

Digital Analytics Installation and Configuration

Introduction

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. 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 Digital Analytics installer creates a Digital Analytics directory on your machine and installs these components in that directory:

- **Configuration Utility (da_Configure):** A utility that configures an e-automate database for use with Digital Analytics.
- **Data Process Utility (da_DataProcess):** A utility that 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.
- **Digital Analytics Data Process Service (da_DataProcessService):** A service that automatically executes the Data Process Utility. This service is configured as part of the installation process.
- **Configuration File (da_DataProcessService.exe.config):** A file where the system stores the configuration settings provided during the installation process.

During the last step of the Digital Analytics installation process, you have the option to launch the **da_Configure** utility. This utility:

- Creates a **Digital Analytics database** from the live e-automate database you specify. The Digital Analytics database is more conducive to statistical analysis, has the same SQL instance as the live e-automate database, and is named by adding the suffix Analytics to the live database's name (e.g., if the live e-automate database is named *coSample*, the Digital Analytics database is named *coSampleAnalytics*).
- Adds **Digital Analytics specific reports** to the Report Console in e-automate.
- Adds **Digital Analytics specific e-views** to e-views.

If the **da_Configure** utility detects any of the following issues, the system will not configure the database and will a message:

- The company for which you want to create a Digital Analytics database does not exist.
- The base schema version (e.g., 7.6.5., 8.0) cannot be determined.
- A Digital Analytics database already exists for the specified company.
Note: If you see a "Digital Analytics is already configured for [database]" message, see the Updating Digital Analytics section of this topic.

When the configuration process completes, the new Digital Analytics Data Process Service will automatically execute 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 databases for which you want to create Digital Analytics databases, you must execute the Digital Analytics Process manually for each database.

Downloading the Digital Analytics Installer

1. Using a browser on a computer connected to the Internet, go to <https://support.ecisolutions.com/login/login.php>.

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- In the **Email** field, enter your email address.
- In the **Password** field, enter your password for this site.
Note: If you cannot remember your password, click the [I forgot my password](#) link.
- Click **Login**. If the information you entered is valid, the system displays the Customer Support Center home page.
- On the Customer Support Center **Home** page, click the **ECi e-automate** icon to go to the **Home > E-automate** page.

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Welcome to the new Customer Support Center.

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- On the **Home > E-automate** page, click the [Software Downloads](#) link to go to the **Home > E-automate > Software Downloads** page.





The screenshot shows the ECI Software Solutions Customer Support Center. At the top left is the ECI Software Solutions logo. At the top right are social media icons for Twitter, LinkedIn, Facebook, and YouTube, along with a link for 'Other ECI Sites'. Below the logo is a breadcrumb trail: 'HOME > E-AUTOMATE'. The main heading is 'Welcome to the new Customer Support Center.' followed by a paragraph: 'We take pride in providing exceptional customer service. The Support Center will provide you convenient access to resources and information about your ECI software, a consolidated location to view your support cases and a streamlined process to submit a case to support for assistance.' Below this is a search bar with the placeholder text 'Have a Question? Ask or enter a search term here.' and a 'SEARCH' button. The page is divided into three columns. The left column is titled 'FIND ANSWERS' and contains links for 'Knowledge Base', 'User Guides', and 'How-to Videos'. The middle column is titled 'STAY CURRENT' and contains links for 'Support Alerts', 'Software Downloads' (with a red arrow pointing to it), and 'Training Classes'. The right column is titled 'CONTACT US' and contains links for 'My Cases' and 'Create Case', along with the phone number '866-347-8776' and the hours '7:00 a.m. to 6:00 p.m. Mountain, Monday through Friday'.

7. On the **Home > E-automate > Software Downloads** page, click the [Download e-automate Products](#) link to go to the **Home > E-automate > Software Downloads > Download E-automate Products** page.

The screenshot shows the ECI Software Solutions Software Downloads page. At the top left is the ECI Software Solutions logo. At the top right are social media icons for Twitter, LinkedIn, Facebook, and YouTube, along with a link for 'Other ECI Sites'. Below the logo is a breadcrumb trail: 'HOME > E-AUTOMATE > SOFTWARE DOWNLOADS'. The main heading is 'Search e-automate Software Downloads'. Below this is a search bar with the placeholder text 'Have a Question? Ask or enter a search term here.' and a 'SEARCH' button. The page is divided into two columns. The left column is titled 'Browse by Topic' and contains a link for 'Download e-automate Products' (with a red arrow pointing to it) and a sub-link '1 ARTICLE VIEW ALL' with a bullet point 'Link for All e-automate Product Downloa...'. The right column is titled 'CONTACT US' and contains links for 'My Cases' and 'Create Case', along with the phone number '866-347-8776' and the hours '7:00 a.m. to 6:00 p.m. Mountain, Monday through Friday'.

8. On the **Home > E-automate > Software Downloads > Download E-automate Products** page, click the [Link for All e-automate Product Downloads](#) link to go to the **Home > E-automate > Software Downloads > Download E-automate Products > Link for All E-automate Product Downloads** page.

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The following link will take you to the downloads for versions 8.5, 8.7, and 2016.1, as well as the system req...

AUG 25, 2016 04:25PM CDT

CONTACT US





 My Cases


 Create Case

866-347-8776
7:00 a.m. to 6:00 p.m. Mountain,
Monday through Friday

9. On the **Home > E-automate > Software Downloads > Download E-automate Products > Link for All E-automate Product Downloads** page, click the [http://](#) link (full link not shown) to go to the **E-automate 16.1 Released!** page.

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Enter a search term here. 

HOME > E-AUTOMATE > SOFTWARE DOWNLOADS > DOWNLOAD E-AUTOMATE PRODUCTS > LINK FOR ALL E-AUTOMATE PRODUCT DOWNLOADS


Link for All e-automate Product Downloads


Last Updated: Aug 25, 2016 04:25PM CDT

The following link will take you to the downloads for versions 8.5, 8.7, and 2016.1, as well as the system requirements, installation instructions, and add-on downloads:

[https://](#) ←

CONTACT US

 My Cases

 Create Case

866-347-8776
7:00 a.m. to 6:00 p.m. Mountain,
Monday through Friday

10. On the **E-automate 16.1 Released!** page, under **All Versions**, in the **Version 16.1** region, click the **[Download]** button to open the **Version 16.1** page.

e-automate Downloads

E-automate [Version] Released!

This release is e-automate's Financial Management Solutions release and the first of a series of updates that will focus on a concentrated area of the software. Organizing releases in this way will allow us to provide more in-depth and high quality solutions. To prepare for this upgrade please review the release notes and system requirements below. When upgrading to this release, remember that all add-on products should also be upgraded.

[Release Notes for 16.1](#)
[System Requirements \(16.1\)](#)
[Download \(16.1\)](#)

All Versions

Version [Version]

The latest release of [version] on date [date]

[System Requirements](#)
[Installation Overview](#)
[Download](#)

- On the **Version 16.1** page, click the [Digital Analytics](#) link in the **Server Downloads** region to go to the Digital Analytics software download section.

e-automate Downloads [Jump to Product](#)

Version [Version Number]

Below are links to download for e-automate [version] and all related [version] add-on products. Select from the list to jump to the downloads, or scroll through to find the product.

Remember to upgrade any of your add-on products that you may have.

Client Downloads

- [e-automate](#)
- [PO Processor \(POP\)](#)
- [Digital Quote Manager](#)
- [e-automate Commissions](#)

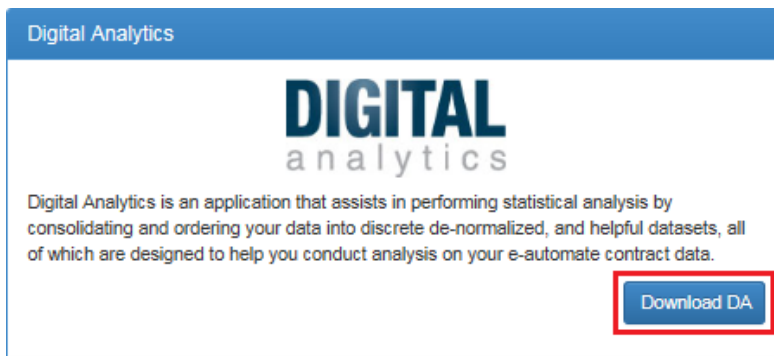
Server Downloads

- [e-automate](#)
- [Digital Taskforce](#)
- [Digital Analytics](#)
- [e-automate Task Engine](#)

Web Server Downloads

- [e-info](#)
- [Remote Tech](#)
- [Remote Service Manager](#)
- [Partner Integration Portal \(PIP\)](#)
- [RAP \(Digital Barcode\)](#)

- Click the **[Download DA]** button (similar to the one in the image shown below) to start the download.

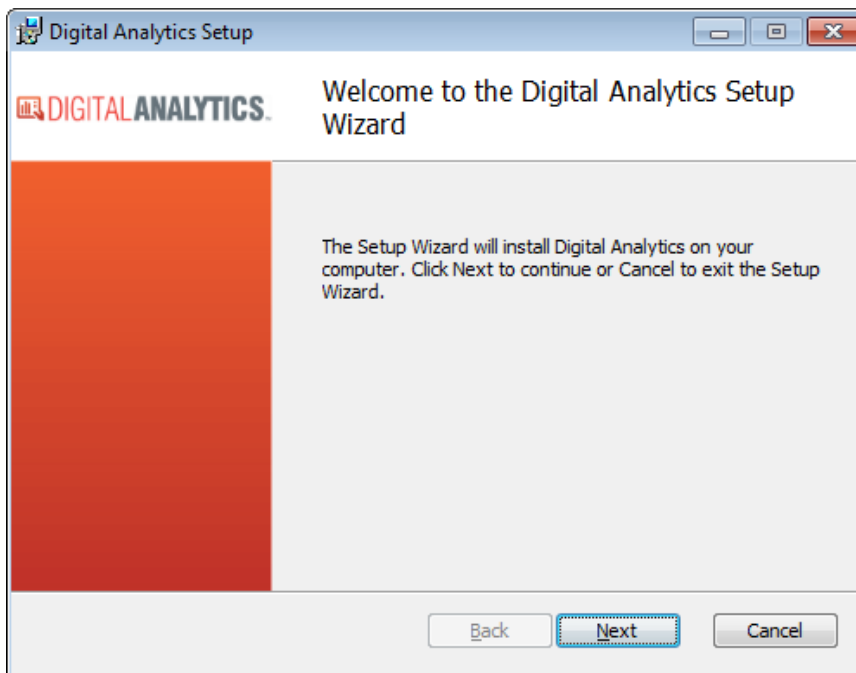


13. Follow your browser's prompts for downloading and saving the installation file.
Note: When you install a new version of e-automate, it is best practice to download and install new versions of all e-automate add-on products you actively use.
14. Be sure to review the [System Requirements](#) and related documentation.

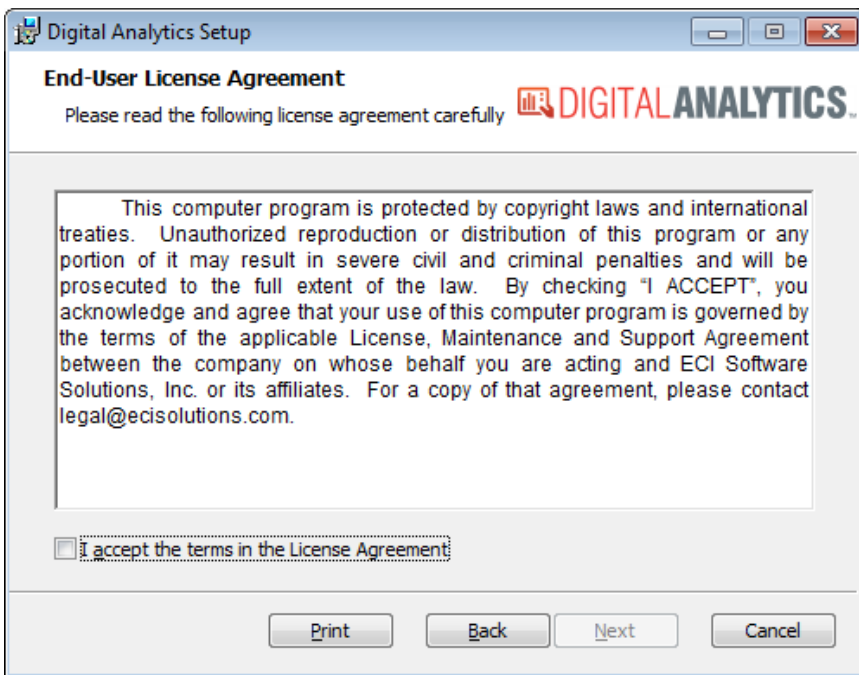
➤ First Time Digital Analytics Installation

If you are installing Digital Analytics for the first time, use the instructions in this topic to install Digital Analytics.

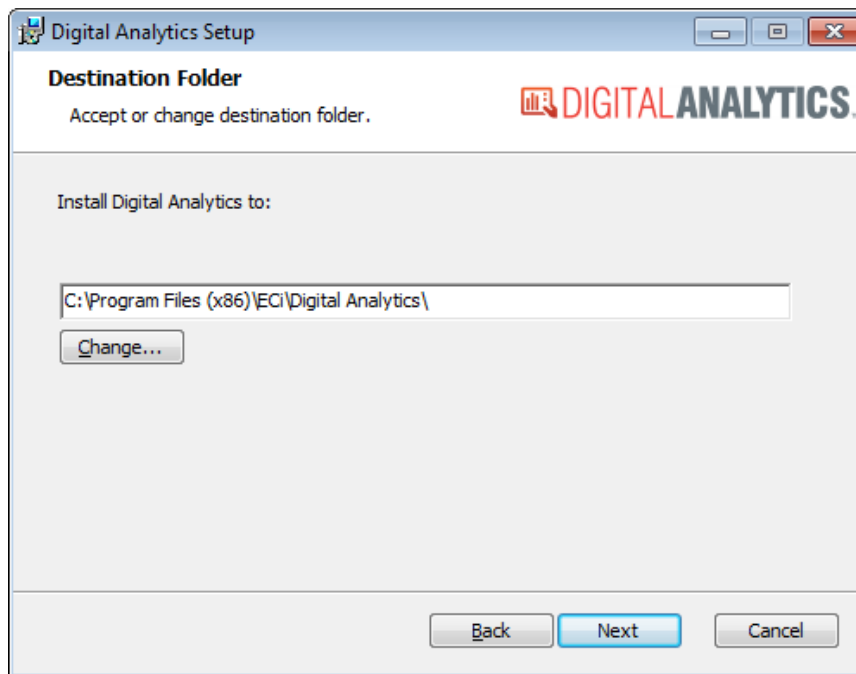
1. Place the downloaded Digital Analytics Microsoft Installer (MSI) file on the intended installation computer on your network.
2. Open the Digital Analytics MSI file to access the Digital Analytics Setup window.
3. On the Welcome to the Digital Analytics Setup Wizard window, click **[Next]** to continue.



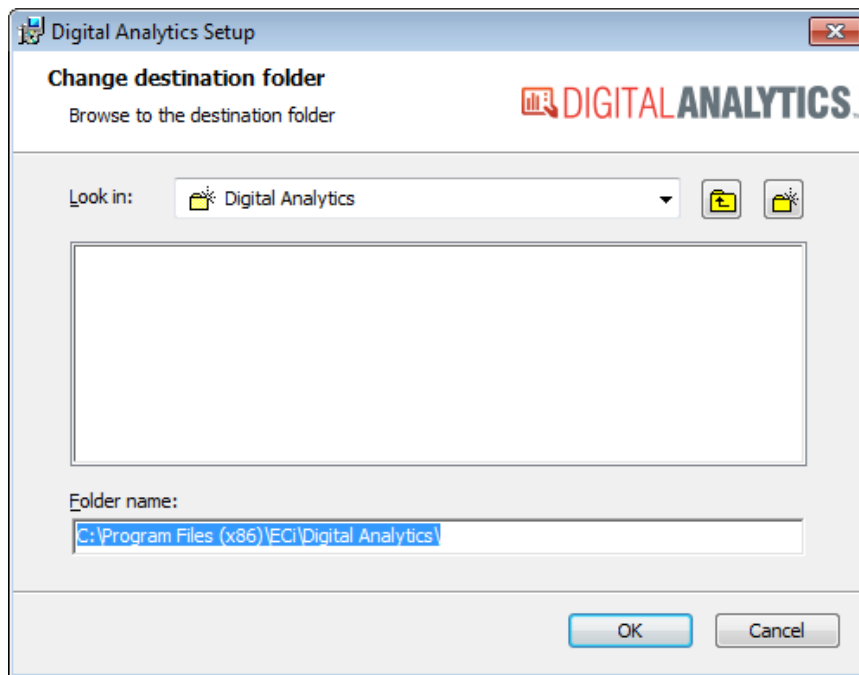
4. On the End-User License Agreement window, review the terms of the license agreement and then check the **I accept the terms of the License Agreement** box if you want to proceed with the installation.



5. Click [**Next**] to continue.
6. On the Destination Folder window, do one of the following:
 - a. To accept the default **Install Digital Analytics to:** location, click [**Next**] to continue.



- b. To change the default **Install Digital Analytics to:** location, do the following:
 - i. Click [**Change...**] to open the Change Destination Folder window.



- ii. On the Change Destination Folder window, do any of the following:
 - In the **Folder name** field, enter the destination folder name.
 - In the **Look in** field, use the drop-down menu to navigate to a folder location.

Note: This action updates the display of subfolders in this location and updates the path displayed in the **Folder name** field.
 - To go up one folder from the currently selected folder location, click the **Up one folder** icon to the right of the **Look in** field.

Note: This action updates the display of subfolders in this location and updates the path displayed in the **Folder name** field.
 - To create a new subfolder in the currently selected folder location, do the following:
 - Click the **Create a new folder** icon to the right of the **Up one folder** icon.
 - Enter a name for the folder.

Note: This action adds the new folder to the display of subfolders in this location and updates the path displayed in the **Folder name** field.
 - In the display of subfolders, click a subfolder.

Note: This action updates the Look in field, displays the subfolders listed in the selected folder, and updates the path displayed in the **Folder name** field.
 - iii. When the **Folder name** field contains the destination folder you want to use, click **[OK]** to close this window and populate the **Destination Folder** field on the Destination Folder window.
 - iv. Click **[Next]** to continue.
7. On the E-automate Settings window, do the following:

Digital Analytics Setup

E-automate Settings

Click Next to install with these settings below...

Valid network name for the DGServer:

Valid network name for the database server:

E-automate company database (including the preceding 'co'):

Back Next Cancel

- a. In the **Valid network name for the DGServer** field, enter the name of the computer where DGServer is running.
 - b. In the **Valid network name for the database server** field, enter the name of the network where your e-automate database is located.
 - c. In the **E-automate company database (including the preceding 'co')** field, enter the name of an e-automate database for which you to create an analytics database.
 - d. Click [**Next**] to continue.

Note: All fields on this window require an entry. To enable the [**Next**] button, enter data in each field and then tab out of the last field.
8. On the E-automate User Settings window, do the following:

Digital Analytics Setup

E-automate User Settings

Click Next to install with these settings below...

E-automate user account used by data sync service:

E-automate user password:

Back Next Cancel

- a. In the **E-automate user account used by data sync service** field, enter the e-automate user name you want to use for this purpose.
- b. In the **E-automate user password** field, enter the password associated with the e-automate user name you entered in the **E-automate user account used by data sync service** field.
- c. Click [**Next**] to continue.

Note: The first field on this window requires an entry. To enable the [**Next**] button, enter data in the first field

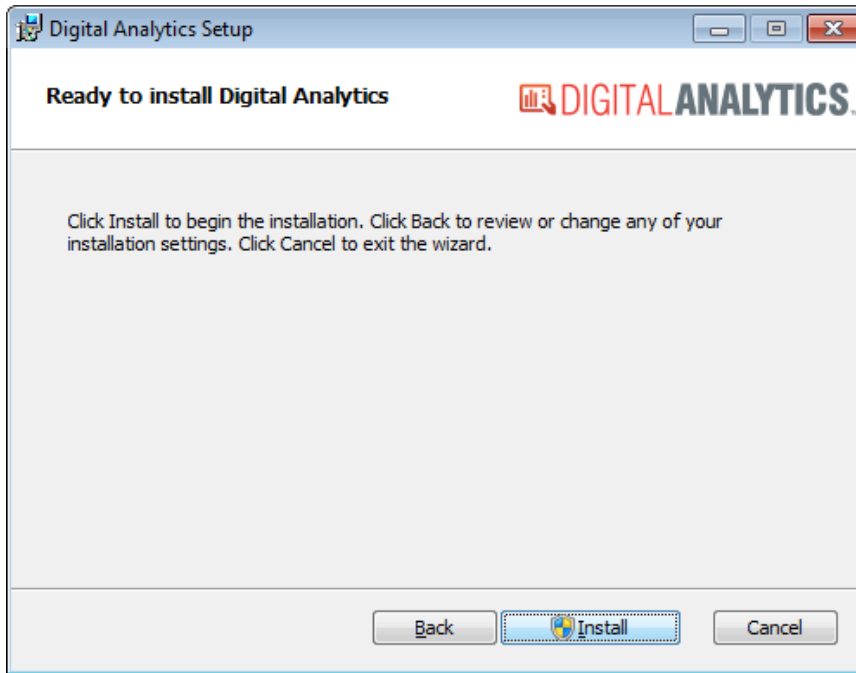
and then tab to the next field.

9. On the Sync Service Settings window, do the following:

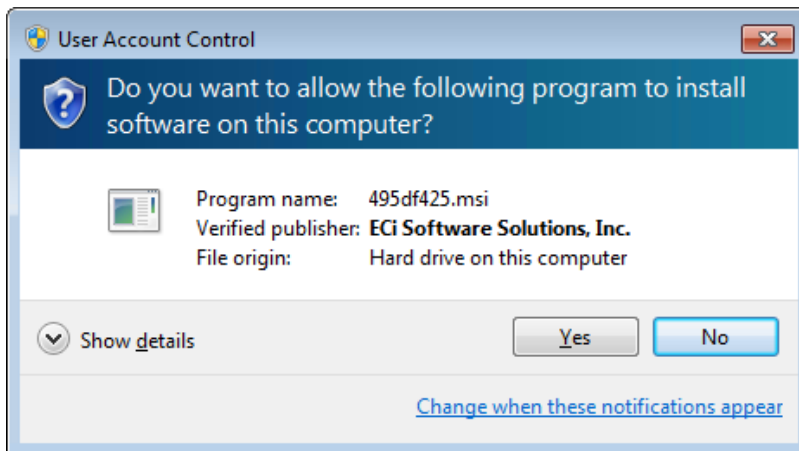
- a. In the **Time of day that the data sync service will execute** field, enter the time of day you want the analytics database to sync with your e-automate database or make no change to use the value displayed.
 - b. In the **Number of seconds the sync service should sleep between checking for new jobs** field, enter the frequency (in seconds) at which the service should check to determine if the Digital Analytics Data Process utility should be run or make no change to use the value displayed.
 - c. Click [**Next**] to continue.
10. On the Email Settings window, you can specify default values for the following fields or leave them blank:

- a. In the **Email address to use as the sender address for service notification messages** field, enter the email address from which you want Digital Analytics to send service notification emails (e.g., noreply@sender.com).
- b. In the **Email address to contact for service error notification messages** field, enter the email address to which you want Digital Analytics to send service error notification emails.

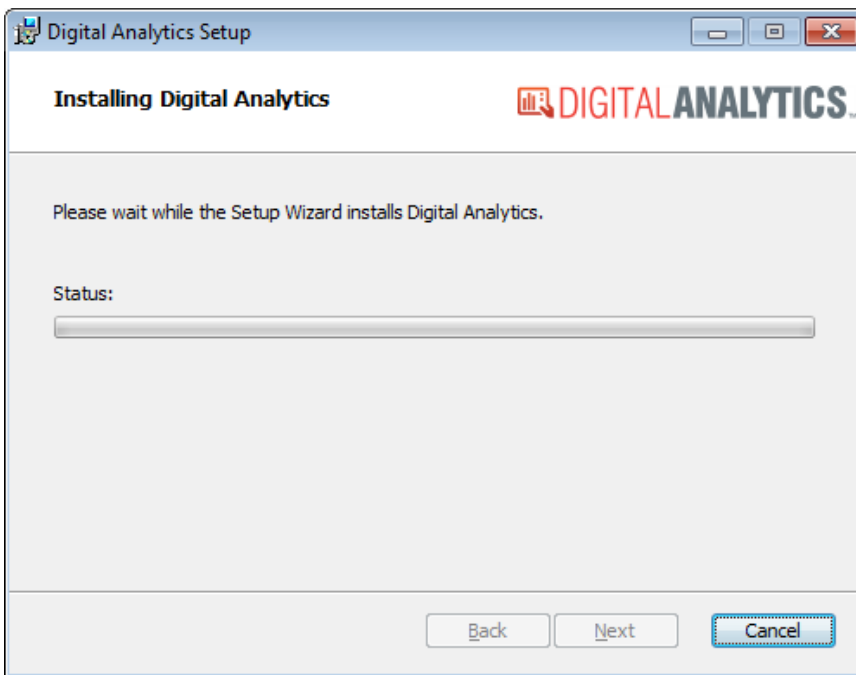
- c. In the **Email address to contact for service status/info notification messages** field, enter the email address to which you want Digital Analytics to send notification emails when a Digital Analytics database has been updated.
 - d. Click [**Next**] to continue.
11. On the Ready to Install Digital Analytics window, click [**Install**] to continue.



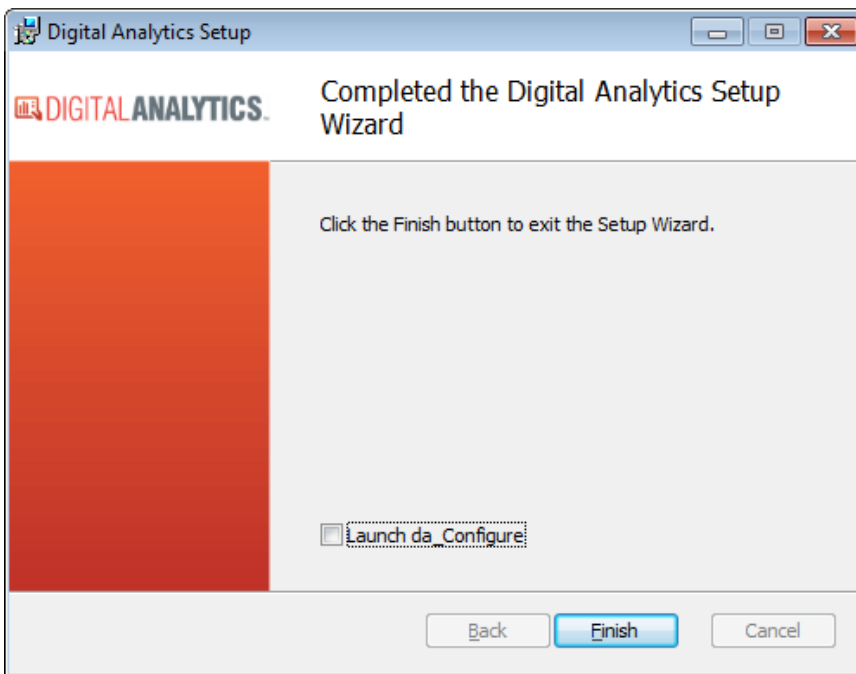
12. On the User Account Control window, click [**Yes**] to allow this program to proceed with installing Digital Analytics on this computer.



The system displays the Installing Digital Analytics window.



13. When the installation is complete, the system displays the Completed the Digital Analytics Setup Wizard window. Check the **Launch da_Configure** box if you want the system to open the da_Configure window after you click the **[Finish]** button.



14. Click **[Finish]** to close this window.
15. If you checked the **Launch da_Configure** box, the system displays the Da_Configure: Digital Analytics Server window with summary data for configuring Digital Analytics for the e-automate company database you specified in Step 7.c above. To continue with the configuration, click **[OK]**. To exit without configuring the database, click **[Cancel]**.
Note: If the system displays the message, "Analytics is already configured for [Company ID]" (which may occur if you are running through this process after uninstalling a previous version of this software), click **[OK]** to acknowledge the message and to close da_Configure; you do not need to reconfigure Digital Analytics for the specified company.
16. If you clicked **[OK]** in the previous step, the system configures the specified company database for use with Digital Analytics. When the process completes, the system displays a message with the text, "Configured analytics for [Company ID]." Click **[OK]** to acknowledge this message and close this window.

Note: Consistent with Microsoft installer (MSI) file processes, this installer does not automatically create Windows desktop shortcuts.

To create a Windows shortcut to the program, pin the program to your Windows Start menu, or pin the program to your Windows task bar, do the following:

1. Navigate to the path where you installed Digital Analytics (by default *C:\Program Files (x86)\ECI\Digital Analytics*).
Note: If you did not install Digital Analytics in the default location, navigate to the path where you installed Digital Analytics.
2. Right-click the program for which you want to create a shortcut or which you want to pin (e.g., **da_Configure**).
3. To create a Windows shortcut, do the following:
 - a. From the right-click menu, select **Create shortcut**.
 - b. Click **[OK]** to the message asking if you want the system to place the icon on the desktop. The system displays the shortcut on the desktop.
4. To pin the program to the Windows **Start** menu, select **Pin to Start Menu** from the right-click menu. The system adds the program to the Windows **Start** menu.
5. To pin the program to the Windows taskbar, select **Pin to Taskbar** from the right-click menu. The system adds the program to the Windows taskbar.

If you chose not to check the **Launch da_Configure** box in Step 13 above and/or if you need to configure other company databases for use with Digital Analytics, proceed to the *Digital Analytics Configuration Utility* section of this topic.

➤ Updating Digital Analytics

➤ Uninstalling the previous version of the Digital Analytics Software

If you are updating Digital Analytics from a software version prior to 16.1, best practice is to manually remove your previous version of this software before installing the new version.

Note: After you install Digital Analytics using the Digital Analytics MSI installer for 16.1, the system will remove the previous version of the software automatically during the process of installing a new version.

If you want to remove the previous version of Digital Analytics manually before proceeding with the new installation, use a process similar to the following (based on Windows 7):

1. To facilitate the process of removing the software, close any open e-automate programs—including add-in programs.
2. Using the Windows **Start** menu, click **Start > Control Panel > Programs and Features** to open the Uninstall or Change a Program window.
3. In the **Name** column, locate *Digital Analytics*.
Note: If *Digital Analytics* is not listed on the Uninstall or Change a Program window, you do not need to complete this uninstall process.
4. Right-click *Digital Analytics* and select **Uninstall** from the right-click menu.
5. If the system displays the prompt, "Are you sure you want to uninstall Digital Analytics?", click **[Yes]** to continue.
Note: If any e-automate programs are open, the system will display a Digital Analytics window listing the open program(s). If you see this message, click **[Cancel]**, close the open program(s) displayed in the list, and then restart the uninstall process.
6. If the system displays a User Account Control window, click **[Yes]** to allow this program to proceed with uninstalling the e-automate software components on this computer.

The system will display a Please Wait window while the program is being uninstalled. When the system closes this window and removes *Digital Analytics* from the list on the Uninstall or Change a Program window, the uninstallation process is complete.

➤ Updating E-automate Databases (Version 8.7 or earlier) Against Which You Previously Ran Digital Analytics

If you previously ran Digital Analytics against any e-automate databases from version 8.7 or earlier that you need to update to the current software version using e-admin, you must re-run **da_Configure** against each of those databases after you update them through e-admin.

Warning: If you do not re-run **da_Configure** against these databases after you convert them through e-admin, Digital Analytics will no longer work correctly.

For information on updating an e-automate database through e-admin, see the [Updating a Database](#) topic.

To re-run **da_Configure** against a database, do the following:

Access the Digital Analytics Configuration Utility

To access the Digital Analytics Configuration utility, do the following:

Note: If you just completed the Digital Analytics software installation and checked the **Launch da_Configure** box, the system opened the login window for the Digital Analytics Configuration utility; proceed to Step 2 in the process listed below.

1. To open the Digital Analytics Configuration utility, do any of the following:
 - If you did not create a Windows shortcut to the program, pin the program to your Windows Start menu, or pin the program to your Windows task bar, do the following:
 - a. Navigate to the path where you installed Digital Analytics (by default *C:\Program Files (x86)\ECi\Digital Analytics*).

Note: If you did not install Digital Analytics in the default location, navigate to the path where you installed Digital Analytics.
 - b. To simplify access to the program in the future, do the following:
 - i. Right-click **da_Configure**.
 - ii. To create a Windows shortcut, do the following:
 - a. From the right-click menu, select **Create shortcut**.
 - b. Click **[OK]** to the message asking if you want the system to place the icon on the desktop. The system displays the shortcut on the desktop.
 - iii. To pin the program to the Windows **Start** menu, select **Pin to Start Menu** from the right-click menu. The system adds the program to the Windows **Start** menu.
 - iv. To pin the program to the Windows taskbar, select **Pin to Taskbar** from the right-click menu. The system adds the program to the Windows taskbar.
 - a. Click the **da_Configure** file to open the Digital Analytics login window.
 - If you created a Windows shortcut to the program, pinned the program to your Windows **Start** menu, or pinned the program to your Windows taskbar, click your Digital Analytics Configuration utility (**da_Configure**) program icon to open the Digital Analytics login window.
2. In the **Profile** field, use the drop-down menu to select the appropriate login profile.
3. Click **[OK]** to open the main **da_Configure** window. See the additional sections of this topic for information on using this window.

Deconfigure Digital Analytics

When you deconfigure a Digital Analytics database, the system removes the Digital Analytics database and removes all elements specific to Digital Analytics (such as e-views and report definitions) from the selected e-automate database.

To deconfigure a Digital Analytics database, do the following:

1. Access the **da_Configure** window (for information on accessing the utility, see the *Accessing the Digital Analytics Configuration Utility* section of this topic).
2. Right-click the database for which you want to deconfigure Digital Analytics. The system displays the Enter Admin Password window.
3. In the **Admin password for [Company ID]** field, enter the admin password.
4. Click **[OK]**. The right-click menu displays.

Note: If you do not have an admin password, simply click **[OK]**.
5. If the system validates the password you entered, the system displays the right-click menu. Select **Deconfigure Digital Analytics**. The system displays a **da_Configure: Digital Analytics** window asking you to confirm you want to deconfigure Digital Analytics for this database.
6. Click **[OK]** to deconfigure Digital Analytics for this e-automate database.

Note: If you do not want to deconfigure Digital Analytics for this e-automate database, click **[Cancel]** to exit this process.

When the process completes, the system closes the da_Configure: Digital Analytics window, clears the **AnalyticsServer** and **AnalyticsDatabase** columns of the e-automate database list for the selected e-automate database, removes the Digital Analytics database, and removes elements specific to Digital Analytics (such as e-views and report definitions) from the e-automate database.

➤ Configure Digital Analytics

To use Digital Analytics with an e-automate database, you must process the **Configure Digital Analytics** option. This process creates the Digital Analytics database, identifies the Digital Analytics server, and populate the **AnalyticsServer** and **AnalyticsDatabase** columns of the e-automate database list with this information. Use the following process to configure each e-automate database on which you want to use Digital Analytics:

1. Verify all e-automate users are offline.
2. Access the da_Configure window (for information on accessing the utility see the *Accessing the Digital Analytics Configuration Utility* section of this topic).
3. Right-click the database for which you want to configure Digital Analytics. The system displays the Enter Admin Password window.
4. In the **Admin password for [Company ID]** field, enter the admin password.
5. Click **[OK]**. The right-click menu displays.

Note: If you do not have an admin password, simply click **[OK]**.
6. If the system validates the password you entered, the system displays the right-click menu. Select **Configure Digital Analytics**. The system displays the da_Configure: Digital Analytics Server window. This window lists the e-automate SQL Server, e-automated Database Name you have selected, the Analytics Database Name the system will create, and the Analytics SQL Server.
7. If the information the system is displaying is correct, click **[OK]** to configure the analytics database.

Note: If the information the system displays is not as you expect, click **[Cancel]** to exit this process.

When the process completes, the system closes the da_Configure: Digital Analytics Server window, populates the **AnalyticsServer** and **AnalyticsDatabase** columns of the e-automate database list for the selected e-automate database, creates the Digital Analytics database, and adds elements specific to Digital Analytics (such as e-views and report definitions) to the e-automate database.

➤ Installing the New Digital Analytics Software

When the process is complete, use the steps listed in the *First Time Digital Analytics Installation* section of this topic to install the software.

➤ Digital Analytics Configuration Utility

You use the Digital Analytics Configuration utility to enter optional data component license information and to create, delete, and manage analytics databases. The Digital Analytics Configuration utility must be executed from a Windows account that has SQL Admin rights.

For each of your company's e-automate databases, the utility lists one row containing the **Company ID**, **Company name**, **City**, **Created on** date, **AnalyticsServer**, **AnalyticsDatabase**, e-automate software **Version**, **Compatibility level**, **Database type**, and **Days since last backup**. Using this utility, you perform all actions by right-clicking a database and selecting from the right-click menu the option you want to process. The options the system displays in the right-click menu vary depending on whether the version of the database matches the version of the software and whether you have configured the database for use with Digital Analytics. The **Version** column displays each database's version information. The **AnalyticsServer** and **AnalyticsDatabase** columns are populated for each database for which Digital Analytics is configured.

The first time you access a database after opening this window, you are asked to supply the admin password for the database. A delay between the time when you enter the password and when the system displays the appropriate popup menu is normal.

➤ Accessing the Digital Analytics Configuration Utility

To access the Digital Analytics Configuration utility, do the following:

Note: If you just completed the Digital Analytics software installation and checked the **Launch da_Configure** box, the

system opened the login window for the Digital Analytics Configuration utility; proceed to Step 2 in the process listed below.

1. To open the Digital Analytics Configuration utility, do any of the following:
 - If you did not create a Windows shortcut to the program, pin the program to your Windows Start menu, or pin the program to your Windows task bar, do the following:
 - a. Navigate to the path where you installed Digital Analytics (by default *C:\Program Files (x86)\ECi\Digital Analytics*).

Note: If you did not install Digital Analytics in the default location, navigate to the path where you installed Digital Analytics.
 - b. To simplify access to the program in the future, do the following:
 - i. Right-click **da_Configure**.
 - ii. To create a Windows shortcut, do the following:
 - a. From the right-click menu, select **Create shortcut**.
 - b. Click **[OK]** to the message asking if you want the system to place the icon on the desktop. The system displays the shortcut on the desktop.
 - iii. To pin the program to the Windows **Start** menu, select **Pin to Start Menu** from the right-click menu. The system adds the program to the Windows **Start** menu.
 - iv. To pin the program to the Windows taskbar, select **Pin to Taskbar** from the right-click menu. The system adds the program to the Windows taskbar.
 - c. Click the **da_Configure** file to open the Digital Analytics login window.
 - If you created a Windows shortcut to the program, pinned the program to your Windows **Start** menu, or pinned the program to your Windows taskbar, click your Digital Analytics Configuration utility (da_Configure) program icon to open the Digital Analytics login window.
2. In the **Profile** field, use the drop-down menu to select the appropriate login profile.
3. Click **[OK]** to open the main da_Configure window. See the additional sections of this topic for information on using this window.

➤ Editing Dealer Connection Setting (Entering License Info)

This functionality is not currently being used.

➤ Configuring Digital Analytics

To use Digital Analytics with an e-automate database, you must process the **Configure Digital Analytics** option. This process creates the Digital Analytics database, identifies the Digital Analytics server, and populate the **AnalyticsServer** and **AnalyticsDatabase** columns of the e-automate database list with this information. Use the following process to configure each e-automate database on which you want to use Digital Analytics:

1. Verify all e-automate users are offline.
2. Access the da_Configure window (for information on accessing the utility see the *Accessing the Digital Analytics Configuration Utility* section of this topic).
3. Right-click the database for which you want to configure Digital Analytics. The system displays the Enter Admin Password window.
4. In the **Admin password for [Company ID]** field, enter the admin password.
5. Click **[OK]**. The right-click menu displays.

Note: If you do not have an admin password, simply click **[OK]**.
6. If the system validates the password you entered, the system displays the right-click menu. Select **Configure Digital Analytics**. The system displays the da_Configure: Digital Analytics Server window. This window lists the e-automate SQL Server, e-automated Database Name you have selected, the Analytics Database Name the system will create, and the Analytics SQL Server.
7. If the information the system is displaying is correct, click **[OK]** to configure the analytics database.

Note: If the information the system displays is not as you expect, click **[Cancel]** to exit this process.

When the process completes, the system closes the da_Configure: Digital Analytics Server window, populates the **AnalyticsServer** and **AnalyticsDatabase** columns of the e-automate database list for the selected e-automate database, creates the Digital Analytics database, and adds elements specific to Digital Analytics (such as e-views and report definitions) to the e-automate database.

➤ Deconfiguring Digital Analytics

When you deconfigure a Digital Analytics database, the system removes the Digital Analytics database and removes all elements specific to Digital Analytics (such as e-views and report definitions) from the selected e-automate database.

To deconfigure a Digital Analytics database, do the following:

1. Access the da_Configure window (for information on accessing the utility, see the *Accessing the Digital Analytics Configuration Utility* section of this topic).
2. Right-click the database for which you want to deconfigure Digital Analytics. The system displays the Enter Admin Password window.
3. In the **Admin password for [Company ID]** field, enter the admin password.
4. Click **[OK]**. The right-click menu displays.
Note: If you do not have an admin password, simply click **[OK]**.
5. If the system validates the password you entered, the system displays the right-click menu. Select **Deconfigure Digital Analytics**. The system displays a da_Configure: Digital Analytics window asking you to confirm you want to deconfigure Digital Analytics for this database.
6. Click **[OK]** to deconfigure Digital Analytics for this e-automate database.
Note: If you do not want to deconfigure Digital Analytics for this e-automate database, click **[Cancel]** to exit this process.

When the process completes, the system closes the da_Configure: Digital Analytics window, clears the **AnalyticsServer** and **AnalyticsDatabase** columns of the e-automate database list for the selected e-automate database, removes the Digital Analytics database, and removes elements specific to Digital Analytics (such as e-views and report definitions) from the e-automate database.

Resetting Digital Analytics Data

The **Reset Digital Analytics Data** 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 Digital Analytics (such as e-views and report definitions) remain in the e-automate database.

To reset the Digital Analytics data for a database, do the following:

1. Access the da_Configure window (for information on accessing the utility, see the *Accessing the Digital Analytics Configuration Utility* section of this topic).
2. Right-click the database for which you want to deconfigure Digital Analytics. The system displays the Enter Admin Password window.
3. In the **Admin password for [Company ID]** field, enter the admin password.
4. Click **[OK]**. The right-click menu displays.
Note: If you do not have an admin password, simply click **[OK]**.
5. If the system validates the password you entered, the system displays the right-click menu. Select **Reset Digital Analytics Data**. The system displays a Digital Analytics: da_Configure window asking you to confirm you want to reset/clear Digital Analytics data for this database.
6. Click **[Yes]** to reset/clear Digital Analytics data for this e-automate database.
Note: If you do not want to reset/clear Digital Analytics data for this e-automate database, click **[No]** to exit this process.

When the process completes, the system closes the Digital Analytics: da_Configure window, leaves populated the **AnalyticsServer** and **AnalyticsDatabase** columns of the e-automate database list for the selected e-automate database, resets/clears the Digital Analytics database, and does not modify elements specific to Digital Analytics (such as e-views and report definitions) in the e-automate database.

Clearing Work in Progress

Only one instance of the Digital Analytics Data Process utility can be active at a time. To ensure only one instance is active at a time, the system sets a Work In Progress flag. If another instance of the Digital Analytics Data Process utility is executed while this flag is set, the system displays an error and closes the utility. Normally, the system clears this flag when the Digital Analytics Data Process utility terminates—even if it terminates due to an error. In rare cases, this flag can remain set. In these rare cases, use the **Clear Work in Progress** option to clear the flag and permit another instance of the Digital Analytics Data Process utility to run. Make certain no instances of the Digital Analytics Data Process utility are running before using the **Clear Work in Progress** option.

To use the **Clear Work in Progress** option, do the following:

1. Access the da_Configure window (for information on accessing the utility, see the *Accessing the Digital Analytics Configuration Utility* section of this topic).
2. Right-click the database for which you want to clear the Work In Progress flag. The system displays the Enter Admin Password window.
3. In the **Admin password for [Company ID]** field, enter the admin password.
Note: If you do not have an admin password, leave this field blank.
4. Click **[OK]**.
5. If the system validates the password you entered, the system displays the right-click menu. Select **Clear Work in Progress** to clear the Work In Progress flag.
6. If the system verifies the Work In Progress flag is set (indicating a data process is active), the system displays the message: "Analytics data processing was started at [time and date] by [user]. This state should NOT be changed unless the data process is no longer running! Are you certain you wish to clear this status?"
7. If you are certain the Work In Progress flag should be cleared for the process identified in the message, click **[Yes]**. The system will clear the flag and display the message: "Analytics Work In Progress status has been cleared." You can now run another instance of the Digital Analytics Data Process utility. If you are not certain the flag should be cleared, click **[No]** to close this message and leave the Work In Progress flag set.

Editing 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. Access the da_Configure window (for information on accessing the utility, see the *Accessing the Digital Analytics Configuration Utility* section of this topic).
2. Right-click the database for which you want to deconfigure Digital Analytics. The system displays the Enter Admin Password window.
3. In the **Admin password for [Company ID]** field, enter the admin password.
4. Click **[OK]**. The right-click menu displays.
Note: If you do not have an admin password, simply click **[OK]**.
5. If the system validates the password you entered, the system displays the right-click menu. Select **Edit Data Process Service Parameters**. The system displays the Digital Analytics Configuration Settings window.
6. In the **Service App Settings (optional)** region, the system displays the following defaults (which were initially specified when Digital Analytics was installed):
 - In the **Email From** field, enter the email address from which you want Digital Analytics to send emails (or make no change to use the value displayed).
 - In the **Email Error Contact** field, enter the email address to which you want Digital Analytics to send emails informing the individual of Digital Analytics errors (or make no change to use the value displayed).
 - In the **Email Info Contact** field, enter the email address to which you want Digital Analytics to send emails informing the individual when the Digital Analytics database has been updated (or make no change to use the value displayed).
 - The **Sleep Seconds** field displays the frequency with which the service will check to determine whether the Digital Analytics Data Process utility should be run. This field cannot be edited.
7. To add a database entry, do the following:
8. Click **[Add]** to open the Digital Analytics Configuration Settings window.
9. In the **Entry Identifier** field, enter an appropriate identifier for this process (e.g., *da_DataProcess*).
10. In the **Server Authentication** region, enter the appropriate information in the following fields:
 - In the **DG Server** field, enter the name of DG Server where the e-automate database resides (or make no change to use the value displayed).
 - In the **SQL Server** field, enter the name of your SQL Server where the e-automate database resides (or make no change to use the value displayed).
 - In the **CompanyID** field, enter the name of a company database from which Digital Analytics will put information.
Note: Do not add the 'co' prefix to the **CompanyID** field. The system populates the **Database Name** field based on the value you enter in the **CompanyID** field.
11. In the **Service Config Settings** region, enter the appropriate information in the following fields:
 - In the **Application Path** field, enter the location where the **da_DataProcess.exe** file is located (or make no change to use the value displayed).

Note: If you need to change the location, use the **[Browse]** button to navigate to the location where this program is installed (by default *C:\Program Files (x86)\ECi\Digital Analytics\da_DataProcess.exe*).

- In the **e-auto Username** field, enter the username you use to log in to e-automate (or make no change to use the value displayed).
 - In the **e-auto Password** field, enter the password you use to log in to e-automate with the **Username** supplied (or make no change to use the value displayed).
 - To see the value in the **e-auto Password** field, check the **Show Password** box; to use asterisks (*) to hide the value in the **e-auto Password** field, uncheck the **Show Password** box.
 - In the **Execution Time** field, enter the time of day you want Digital Analytics to update the database. You can specify the time in 12-hour (with AM/PM suffix) format or 24-hour format.
12. Verify the **Enabled** box is checked.
 13. Click **[OK]** to save the changes and return to the Digital Analytics Service Configuration Settings window.
 14. Click **[Update]** to update the display.
 15. Click **[Close]** to close the Digital Analytics Service Configuration Settings window.

➤ 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. Subsequent executions of the Data Process utility can be set to run automatically at the time you determine 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.

Each time the data process utility executes, a series of intermediate tables are created in the live e-automate database to hold the data as the data is being processed and prepared to be organized into the analytics database. The first time the data process utility executes, the size of the tables can be substantial which, in turn, causes the size of your e-automate database to increase considerably. Once the analytics database is created, those intermediate tables are dropped. The space that was used by the tables, however, is not released. The SQL service engine will use that space as required. Subsequent executions of the data process utility will only moderately increase the size of your e-automate database.

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

1. To open the Digital Analytics Data Process utility, do any of the following:
 - If you did not create a Windows shortcut to the program, pin the program to your Windows Start menu, or pin the program to your Windows task bar, do the following:
 - a. Navigate to the path where you installed Digital Analytics (by default *C:\Program Files (x86)\ECi\Digital Analytics*).
 - Note:** If you did not install Digital Analytics in the default location, navigate to the path where you installed Digital Analytics.
 - b. To simplify access to the program in the future, do the following:
 - i. Right-click **da_DataProcess**.
 - ii. To create a Windows shortcut, do the following:
 - a. From the right-click menu, select **Create shortcut**.
 - b. Click **[OK]** to the message asking if you want the system to place the icon on the desktop. The system displays the shortcut on the desktop.
 - iii. To pin the program to the Windows **Start** menu, select **Pin to Start Menu** from the right-click menu. The system adds the program to the Windows **Start** menu.
 - iv. To pin the program to the Windows taskbar, select **Pin to Taskbar** from the right-click menu. The system adds the program to the Windows taskbar.
 - c. Click the **da_DataProcess** file to open the Digital Analytics login window.
 - If you created a Windows shortcut to the program, pinned the program to your Windows **Start** menu, or pinned the program to your Windows taskbar, click the Digital Analytics Data Process utility (*da_DataProcess*) program icon to open the Digital Analytics login window.
2. In the **Profile** field, use the drop-down menu to select the appropriate login profile.
3. Click **[OK]** to continue.
4. The *da_DataProcess* window informs you this process may take some time and asks if you are ready to proceed. Click **[Yes]** to proceed, or click **[No]** to cancel this process.
5. If you clicked **[Yes]** in the previous step, the system displays a "Please Wait" message during processing and then a *Da_DataProcess* message indicating the process is complete. Click **[OK]** to acknowledge and close this message.

SMTP e-mail Configuration

SMTP settings must be properly configured for Digital Analytics to send notification emails. During the installation process, the system collects e-mail credentials as part of the process of configuring Digital Analytics for the company database you specify. After the installation, you can use the Digital Analytics Configuration utility (da_Configure) to update this information for that company database and/or to enter information to use in conjunction with other company databases for which you configure Digital Analytics. For more information, see the *Digital Analytics Configuration Utility > Editing Data Process Service Parameters* section of this topic.

The system stores the SMTP configuration values in a **da_DataProcessService.exe.config** file, which you can edit with any text editor (such as Microsoft Notepad). Within the <configuration> tag, you can add a new section containing the tags shown in the example below, starting with the <system.net> tag. Note that for many SMTP systems, the value for the **EmailFrom** key must match the SMTP network **userName** value. Also, some systems will require the **enableSsl** attribute to be set to *true* while others will require it to be set to *false*.

```
<system.net>
  <mailSettings>
    <smtp deliveryMethod="network">
      <network
        host="smtp host name"
        port="port number"
        enableSsl="true"
        userName="user name"
        password="password"
      defaultCredentials="true"
      />
    </smtp>
  </mailSettings>
</system.net>
```

Time Out Issues

The system may need a significant amount of time to create the Digital Analytics database, especially if you are creating the Digital Analytics database for the first time on a database your company has been using for many years and you have a lot of data to process. If Digital Analytics times out during processing, you can modify the timeout options using the **da_DataProcessOptions.xml** file in the Digital Analytics folder (which is stored by default at C:\Program Files (x86)\ECi\Digital Analytics).

The **da_DataProcessOptions.xml** file provides four options you can use to keep your system from timing out when processing the Digital Analytics database.

The file contains the following basic code (along with comments on using each of the four options):

```
<?xml version="1.0"?>
<DigitalAnalytics>
  <Options>
    <ProcessingCutoffDateTime> now </ProcessingCutoffDateTime>
    <RegularSQLTimeout> 0:40:0 </RegularSQLTimeout>
    <HugeSQLTimeout> 6:0:0 </HugeSQLTimeout>
    <SQLCommandTimeOutMultiplier> 1.0 </SQLCommandTimeOutMultiplier>
  </Options>
</DigitalAnalytics>
```

The options are:

- ProcessingCutoffDateTime:** This code tag is used to identify the most recent transaction date that will be processed. The default value is *now* (or any value the system cannot identify as a valid date and time) so that the system's default cutoff is through the most recent transaction. You can change this value to a specific date and time (e.g., *31-Dec-2012 23:59:59*) to limit the date and time through which the system will process transactions. You can use any

date and time supported by the .Net date/time parser. If the system recognizes the value you enter as a valid date and time, then the system will process transactions through that date and time. If the system does not recognize the value you enter as a valid date and time, the system will process transactions through the date and time the database was created. Example:

```
<ProcessingCutoffDateTime> now 31-Dec-2012 23:59:59 </ProcessingCutoffDateTime>
```

In this example, the *now* at the beginning of the value will prevent the system from recognizing the value as a valid date and time, causing the system to process transactions through the date and time the database was created. If you remove the *now* prefix, leaving *31-Dec-2012 23:59:59*, the system will process transactions through that date and time only and no transactions dated after that will be processed.

- **RegularSQLTimeout:** This code tag tells the utility how long to let the utility process before the system times out. The standard timeout value used for the majority of SQL statements in the analytics data process is 40 minutes. The value of this tag is in the “hours:minutes:seconds” format. Modifying this option should not typically be required, but may be in cases where a very large e-automate database results in very large executions times. Example:

```
<RegularSQLTimeout> 1:00:0 </RegularSQLTimeout>
```

In this example, the regular SQL timeout is extended from 40 minutes to 60 minutes (1 hour).

- **HugeSQLTimeout:** A small number of SQL statements in the analytics data process can take much longer to execute than the majority of the statements. Because of this, these SQL statement use a much larger timeout value. This code tag tells the utility how long to let these specific SQL statements process before timing out. The default value is 6 hours. The value of this tag is in the “hours:minutes:seconds” format. Example:

```
<HugeSQLTimeout> 9:0:0 </HugeSQLTimeout>
```

In this example, the huge SQL timeout is extended from 6 hours to 9 hours.

- **SQLCommandTimeoutMultiplier:** If you want to increase (or decrease) the timeout length using a constant factor, you can edit the value of this tag to set a multiplier value. The multiplier value defaults to 1.0. Example:

```
<SQLCommandTimeOutMultiplier> 1.5 </SQLCommandTimeOutMultiplier>
```

In this example, the timeout values for the regular and huge SQL timeouts will be increased by 50%. A 40-minute regular SQL timeout would become a 60-minute (1 hour) timeout, and 6-hour huge SQL timeout would become a 9-hour timeout.

You can use all the options with their standard values, modify any of the values, and/or remove any of the options you do not want to use. For example, if all you want to do is increase the timeout values by 50%, you only need to change the <SQLCommandTimeoutMultiplier> tag's default value from *1.0* to *1.5*.

➤ 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 location (by default *C:\Program Files (x86)\ECi\Digital Analytics\Reports*) on the workstation on which the installer is run. If you normally store report definitions on a shared folder, copy the report files to that shared folder to ensure 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.

