Sample Reports Setup Guide

For Analytics Center

1   Introduction

AgilePoint NX v8.0 introduced a modern and powerful Analytics Center to support both self-service BI and complex reports for professional reports developers. This document is a step-by-step guide to setup sample reports and dashboards on AgilePoint NX Analytics Center using popular open sourced third-party databases to experience the capabilities of the Analytics platform. The benefits of setting up these sample reports are:

1. Users can quickly learn about the rich and powerful features of the Analytics Center without actually developing reports.

2. Users can alter and play around with these sample reports to try various features in the Analytics Center module.

The third-party databases used here are provided by Microsoft. To learn more please click on the link below:

https://docs.microsoft.com/en-us/sql/samples/sql-samples-where-are?view=sql-server-ver15

Important note: This guide is not part of the official product documentation. It was created to help first time users and prospects evaluate/understand the features of Analytics Center. The databases discussed in this report are provided, controlled and managed by Microsoft.

2   Download the sample databases

To setup sample databases on SQL server, one needs to download these from the internet and then restore them on to the existing SQL server. If you are an AgilePoint NX OnPremises or Private Cloud customer, you could reuse the same database server which is used by AgilePoint NX. AgilePoint NX Public Cloud customers need to spin up their own SQL Server to host these 3rd party databases. Please use SQL Server 2017 and above. Microsoft provides the following three databases:

1. AdventureWorks
2. Wide World Importers
3. Northwind and Pubs

Shown below are the links to download these databases. Please click on the corresponding file download link to download these (backup or SQL) files on to your local system.

Database Name	Database Page	File Download Link
AdventureWorks	https://docs.microsoft.com/en-us/sql/samples/adventureworks-install-configure?view=sql-server-ver15&tabs=ssms	https://github.com/Microsoft/sql-server-samples/releases/download/adventureworks/AdventureWorks2017.bak
Wide World Importers	https://github.com/Microsoft/sql-server-samples/releases/tag/wide-world-importers-v1.0	https://github.com/Microsoft/sql-server-samples/releases/download/wide-world-importers-v1.0/WideWorldImporters-Full.bak
Northwind and Pubs	https://github.com/Microsoft/sql-server-samples/tree/master/samples/databases/northwind-pubs	https://github.com/microsoft/sql-server-samples/blob/master/samples/databases/northwind-pubs/instnwnd.sql

3   Setup the Northwind and Pubs database

Open SQL Server Management Studio (SSMS) as shown below.
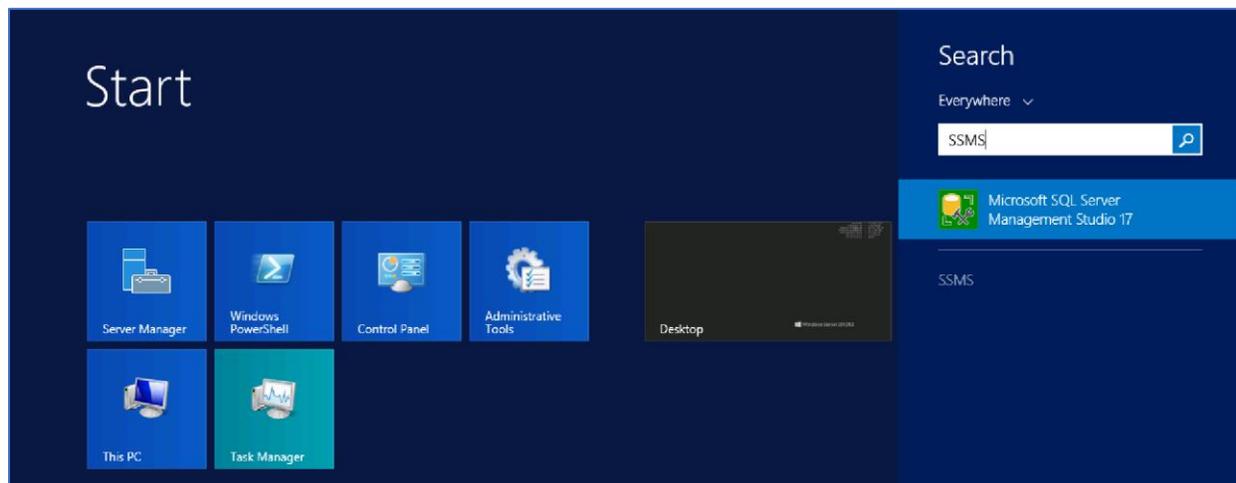
Select the SQL server name and click on connect button.
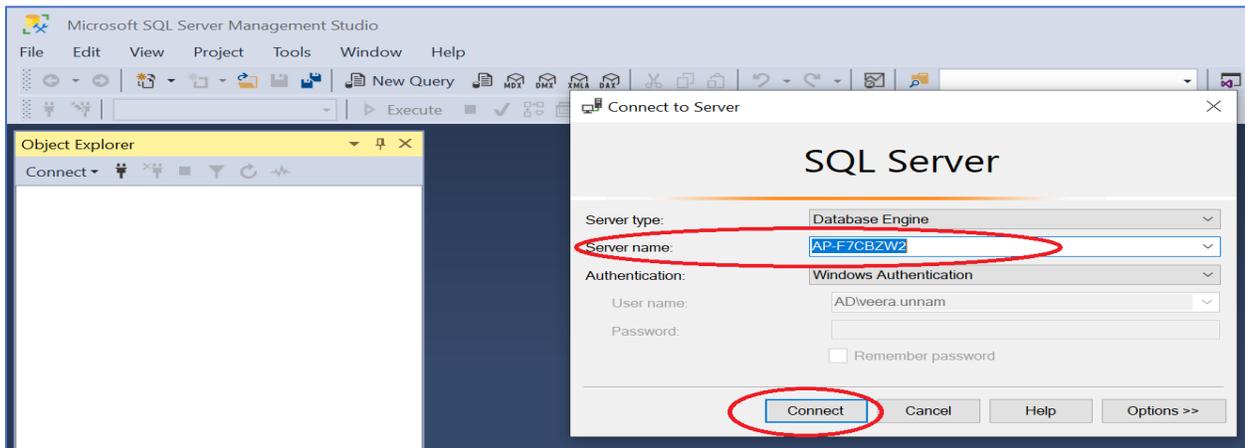
Once connected to the SQL Server, click on the New QUERY button to open a query window. Paste the downloaded SQL script (the .sql file) and execute it.
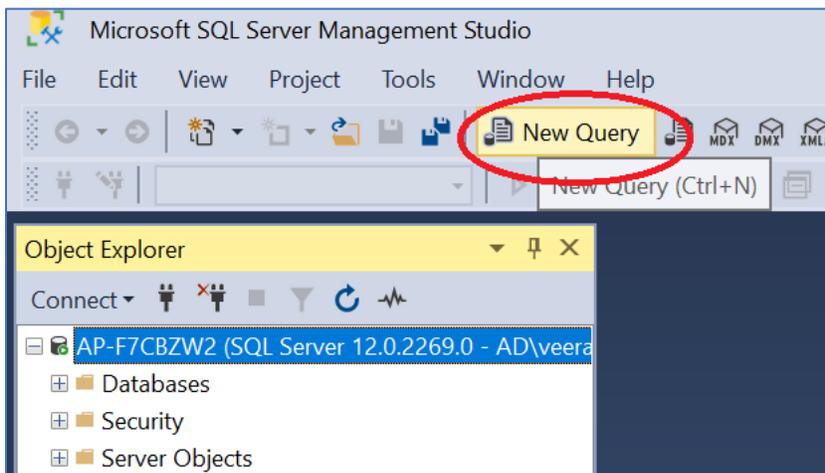
The script execution creates the database and inserts the data records. The database will now appear in the database list, as shown below.
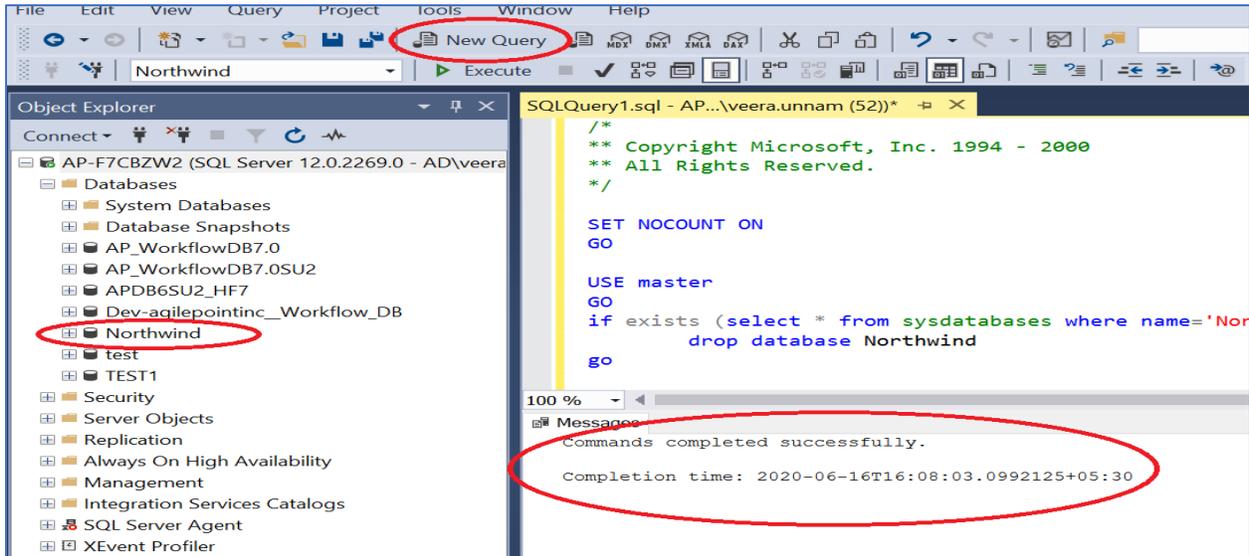

4 Setup the AdventureWorks database and the Wide World Importers database

In **Object Explorer**, connect to an instance of the SQL Server Database Engine and then expand that instance.
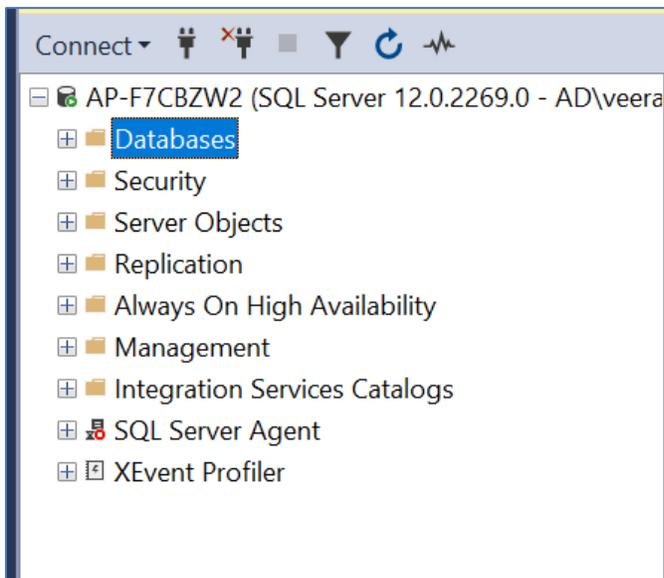
Right-click **Databases** and select **Restore Database.**
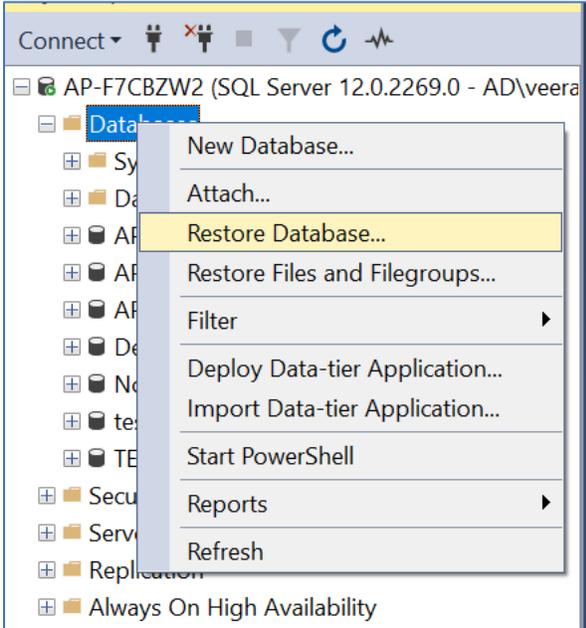
On the **General** page, use the **Source** section to specify the source and location of the backup sets to restore. Select the **Device** options. Click the browse '**...**' button to open the **Select backup devices** dialog box.
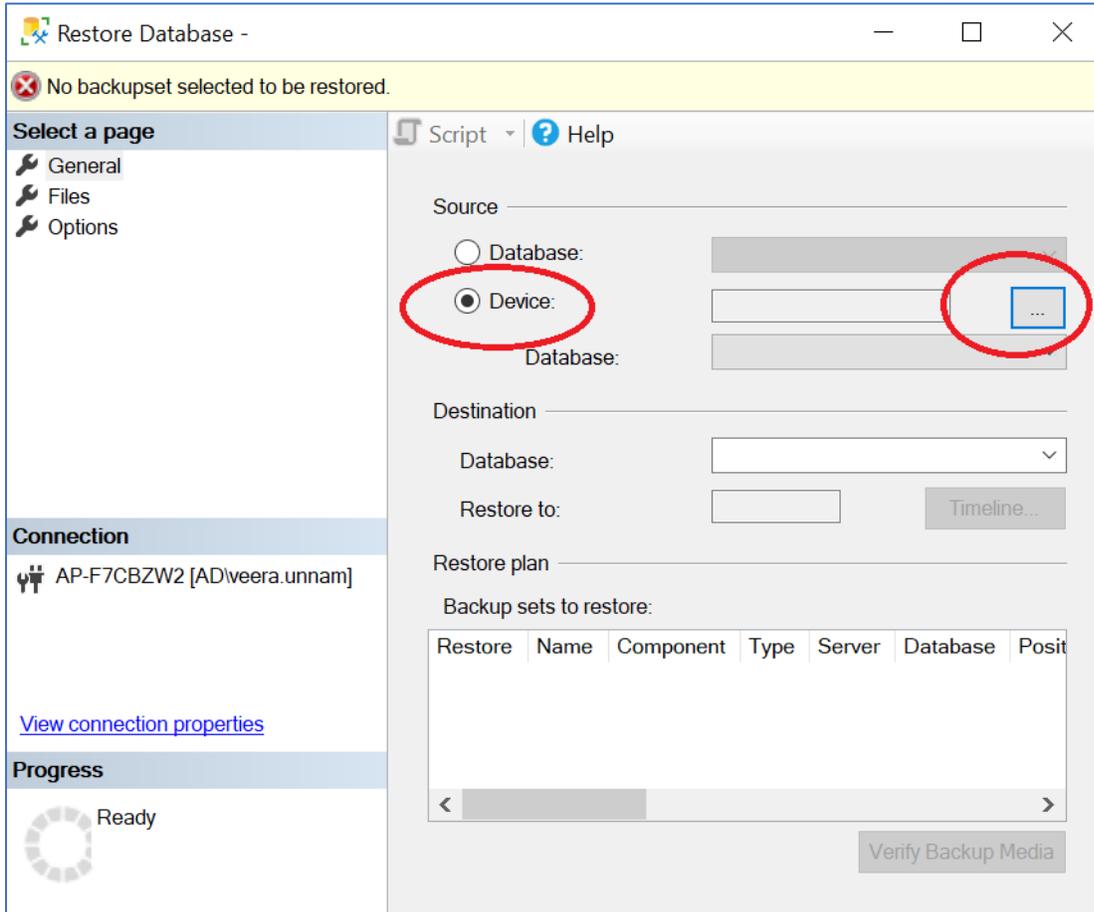

Select backup devices dialog box

> **Backup media type:** Select a media type from the **Backup media type** drop-down list. Note: The **Tape** option appears only if a tape drive is mounted on the computer, and the **Backup Device** option appears, only if at least one backup device exists.

> **Add:** Depending on the type of media you select from the **Backup media type** drop-down list, clicking **Add** opens the corresponding dialog boxes. If the list in the **Backup media** list box is full, the **Add** button will be unavailable.
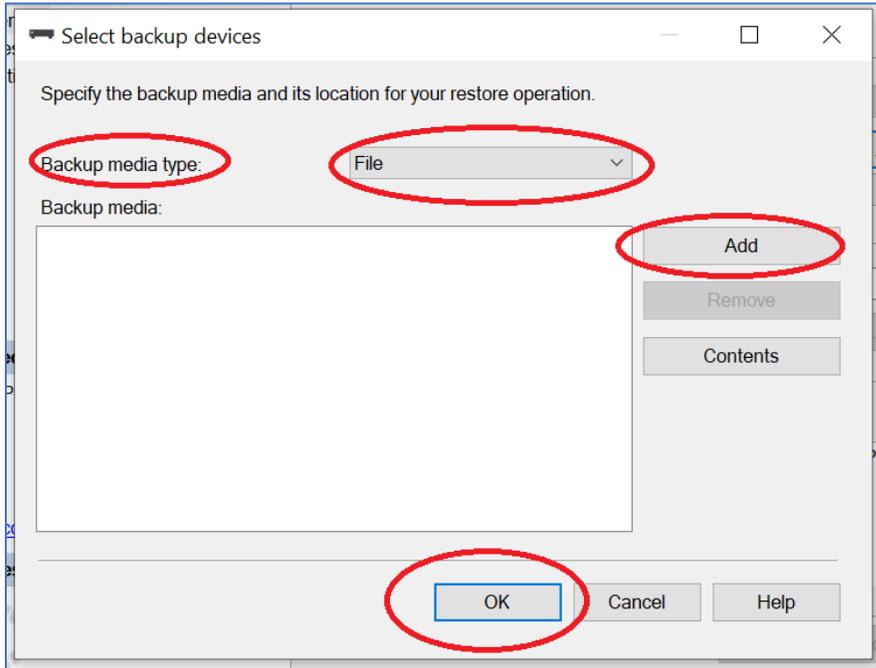
In the Destination section, the Database box is automatically populated with the name of the database to be restored. To change the name of the database, enter the new name in the Database box.
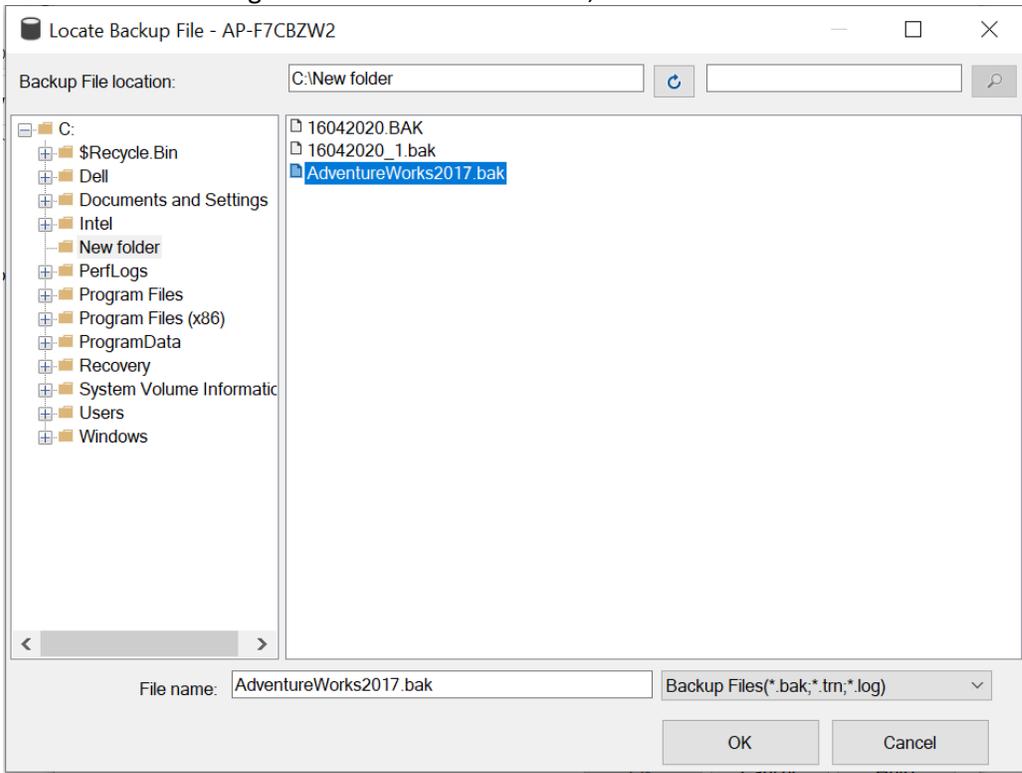
The details get populated as shown.
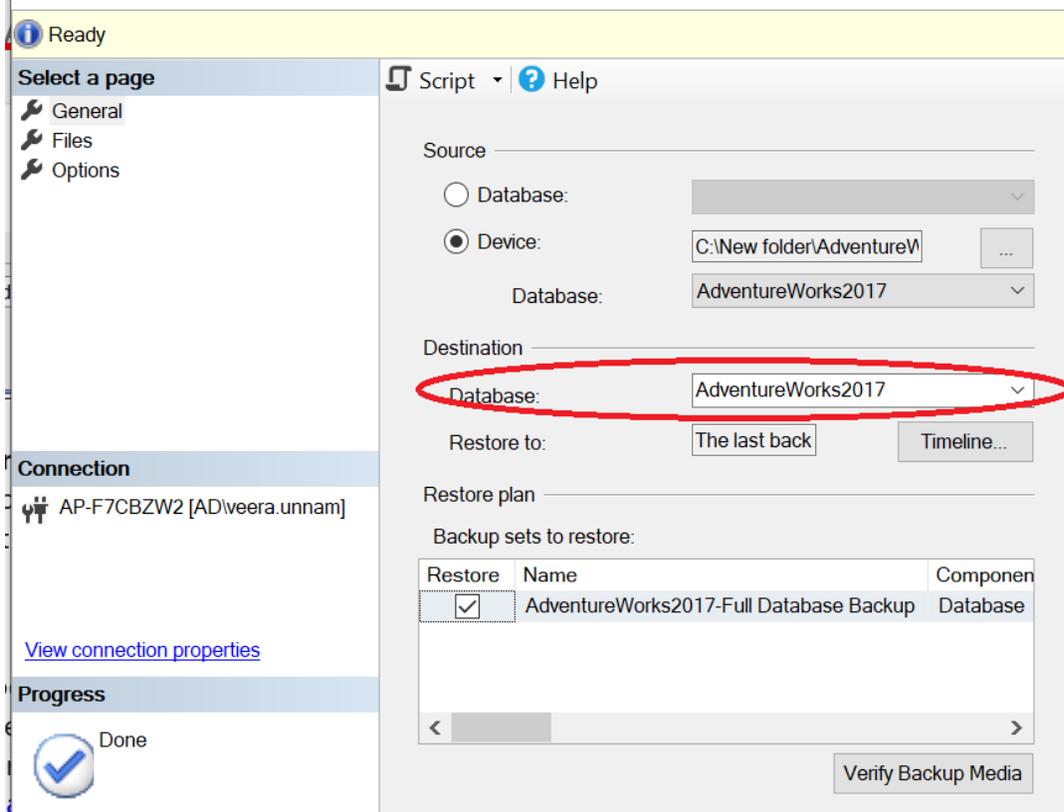
In the Restore to box, leave the default as to the last backup.
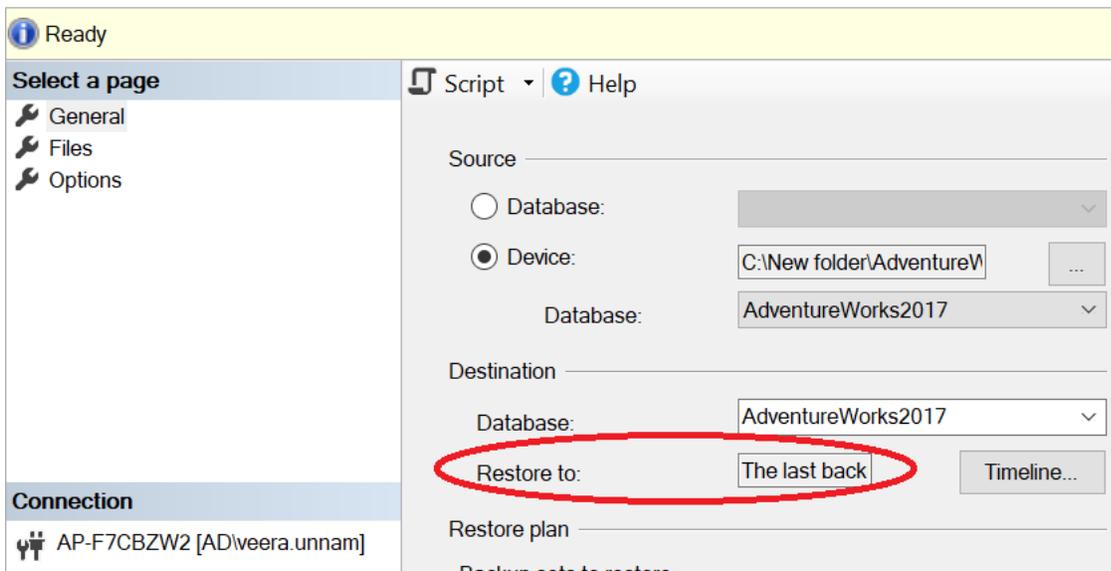
In the **Backup sets to restore** grid, select the backups to restore.
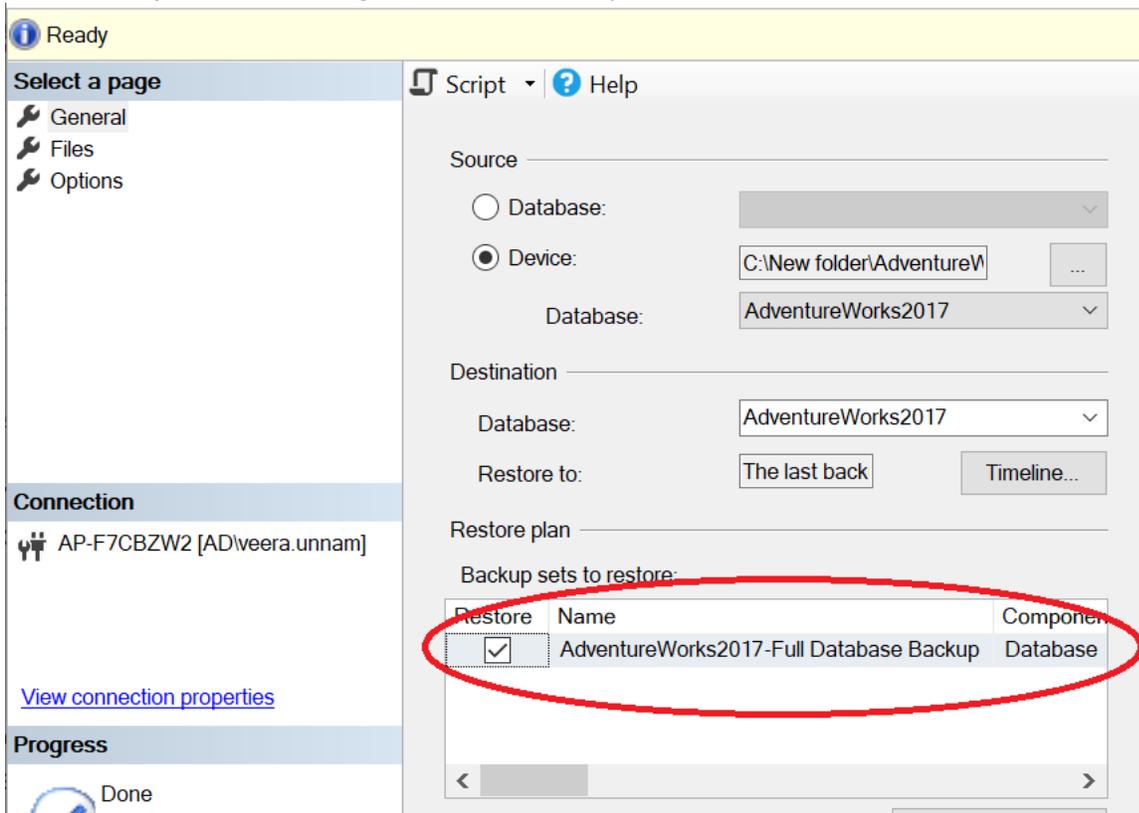
Optionally, click **Files** in the **Select a page** pane to access the **Files** dialog box. Here one can restore the database to a new location by specifying a path for each file in the **Restore the database files as** grid.
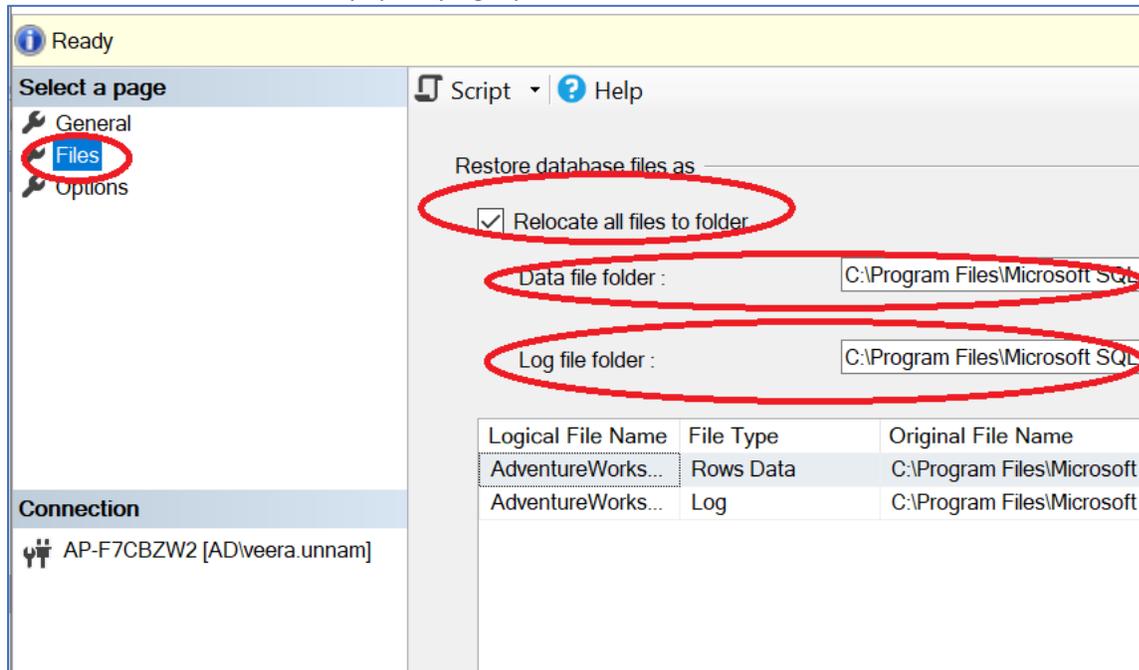
To view or select the advanced options, on the **Options** page, in the **Restore options** panel, one can select any of the following options (These are generally not required):

- **Overwrite the existing database (WITH REPLACE)**
- **Preserve the replication settings (WITH KEEP_REPLICATION)**
- **Restrict access to the restored database (WITH RESTRICTED_USER)**
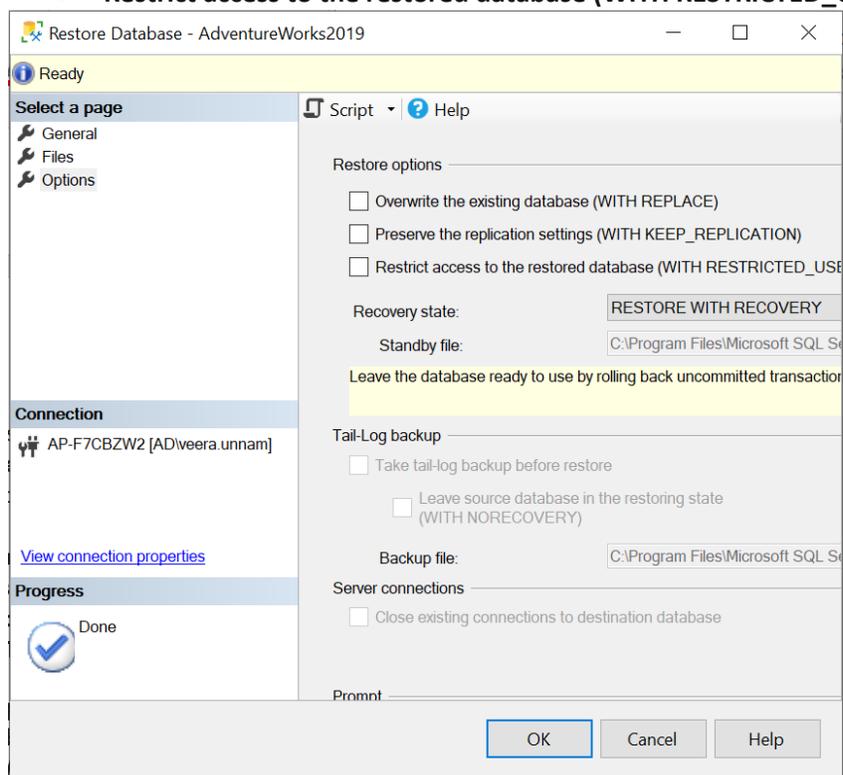
Select an option for the **Recovery state** box. This box determines the state of the database after the restore operation **RESTORE WITH RECOVERY**.
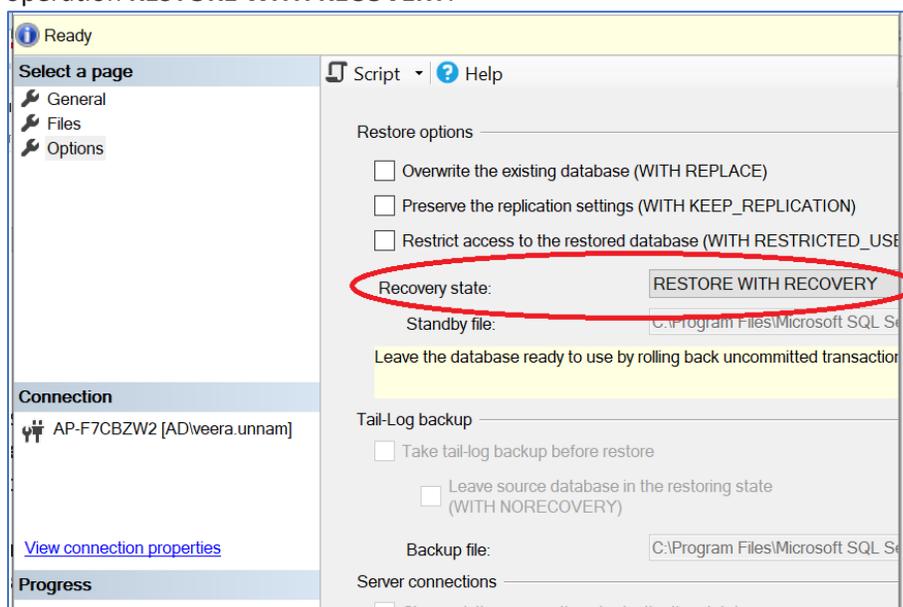
<u>Notes</u>:

- **RESTORE WITH RECOVERY** is the default behavior which leaves the database ready for use by rolling back the uncommitted transactions. Additional transaction logs cannot be restored. Select this option if you are restoring all of the necessary backups now.
- **RESTORE WITH NORECOVERY** which leaves the database non-operational, and does not roll back the uncommitted transactions. Additional transaction logs can be restored. The database cannot be used until it is recovered.
- **RESTORE WITH STANDBY** which leaves the database in read-only mode. It undoes uncommitted transactions, but saves the undo actions in a standby file so that recovery effects can be reverted.

When you click the **OK** button, you will get a popup like the one below indicating that the DB has been setup.
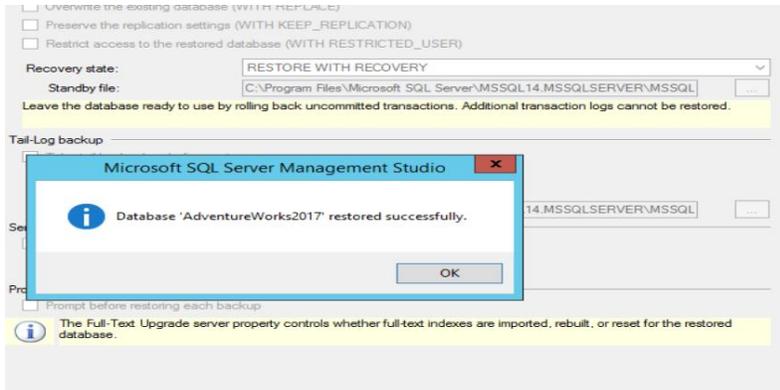

5   Import Reports

Download the corresponding canned reports/dashboards zip files. Unzip the zip files to a folder on your laptop.

Database Name	File Download Link
AdventureWorks	http://www.agilepointnxblog.com/wp-content/uploads/2020/11/AdventureWorks2017.zip
Wide World Importers	http://www.agilepointnxblog.com/wp-content/uploads/2020/11/WideWorldImports.zip

| **Northwind and Pubs**	http://www.agilepointnxblog.com/wp-content/uploads/2020/11/Northwind.zip

Please ensure that you have tenant administrator permission. Open AgilePoint NX in your browser window. Navigate to **Settings** -> **Analytics**.

Navigate to **Data Setup** -> **Data Connectors** -> **Add Connector**.
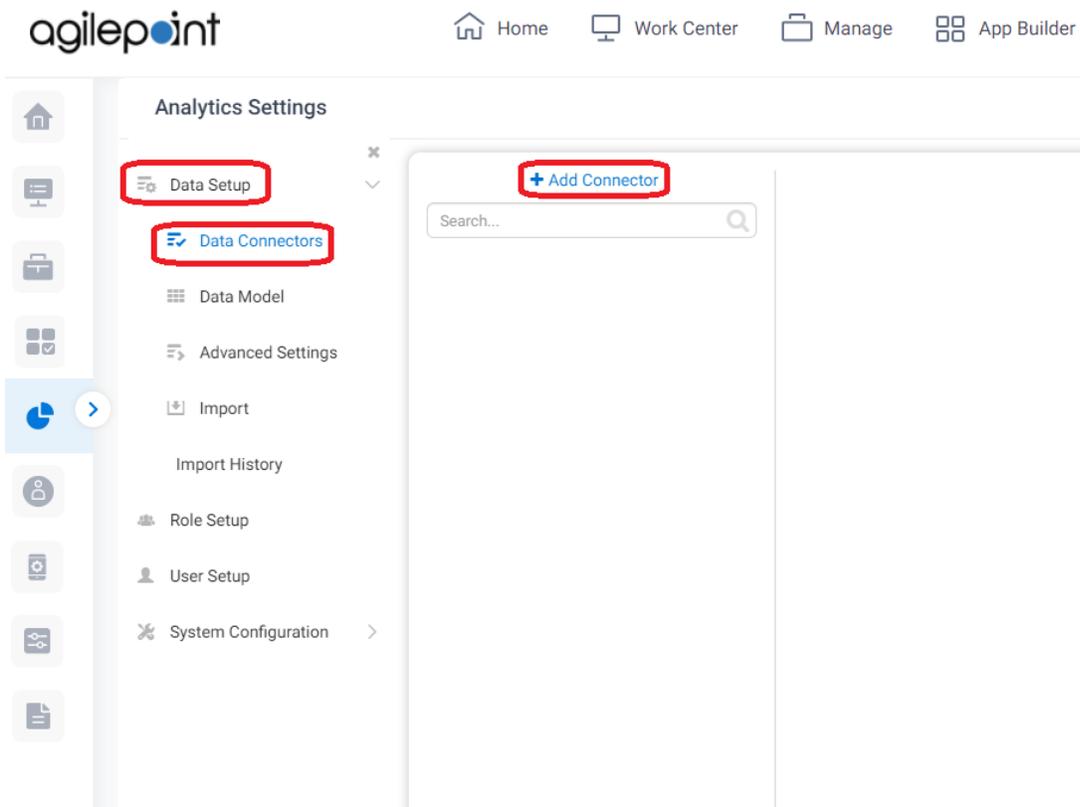

On the popup menu select **SQL Server**.
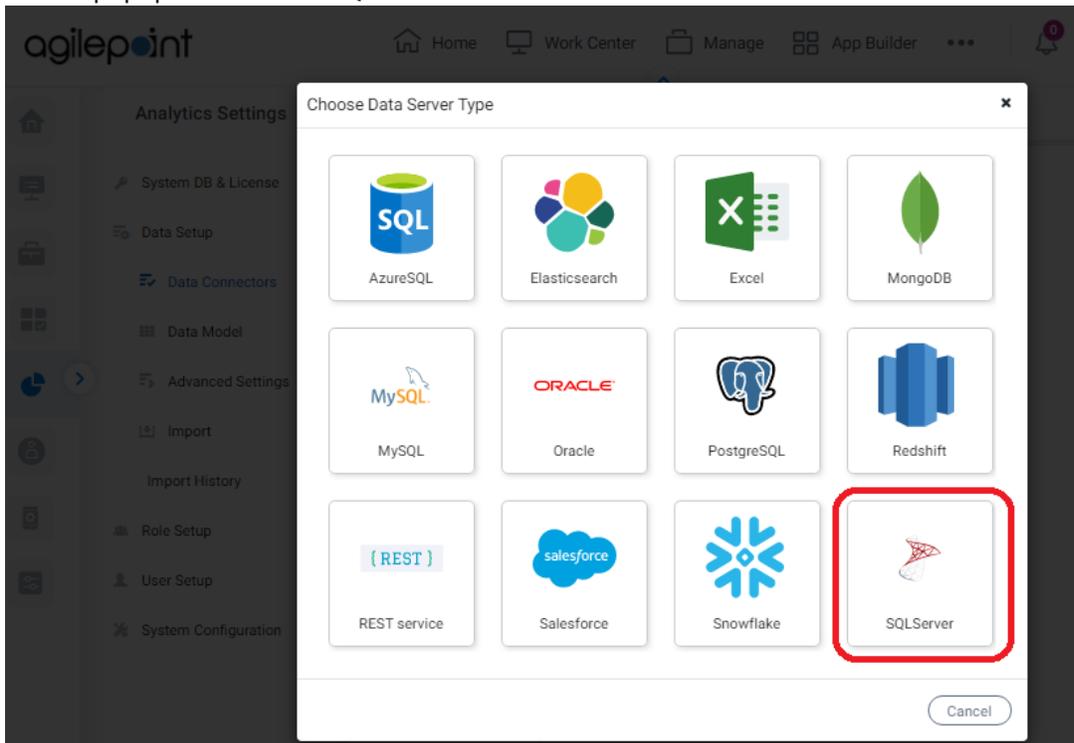
On the **Database Connection** window, select **Connection String**.
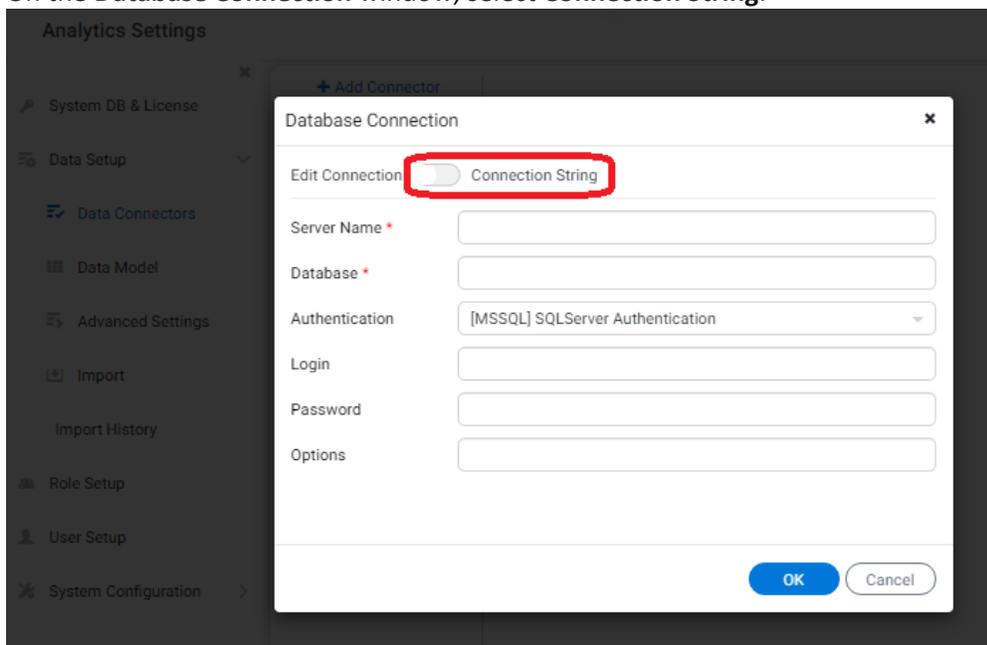
Enter the Connection String in the format
"**Server=<value>;Database=<Value>;Trusted_Connection=True;Integrated Security=true;**"
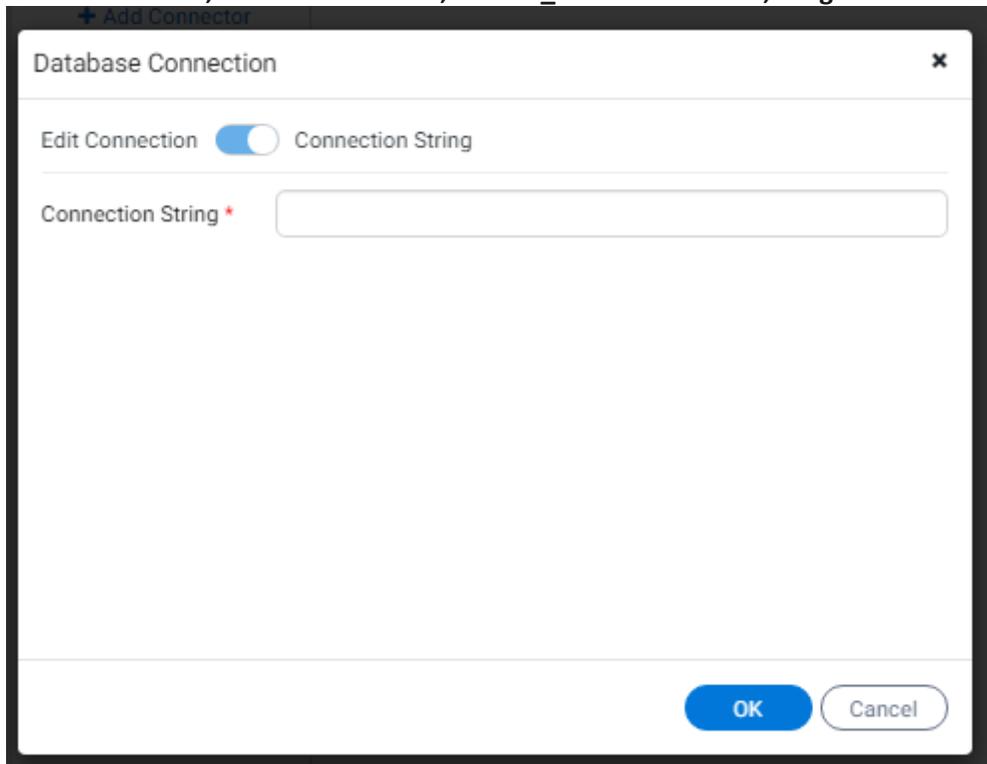
Move all the **Available Data Sources** to **Visible Data Sources** by clicking on the various categories like Table, View, Stored Procedure, Function under Available Data Sources list box. You will notice that the count of objects goes up in the Visible Data Sources list box. Click on the **Save** button.
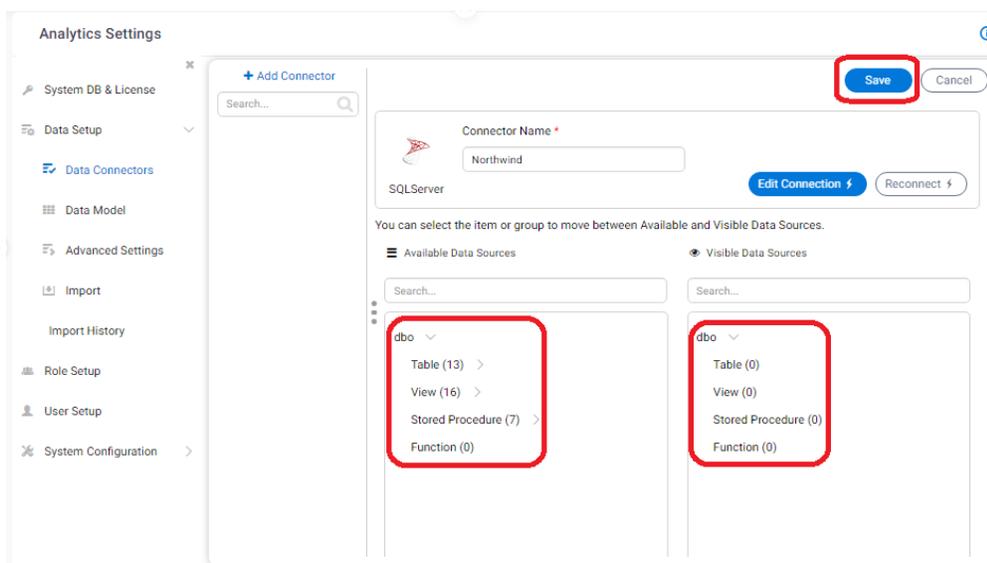
You can see the changes saved successfully.
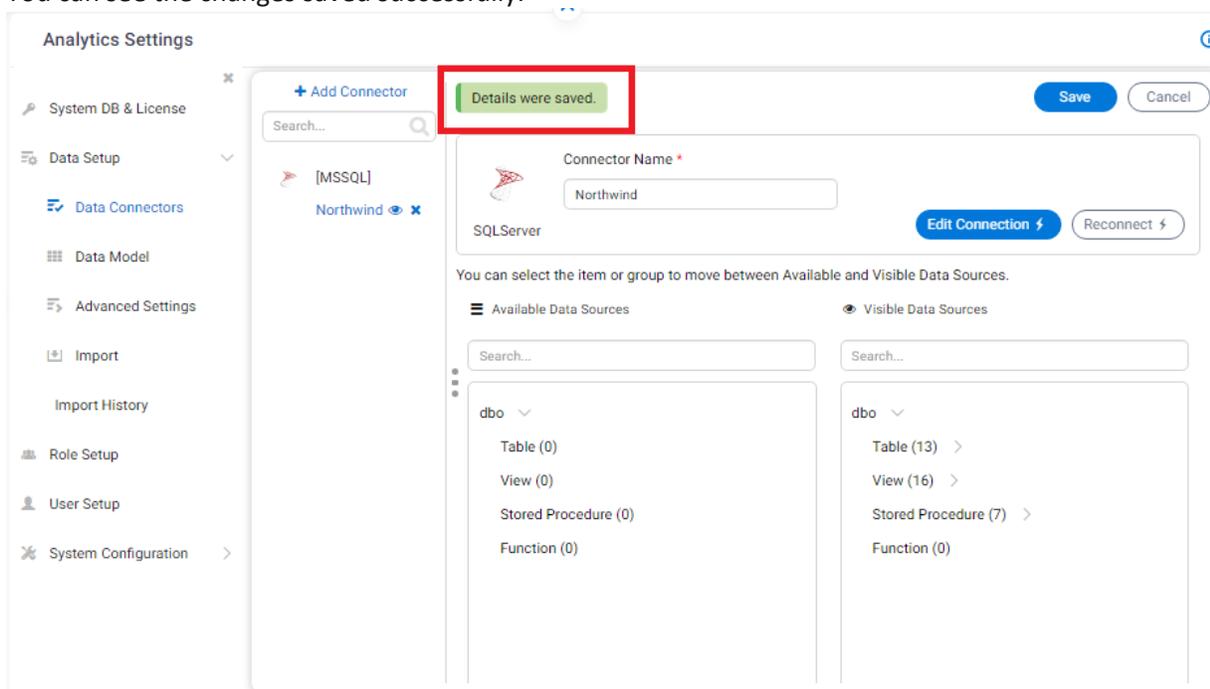
Repeat the above steps for the other two databases.

Now, navigate to **Data Setup** -> **Import**. The screen will allow you to add the unzipped files which includes both reports and dashboards.
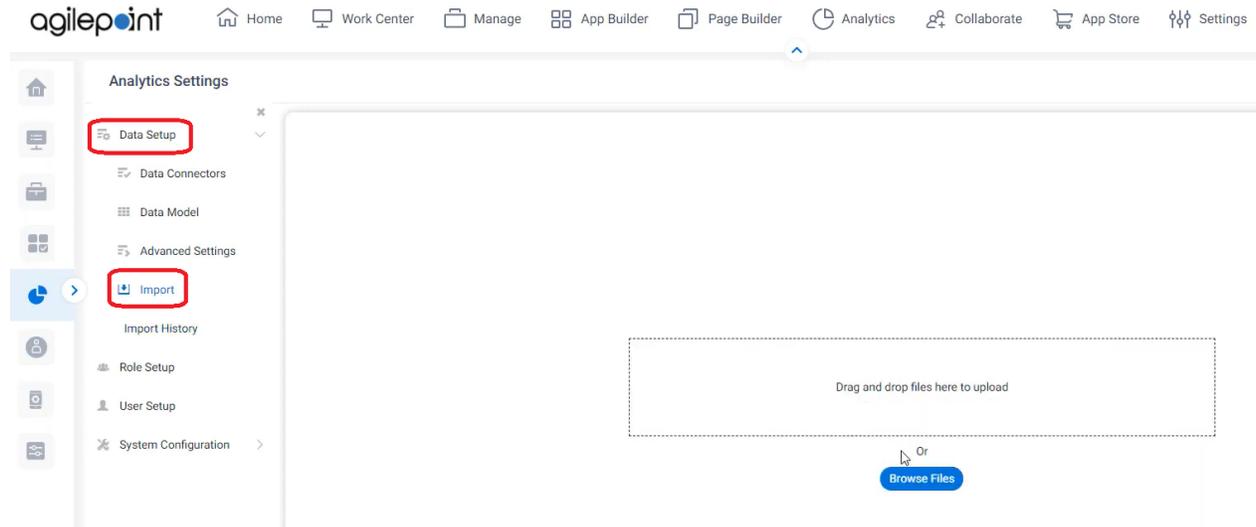
Ensure that you check the **Import the source category/subcategory** checkbox. Perform Database Mapping against the Database and schema name. When done click on the **Import** button on the top right.
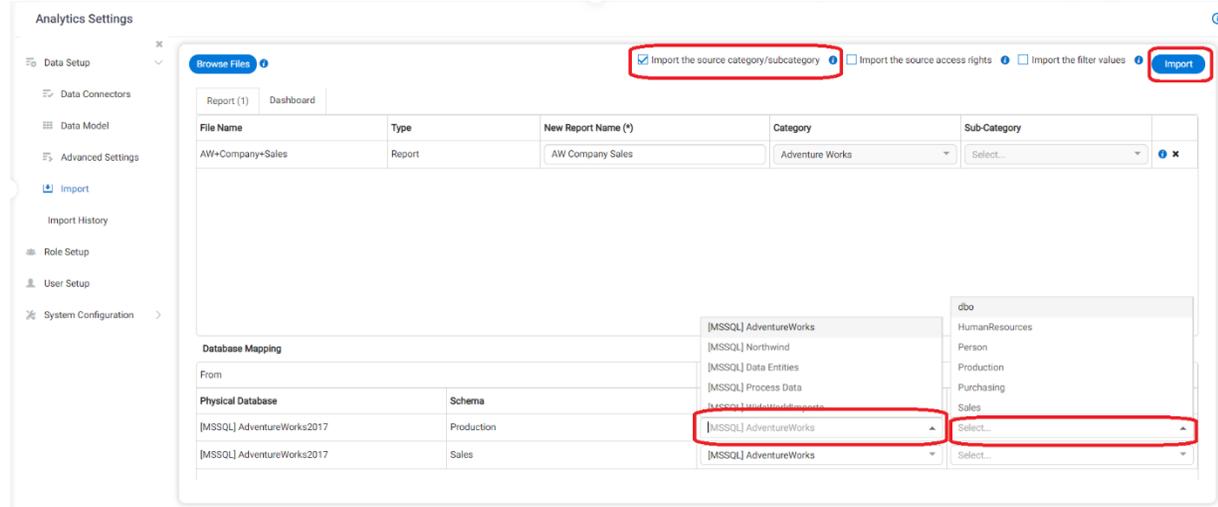
Repeat these steps against the other two sample databases. Return to **Analytics Center** and go to **List of Reports**. The imports will be visible against the respective category.
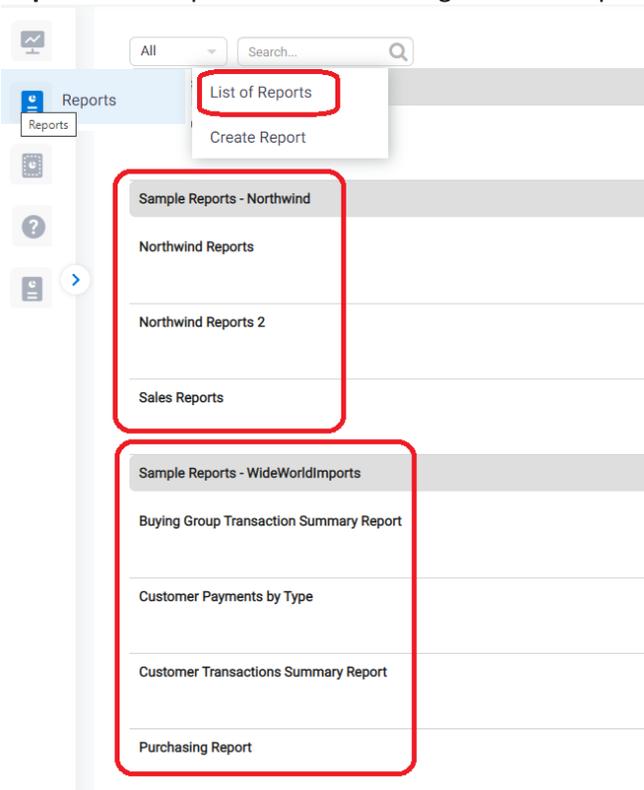
6   Additional Information

1. For video tutorial on importing reports: http://www.agilepointnxblog.com/analytics-center-overview-part-9-import-reports-and-dashboards/

2. For video tutorial on the three sample reports: http://www.agilepointnxblog.com/analytics-center-overview-part-6-sample-reports/