TE110. Development testing protocol

Essbase Excel Ribbon

“Essbase.Act!”

## Control list of document changes

### Changes

| Дата | Автор | Версия | Содержание изменения |
| --- | --- | --- | --- |
|  |  |  |  |
| 2015.10.15 | Rasyuk E.A. | 1.0 | New document |
| 2016.03.15 | Rasyuk E.A. | 1.1 | MDX Support added |
| 2016.03.19 | Rasyuk E.A. | 1.2 | English translation |
| 2016.06.05 | Rasyuk E.A. | 1.3 | Final release |
| 2017.01.16 | Rasyuk E.A. | 1.4 | Excel 2016 adoptions |
| 2017.08.24 | Rasyuk E.A. | 2 | Updated for release 2.42 |
| 2017.10.20 | Rasyuk E.A. | 2.1 | Updated for release 2.54  added new Excel tuning features |

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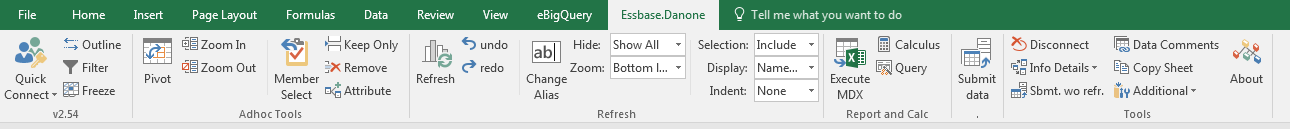
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## Testing protocol



### Setup and configure

| Step | Action |
| --- | --- |
|  |  |
| 01. | [Install AddOn](#_Установка_надстройки) |
| 02. | [Setup Essbase Addon](#_Подключение_надстройки_Danone) |
| 03. | [Post installation task](#_Прочие_настройки) |
| 04. | [Setup Essbase “Quick Connections”](#_Настройка_подключений_Quick) |
| 05 | [Check SmartView standard functionality](#_Проверка_стандартной_панели) |
|  |  |

### Standard functionality check list

| Step | Action |
| --- | --- |
|  |  |
| 01 | [Create Essbase Connections](#_Подключение_к_приложению) |
| 02 | [Setup query parameters](#_Настройка_параметров_запросов) |
| 03 | [Setup formatting options](#_Установить_стиль_отображения) |
| 04 | [Export dimensions member list](#_Выгрузка_значений_справочников) |
| 05 | [Creating Ad-Hoc query](#_Выполнение_Ad-Hoc_операций) |
| 06. | [Manage Substitution Variables](#_Проверка_значений_параметров) |
| 07 | [Work with MDX](#_Запуск_отчета_MDX) |
| 08 | [Load data to Essbase](#_Отправка_данных_из) |
| 09 | [Running calculations](#_Run_Calculations) |

## Steps of testing

### Setup Excel Add IN

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| A. Unpack archive | Latest versions is here  [**https://goo.gl/kDyNmS**](https://goo.gl/kDyNmS) |
| B. Go to Excel Addin store folder | 1. Open “My Computer” 2. Insert to address bar this string   %USERPROFILE%\AppData\Roaming\Microsoft\AddIns   1. Copy all files from archive to this place |
| C. Setup Excel permitions | 1. Launch MS Excel then go to “File” menu:      1. Click on “options” 2. Click on “Trust Center”:      1. Click on “Trust Center Settings”:      1. Click on “Trusted Locations”:      1. Click on “Add new location…”:      1. Add the location (default is “C:\Oracle\SmartView”), tick “Subfolders of this location are also trusted” and click |

### Plug In Excel AddOn “Danone:Essabse”

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| A. Change SmartView locale to “English” | 1. Open Excel. Go to SmartView Ribbon panel      1. Select «Options»      1. In the sections «Extensions», under tab «View» must chose “English” |
| B. Setup performance settings | 1. Select choose «Improve Metadata Storage»      1. Select choose «Use Cell Styles» |

|  |  |
| --- | --- |
|  | 1. Unplug all extensions |
| С. Change SubTotal view options | (This is actions are only available with life Essbase connections ) |
| D. Save changes |  |
| E. Plug Excel addon “Danone:Essbase” | 01 Open excel options “File” -> “Options”     1. Select “EssBaseWF”      1. Restart Excel |

### Setup Quick Connections

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| A. Open QC manager |  |
| B. write connection settings | 1. APS Server – WEB service for getting data wedcb786.frmon.danet 2. EssBase Server – Database sever 3. Wedcb785.frmon.danet:1424 4. Application / Database - Name of applications   BY1TTCST.BY1TTCST |
| С. If necessary edit saved connections | 1) Edit - load to edit saved connections  2) Delete – remove selected rows  3) Test - check cureent settings  4) Test & Save – store current connections |

### Other SmartView settings

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| Add Repeated members |  |
| Turn on “preserve formulas” |  |

### Check standard SmartView functionality

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| A. Turn on «SmartView Panel» button |  |
| B. Check visibility «SmartView» and (or) “EssBase” Excel Ribbons |  |
| С. Check the visibility standard connections tools on the right place |  |
| d. Hide standard SmartView ribbons | Turn off “SmartView Panel” button |

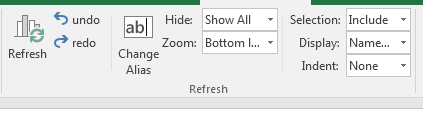
### Connect to EssBase applications

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| A. Select connection name from QC menu |  |
| B. Check connections alert |  |
| С. Additional : check current connection settings | 1. Press “Connect Info”      1. Check records |

### Setup query parameters

[(to outline)](#_Установка_и_настройка)



| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| A. Suppress options (only for rows ) | 1. “#Missing Rows” Suppress missing data 2. “Show All Rows”. – No any suppress options |
| B. Change alias table | |  |  | | --- | --- | |  |  |  1. Default – show member name 2. None – show member code |
| C. Change display options | 1. Name or Code – show ones 2. Code and Name – show both |
| G. Setup indent options |  |
| H. Setup action for retaining selection member |  |

### Export dimension dictionary

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| 1. Check Essbase connection and connect if necessary |  |
| 1. Setup view options | 1. Disable suppress 2. Return all members 3. Use code name and alias 4. Use indent options 5. Retain selected member |
| 1. Export model definition |  |
| 1. Export dimensions members | 1. Pivot to place dimension member to the rows       2. Zoom IN (or double click on dimension name )      1. Check the member list |

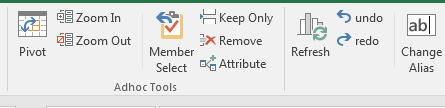
### Setup member show options

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| A. Open Smartview standard options |  |
| B. Under “ Analytic Service” sections setup style for “Dynamic Calc” and “Parent” members |  |
| C. Save as default options |  |

### Creating Ad-Hoc actions

[(to outline)](#_Установка_и_настройка)



| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| 1. Zoom IN – | (or double click on the left mouse button ) |
| 1. Zoom Out | (or double click on the right mouse button ) |
| 1. Pivot | Transform columns to rows |
| 1. Keep Only | Remove all members. Keeps only selected memeber |
| 1. Remove Only | Remove selected member. Keeps other different |
| 1. Member Select | Add member to the reports |
| 1. Refresh | Renew the data grid |
| 1. Undo |  |
| 1. Redo |  |

### Execute MDX report

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| 1. Make connections to Ru3TTCST.Ru3TTCST database |  |
| 1. Push button “Execute MDX” |  |
| 1. Insert this query to the text frame | SELECT  {CROSSJOIN (  {M01:M12}  , {[&OUT\_ACT]} ) }  ON COLUMNS,  NON EMPTY NONEMPTYBLOCK  CROSSJOIN ( CROSSJOIN (  {[AR1].LEVELS(4).MEMBERS}  , { [BG\_TOT] } )  , {[CA\_5000TOT]})  ON ROWS  FROM  Ru3TTCST. Ru3TTCST |
| 1. Check result |  |
| 1. Check stored MDX query – Press “Execute MDX” button | . |

### Load data to Essbase

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| 1. Create data grid where no Dynamic or Parent member in the slice |  |
| 1. Change data figures |  |
| 1. Press “Submit Data” button |  |
| 1. Refresh report |  |

### Check substitution variables

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| 1. Execute Subs Variables report | 1. Open Calculation manager      1. Load variables |
| 1. Check the rows |  |

### Run Calculations

[(to outline)](#_Установка_и_настройка)

| Описание шага | Последовательность действий |
| --- | --- |
|  |  |
| 1. Open Calculation manager |  |
| Select the rule and press “run” for calculations process |  |
| To change calculation database click on the right menu |  |
| You can set up calculation sequence list by clicking on the rule |  |