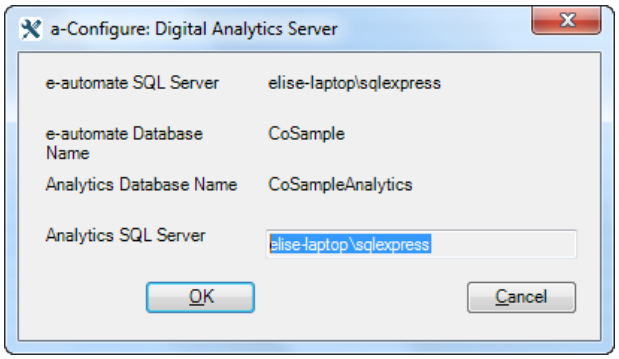


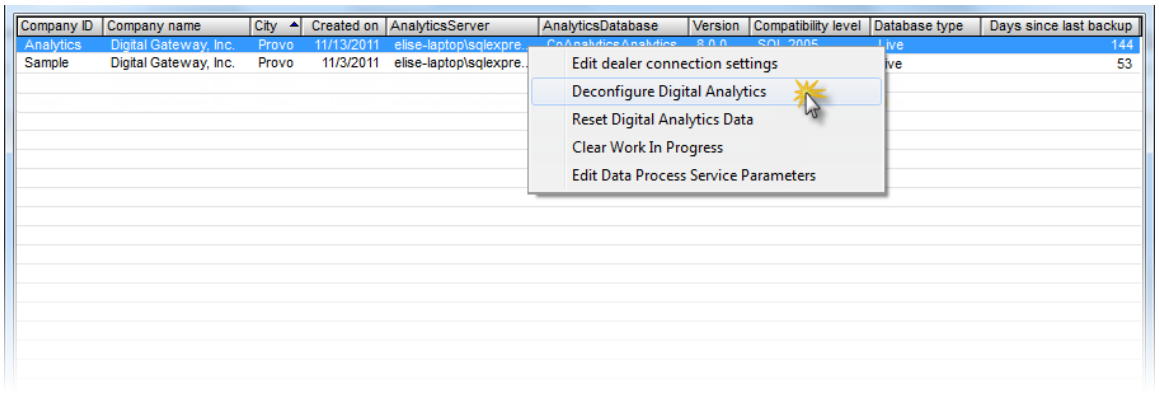
Once an analytics database has been created, the name of the analytics database displays in the **AnalyticsDatabase** column of the Digital Analytics Configuration utility and specific elements (such as e-view and report definitions) are added to the associated e-automate database.

Deconfigure Digital Analytics

When you deconfigure a digital analytics database, the system removes the analytics database and removes all elements specific to analytics, such as e-views and report definitions, from the e-automate database associated with the analytics database.

To deconfigure an analytics database, do the following:

1. Right-click on the database you want to deconfigure and select **Deconfigure Digital Analytics**.



Digital Analytics displays a verification window.

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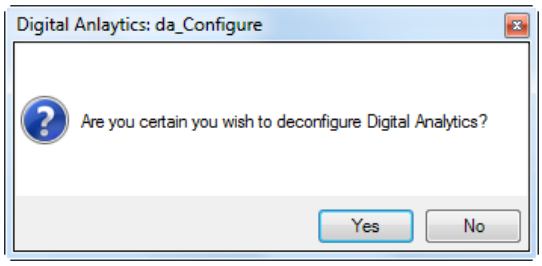


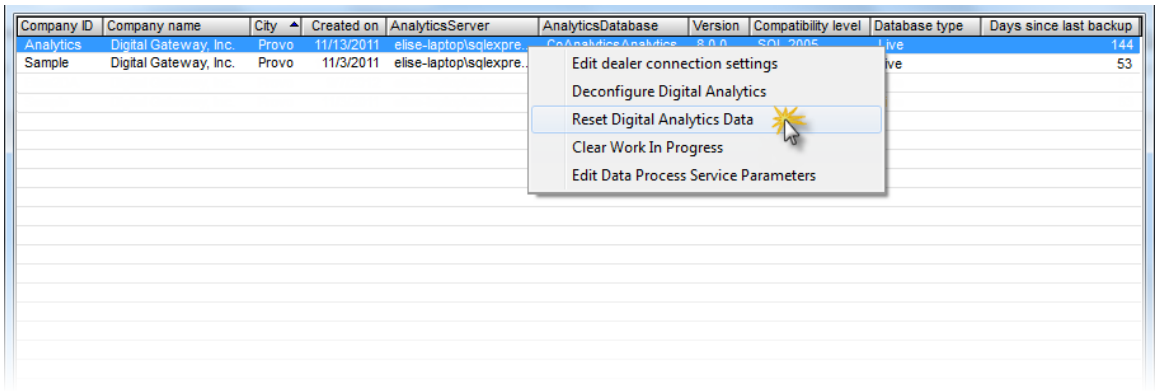
2. Click [**Yes**]. The database is dropped leaving the **AnalyticsServer** and **AnalyticsDatabase** columns empty. All analytics elements specific to analytics, such as e-views and report definitions, are also removed from the associated e-automate database.

Reset Digital Analytics Data

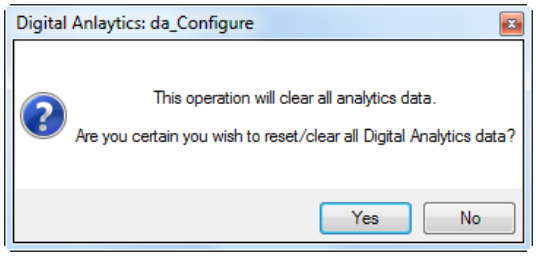
The Reset option is similar to performing a deconfigure and then a reconfigure of the analytics database. The difference, however, is that using the Reset option does not make a change to the e-automate database; all elements specific to analytics, such as e-views and report definitions remain in the e-automate database.

Do the following:

1. Right-click on the database you want to reset.
2. Select **Reset Digital Analtyics Data**.



Digital Analytics displays a verification window.



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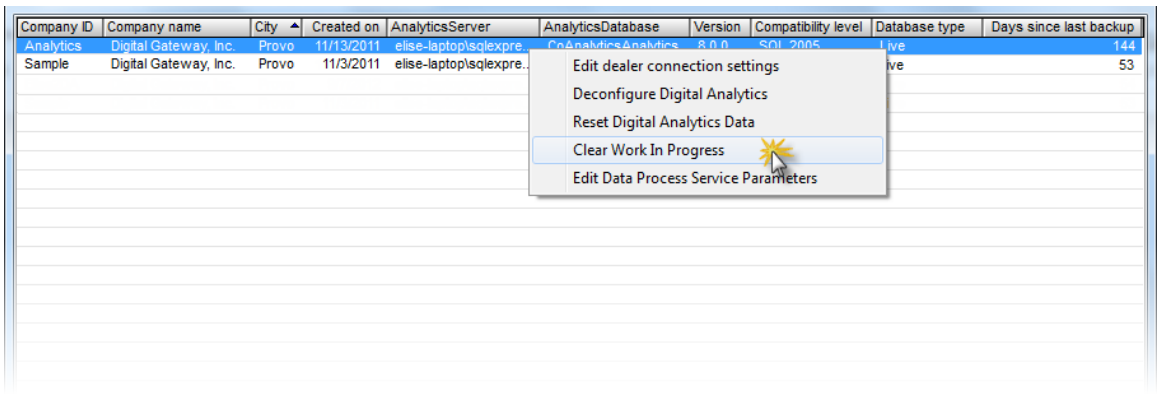
3. Click [**Yes**] to reset the selected Analytics database.

Clear Work in Progress

Only one instance of the Digital Analytics Data Process utility can be active at a time. To ensure there is not more than one instance active at a time a Work In Progress flag is set. If another instance of the Digital Analytics Data Process utility is executed while this flag is set, an error is displayed and the utility exits. Normally this flag is cleared when the Digital Analytics Data Process utility terminates, whether in error or not. In rare cases the flag can be left in the set condition. In these rare cases the Clear Work in Progress option is used to clear the flag and permit another instance of the Digital Analytics Process utility to run. Make certain there is no running instance of the Digital Analytics Data Process utility before using the Clear Work in Progress option.

Do the following:

1. Right-click on the desired database.
2. Select **Clear Work in Progress** to clear the Work in Progress flag and permit another instance of the Digital Analytics Data Process utility to run.



Edit Data Process Service Parameters

The Edit Data Process Service Parameters option is used to edit the Digital Analytics configuration settings. These settings are initially configured during the installation process. To edit the configuration settings, do the following:

1. Right-click on the database for which you want to edit configuration settings.
2. Select **Edit Data Process Service Parameters**.

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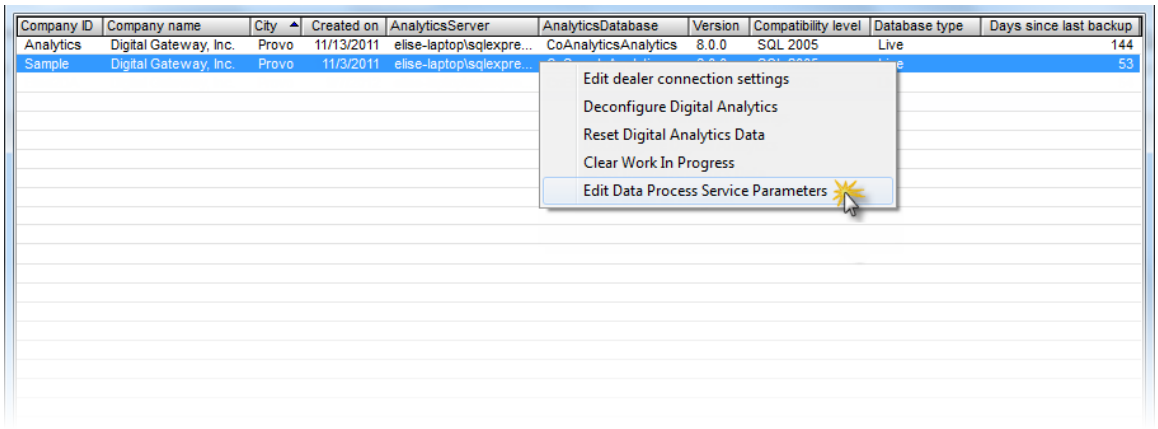

The **Digital Analytics Configuration Settings** window opens.

3. In the **Server Authentication** region, enter the appropriate information in the following fields.
   DG Server: Name of DG Server where the e-automate database resides.
   SQL Server: Name of your SQL Server where the e-automate database resides.
   CompanyID: Name of database from which Digital Analytics will put information.
   Note: Do not add the *co* prefix to the Company ID.
4. In the **Service Config Settings** region, enter the appropriate information in the following fields.
   Application Path: Displays where Digital Analytics is saved on your computer.
   Note: This field cannot be edited.
   e-auto Username: Username you use to log in to e-automate.
   e-auto Password: Password you use to log in to e-automate with the Username supplied.
   Show Password: When checked, the characters of the password display. If left unchecked, the password displays as asterisks.
   Execution Time: Time of day you want the Analytics database to update. The execution time can be specified in 12-hour (with AM/PM suffix) format or 24-hour format.
5. In the **Service App Settings (optional)** region, you may optionally enter the appropriate information in the following fields.
   Email From: email address from which you want emails sent form Digital Analytics to come.
   Email Error Contact: email address to which you want emails sent informing you of Digital Analytics errors.
   Email Info Contact: email address to which you want an email sent informing you the Digital Analytics database has been updated.
   Sleep Seconds: Controls how frequently the service will check to determine whether the Digital Analytics Data Process utility should be run. This field cannot be edited.
6. Click [**OK**] to save the changes.

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Digital Analytics Data Process Utility

The Digital Analytics Data Process utility is used to process the contents of the e-automate database and place the resulting information in the associated analytics database. This utility is set to run automatically at the time you set in the Digital Analytics Configuration Settings (see the **Edit Data Process Service Parameters**). You may also run the Digital Analytics Data Process utility manually, if needed. The Digital Analytics Data Process utility must be run from a Windows account that has read and write SQL access to the e-automate database.

To run the Digital Analytics Data Process utility manually, do the following.

1. From the **Start** menu go to **All programs** > **Digital Gateway**.
2. Select **Digital Analytics Data Process**. A login screen displays.
3. Enter your login criteria.
   User ID: User ID you use to login to e-automate.
   Password: Password you use to login to e-automate.
   Profile: e-automate database profile of the corresponding analytics database you want to populate.
4. The da_DataProcess window displays.
5. Click [**Yes**] to populate the analytics database for the selected company.
6. When the process is complete a dialogue displays. Click [**OK**].

e-views

If you are running e-automate 7.6.5, you must make sure you have the latest eviews.exe file in order to be able to run the Analytics views. This file contains extended functionality for Digital Analytics that does not exist with the standard e-views that ships with e-automate 7.6.5.

Reports

The installer will copy the reports to the standard location, c:\program files\e-automate\reports, on the workstation on which the installer is run. If you normally store report definitions on a shared folder, you need to copy the report files to that shared folder. This ensures that everyone you want to have access to the reports will have access. If you are not sure where to place the reports, look under **Tools** > **Options** > **Reports** and under **Tools** > **Client Settings** > **Reports** to see how you have your report paths set up.

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