



SAW CubeViewer 4 Templates Guide

Rev 3-2-0

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Introduction

This guide covers all the steps required to download and configure the SAW CubeViewer 4 Template files for use in your company environment. The sections in this guide are:

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- Accessing and Downloading the SAW Templates Page 3
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Prerequisites

The SAW CubeViewer 4 Template files are for the CubeViewer 4 program. Therefore, you must have the CubeViewer 4 program installed on the computer where you are planning to configure the files for use in your environment.

The template feature is only supported from the CubeViewer 4 version 4-1-2-7 (Released November 20th 2011) onwards. You must have access to this version of the program - you must have purchased the program after this date, or you must have the program covered by a SAW Maintenance Plan. You can check the current version of the CubeViewer 4 program through the Help -> About menu option and you can download the latest update using the Help -> Check for Updates menu option.

Selecting which Templates to Install

The SAW Templates are configured for a particular module, version and type of installation. Make sure that you select the set of templates that are correct for your environment. Before you start, you will need to know:

- Which SAW module you are selecting?
- What your current version of SAW is?
- Whether you are using SQL Server Analysis Services cubes or Local (Access) cubes?
- Whether you have a single company installation, a multi-company single base currency installation, or a multi-company, multi-currency installation?
 - Use the single company cubes for single company installations and for multi-company installations which all have the same base currency.
 - Even in a multi-company, multi-currency installation you may still wish to select some examples from the single company selection for either:
 - Users that only have access to a single company, or
 - When you wish to apply a filter for a single company and see the results in that company's standard base currency. (See the section on Configuring for a Single Company in a Multi-Company Environment.)

If you are unsure of any of the answers to the above questions ask your administrator or your SAW support person before you begin the download process.

Recommended Approach

While it is possible to allow each user to open the template files directly from the website, it is recommended that the administrator on each site download, stage and configure the files once and then distribute the configured files internally. This guide follows that approach.

If you wish you can open a file directly from the website, configure it for your environment and then use the File -> Save Settings File As .. menu option to save the file to your staging area. However, it is recommended that you save the files that you want from the website directly into your staging area and then configure them for your environment from within the staging area.

Accessing and Downloading the SAW Templates

It is recommended that you create a new folder to stage the template files in before you start selecting the files for download.

You access the templates from the Templates page on the SAW website, available directly at the following link: www.cabotinc.ca/saw_templates.aspx.



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SAW CubeViewer 4 Templates

SAW CubeViewer templates are downloadable settings files that will prompt you to connect to your company cubes. Each file includes multiple views that will jump start your analysis of your company information and help you to design your own files.

You will need the following in order to take advantage of the templates:

- SAW Version 3-2-0.
- CubeViewer 4 Version 4-1-2-7 (or later).

Refer to the [SAW Templates Guide](#) for information on how to download and use the template files.

Select the appropriate page from the list below:

- [Sales SQL Server Single Company \(or Multi-Company Single-Currency\)](#)
- [Sales SQL Server Multi-Company Multi-Currency](#)
- [Sales Local \(Access\) Based Cubes](#)

Select the appropriate templates page from the available selection.

Sales SQL Server Single Company

Use these templates when you:

- Have a single SAW company in SQL Server Analysis Services cubes, or
- You have multiple SAW companies in SQL Server Analysis Services cubes, but all use the same base currency, or
- You have multiple SAW companies in SQL Server Analysis Services cubes, but wish to view the companies individually.

Refer to the [SAW Templates Guide](#) for information on how to download and use the template files.

Select the settings files from the list below:

- [Revenue Current Period and Year to Date](#)
- [Revenue By Period](#)
- [Revenue By Quarter](#)
- [Revenue Last 5 Years](#)

Individually select the template files that you wish to download and save to your staging folder.

Configuring the SAW Template files for Use (SQL Server Cubes)

Before you start to configure your template files you need to ensure that you have the appropriate information for your environment.

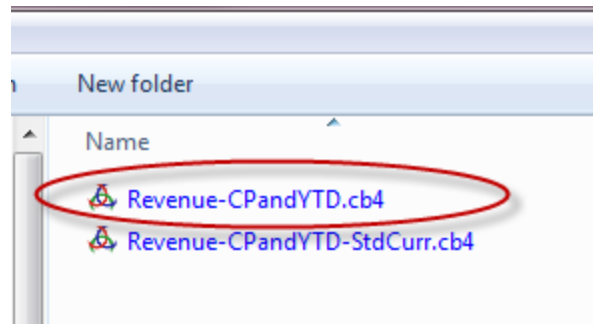
In a SQL Server Analysis Services environment you will need to know:

- The name of the SQL Server Analysis Services instance
- The name of the Analysis Services database that is correct for the module you are configuring.
- What is a valid timeframe selection for your data—current Fiscal Year and Period.

If you are unsure of this information you can open one of your existing CubeViewer 4 settings files for the appropriate cube and take the File -> Connection menu option to see what your current settings are.

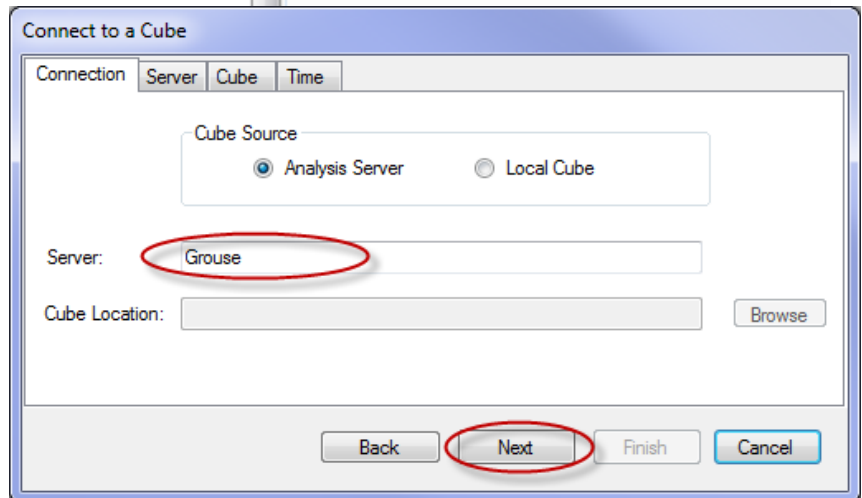
Open your staging area folder and select the first of your template files.

Note: If your version of the CubeViewer 4 program is prior to 4-1-2-7 you will receive errors and will be forced to close the program down.

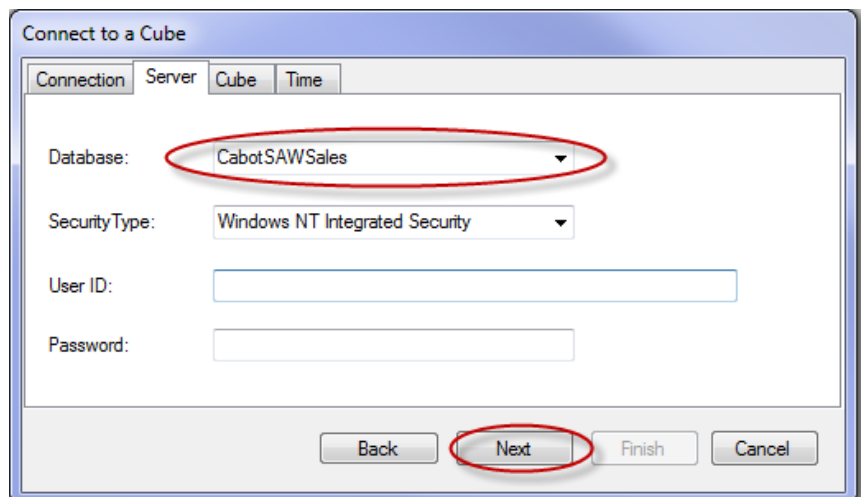


As the template file opens it will immediately take you through the Connect to a Cube wizard.

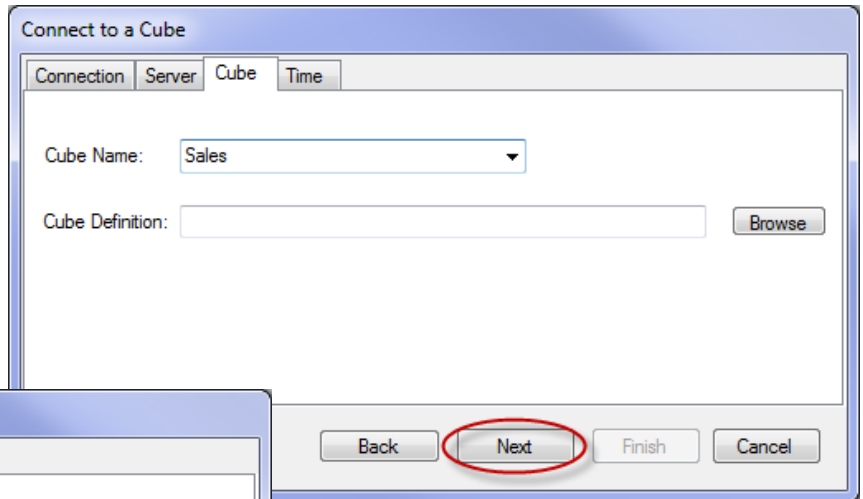
On the Connection page enter the SQL Server Analysis Services instance in the Server box and press Next.



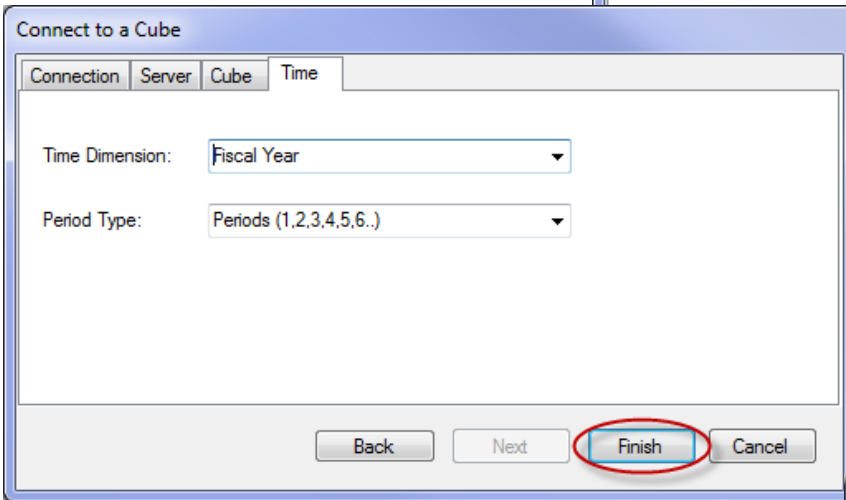
Select the appropriate Analysis Services database from the drop-down list on the Server page and press Next.



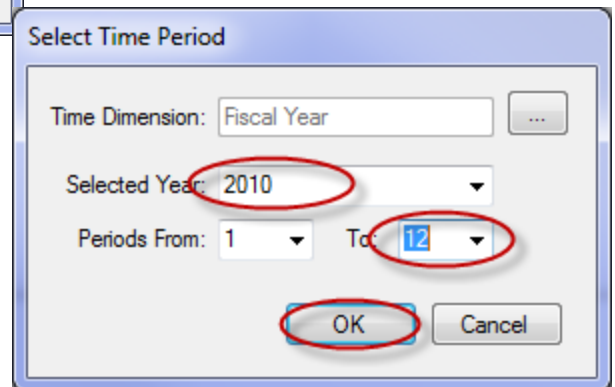
Press Next on the Cube page.



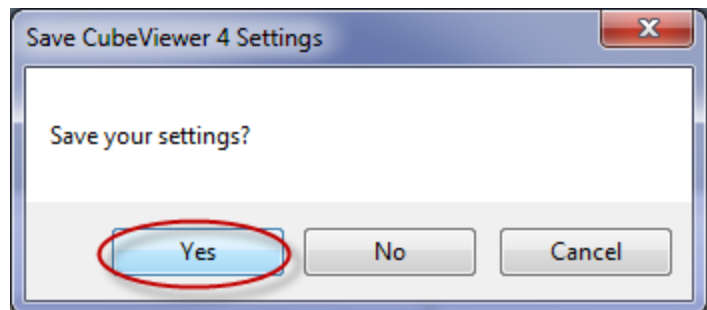
Press Finish on the Time page.



Select an appropriate timeframe for your data and press OK.



Close the CubeViewer program and select Yes to Save your settings?



Test your configuration by re-opening the settings file. This time it should bypass the Connect to a Cube wizard and prompt you for the timeframe to display.

This file is now configured for distribution in your environment—unless you need to configure this file for a single company in a multi-company environment in which case you need to proceed to the Configuring for a Single Company in a Multi-Company Environment step.

Repeat the process for all the templates that you have selected.

Configuring the SAW Template files for Use (Local Based Cubes)

Before you start to configure your template files you need to ensure that you have the appropriate information for your environment.

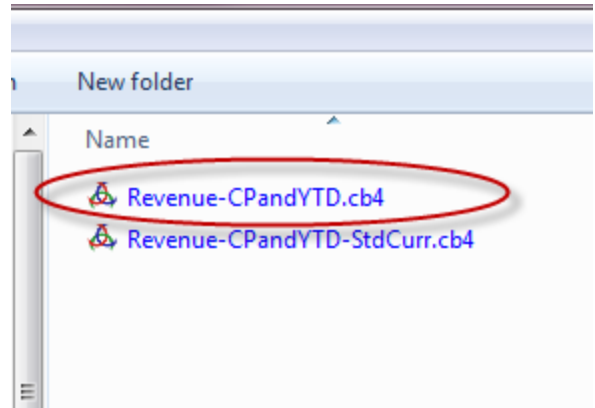
For local (or Access) based cubes you will need to know:

- Where your cubes are located on the network (use of a relative name is recommended).

If you are unsure of this information you can open one of your existing CubeViewer 4 settings files for the appropriate cube and take the File -> Connection menu option to see what your current settings are.

Open your staging area folder and select the first of your template files.

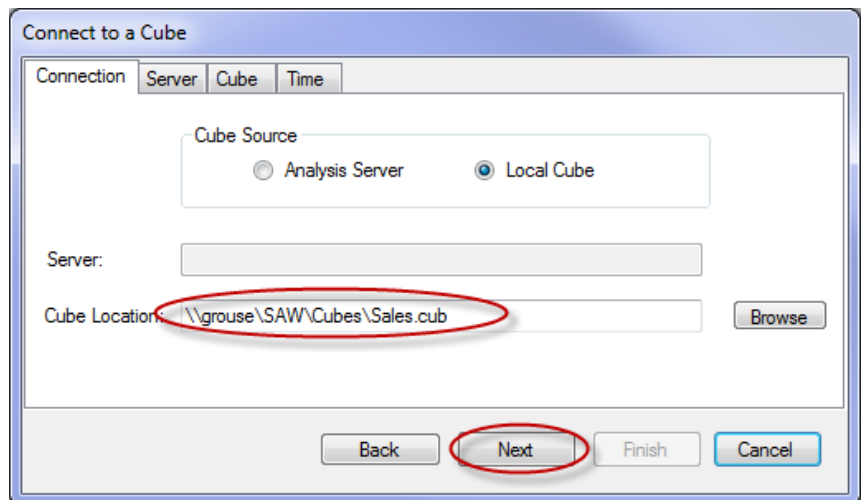
Note: If your version of the CubeViewer 4 program is prior to 4-1-2-7 you will receive errors and will be forced to close the program down.



As the template file opens it will immediately take you through the Connect to a Cube wizard.

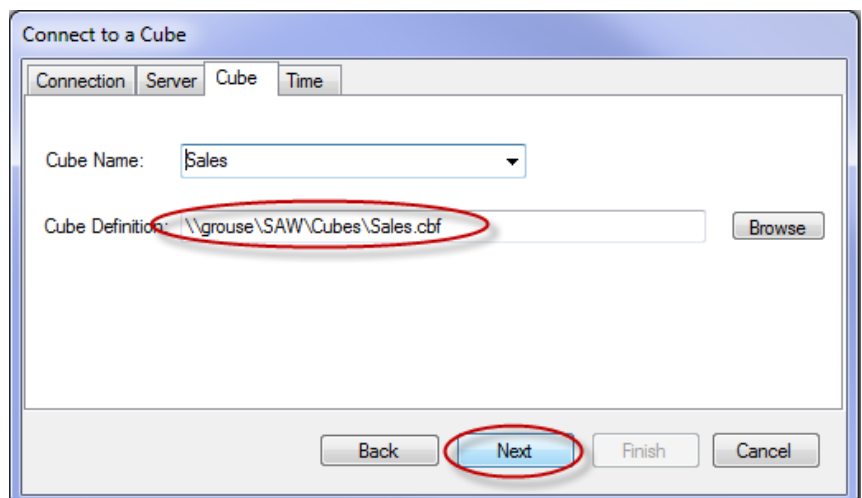
On the Connection page enter the full path to the cube location and press Next.

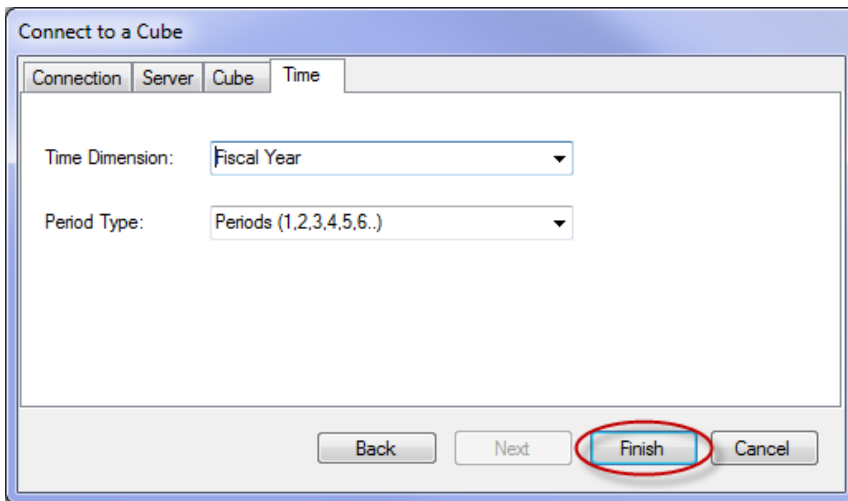
It is recommended that you use a relative path location if possible. Use the Browse button if necessary to locate the cube.



Enter the Cube Definition on the Cube page and press Next.

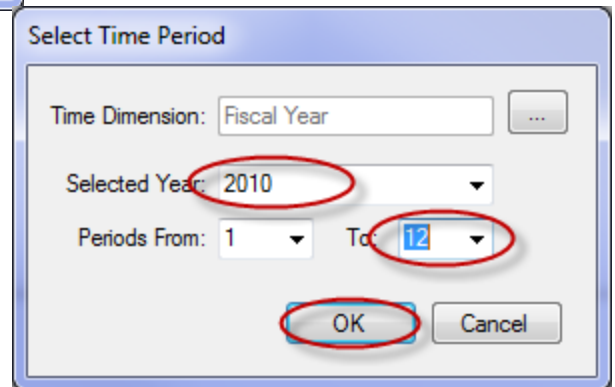
The cube definition is in the same location as the cube and has the same name, but with a .cbf extension. Use the Browse button if necessary to locate the cube definition.



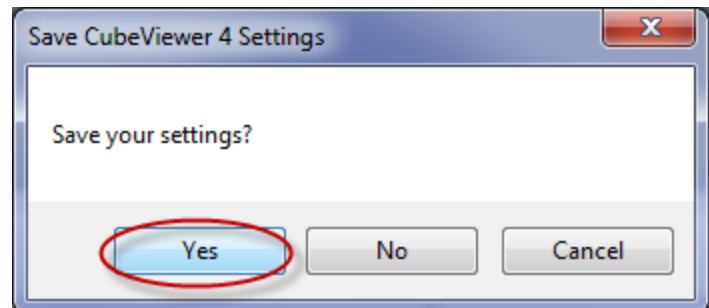


Press Finish on the Time page.

Select an appropriate timeframe for your data and press OK.



Close the CubeViewer program and select Yes to Save your settings?



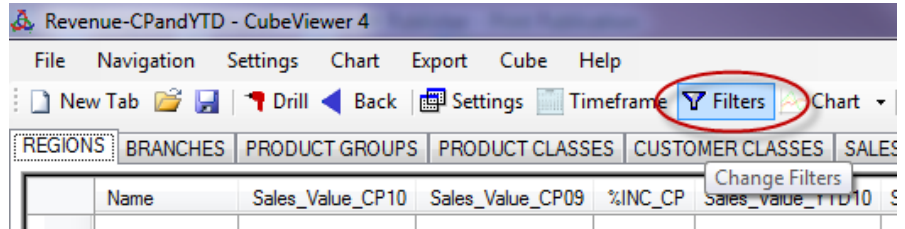
Test your configuration by re-opening the settings file. This time it should bypass the Connect to a Cube wizard and prompt you for the timeframe to display.

This file is now configured for distribution in your environment—unless you need to configure this file for a single company in a multi-company environment in which case you need to proceed to the Configuring for a Single Company in a Multi-Company Environment step.

Repeat the process for all the templates that you have selected.

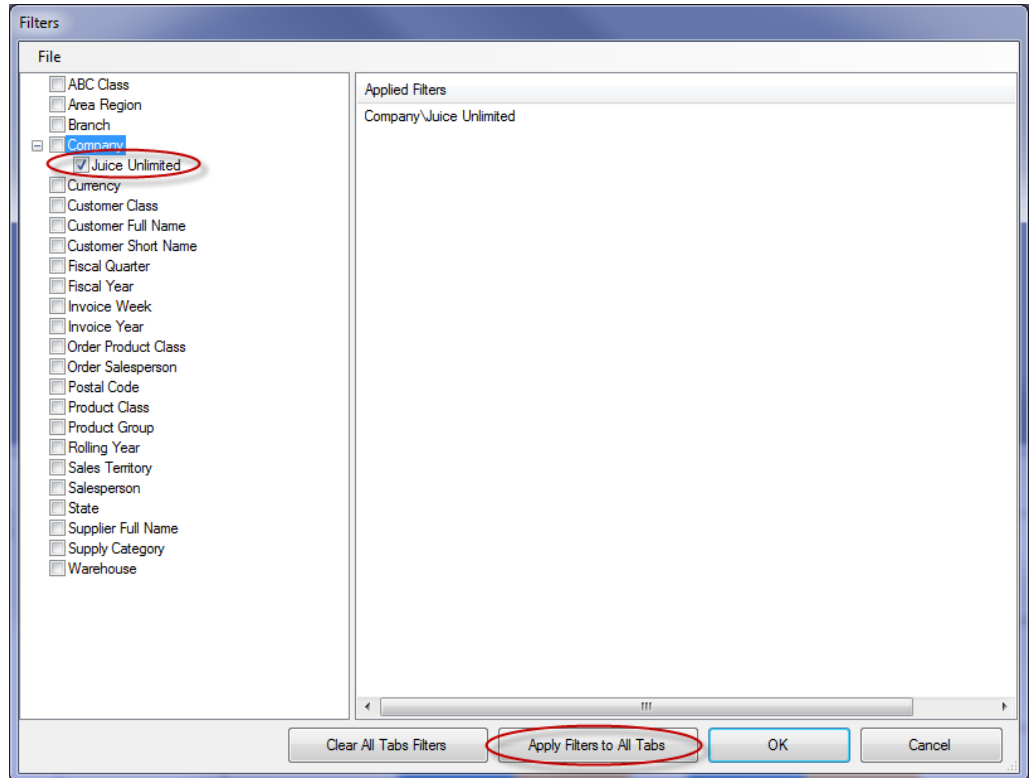
Configuring for a Single Company in a Multi-Company Environment

Open the settings file and select the Filters toolbar option.



On the Filters screen expand the Company node and select the company to filter on.

Press the Apply Filters to All Tabs.



Select the Save Settings File As .. Menu option and either save the settings file to a company specific folder or add a prefix or suffix to the name to identify the Company.

Close the settings file and select No to Save your settings?

