170 MarkView Advisor™ Operation and Administration

Version 2.1 for Oracle

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Contents

Preface 7
Who should read this guide 7
Companion guides 7

CHAPTER 1 About 170 MarkView Advisor 9
Advisor users 10
Interface features 10
Accessing information in Advisor 11
Using dashboards 12
Dashboards 14
Scorecards 14
Using reports 15
Advisor reports 17
Action process 18
Escalate 19
Reassign 20
Increase Priority 21
Using help 22

CHAPTER 2 Planning for Installation 23
Advisor Architecture 24
Hosted environments 24
170 MarkView Application Server components 25
Requirements for Advisor user machines 25

Database sizing 26
Installation information 26

CHAPTER 3 Before You Install 27
Downloading the Advisor installation files 27
Database server pre-installation tasks 28
170 MarkView Application Server pre-installation tasks 29

CHAPTER 4 Verifying the Environment and Installing Advisor 33
Verifying the environment 33
Starting the installer 36
Running the installer 37
Verifying Advisor deployment 41

CHAPTER 5 Synchronizing Databases 43
Synchronizing the databases 43
Performing a Cold Sync 45
Running Cold Sync Export 45
Using the Cold Sync Import Time Calculator 46
Running Cold Sync Import 47
Running Hot Sync 49

CHAPTER 6 Setting Up and Configuring Advisor 51
Configuring Advisor system processes 51
Configuring Thresholds 53
Configuring Automatic Actions 57
Configuring Alerts 58
Configuring Filters 60

CHAPTER 7 Adding Advisor Users 63
Adding users to MarkView groups 63
Adding an Advisor Administrator 64
Verifying members of AP User groups 66
Adding users to Advisor roles 66
Creating Advisor Roles 70

CHAPTER 8 Verifying and Maintaining Advisor Installation and Configuration **75**

Verifying the Installation and Configuration **75**

Maintaining Advisor **77**

Third-Party License Agreements 79

BEA Public License Version 2.1 **79**

Index 83

Preface

This guide describes 170 MarkView Advisor™ features, prerequisites, installation, operation, and administration. Read this guide to familiarize yourself with what you need to do to successfully deploy and use 170 MarkView Advisor.

Who should read this guide

Users who serve in the following roles should read the instructions in this guide:

- A 170 MarkView database administrator who will update the 170 MarkView schema and add grants for Advisor deployment.
- An application server administrator who will install the 170 MarkView Advisor software and run the initial Cold Sync process to synchronize databases. The administrator must have a working knowledge of the operating system and command-line navigation and use.
- A 170 MarkView administrator who will add Advisor users to groups and roles, ensure that a user hierarchy is set up in MarkView or Oracle to enable the Escalate feature, and configure Advisor user management.

Companion guides

For information about other 170 Systems products, see the following:

- *170 MarkView Release Notes*—Describes what is new with the 170 MarkView product release, identifies outstanding defects and work-around solutions (where applicable), and lists defects fixed in the release.

- *170 MarkView System Planning*—Defines the prerequisites associated with implementing the associated 170 MarkView product. The guide includes information such as the protocols required for communication between servers, hardware and software prerequisites, and minimum RAM requirements.

  The information in the planning guide may also appear in the installation guide, but it is incorporated into a planning guide to accommodate requests for such information by sales prospects.

  Use the planning guide in conjunction with the Supported Platform Matrix to prepare a site for 170 MarkView product installation. Go to 170 MarkView Supported Platforms and Versions.

- *170 MarkView Product Features*—Gives an overview of the features included and options available with the 170 MarkView product. *170 MarkView Product Features* includes information about how various features impact the workflow, the interaction amongst features, the touch points with the ERP, and how the features in a product address business problems.

  Use the features guide to become familiar with 170 System products and to decide which are important to the business challenges that you face and therefore which best suit your site.

- *170 MarkView System Installation and Configuration*—Describes how to install, upgrade, and configure the associated product. The installation and configuration guide also includes information about configuring third-party products that integrate with 170 MarkView.

  Use the installation and configuration guide in conjunction with the installation worksheet to install and configure the product.

- *170 MarkView System Administration*—Describes the concepts and tasks necessary to administer the associated 170 MarkView product.

  The Administrator should be well-versed in subjects like database administration, 170 MarkView Application Server setup, tuning and maintenance and so forth or should know where to get such information. The administration guide does not replicate this information, but conveys 170 MarkView product-specific information. The guide describes how 170 MarkView influences the administration of other servers and software that interface with 170 MarkView applications.

  Use the administration guide to configure, maintain and tune the 170 MarkView product.

CHAPTER 1 About 170 MarkView Advisor

170 MarkView Advisor is a management interface that brings together data from the Oracle E-Business suite and 170 MarkView workflows to give you strategic information about your Accounts Payables business activities. With this interface, you can take action to meet key performance indicators (KPI) or service level agreements (SLA), prioritize daily activities, evaluate employee performance and work loads, identify possible conflicts of interest, and pro-actively tackle pressing issues.

With Advisor, you can:

- Define actions that Advisor takes automatically when specified conditions are met
- Move invoices more quickly through the invoice-to-payment cycle to
  - Take advantage of available discounts
  - Manage high-value invoices to suit business interests
- Identify invoice processing bottlenecks and take action to clear them
- Monitor the performance of AP team members and address issues that impact productivity
- View AP backlogs
- Check for duplicate invoices and possible compliance violations

Advisor users

Advisor provides roles to which you assign users. Each role allows or restricts access to Advisor dashboards and configuration windows:

- **Advisor Administrators** work with the Finance Manager to establish and configure system-wide Advisor settings, report thresholds, scorecard targets, alerts, filters and automatic actions. The Advisor Administrator can also restrict which users can access or view specific reports or Business Units
- **Finance Managers** work with the Advisor Administrator, configure alerts and filters for their view of Advisor, and use Advisor dashboards and reports to:
  - Ensure that their organization meets targets and SLAs.
  - Monitor invoice processing and productivity in their organization
  - Take action as needed.
- **Advisor Reports Users** view Advisor reports and access details about the items contained in reports. The reports user can configure alerts and filters for their view of Advisor but cannot act upon any invoices from Advisor.

Advisor users who can access a dashboard, can also access the related reports. Finance Mangers with access to reports and permission can act on invoices through the Details Table.

Interface features

A 3-layer approach gives you access to high-level and detail-level views of your AP processes:

- Dashboards provide a high-level view of AP processes and provide access to Reports for more detailed views.
- Reports provide summary information about the selected dashboard process, details about invoices within that process, and options to act upon invoices.
- Actions enable you to move invoices through the 170 MarkView workflow.

The following components control what appears on the screen:

- **Thresholds** define settings associated with a report or an alert. The Advisor Administrator sets thresholds during system configuration. For example, the Advisor Administrator can set a threshold to show all invoices coming due within the next 10 days, where 10 days is the configured threshold.
- **Filters** provide control of the information that appears within a dashboard or report. Finance Managers and Advisor Reports Users can create filters to view information. They can create filters to view information about a group of selected business units or a group of selected AP processors.

Note: If an employee selects "All" from the Business Unit list, only the Business Units that they are authorized to see appear. Business Units for which the employee has no authorization, do not appear.

- **Alerts** notify you about invoices that need attention. Advisor uses the email system to send alerts. For example, you can activate an alert to notify you if invoices remain on hold for a configurable number of days.

Accessing information in Advisor

With Advisor, you start at a pre-defined, system-wide dashboard that displays a high-level view of the current state of invoices in your 170 MarkView system and ERP system. The dashboard provides access to reports that, in most cases, let you act on invoices.

The following figure and the text immediately following the figure describe access to information in Advisor.

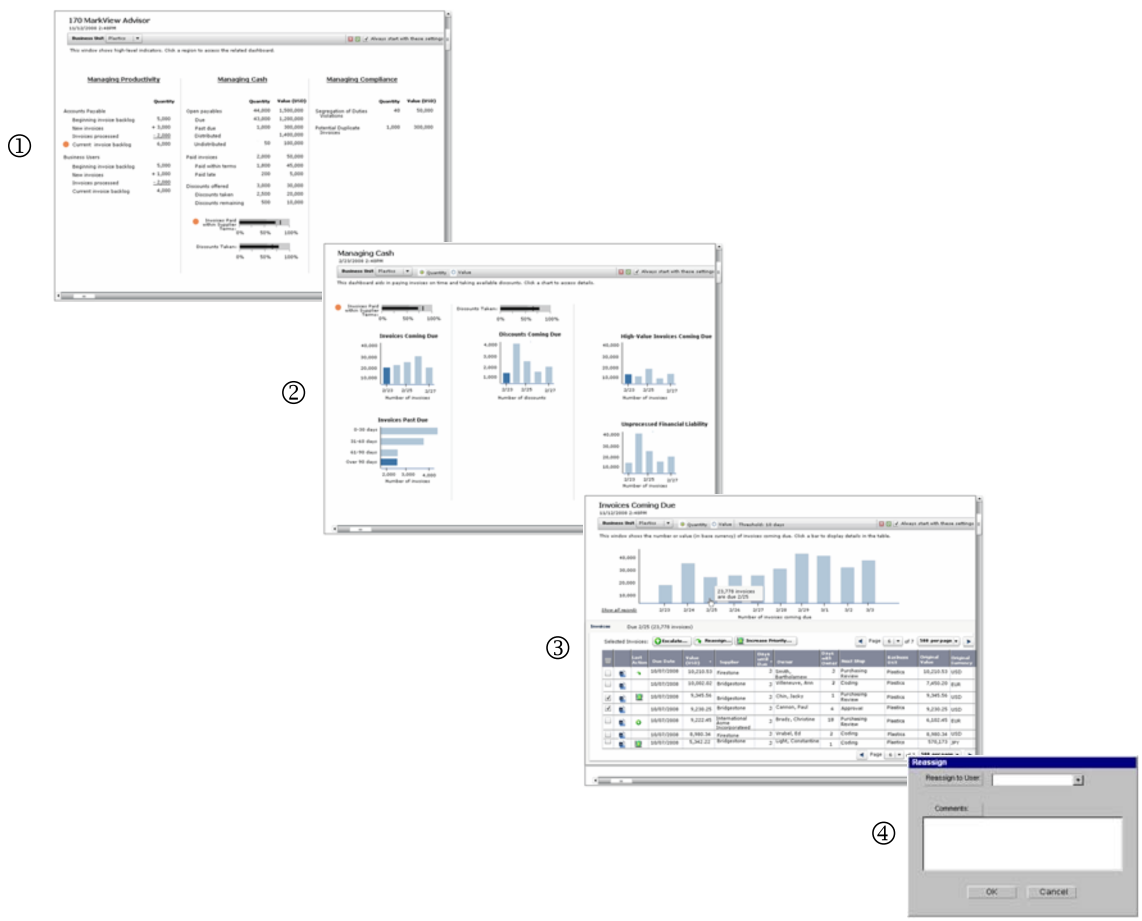


Figure 1-1. Flow of information and action

1 **Overview Dashboard**—From 170 MarkView Home, selecting Advisor > Overview displays the Overview Dashboard.

After selecting a business unit, the dashboard shows a high-level view of the AP activities for that business unit. The Overview Dashboard provides summary data and scorecards that show how the business unit is performing against goals.

The Overview Dashboard shows summary data for 3 dashboards: Managing Cash, Managing Productivity, and Managing Compliance.

Business Units are equivalent to ORGs in Oracle.

2 **Management Dashboard**—Clicking a management area on the Overview Dashboard displays the dashboard for that area. You also have direct access to management dashboards from the 170 MarkView Home > Advisor menu.

3 **Report**—Clicking a graph on a dashboard opens the report for the graph. The report includes a Summary Graph or Table depending on the filters in use and a Details Table, which is initially empty.

Clicking a graph bar or table cell populates the Details Table at the bottom of the window with the related information.

4 **Action Dialog Box**—From the Details Table, employees assigned to the Finance Manager group can select invoices and click a button to take action on the invoice:

— Escalate—moves an invoice to the Working Folder or Web Inbox of the next person in the hierarchy

— Reassign—assigns an invoice to a different employee

— Increase Priority—increases the priority of an invoice by 10 points

Advisor generates a dialog box for you to complete and then sends email to notify the affected employees about the change.

Some reports, for example those that show possible fraud violations, do not include any actions available from within Advisor. However, these reports provide insight into actions required outside of the system.

Using dashboards

Dashboards in Advisor consolidate information into a single window to provide a high-level view of AP business activities. From the summary graphs and scorecards displayed, an employee can access details from which to view detailed reports, act upon invoices that need attention, or take steps to address productivity and compliance issues.

- Advisor derives business units from organizations configured in Oracle and defined in MarkView.
- Advisor derives AP users from employees who are assigned AP responsibilities in 170 MarkView.

- Advisor identifies business users as those without AP responsibilities.

The following figure illustrates areas of a dashboard. The text immediately following the figure describes those areas.

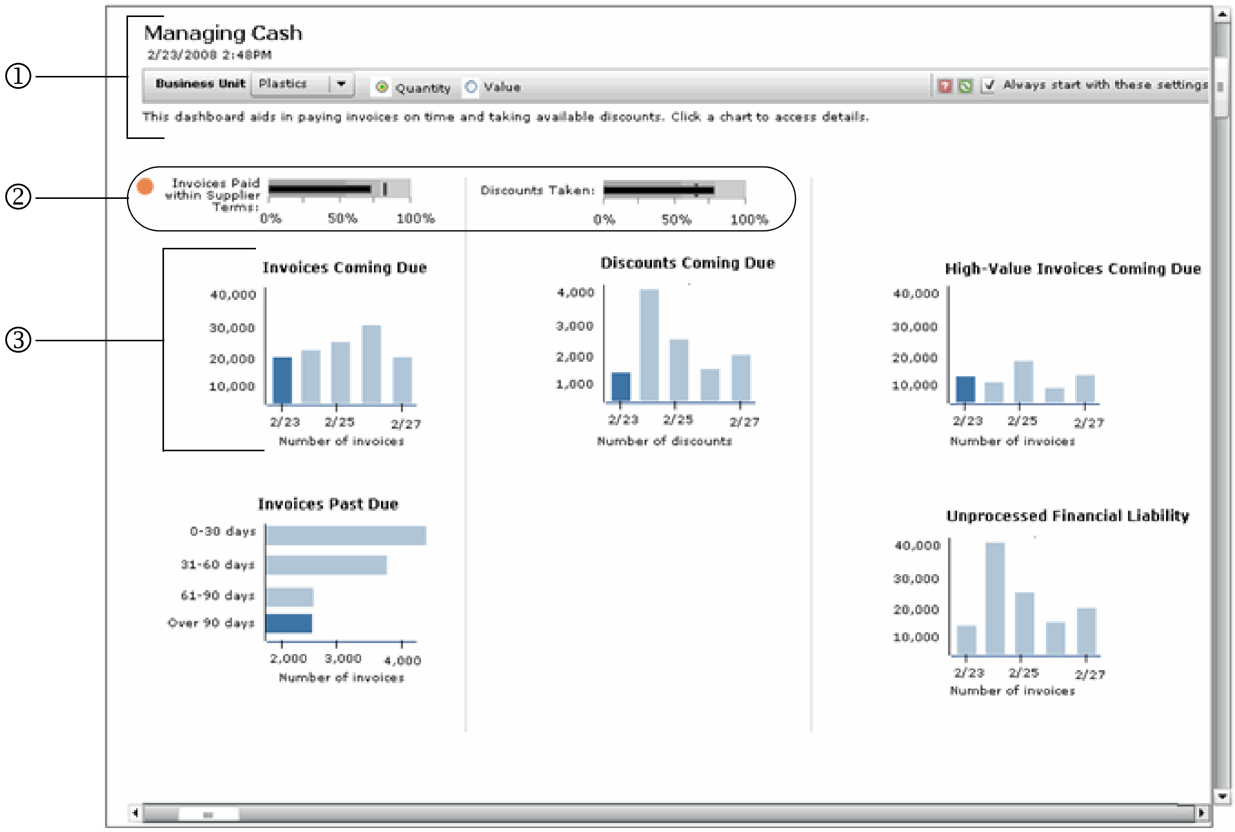


Figure 1-2. Dashboard features

1. **Header**—Controls what appears on-screen by using filters. Some headers also display threshold settings.

   The value view shows the monetary amount associated with the reported items. The quantity view shows how many items are associated with the report.

2. **Scorecards**—Show how the current business unit is performing against target goals. An exclamation point indicates that a business unit is failing to meet the target. The target appears as a black vertical bar on the scorecard. The Advisor Administrator configures the target goals when setting Thresholds.

3. **Summary graph**—Shows a consolidated view of the report.

   Clicking a summary graph accesses the detailed report associated with that chart.

You can:

- Print the dashboard using the browser print feature. Depending on the browser, you may need to change the page orientation to landscape or scale the size. Use the Print Preview feature to do so.
- Make the current view and filters the default settings for the dashboard and related reports. Select **Always start with these settings** to change the default settings for yourself, but not for other Advisor users. Reports that you access from the dashboard reflect these settings.
- Access reports related to the dashboard. Reports that have no associated data display a message "No Data to View." If you fail to select a Business Unit, if you have not yet synchronized the databases, or if there are no items that fit the report criteria, this message appears.

Dashboards

Table 1-1. Dashboards

Dashboard	Description
Advisor Overview*	The highest-level view of AP business activities. Select a business unit for which to see information. If you select **Always start with these settings**, the information for that business unit appears when Advisor opens. This dashboard also provides access to other dashboards.
Managing Cash*	The state of invoices that impact your cash flow. (This dashboard does not include invoices with zero dollar values.)
Managing Productivity*	Information about invoices and processing throughput that impact productivity.
Managing Compliance	The number of segregation of duties violations and possible duplicate invoices for invoices that were created or updated in the previous or current calendar month.
Alerts	A summary of invoices that generated alerts and detailed invoice information from which you can perform Advisor actions. Access this dashboard from the Advisor menu on the MarkView home page.

*Because of possible differences in currency between Business Units, you can only access information for one Business Unit at a time.

Scorecards

A scorecard provides metrics to track business unit performance for the current calendar month. Scorecard indicators display a vertical black bar at the target goal and the current level of performance. Use the scorecard to compare performance against target goals.

A scorecard:

- Measures metrics per business unit.
- Alerts you through email when a process starts to fall below the metrics set.
- Is associated with reports from which you can take action to improve performance.

An exclamation point next to a scorecard indicates that performance does not meet the target goal.

Advisor provides the following scorecards

- Invoices Paid within Supplier Terms
- Discounts Taken

Using reports

Reports provide summary information about a selected dashboard process, details about invoices within that process, and options to act upon invoices.

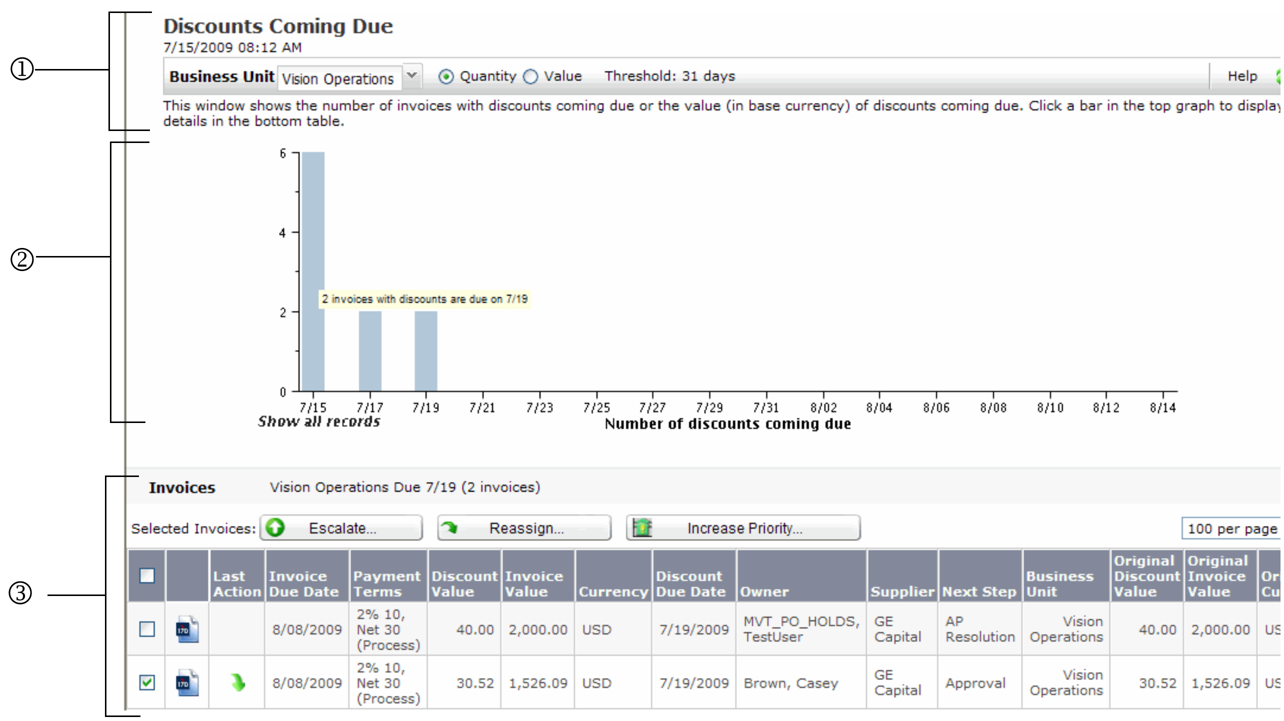


Figure 1-3. Report features

1 **Header**—Gives the name of the report, the date and time when the report was generated, filters that control what appears in the report, and a report description.

2 **Summary Graph**—(or Summary Table) Provides a high-level view of the current data as filtered through established settings, for example, a date range or value for a business unit.

The type of graph or table that appears varies between reports and depends on the type of information being shown.

- Holding the cursor over an area of a graph or table cell displays additional information about that segment.
- Clicking a table cell, graph bar, or graph line populates the Details Table with the related information.
- Clicking **Show all records** also populates the Details Table.

3 **Details Table**—Shows detailed information about the graph bar, graph line, or table cell clicked in the Summary Graph or Summary Table, for example, invoices with discounts coming due on 7/17. Table columns depend on the report content.

- The Last Action column displays an icon depicting the last Advisor action applied to the affected invoice, regardless of whether the action was initiated manually or automatically.
- Columns that show elapsed time do so in hours and minutes. For example, 120:05 is 120 hours and 5 minutes.

You can:

- Click a column heading to sort the table by that column.
- Select check boxes next to table entries to act on all selected entries.
- Select the check box in the heading row to select all entries; de-select the check box to deselect all entries.
- Hold the cursor over some table cells to display additional information about the entry.
- Click the document icon in the Details Table to open the document in a 170 MarkView viewer.
- Export the report to a file format that Microsoft Excel Spreadsheet supports.
- You can also print the report using the browser print feature.

Advisor uses a dedicated schema to populate dashboards and reports. The data that populates the Advisor schema is derived from both the 170 MarkView database and the Oracle database. The Advisor schema is updated in real-time.

Advisor also provides Hot Sync, which is a periodic synchronization process that acts as a backup to the real-time synchronization. The Advisor Administrator specifies at what time of day the synchronization occurs. For the best results, plan for the synchronization to run during off-peak system use, or at a specific time of day before you access the reports.

Advisor reports

Table 1-2. Advisor reports

Report	Description
Accounts Payable Throughput	Shows the invoice backlog and the number of invoices processed over the last 31 days (preset).
Accounts Payable Working Folders	Shows the number of invoices currently assigned to a configurable number of AP processors. Advisor considers an employee who is assigned to an AP group in 170 MarkView an AP user, for example, AP ENTRY, or AP RESOLUTION.
Business User Working Folders	Shows the number of invoices currently assigned to a configurable number of business users who have the most invoices. Advisor considers an employee who is not assigned to an AP group in 170 MarkView as a business user, for example, SUPPLIER FOLLOW-UP or SCAN USERS.
Discounts Coming Due	Shows the number of invoices with discounts coming due or the value of the invoices with discounts coming due. The Advisor Administrator sets a threshold to specify how many days of information to display (from 1 to 31).
High-Value Invoices Coming Due	Shows the number or value of high-value invoices coming due. The Advisor Administrator sets a threshold to specify: • how many days of information to display (from 1 to 31). • the minimum amount that defines an invoice as high-value for each business unit. This amount differs from the MarkView workflow setting that requires Additional Review.
Invoices Coming Due*	Shows the number or value of invoices coming due within a specified number of days. Shows all invoices that are not yet paid. The Advisor Administrator sets a threshold to specify the number of days.
Invoices Not Entered	Shows the number of invoices that must be entered within the next 24 hours to meet the target or SLA number of hours. The Advisor Administrator sets a threshold for each business unit to specify the target or SLA for entering invoices.
Invoices on Hold	Shows how many invoices are currently on hold.
Invoices Past Due*	Shows how many or the monetary value of past-due invoices.
Invoices Processed by Accounts Payable Today	Shows the number of invoices each AP employee processed today and the last action taken on each invoice. An invoice is considered processed each time the invoice transitions out of an AP Backlog queue. Therefore, an invoice might be counted more than once. For example, if an AP processor sends an invoice to a number of users for comment, Advisor counts the invoice as processed each time the invoice transitions out of the backlog queue.
Potential Duplicate Invoices*	Shows the number of invoices created or updated in the current or previous calendar month that are potentially duplicates.
Segregation of Duties Potential Violations	Shows the employees who created or approved invoices in the current or previous calendar month despite having a conflict of interest.
Unprocessed Financial Liability	Shows the percentage of invoices that are in the ERP system, but are not validated for payment.

*These reports do not include invoices with zero dollar values.

Action process

In Advisor, a Finance Manager can take an action manually or the Advisor Administrator can set actions to occur automatically. Only a Finance Manager can take actions.

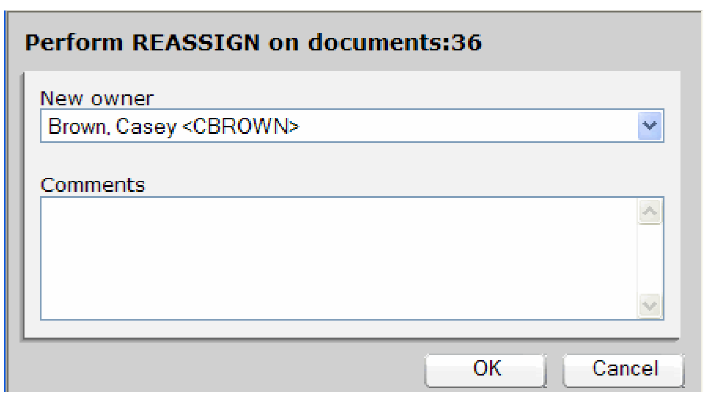
Automatic actions

170 MarkView Advisor lets the Advisor Administrator configure the system to automate some actions. Automatic actions occur when invoices meet configured criteria. For example, the administrator can specify that Advisor will prompt MarkView to increase the priority of an invoice that remains in an AP processor's Working Folder or Web Inbox for more than a specified number of days. When the time configured elapses, the system increases the priority of the invoice automatically.

Manual actions

After selecting invoices in the Details Table, the Finance Manager can take action on the selected invoices: Escalate, Reassign and Increase Priority. The manager can act on an invoice in any step of an invoice workflow.

Clicking an action button opens a dialog box similar to the following from which to start the selected action.



For reassignments, the employee must select a user from the list. If a user does not appear in the list, that user is not authorized to retrieve that invoice. Advisor uses information from 170 MarkView and the ERP system to determine the hierarchy.

Adding comments is optional. Use the comments area to include questions about an invoice (for example, "Does this invoice include all the required information?"), add information ("The priority for these invoices was increased because the AP approval staff is attending an off-site meeting next week."), or provide insight into the current state of an invoice ("The supplier failed to deliver the entire order.")

In addition to manually processing invoices, 170 MarkView Advisor lets you configure the system to automate some actions. For example, if an invoice remains in an employee's

Working Folder or Web Inbox for more than a specified number of days, the system can increase the priority of the invoice automatically. If the invoice continues to sit the employee's Working Folder or Web Inbox for an additional number of specified days, the system can automatically escalate the invoice to their manager.

Messages

For each action, 170 MarkView Advisor generates messages indicating success or failure:

- Upon successful escalation or reassignment, the message indicates how many items were escalated or reassigned, and the user who received the new assignment.
- If escalation or reassignment is unsuccessful, the message identifies which invoices were successfully escalated or reassigned and which were not.
- Upon a successful increase in priority, the message indicates that the priority increase succeeded.

170 MarkView maintains a history of the messages in the History log for the item.

Escalate

Escalate lets you move an invoice requiring attention to the Working Folder or Web Inbox of the next person in the hierarchy that is set up in 170 MarkView for invoice approval.

Note: To use the Escalate action, your site must have hierarchies set up in Oracle or 170 MarkView.

You can escalate a 170 MarkView invoice under the following conditions:

- The employee has a supervisor defined in the MarkView or Oracle hierarchy.

  If the employee does not have a supervisor defined in the 170 MarkView hierarchy, or the supervisor is not a 170 MarkView user, you cannot escalate the invoice. (In this case, you might use the Reassign function instead.)
- The supervisor has permission to retrieve the work item.

For example, using Advisor, you might escalate an invoice to the Working Folder of an employee’s manager. The escalation sends email to notify both employees of the change in assignment.

Use this action to address possible resource, scheduling, or performance issues.

Under the following circumstances, Advisor generates error messages and stops the escalation for the invoices that fail:

- If the manager, next person in the hierarchy, or assigned alternate user does not have authorization to process the invoice.
- If Advisor cannot determine who holds the next highest position in the 170 MarkView or ERP hierarchy.

Alternate Users

You cannot escalate an invoice if the manager or next person in the hierarchy currently has an alternate user assuming their responsibilities.

Email Message

Advisor notifies both parties in separate emails about the invoice escalation. The email identifies the work item, the name of the person who escalated the work item, and the names of the persons who are affected by the escalation. For example:

To: Devin Edwards

Subject: GE Capital (DP221118) escalated

```
Jim Smith <JSMITH> escalated work item GE Capital (DP221118) from Connor Horton <CHORTON> to you.
To review this work item, go to your Web Inbox.
```

For example, an automatic action:

To: Devin Edwards

Subject: GE Capital (DP221118) escalated

```
Advisor System <ADVSYS> escalated work item GE Capital (DP221118) to Connor Horton <CHORTON>.
```

Note: You cannot modify the email that Advisor sends.

Reassign

Reassign lets you assign an invoice to a different employee who has the correct authorization set up in 170 MarkView. You can reassign any 170 MarkView invoice in any workflow queue. The system sends email to notify both employees of the change. The invoice appears at the top of the list in the newly assigned employee's Working Folder or Web Inbox as a high-priority item.

You cannot reassign an invoice if no other 170 MarkView employee has authorization to retrieve the invoice.

Use Reassign to manage resources and schedules by shifting assignments between employees.

Alternate Users

You cannot reassign an invoice if a user currently has an Alternate User assuming their responsibilities.

Email Message

Advisor notifies both parties by separate emails about the invoice escalation. The email identifies the work item, the name of the person who escalated the work item, and the names of the persons who are affected by the escalation. For example:

To: Devin Edwards

Subject: GE Capital (CH_MAN001) reassigned

Alex Johnson <AJOHNSON> reassigned work item GE Capital (CH_MAN001) from Connor Horton <CHORTON> to you. To review this work item, go to your Web Inbox.

Increase Priority

Increase Priority lets you increase the priority of any invoice that has an associated 170 MarkView document by 10 points. If the invoice is in an employee's Working Folder or Web Inbox, the system sends email to notify the employee of the increased priority. The invoice moves to the correct place in the priority of invoices listed in the Working Folder or Web Inbox. 170 MarkView places invoices with the highest priority at the top of the list.

Increase Priority lets you communicate through 170 MarkView without interrupting the employee who may be processing the invoice in question.

Email Message

Advisor notifies the AP processor (either the owner of the invoice or the AP processor who retrieved the invoice) by email about the increase in priority assigned to the invoice. The email identifies the invoice and the name of the person who increased the priority. For example:

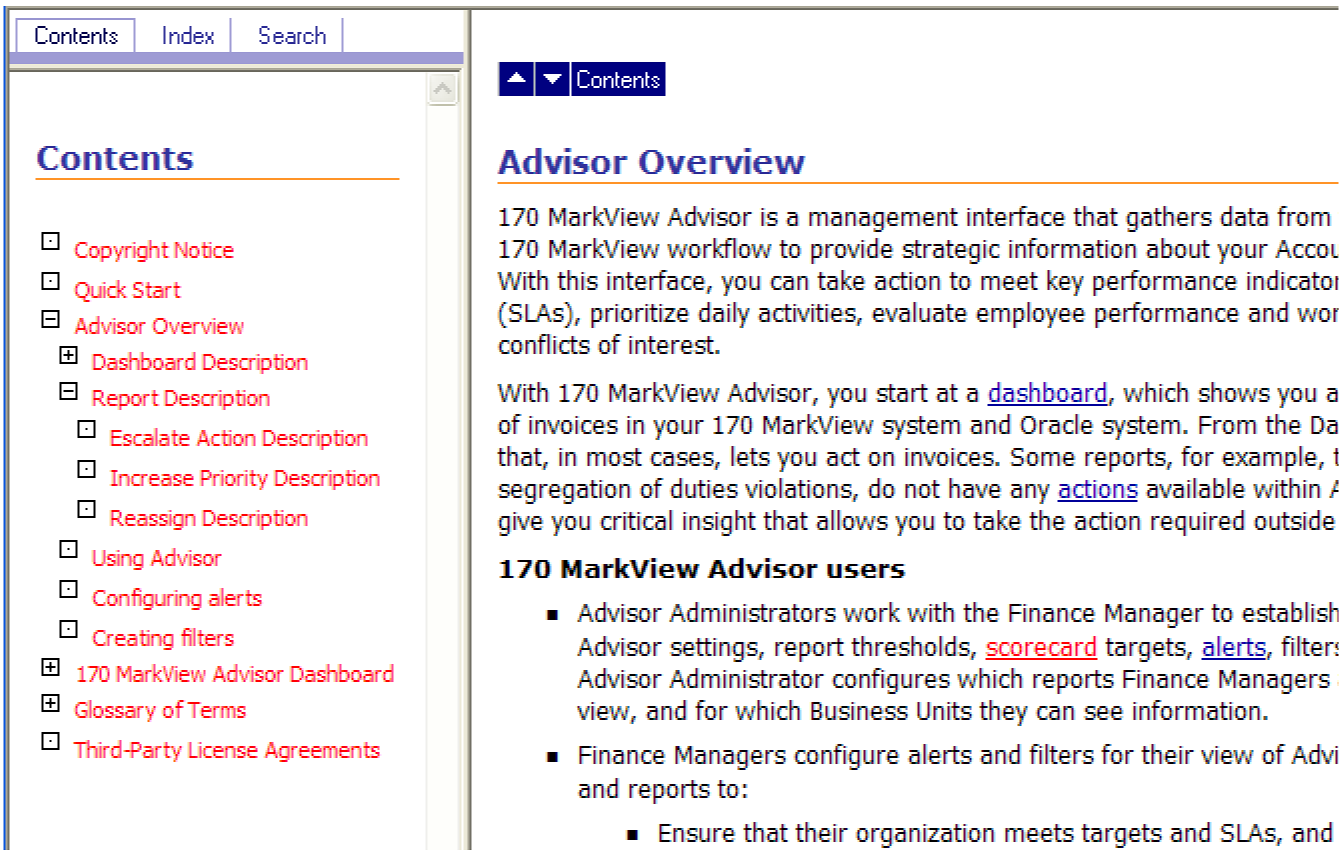
To: Devin Edwards

Subject: GE Capital (DP221118) priority increased

Jim Smith <JSMITH> increased the priority of invoice GE Capital (DP221118). To review this invoice, go to your Web Inbox.

Using help

Each Advisor dashboard, report, and configuration window has a link to help with more information. Clicking the Help link accesses help for the current window. Using the Contents, Index, and Search tabs in the help gives you access to information about other Advisor dashboards and reports.



For Advisor configuration, the help is stand-alone and does not link to information about other windows.

CHAPTER 2

Planning for Installation

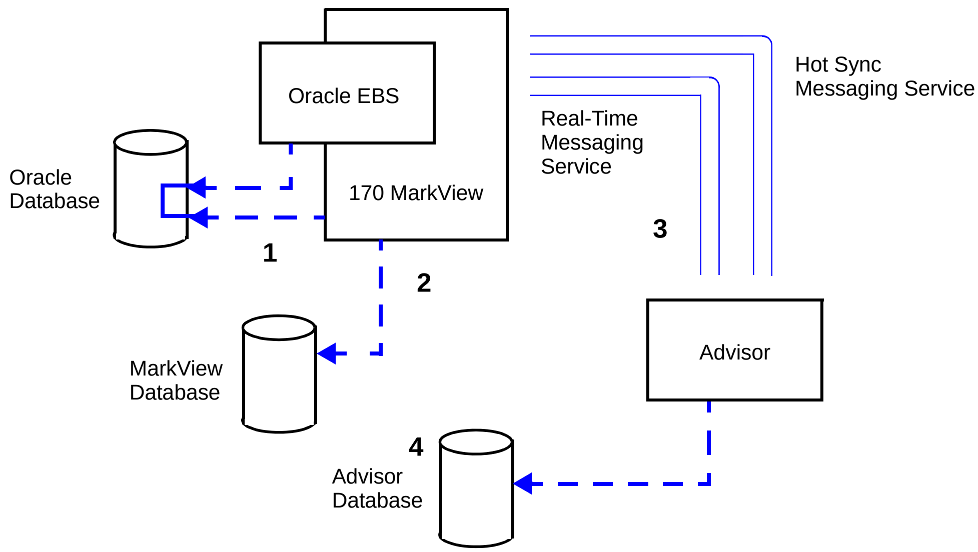
An Advisor installation requires changes to the database server, connection information for communication between 170 MarkView and Advisor, and Oracle Application Server (OAS) information for Advisor.

The process requires the expertise of the following users:

- Database Administrator (DBA)—completes the database changes needed for Advisor installation (Chapter 3, Before You Install).
- Operating System Administrator or a user with administrative privileges on the 170 MarkView Application Server—installs Advisor, (Chapter 4, Verifying the Environment and Installing Advisor) and runs the database synchronization processes (Chapter 5, Synchronizing Databases).
- Advisor Administrator—configures Advisor once installation and data synchronization is completed (Chapter 6, Setting Up and Configuring Advisor), and adds Advisor users to groups in MarkView and roles in Advisor (Chapter 7, Adding Advisor Users).

Advisor Architecture

The following diagram shows the communication between Oracle, 170 MarkView, and Advisor.



1 170 MarkView and the Oracle system communicate through the Oracle database.

2 170 MarkView communicates with the MarkView database to maintain captured images and reference information.

3 170 MarkView communicates with Advisor through a real-time messaging service and a hot sync messaging service.

4 With the updated information from the messaging services, Advisor maintains the Advisor database.

Hosted environments

The 170 MarkView schema, 170 MarkView Advisor schema, and 170 MarkView Application Server components can reside on a hosted environment. This environment requires that the firewall permit secure traffic between the hosted environment and your site. Review the proposed configuration with your 170 Systems Practice Manager to ensure that your setup complies with the 170 MarkView Suite requirements.

170 MarkView Application Server components

The following J2EE applications are 170 MarkView Application Server components for Advisor:

- 170 MarkView Advisor Actionable Module—Provides dashboards for accessing and taking action on MarkView and ERP data.
- 170 MarkView Advisor Hot Sync Module—Synchronizes data between 170 MarkView and 170 MarkView Advisor at configured times.

On the application server, the Advisor installation uses the following:

- Installation files—hold the 170 MarkView Advisor Installer and 170 MarkView Verification Utility. This is the directory where you downloaded the installation files. Allocate approximately 1 GB of disk space.
- Logs and Configuration directory—holds logs for the initial installation and on-going use of 170 MarkView Advisor (not directly related to the J2EE components). This is the Installation Directory for which the installer prompts. Allocate approximately 500 MB of space.
- Advisor Dashboards directory—holds information that Advisor uses on an on-going basis to deliver the dashboard content. Allocate approximately 10 MB of space.
- OAS Filesystem—contains additional Advisor-related OC4Js and logs within the OAS framework and filesystem. Log entries are generated as the application is used. Space requirements depend on 170 Markview application usage.

Requirements for Advisor user machines

Because Advisor is a browser-based product, the Advisor user machine must have:

- A Browser installed (see 170 MarkView Supported Platforms and Versions for a list of supported browsers)
- A minimum screen resolution of 1152 x 864
- Adobe Flash Player, version 9 or above
- Javascript enabled

Database sizing

The amount of disk space required is based on the number of document pages to be stored annually. The following table provides estimates of the database server disk space required annually by 170 MarkView. These estimates include the base 170 MarkView software, 170 MarkView for Accounts Payable, and 170 MarkView Advisor.

Table 2-1. Minimum database sizing for Advisor

Size	Invoices per year	Disk space consumed per year*
Large	> 1,000,000	70 GB
Medium	~ 500,000	34 GB
Small	~ 100,000	8 GB

The ratio of table data to index data is from approximately 55 to 45 percent. For example, in a database consuming 10 GB of disk per year, approximately 5.5 GB is table data and 4.5 GB is index data.

Installation information

Before you run the 170 Advisor installation and upgrade application, complete the *170 MarkView Advisor Worksheet*. Doing saves you time because you have all of the information that you need to complete pre-installation, installation and upgrade, and post-installation tasks. Completing the worksheet also helps you to proactively address system connection or access issues that you need to solve before installation.

CHAPTER 3

Before You Install

1. Verify that 170 MarkView for Accounts Payable is installed and configured.
2. Complete the 170 MarkView Advisor Worksheet, which provides the information needed to perform pre-installation tasks, installation tasks, and post-installation tasks.
3. Have the Database Administrator (DBA) complete pre-installation tasks on the database server before the application server administrator completes pre-installation tasks on the 170 MarkView Application Server.
4. Have the application server administrator complete pre-installation tasks on the 170 MarkView Application Server.
5. Verify that all pre-installation tasks are completed before you install 170 MarkView Advisor.

Downloading the Advisor installation files

The Advisor installation application uses a graphical interface. If you are using a UNIX system, verify that your system supports such an interface.

1. Contact the 170 Systems representative for the location from which to download the Advisor installation files.
2. Verify that a target installation directory exists, for example, $HOME/*target_install_dir*.

   The installation software saves all installation activities and log files in this directory.
3. Navigate to the software distribution directory that your 170 Systems representative gave you.

4 Download the compressed file **install-image-advisor-verify-6.4.zip** into the target directory.

In addition to the required Advisor installation files, the zip file contains a folder of scripts to run on the database server.

If your company requires that you run database files locally, a zip file containing only the database scripts (advisor-database-scripts.zip) is available for you to download to the database server. The file contains the same scripts as those in the install image file.

5 Decompress the zip file into the target installation directory.

Note: Decompress the file with a program other than the Windows XP file decompression program.

Database server pre-installation tasks

The DBA should complete the tasks in this section.

The decompression process saves the following to a scripts folder in the target directory:

- create_tablespace.sql
- create_account.sql
- markview_grant_privileges.sql
- advisor_grant_privileges.sql
- gencomp.sql

Creating tablespaces for Advisor

1 Log on to the database server as the Database Administrator.

2 Select one of the following methods and continue:

- Create locally managed tablespaces using the **create tablespace** SQL command. Use the create_tablespace.sql script as a guideline.
- Use the script as provided. Run the script twice to create the data and index tablespaces.

  The script prompts you for the following information:

  - Tablespace name
  - Initial Size (MB)

- Max Size (MB)
- Location of the store data file (dbf)

Creating the Advisor user

Run **create_account.sql**. The script creates the 170 MarkView Advisor Database Schema user and prompts for the following information:

- username for the Advisor user
- password for the Advisor user
- DB data tablespace name
- DB index tablespace name
- Name of the temp tablespace directory

Granting MarkView privileges

Run **markview_grant_privileges.sql** to grant the privileges that the MarkView schema user needs to set up Advisor. The script prompts you for the MarkView schema username.

Assigning grants and privileges to the Advisor user

Run **advisor_grant_privileges.sql** to assign grants and privileges to the Advisor schema user. The script prompts you for the Advisor schema username.

170 MarkView Application Server pre-installation tasks

After completing the Database server pre-installation tasks, complete the following tasks.

Verifying that OAS is running

1. Log in as the OAS administrator.
2. Run the following command:

   opmnctl status -l

- If OAS is running, a status of the ias components is displayed:

  ```
  OC4JGroup: default_group: Alive
  ASG: Down
  HTTP_Server: Alive
  ```

- If OAS is not running, the following message is displayed:

```
Unable to connect to opmn. Opmn may not be up.
```

To view the full path of the opmnctl directory, run:

opmnctl -help

To start the OAS, run the following command:

opmnctl startall

Setting environment variables

As the OS administrator, set environment variables for the OS user running OAS to point to ORACLE_HOME and JAVA_HOME.

To set $ORACLE_HOME:

export ORACLE_HOME=/projects/home/oraias01/product/10.1.3.3/OracleAS_1

To set $JAVA_HOME:

export JAVA_HOME=$ORACLE_HOME/jdk

Updating the PATH

Add $JAVA_HOME/bin and $ORACLE_HOME/opmn/bin to the beginning of the PATH in the following order:

export PATH=$JAVA_HOME/bin:$ORACLE_HOME/opmn/bin:$PATH

Verifying the JDK version and Java Virtual Machine

The 170 MarkView System requires the Sun JDK 1.5. Use the following command to check the installed JDK version:

java -version

If the wrong version is running, point the server to the 1.5 version, which should be already installed on your system.

Verifying the TRS

The Target Registry Service (TRS) must be running so that install-upgrade application can access the target registry information. See the worksheet for the TRS URL (for example, **http://**<*application server host*>:<*port*>/**mvastrs/markview**).

To verify that the TRS is running:

1. Log in to the Oracle Application Server Enterprise Manager console and expand the instance where the MarkView applications are running.
2. If you see
   - A green up-arrow next to the mvastrs application, TRS is running.
   - A red down-arrow, the TRS is not running.
3. Restart the TRS if necessary.

CHAPTER 4

Verifying the Environment and Installing Advisor

Verify that the pre-installation tasks were finished and that you have the completed 170 MarkView Advisor Worksheet available. You need information from the worksheet to complete the installation.

Caution: The application that installs Advisor restarts the Oracle Application Server. Before running the installer, notify any users who might be working with the server that a restart will occur.

Verifying the environment

Run Verify (**verify.sh)** before installing Advisor. The Verify utility generates logs containing information about issues that can cause the installation to fail.

The values that you enter when you run Verify will pre-populate fields in the Installer.

Use the information on the *170 MarkView Advisor Installation Worksheet* to respond to the prompts.

1. Log in as the operating system user who is running the application server.
2. Navigate to the verify bin directory.
3. Enter one of the following commands to run Verify:
   - On Unix, enter **./verify.sh**.
   - On Windows, enter **verify.bat**.
4. Select **170 MarkView Advisor** and click **Next**.

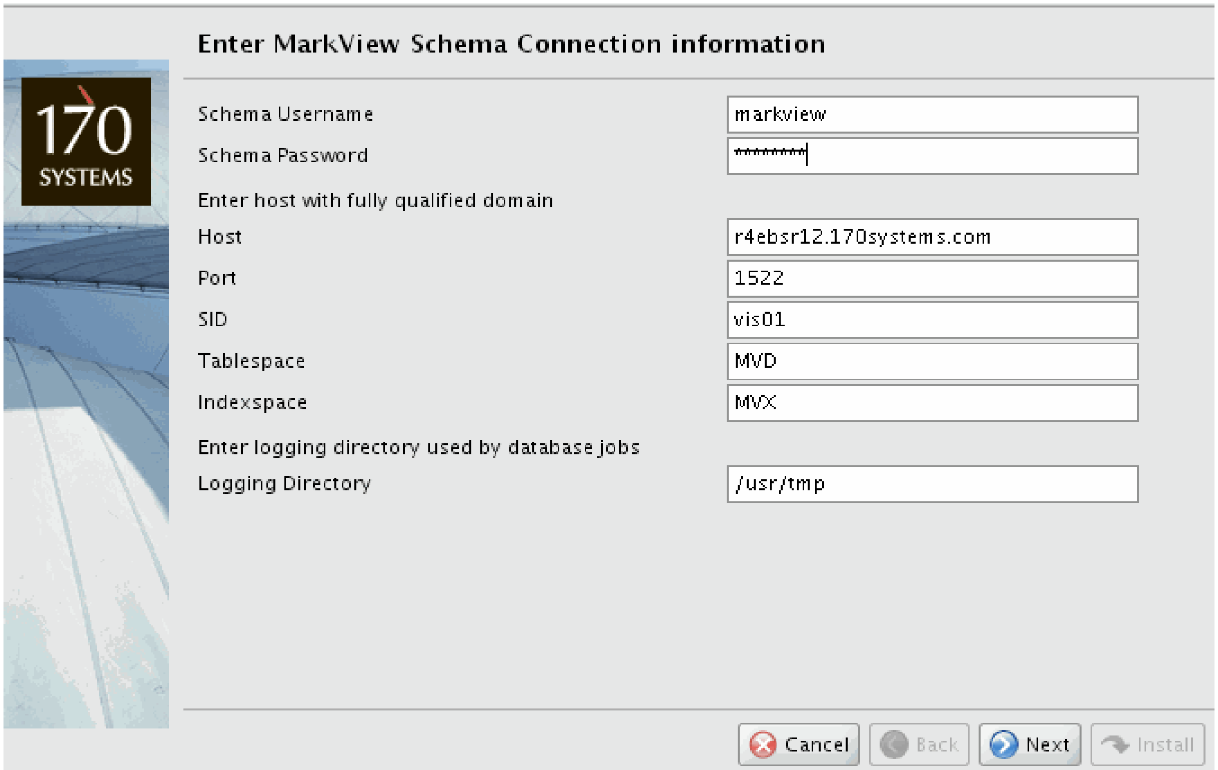
5 Continue as follows:

a For installation type, select **Standard Full Install** and click **Next**.

b Accept the default directory or click Select Folder to change the installation directory, and click **Next**.

Note: If prompted for the location of the TRS, enter the path, for example, *app-server hostname:port*/mvastrs/markview.

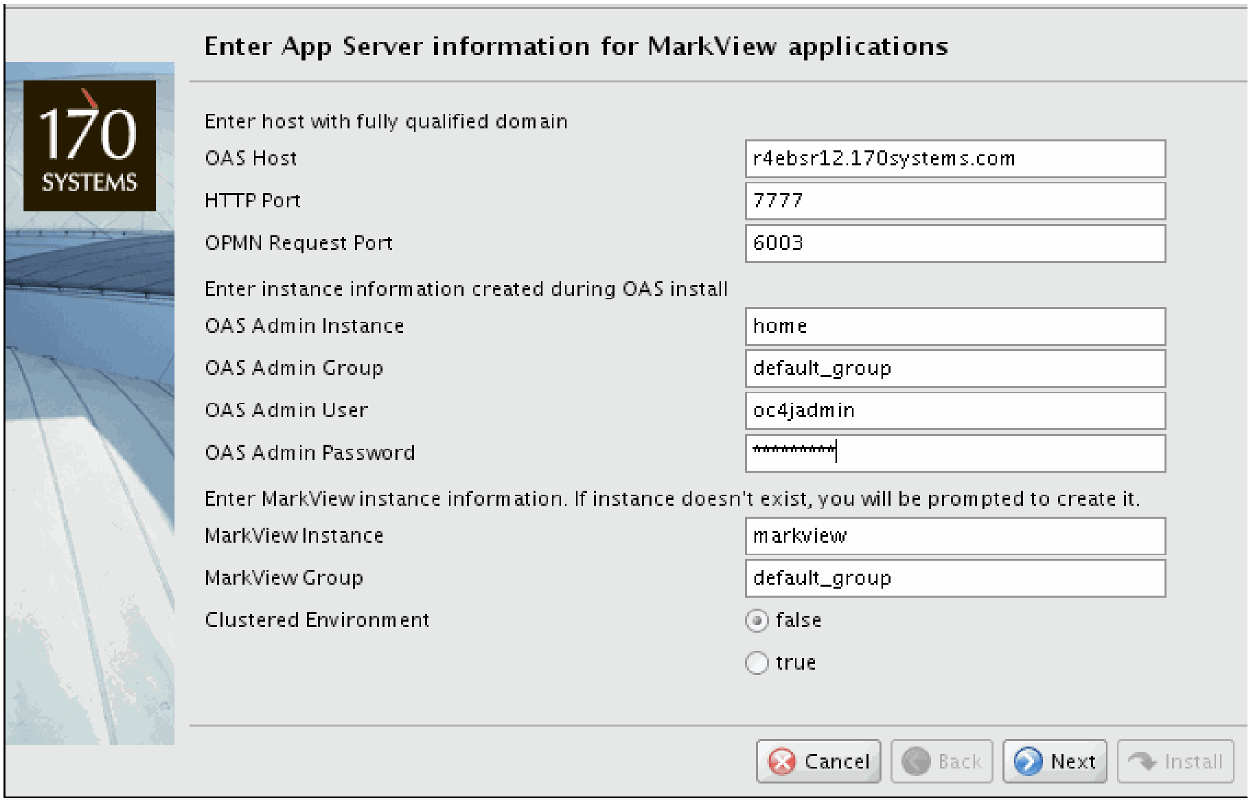
When the MarkView schema connection window opens, some fields may be populated with information from the TRS.



6 Using the installation worksheet, complete any fields that are empty and click **Next**.

7 Complete the Advisor schema connection information and click **Next**.

An application server information window opens.



8 Using the installation worksheet, complete any fields that are empty and click **Next**.

If you do not have an instance of MarkView running, the application prompts you to create one. If prompted, click **Yes**.

9 When prompted to enter application server information for Advisor:

a Enter the *name* of the Advisor instance on the application server.

b Enter the *name* of the Advisor group to which the Advisor instance belongs. If you did not already create a group, the installer prompts you to do so.

c Click **Next**.

If you do not have an instance of Advisor running, the application prompts you to create one. If prompted, click **Yes**.

10 Continue as follows:

a Enter the Oracle E-Business Suite information and click **Next**.

b Enter a communications *password* and click **Next**. This password enables communication between 170 MarkView and Advisor.

c Select the directory in which to install the Advisor dashboards and click **Next**. Advisor uses this directory to store information needed for the user interface.

11 Follow the on-screen instructions to complete the verification.

12 Review the generated report, which is located in the target MarkView install directory that you selected during the verification.

reports/EnvironmentReport.txt – describes issues with your environment that will prevent successful installation.

Save the log in another directory to prevent overwriting them

13 Make changes as indicated in the failure reports before you begin the actual installaton.

Starting the installer

After running the Verify utility, the installer populates some fields based on your answers and entries in the Target Registry Service file. (Installing 170 MarkView for Accounts Payable creates the TRS file.) Some information, like passwords, is not saved.

Use the installation worksheet to complete fields that are empty or to correct information that changed or is wrong.

1. On the Application Server, log in as the administrator or as a user with read/write privileges.
2. Navigate to the installer bin directory. (See the worksheet for the directory location.)

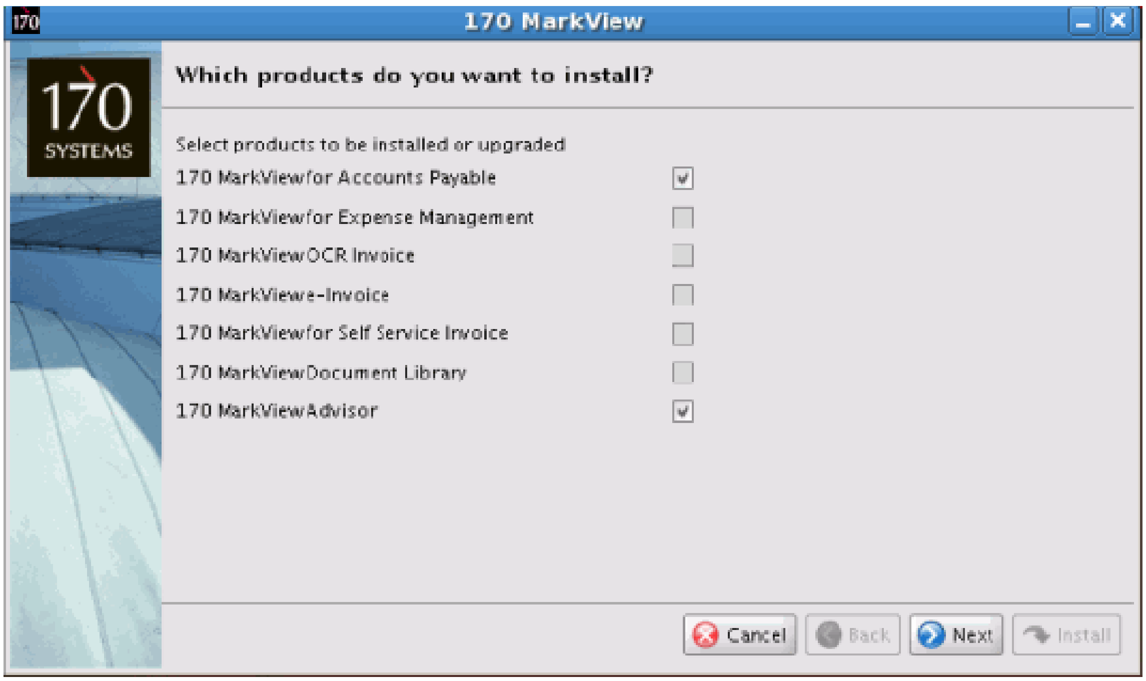
   The bin directory was created when the administrator downloaded and decompressed the installer.
3. Open a command prompt and run the following command:
   - UNIX: **./install.sh**
   - Windows: **install.bat**

   The installer interface opens.

Running the installer

1 Select **170 MarkView for Accounts Payable** and **170 MarkView Advisor** as the products to install and click **Next**.

Note: The installation application verifies that the version of 170 MarkView for Accounts Payable is compatible with Advisor. The installation application does not reinstall 170 MarkView for Accounts Payable unless the version is incorrect.



If 170 MarkView for Accounts Payable is incompatible, an error message appears. Exit the application and wait for the 170 MarkView for Accounts Payable installation and configuration to be completed before installing Advisor.

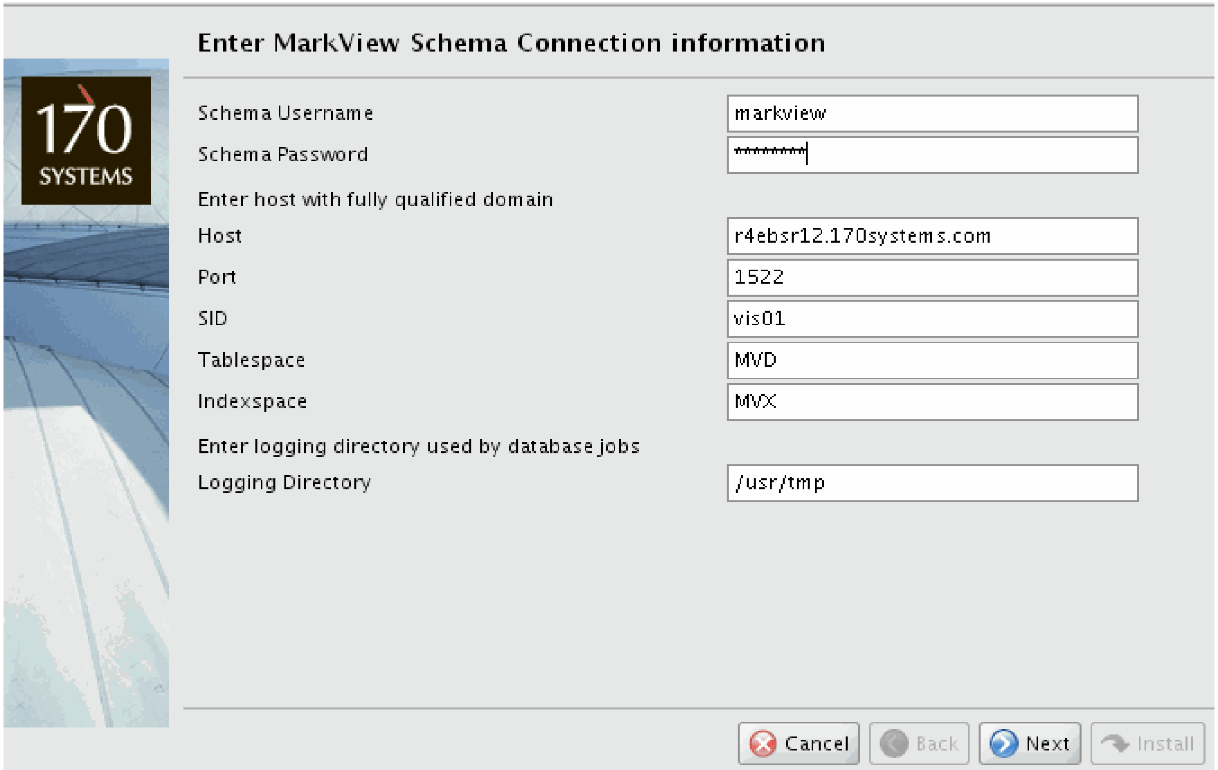
2 Continue as follows:

a For installation type, select **Standard Full Install** and click **Next**.

b Accept the default directory or click Select Folder to change the installation directory, and click **Next**.

Note: If the installer prompts you for the location of the TRS, enter the path, for example, *app-server hostname:port*/mvastrs/markview.

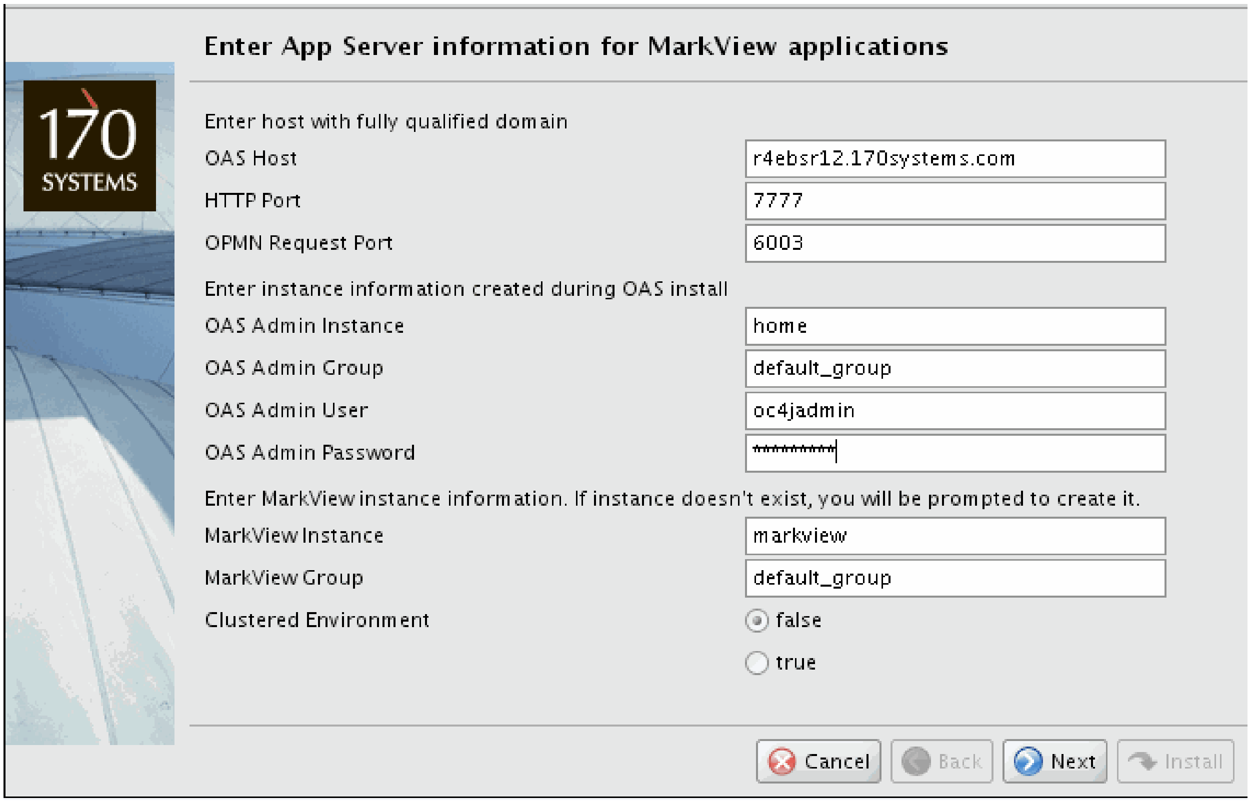
When the MarkView schema connection window opens, some fields may be populated with information from the TRS.



3 Using the installation worksheet, complete any fields that are empty and click **Next**.

4 Complete the Advisor schema connection information and click **Next**.

An application server information window opens.



5 Using the installation worksheet, complete any fields that are empty and click **Next**.

If you do not have an instance of MarkView running, the application prompts you to create one. If prompted, click **Yes**.

6 When prompted to enter application server information for Advisor:

a Enter the *name* of the Advisor instance on the application server.

b Enter the *name* of the Advisor group to which the Advisor instance belongs. If you did not already create a group, the installer prompts you to do so.

c Click **Next**.

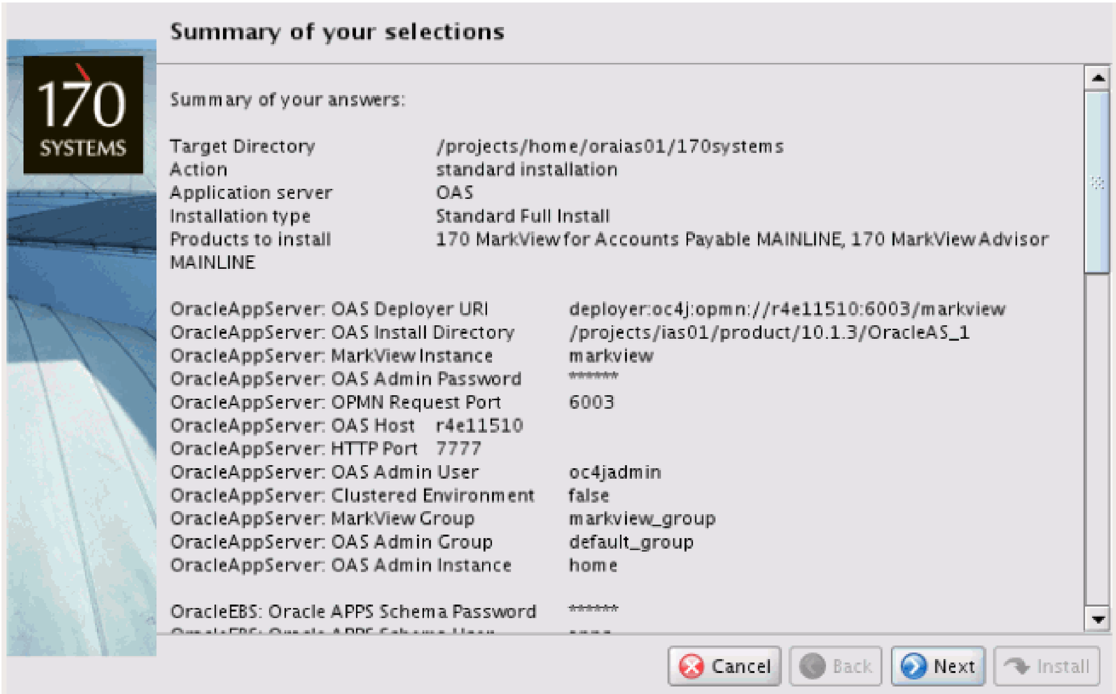
If you do not have an instance of Advisor running, the application prompts you to create one. If prompted, click **Yes**.

7 Continue as follows:

a Enter the Oracle E-Business Suite information and click **Next**.

b Enter a communications *password* and click **Next**. This password enables communication between 170 MarkView and Advisor.

c Select the directory in which to install the Advisor dashboards and click **Next**. Advisor uses this directory to store information needed for the user interface.



8 In the summary window, verify your settings and click **Next**.

9 To see installation progress, click **Show Details** and click **Install**.

When the installation finishes, a message indicates that the installation succeeded or failed.

The installation creates a log file in the Advisor installation directory that you selected during the installation.

If the installation fails, check the log file for errors. Fix the problem and retry the installation. If the installation fails again, contact 170 Systems Technical Support.

Save the installation log files for future reference.

10 Click **Exit** to complete the installation.

Verifying Advisor deployment

1. Open the Oracle Console on the Oracle Application Server and log in as the system administrator.
2. Under the list of applications installed on the server, locate and open the **advisor** entry.
3. Verify that the following entries show a green up-arrow under status, which indicates a successful installation:
   - analytics-actionable
   - analytics-core
   - analytics-markview
   - frameworks

If the status is a red down-arrow, the installation was unsuccessful. Proceed as follows:

1. Check the installer logs.
2. Verify that your system meets the requirements specified in the planning chapter and the170 MarkView Supported Platform Matrix.
3. Verify that the information on the installation worksheet is correct.
4. Retry the installation.

CHAPTER 5

Synchronizing Databases

Before configuring Advisor, complete the 170 MarkView for Accounts Payable set up procedures to configure organizations. Also, verify that your environment is set up as described on page 30.

Synchronizing the databases

Advisor functionality depends on information in the Advisor database being synchronized with data in the 170 MarkView and Oracle E-Business Suite databases. To ensure synchronization, Advisor requires the following processes:

- **Cold Sync**—exports information from the 170 MarkView and Oracle databases and imports the information into the Advisor database. You only run this process once per organization after installing Advisor to populate the Advisor database.

  Cold Sync exports data required for Advisor reports. For example, the process exports Business Unit information to a cold-sync-createbusinessunit file.

  For the best results, run the Cold Sync export and import processes during off-peak hours, non-business hours, or times when your servers experience a low volume of use.

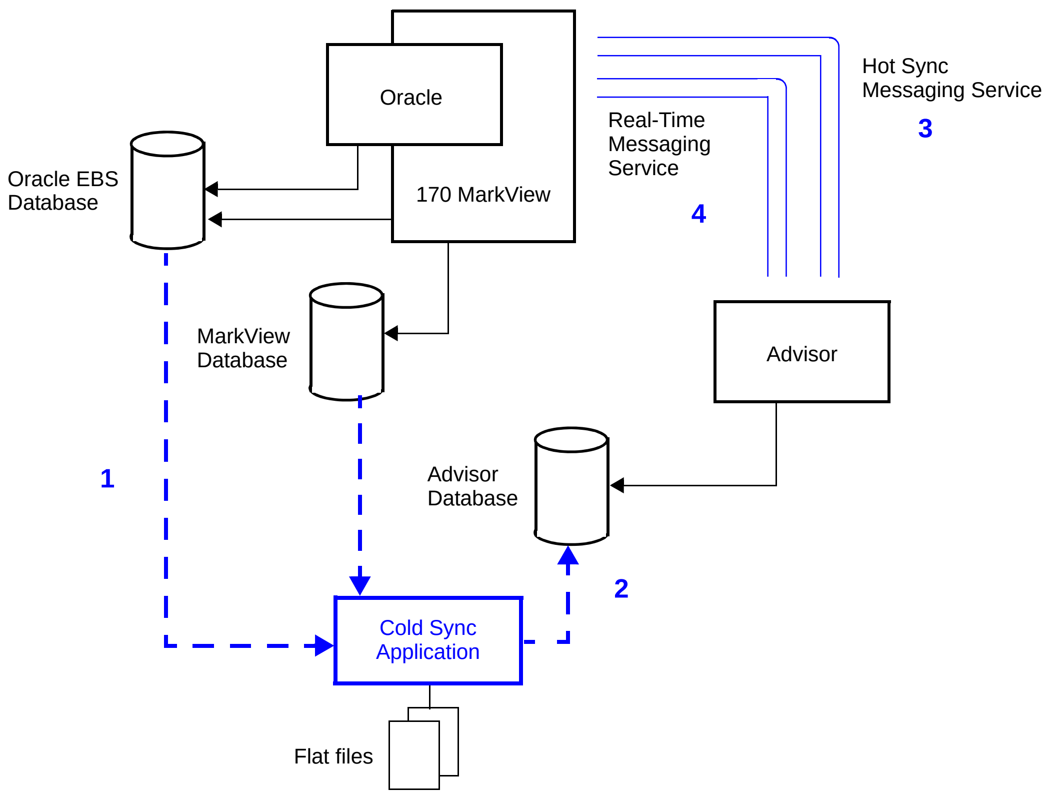
- **Hot Sync**—updates the Advisor database with information that was not captured in the original export. Because invoices can be modified or created in the 170 MarkView database during the import and export process, you must run this process after completing the Cold Sync import process to ensure that the data in the databases match. Run the Hot Sync process before making Advisor available to employees.

  For information about running Hot Sync daily, see Running Hot Sync on page 49.

- **Real-Time Sync**—keeps the Advisor and 170 MarkView databases synchronized after the initial Cold Sync and Hot Sync processes finish and after the scheduled Hot Sync process runs. When an event occurs in 170 MarkView, for example, the priority of an invoice increases, the 170 MarkView system communicates the information to the Advisor database.

The following diagram shows the paths that information follows during and after the Cold Sync process. The text that follows describes the related elements in the diagram.

Note: For information about the Advisor architecture, see Advisor Architecture on page 24.



1. Cold sync exports information from the Oracle and MarkView Databases.
2. From the exported data, Cold Sync creates flat files that it imports into the Advisor database.
3. The Hot Sync messaging system updates Advisor with database events that occurred after the export process.
4. The Real-Time and Hot Sync messaging services keep the Advisor database updated as events happen.

Performing a Cold Sync

The length of time that running the entire Cold Sync process takes depends on the amount of data in your Oracle and 170 MarkView environments (for example, the number of invoices entered or business users registered with 170 MarkView) and the speed of your system processors. A Cold Sync Import Time Calculator is provided to help you determine the length of time. However, you must run the Cold Sync export first.

Use the Cold Sync export and import procedures that follow to synchronize the Advisor database with the 170 MarkView database. These procedures reference information that you recorded on the installation worksheet.

Running Cold Sync Export

The Cold Sync export process collects 170 MarkView database information in files that the import process uses to synchronize the Advisor database.

1. On the 170 MarkView Application Server, log in as the operating system user who owns the OAS server and run the following command to change to the tools directory.

   cd *install directory*/**tools**

2. Run one of the following commands (see the Database and the MarkView sections of the installation worksheet):

   For UNIX:

   ./coldsync-export.sh *dbHost dbPort dbSid markviewDBUser markviewDBPassword appsDBUser appsDBPassword exportDir "orgShortNames"*

   For Windows:

   ./coldsync-export.bat *dbHost dbPort dbSid markviewDBUser markviewDBPassword appsDBUser appsDBPassword exportDir "orgShortNames"*

   For example:
   ./coldsync-export.sh r4e11510.170systems.com 1522 vis01 markview markview apps apps ~/exportDir *"myOrg"*

   where:

   - dbHost—database server host
   - dbPort—database server port
   - dbSid —database sid name (oracle)
   - markviewDBUser—MarkView user with which to connect to dbHost
   - markviewDBPassword—MarkView password for dbUser
   - appsDBUser—apps user to connect to dbHost

- appsDBPassword—password for apps dbUser
- exportDir—the name of the directory in which to save the MarkView export data
- "orgShortNames"—a comma-separated list of organization short names within quotation marks.
  - **To collect data for all organizations at once**—Do not use this parameter or enter any orgShortNames.
  - **To collect data for multiple organizations**—For this parameter, use double quotation marks to enclose a comma-separated string of orgShortNames (without spaces) to run.
  - **To collect data for a single organization**—For this parameter, use double quotation marks to enclose the orgShortName to run.

Note: To add new Organizations to Advisor, re-execute the Cold Sync export and import processes. Specify only the orgShortNames for the new Organizations.

3 Check the log file for errors:

*install directory***/log/coldsync-export-error.log**

Using the Cold Sync Import Time Calculator

1 Locate and open the following file:

*install directory***/tools/Cold-Sync Import Time Calculator.xls**

2 Change directories to access the Cold Sync export files, for example:

cd ./coldsync-export.sh r4e11510.170systems.com 1522 vis01 markview markview apps apps ~/exportDir *"myOrg"*

3 For each file:

a Open the export file in Microsoft Excel.

b Scroll to the bottom of the file to find the total line count.

c Subtract **3** from the line count.

Caution: Close the file *without* saving it. Doing so changes the file format and causes the Cold Sync Import process to fail.

4 In the open calculator, locate the file name and enter the number into the Message Count cell.

For example, the if the line count for createbusinessunit is 27, subtract 3, and enter 24 into the Message Count cell.

5 See the **Min / Max Execution Times** and the **Cold-Sync Execution Time** charts on the spreadsheet to view the projected import processing time.

Running Cold Sync Import

The Cold Sync import process imports the 170 MarkView database information collected by the Cold Sync export process.

Because database information can be extensive, this procedure allows you to import single files, multiple files, or all files at once. However, you must import the files in the order specified (see step 2 in the following procedure).

If you are adding files and have already run Cold Sync import, rename the log files associated with the procedure and save them for reference.

To run Cold Sync import:

1. On the 170 MarkView Application Server, run the following command to change to the tools directory.

   cd *install directory* **/tools**

   Note: You must import the files in the correct order.

2. Use the following list to determine the order in which to enter files in step 3. Enter file names in the order in which they appear here (from top to bottom).

   If you are only running selected files, for example, cold-sync-createuserinfo and cold-sync-createdoctype, maintain the order.

   cold-sync-createuserinfo

   cold-sync-createbusinessunit

   cold-sync-createdoctype

   cold-sync-createmarkviewcall

   cold-sync-createqueue

   cold-sync-createworkflow

   cold-sync-createworkitemclass

   cold-sync-workitemcreate

   cold-sync-workitemretrieved

   cold-sync-workitemtransition

cold-sync-createholdtype

cold-sync-createpaymentterm

cold-sync-createpaymenttermdetail

cold-sync-vendorcreate

cold-sync-vendordetailcreate

cold-sync-invoiceheadercreate

cold-sync-invoicedetailcreate

cold-sync-invoiceholdcreate

cold-sync-invoiceworkitemattach

3 Locate and enter the command for your import type and operating system, where *file names* specifies the files to run:

- **To run all files at once**—Enter the command, specifying no file names.

  For UNIX:

  ./coldsync-import.sh *dbHost dbPort dbSid advisorDBUser advisorDBPassword ColdSyncDir*

  For Windows:

  ./coldsync-import.bat *dbHost dbPort dbSid advisorDBUser advisorDBPassword ColdSyncDir*

- **To run multiple files**—Enter the command. For the last argument, use double quotation marks to enclose a comma-separated string of *file names* (without spaces) to run.

  For UNIX:

  ./coldsync-import.sh *dbHost dbPort dbSid advisorDBUser advisorDBPassword ColdSyncDir* **"***Filenames1,Filename2,Filename3...***"**

  For Windows:

  ./coldsync-import.bat *dbHost dbPort dbSid advisorDBUser advisorDBPassword ColdSyncDir* **"***Filenames1,Filename2,Filename3...***"**

- **To run a single file**—Enter the command and, for the last argument, use double quotation marks to enclose the *file name* to run.

  For UNIX:

  ./coldsync-import.sh *dbHost dbPort dbSid advisorDBUser advisorDBPassword ColdSyncDir* **"***File name1***"**

  For Windows:

  ./coldsync-import.bat *dbHost dbPort dbSid advisorDBUser advisorDBPassword ColdSyncDir* **"***File name1***"**

Note: To add new Organizations to Advisor, re-execute the Cold Sync export and import processes. Specify only the orgShortNames for the new Organizations.

The Cold Sync import process may generate a number of warnings. The coding that generates these warnings assumes that Advisor is fully operational. You can ignore the warnings because the Cold Sync process is an installation procedure and Advisor is not fully operational until the procedure finishes.

4 Check the following import log file for **Failed to insert** or **Failed to update** errors:

install directory/**log/coldsync-import-error.log**

A *.bad file that appears in your export directory indicates a failure to properly process one or more messages. If a *.bad file appears, call Technical Support for guidance. Under their direction, you will correct the problem that caused the message to fail and will re-execute the cold-sync process on the corrected message.

Running Hot Sync

During the Cold Sync export and import process, events may occur in Oracle or 170 MarkView, for example, the priority of an invoice may increase. Because these events occur after the export process, they will not be part of the information imported into the Advisor database. To capture those events, configure the Advisor Hot Sync process to run within an hour of the time when the Cold Sync import process finishes. Until the Hot Sync process runs, that information will be unavailable to Advisor.

Hot Sync also backs up Real-Time Sync to ensure that you do not lose information due to system malfunctions. Hot Sync cleans up messages that were not synchronized due to events such as system downtime.

Note: For the best results, set Hot Sync to run within an hour of when the Cold Sync import process is completed. After the initial Hot Sync process runs, configure Hot Sync to run once a day during off-peak hours.

To enable Hot Sync:

1 Log in to 170 MarkView as an Advisor Administrator.

2 Navigate to **Advisor** > **Configuring** > **Advisor**.

3 In **Configure time zone,** select the time zone for your site. (For details about configuring Advisor, see Configuring Advisor system processes on page 51.)

4 For **Hot sync hours to run**, select the time of day when Advisor synchronizes data with the 170 MarkView system. You must set at least one hour for the process to run.

5 Click **OK**.

6 Restart the 170 MarkView Application Server.

7 Check the Hot Sync and Advisor logs for **Failed message processing** errors (ignore duplicates messages):

install directory/**log/hot-sync.log**
install directory/**log/advisor.log**

CHAPTER 6

Setting Up and Configuring Advisor

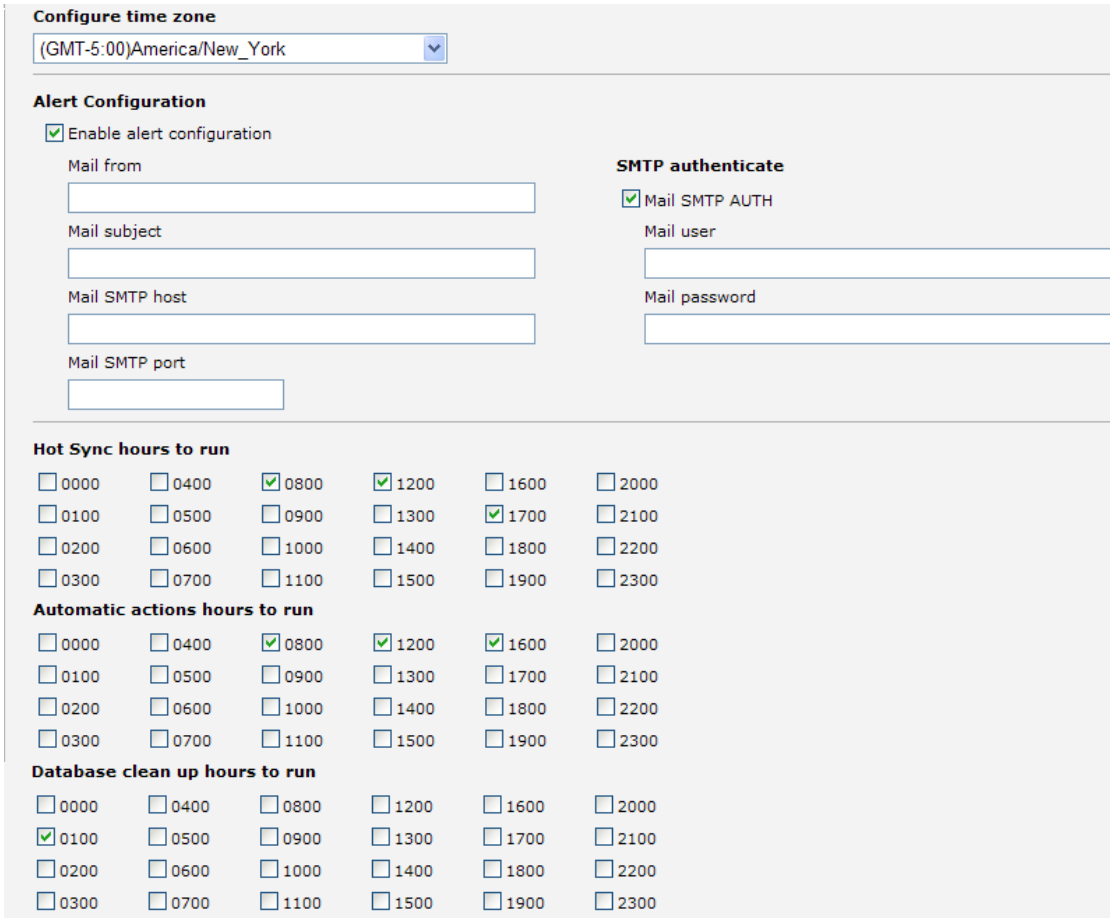
As the Advisor Administrator, you configure settings that apply to all Advisor users. For example, you set the time of day when Advisor processes automatic actions.

Configuring Advisor system processes

Configure Advisor through 170 MarkView home. The settings that you establish during configuration affect all Advisor users.

1 Log into 170 MarkView home with administrative privileges.

2 From the menu bar, select **Advisor > Configuring > Advisor**.



3 Under **Configure Time Zone**, select the *time zone* for the server on which Advisor is installed. Confirm the time zone setting.

4 Under **Alert Configuration**, specify how Advisor sends alert notifications by completing the alert notification fields. Advisor processes alerts once an hour.

If you enable alerts, you must provide email attributes.

Field/Setting	Description
Enable alert configuration	Select this option to enable Advisor users to set up alerts. Disabling this check box disables the alert configuration fields. The fields retain the set values. If you reselect the check box, Advisor reactivates the values.
Mail from	Enter an address to indicate that the email is from Advisor, for example, AdvisorSystems@mydomain.com.
Mail subject	Enter text to appear in the email subject line for Advisor alert notification email, for example, “Advisor Alerts”.

Field/Setting	Description
Mail SMTP AUTH	If the mail server requires authentication, select the check box. If the mail server does not require authentication, deselect the check box.
Mail SMTP host	Enter the SMTP host name or IP address.
Mail SMTP port	Enter the port number used by the Mail SMTP server.
SMTP authenticate > Mail user	Enter the name of the SMTP user to allow Advisor email notifications to use the SMTP mail system.
SMTP authenticate > Mail password	Enter the password associated with the SMTP user.

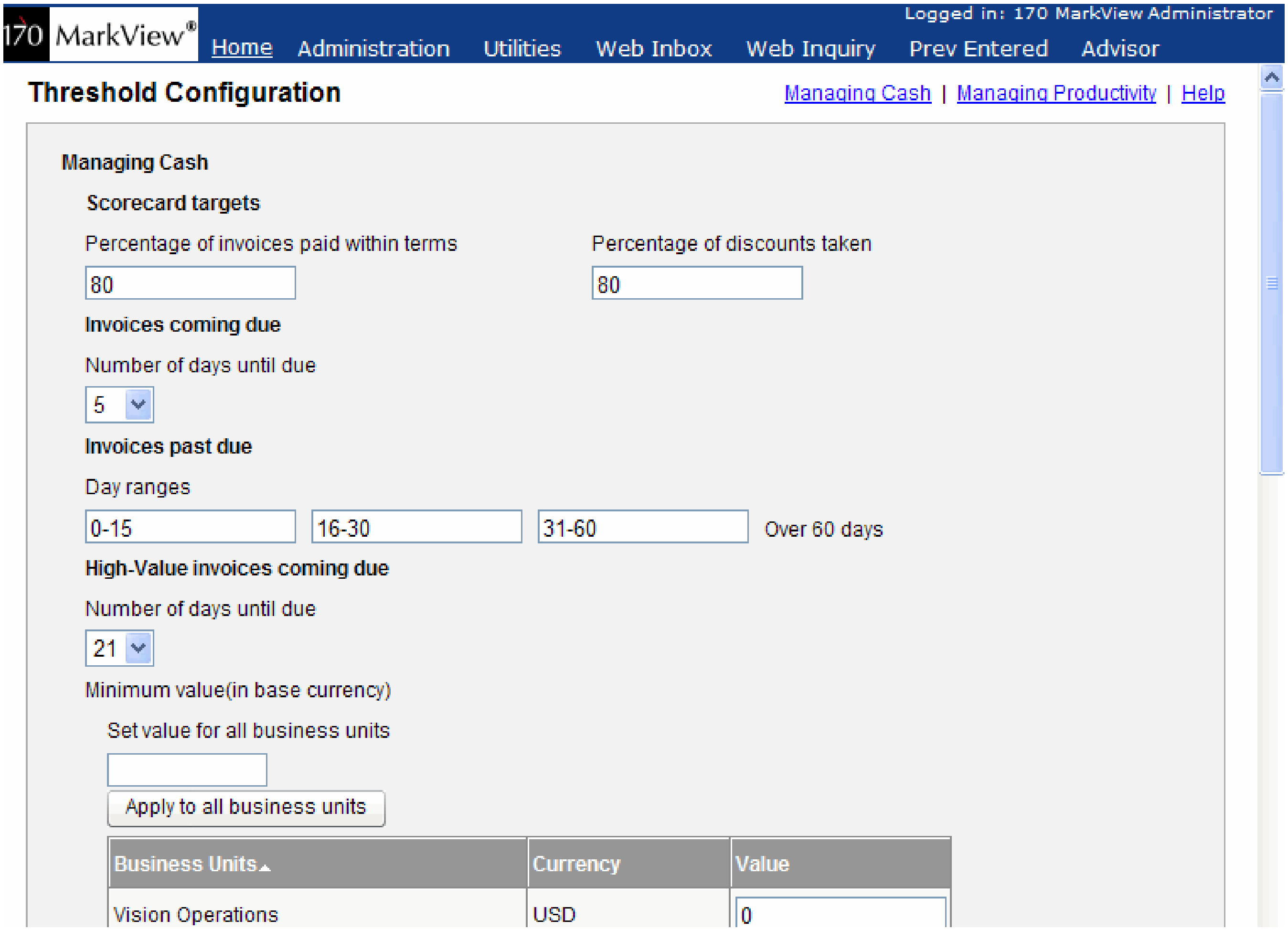
5. For **Hot sync hours to run**, select the time of day when Advisor synchronizes data with the 170 MarkView system. By default, the process runs once a day at midnight (0000). You must set at least one hour for the process to run. (Run Hot Sync at a different time than database clean up.)
6. For **Automatic actions hours to run,** select the time of day when Advisor processes automatic actions. By default, the process runs at 0800, 1200, and 1600 hours. You must set at least one hour for the process to run.
7. For **Database clean up hours to run**, select the time of day when Advisor performs database clean up. By default, the process runs once a day at midnight (0000). You must set at least one hour for the process to run. (Run database cleanup at a different time than Hot Sync.)

   Database cleanup purges outstanding messages that are older than 7 days.
8. Click **OK**.

Configuring Thresholds

Before specifying settings for thresholds and scorecards, discuss the settings to use with the Finance Manager.

1. Log into 170 MarkView home with administrative privileges.
2. From the 170 MarkView menu bar, select **Advisor > Configuring > Thresholds**.



3 Under **Managing Cash**, configure **Scorecard targets** by entering a percentage (from 0 to 100) that represents goals in the Scorecard targets fields.

For example, in the Discounts Taken field, enter 80 to set a goal of taking 80% of the discounts offered. Advisor places a vertical line at the 80% point in the scorecard that appears on the Advisor dashboard and the Managing Cash dashboard. If the number of discounts taken falls short of the 80% goal, Advisor places an exclamation point (!) next to the scorecard.

The default is 75%.

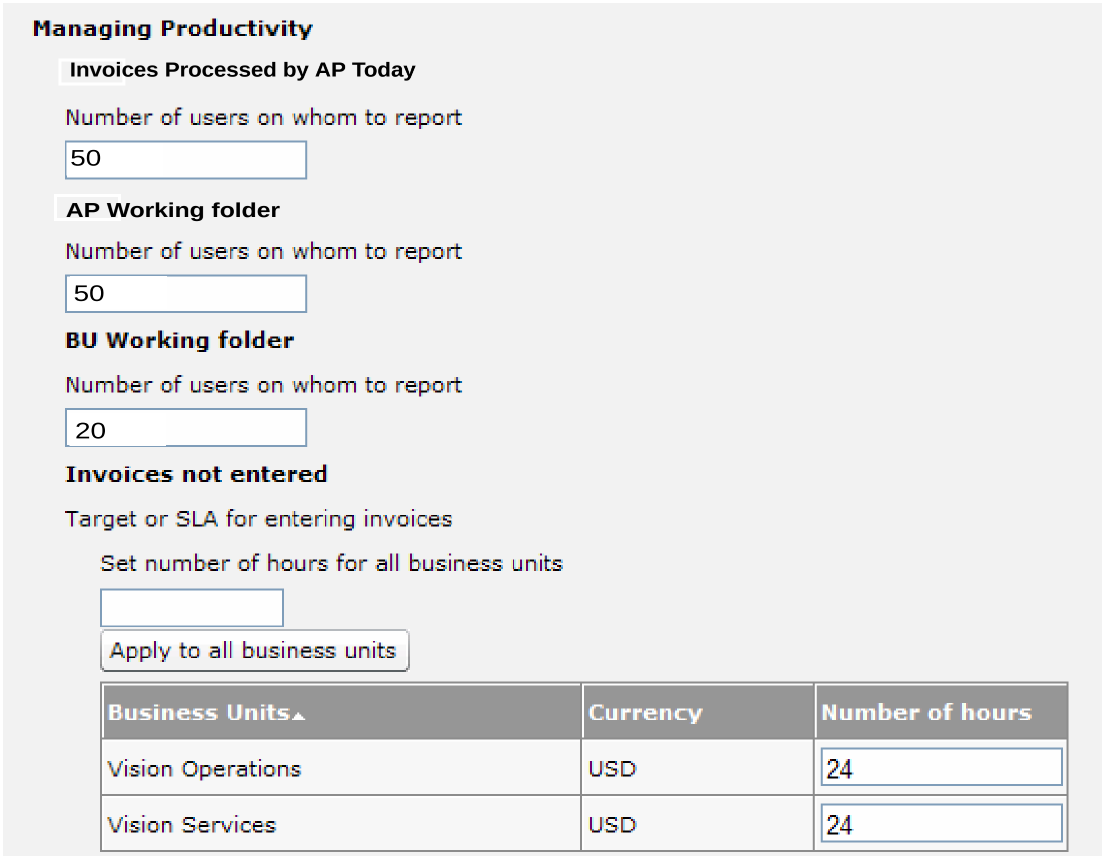
If possible, base your Scorecard targets on KPIs or formal SLAs.

Field	**Description**
Percentage of invoices paid within terms	Specify a target percentage that measures the actual number of invoices paid within supplier terms against the number of invoices paid.
Percentage of discounts taken	Specify a target percentage that measures the actual number of discounts taken against the number of discounts offered.

4 Set values for each report threshold:

Report	**Field Name**	**Description**
Invoices coming due	Number of days until due	Select a number to specify that only invoices due within that number of the days appear in the report. • The default is 7 days. • Use a value from 1 to 31 days.
Invoices past due	Day ranges	Define 3 ranges of days for reporting past-due invoices: • Range values must progress from lowest values (left) to the highest (right) • Range values cannot overlap, for example, 0-30, and 30-60 (use 0-30 and 31-60). Range labels on reports reflect these values.
High-value invoices coming due	Number of days until due	Select a number to specify that only invoices due within that number of the days appear in the report. • The default is 7 days. • Use a value from 1 to 31 days.
	Minimum Value (in base currency)	Specify the minimum value, in the base currency of the business unit, that constitutes a high-value invoice. The default is 10,000 for each business unit. Each business unit must have an entry. • To set the same value for all business units, enter a *number* in the **Set value for all business units** field and click **Apply to all business units**. • To set a value for individual business units, enter a *number* in the Value field next to the business unit name.
Discounts coming due	Number of days until due	Select a number to specify that only invoices with discounts due within that number of the days appear in the report. • The default is 7 days. • Use a value from 1 to 31 days.

5 Under **Managing Productivity**, set values for each report threshold.



Report	Field Name	Description
Invoices Processed by AP Today	Number of users on whom to report	Specify a number in the range of 1 to 100 (the default is 50).
AP Working folder	Number of users on whom to report	Specify a number in the range of 1 to 100 (the default is 50).
BU Working folder	Number of users on whom to report	Specify a number in the range of 1 to 100 (the default is 20).
Invoices not entered	Target or SLA for entering invoices	Specify the number hours by which AP processors must enter invoices to meet the target or SLA • To set the same target for all business units, enter a *number* in the **Set number of hours for all business units** field and click **Apply to all business units**. • To set a value for individual business units, enter a *number* in the **Number of hours** field next to the business unit name. The default is 48.

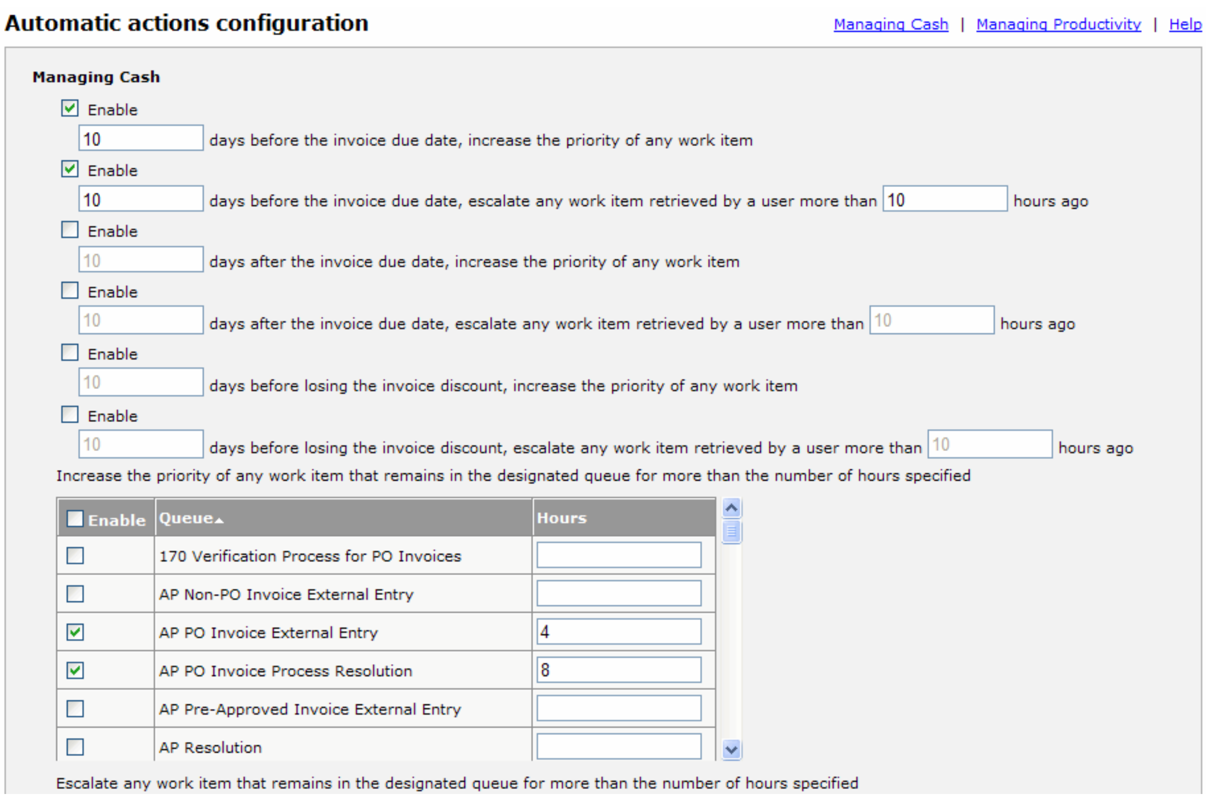
6 Click **OK**.

Configuring Automatic Actions

In addition to manually taking actions, 170 MarkView Advisor lets you configure the system to automate some tasks. For example, if an invoice sits in an employee's working folder or Web Inbox for more than a specified number of days, the system can increase the priority of the invoice automatically. If the invoice continues to sit the employee's working folder or Web Inbox for an additional number of specified days, the system can automatically escalate the invoice to their manager.

1 Log into 170 MarkView home with administrative privileges.

2 From the 170 MarkView menu bar, select **Advisor > Configuring > Automatic Actions**.



3 Select the Enable check box to specify the workflow action that Advisor will initiate without intervention.

Enabling an automatic action activates the associated fields. You cannot enter values for deselected actions.

4 Complete the fields to set the *rules* that trigger Advisor to initiate the action.

5 For actions specific to queues:
- To monitor all queues, select the Enable check box in the table heading.
- To monitor individual queues, select the check box next to the queue name.
- For every queue selected, specify the number of hours.

6 Click **OK**.

Configuring Alerts

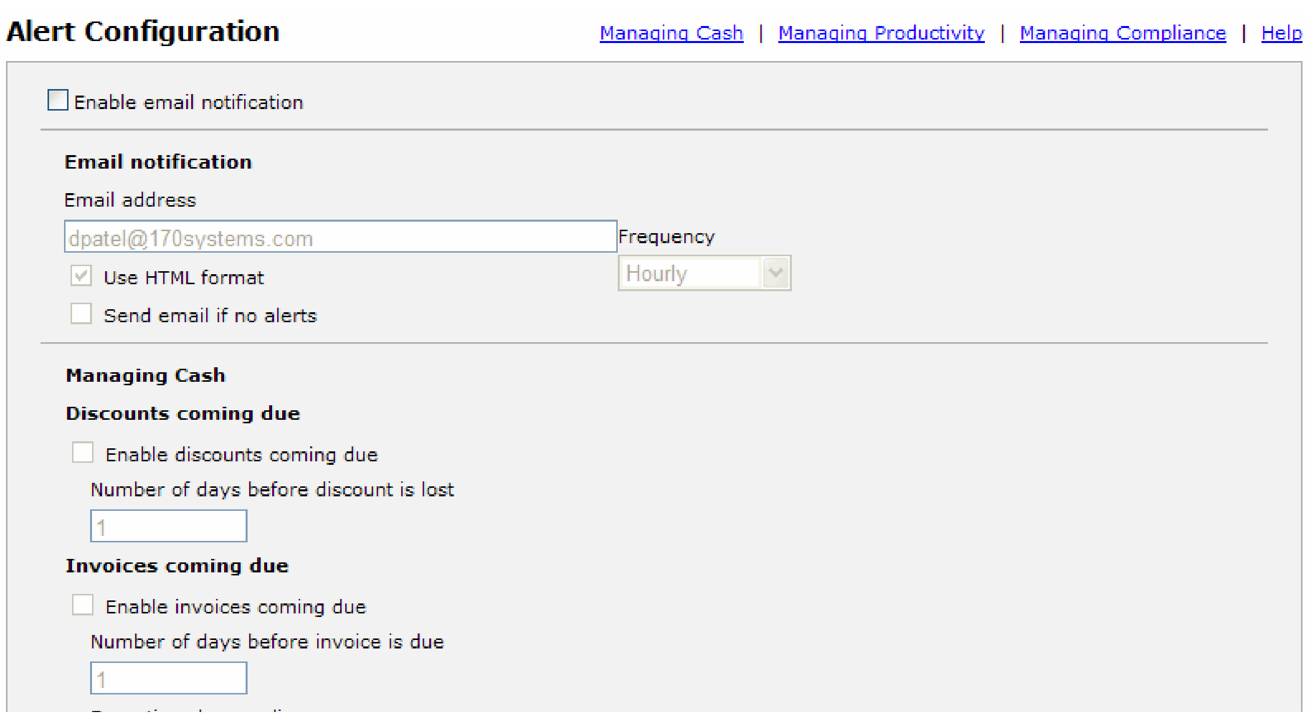
To enhance system monitoring, all Advisor users can configure 170 MarkView Advisor to send alert notifications when invoices meet the conditions of an alert. For example, Advisor can send email when an invoice remains in a working folder or Web Inbox for too long.

Alert configurations apply only to reports for the user who configured the alert. Alerts are not system-wide.

When you enable email notification, Advisor sends alerts hourly, once a day, or twice a day, Monday through Friday, depending on your configuration. Advisor sends no alerts on Saturday and Sunday.

The notification information that you set applies to all alerts that you enable.

1 From the 170 MarkView menu bar, select **Advisor > Configuring > Alerts**.



2 Select the **Enable email notification** check box. Enabling the check box enables the alerts fields.

3 Complete the **Email notification** fields:

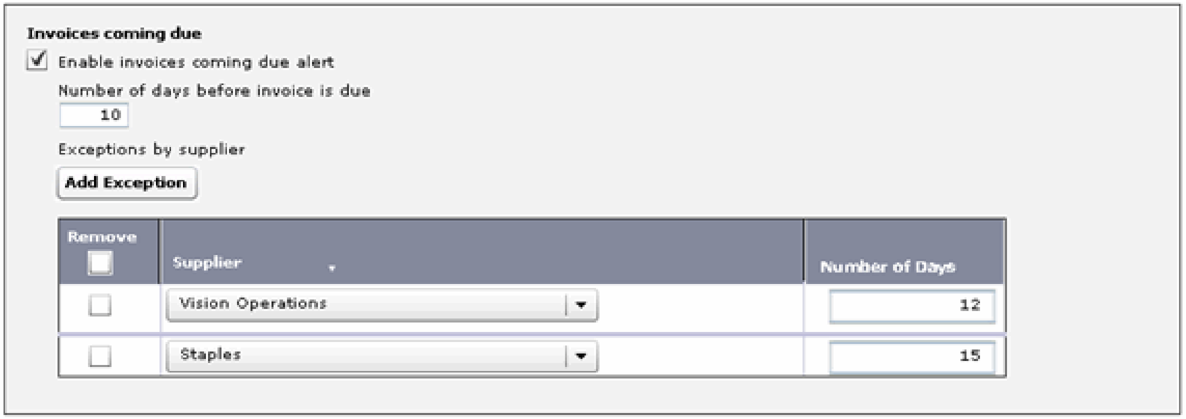
Field/Setting	Description
Email address	Enter the *email address* (name@mydomain.com) to receive notification. You must provide an email address.
Use HTML format	• **Select** to receive HTML-formatted email. • **Deselect** to receive plain-text email.
Send email if no alerts	• **Select** to specify that Advisor send you email notifications when no invoices meet the alert criteria. • **Deselect** to specify that Advisor only send email notification if invoices meet the alert criteria.
Frequency	Select *how often* to receive email notifications: • Once a day • Twice a day • Once an hour
What time to send	If you select a frequency of once or twice a day, select the *time of day*, based on browser time, for Advisor to send the email notification. Two time fields appear if you select a frequency of Twice a day.

4 To specify reports for which to receive alerts:

a Select the Enable check box next to the report for which to generate alerts. Doing so enables the alert fields for that report.

b Complete the alert fields.

- To set parameters for the alert, specify the *number* of days, hours, invoices, and so forth in the *number* fields.
- To add an exception by supplier for **Invoices coming due**, click **Add Exception**, select the *supplier,* and specify the *number of days* to use for the exception.
- To add rows to the exception list, click **Add Exception** again.



- To specify a value for **High-value invoices coming due** about which to be alerted, enter an *amount* in the **Value** field next to the business unit.

c Repeat the process for each alert to set.

For example, to receive notification for Discounts coming due:

a Under Discounts coming due, select the **Enable discounts coming due** alert check box.

b In the **Number of days before discount is lost** field, enter how many days before losing the discount to receive notification, for example, **5**.

Advisor will notify you about invoices with discounts coming due 5 days before you lose the discount.

5 Click **OK**.

Configuring Filters

All Advisor users can create Business Unit and AP Processor filters for their own use and can use filters that are made public.

- All Advisor users can create, modify, and delete their private filters.
- The Advisor Administrator can create, modify, and delete public filters. Advisor only enables these options for the Advisor Administrator.

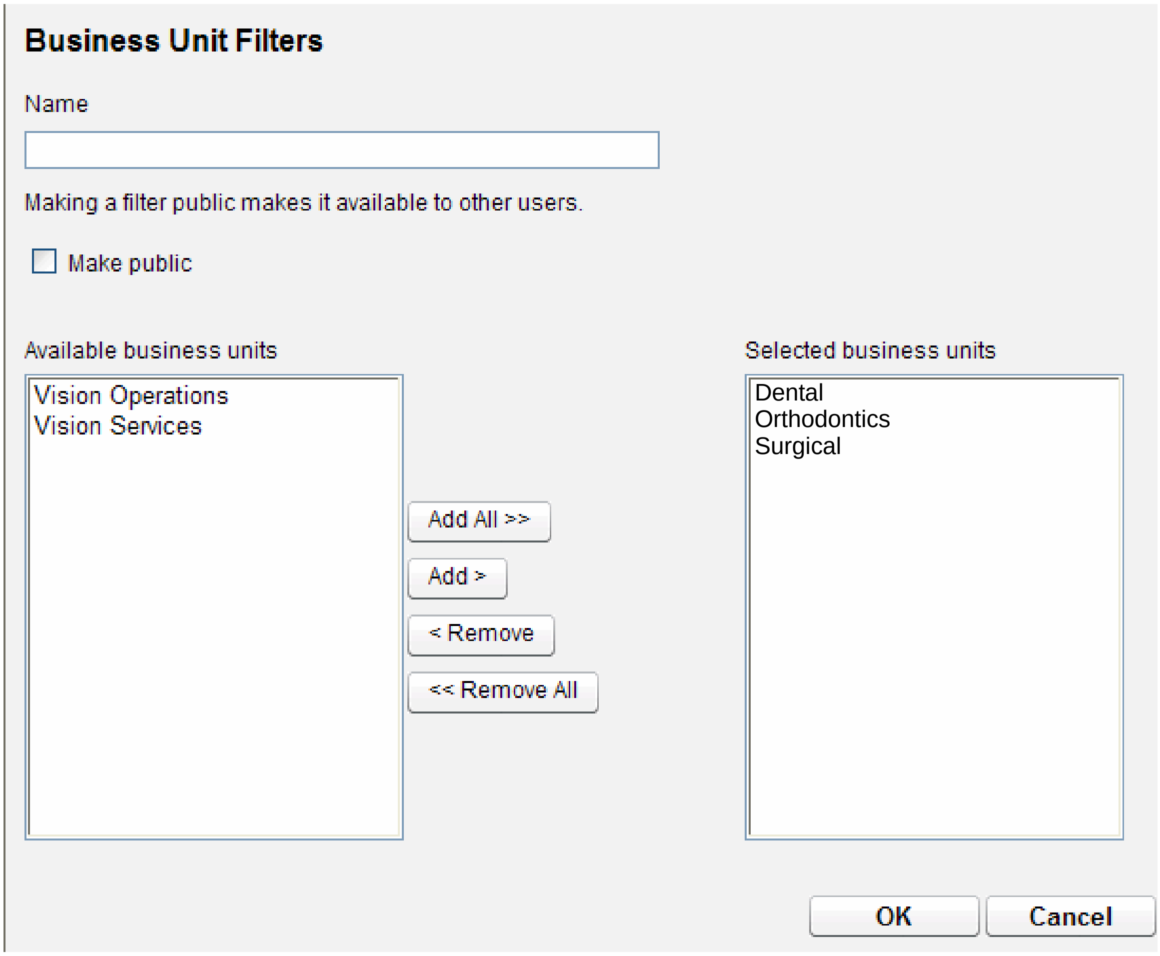
Both filter windows function in the same manner.

1 From the 170 MarkView menu bar, select **Advisor > Configuring > Filters**.

The Filter configuration window lists filters that you created and have authorization to modify.

2 Click the button for the filter type to create:

- **Add Business Unit Filter**
- **Add AP Processor Filter**



3 In the Name field, enter a *unique name*. The field accepts up to 50 characters. You cannot leave this field blank when creating a new filter.

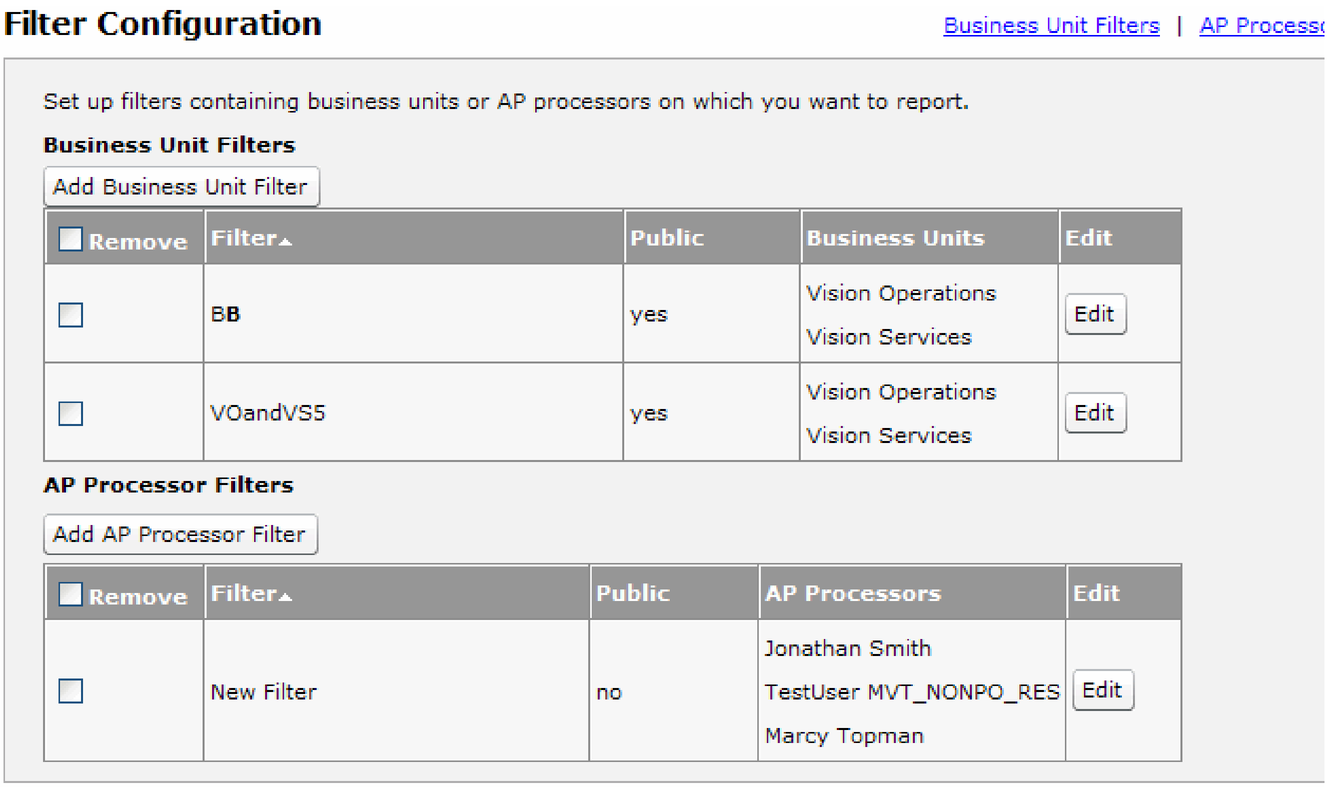
4 To share a filter with others who are using Advisor, select the **Make public** check box. Only the Advisor Administrator can create a public filter.

5 From the list of available business units or AP processors, select the *organizations* or *AP processor*s to include in the filter.

- Click **Add** to include an individual business unit or processor in the filter.
- Click **Add All** to include all business units or processors in the filter.

The selections move to the list of selected business units or AP processors.

6 Click **OK**.



- To edit a filter, click **Edit**.
- To remove a filter, select the **Remove** check box next to the filter and click **OK**.

CHAPTER 7

Adding Advisor Users

To set up, configure, and use Advisor, employees must belong to groups in MarkView and to roles in Advisor. The combination of group membership and role permissions defines the access and actions that an employee can perform in Advisor.

- **MarkView groups** give users access to the Advisor menu from MarkView Home. Without the menu, a user cannot access Advisor.
- **Advisor roles** define what a user has permission to view and gives access to Advisor dashboards and reports. Without permission, a user cannot access dashboards and reports.

For example, an employee must belong to the Advisor Finance Manager group in MarkView to access the Advisor Overview menu option, and to the Finance Manager role in Advisor to see the Overview dashboard.

Advisor relies on the following groups and roles to control who sees what in Advisor:

User Type	MarkView Group	Advisor Role
Advisor Administrator	170 MODULE ADMINISTRATOR	Advisor Administrator
Finance Manager	ADVISOR FINANCE MANAGER	Finance Manager
Advisor Reports User	ADVISOR REPORTS USER	Advisor Reports User

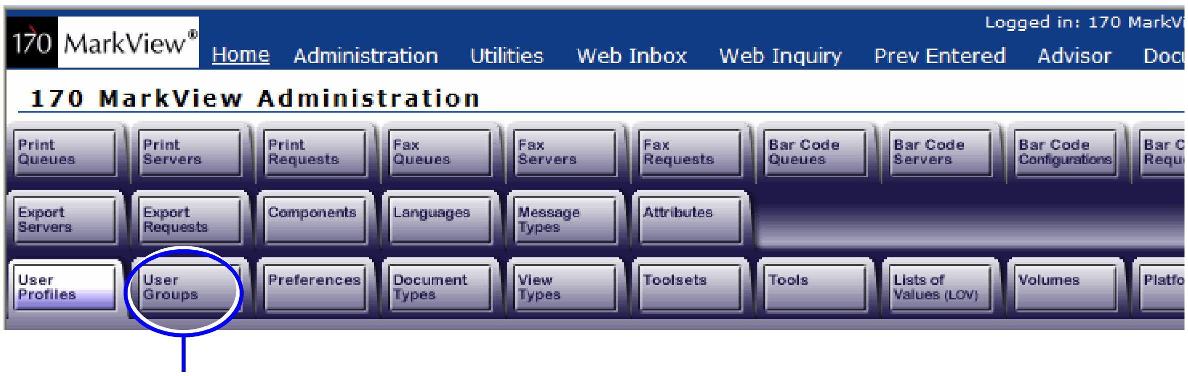
Adding users to MarkView groups

After you add Advisor Administrator, Finance Manager, and Advisor Reports Users to 170 MarkView groups, the users have access from MarkView home to the Advisor menu. Advisor Administrators and Finance Managers can also access Advisor configuration menus.

Adding an Advisor Administrator

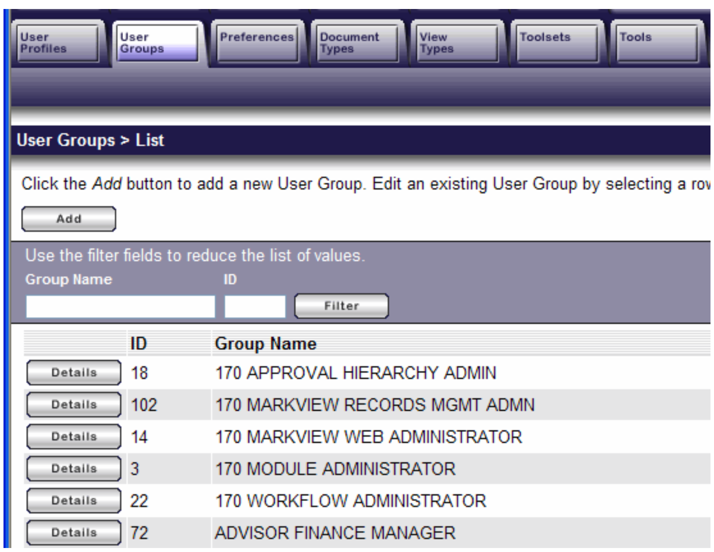
1 Log into 170 MarkView home with administrator privileges and select **Administration > 170 MarkView Admin**.

2 Click the **User Groups** tab.



User Groups tab

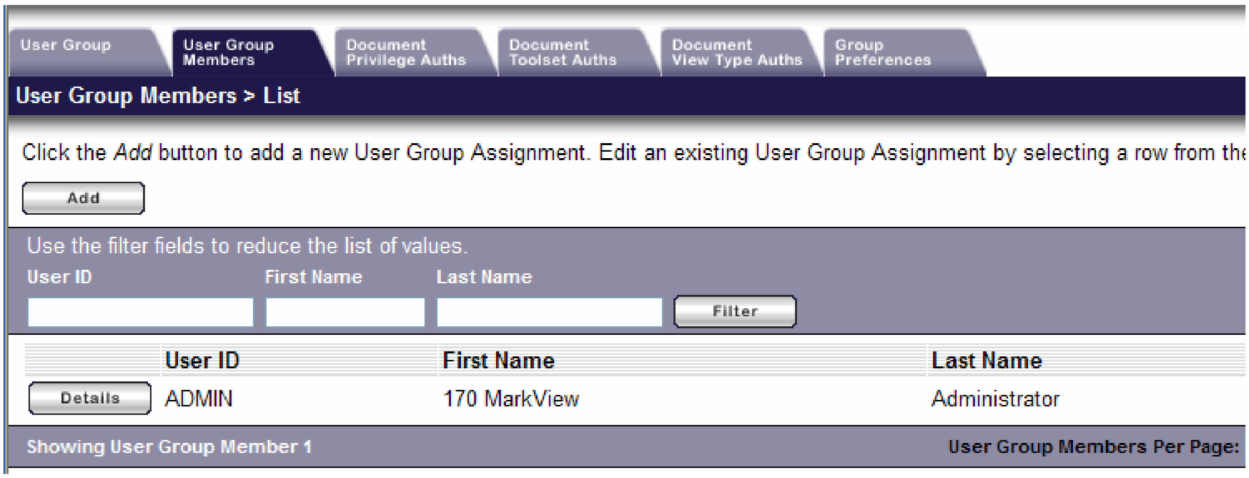
The User Groups page opens, listing existing user groups.



3 Continue as follows:

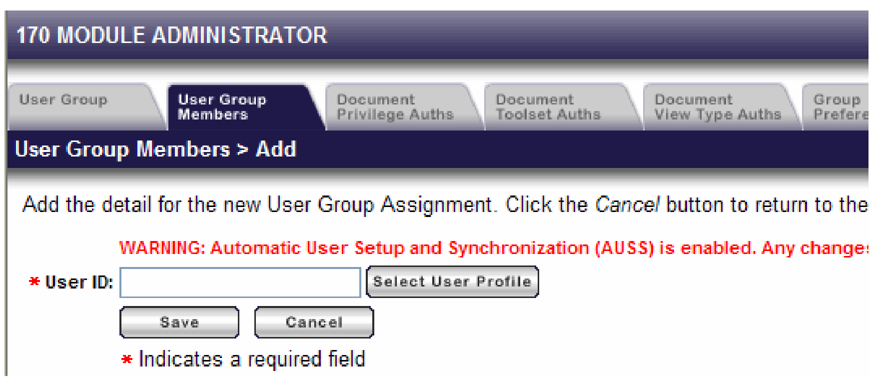
- To add an Advisor Administrator, locate **170 MODULE ADMINISTRATOR** in the list and click the **Details** button in that row.
- To add Finance Managers, locate **ADVISOR FINANCE MANAGER** in the list and click **Details**
- To add Advisor Reports Users, locate **ADVISOR REPORTS USERS** in the list and click **Details**.

4 Select the **User Group Members** tab and click **Add**.

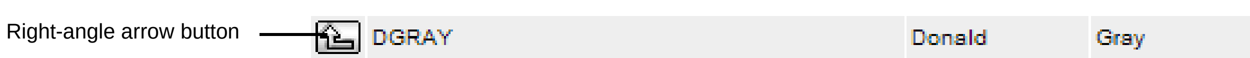


5 Click **Select User Profile**.

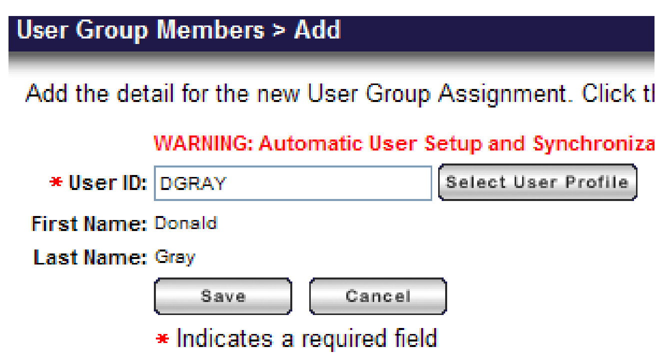
Note: Because the 170 MarkView configuration is already complete, ignore the WARNING about AUSS overwriting your changes if the message appears.



6 Scroll to the *user* to add and click the right-angle arrow button next to the User ID.



7 Click **Save**.



8 Repeat the process to add other Advisor Administrators, Finance Managers, and Advisor Reports Users.

Verifying members of AP User groups

Verify that employees who are AP Users belong to at least one of the following groups in MarkView:

- AP ENTRY NON-PO
- AP ENTRY PO
- AP ENTRY PRE-APPROVED
- AP RESOLUTION
- AP RESOLUTION NON-PO
- AP RESOLUTION NON-PO APPROVAL
- AP RESOLUTION PO
- AP RESOLUTION PO MATCH ERROR
- AP RESOLUTION PRE-APPR COMMENT
- AP RESOLUTION PRE-APPROVED
- AP RESOLUTION PREVIOUSLY ENTER
- AP INVOICE ENTRY REVIEW
- PREVIOUSLY ENTERED INVOICES
- REVIEW
- QA

Note: Employees who are not members of these MarkView groups do not appear in Advisor reports as AP Processors. Advisor identifies employees without AP responsibilities as business users.

Adding users to Advisor roles

The Advisor Administrator uses role management to control which employees have access to Advisor dashboards and reports, and for which the Business Units they can see information. To allow an administrator to use role management, the administrator must belong to a role with privileges to do so.

The Advisor installation process creates pre-defined roles (Advisor Administrator, Finance Manager, Advisor Reports User) to which the administrator adds employees.

Note: You have the ability remove access to the Managing Productivity dashboard from each role. Doing so prevents employees from viewing reports that contain information about employee productivity. This includes the following reports:

- Invoices on Hold
- Invoices Not Entered
- AP Working Folder
- Business User Working Folder
- Invoices Processed by AP Today
- AP Throughput

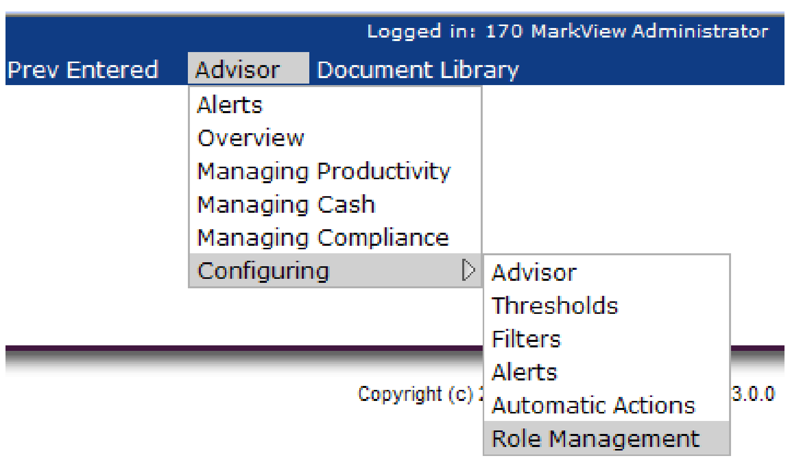
The instructions for restricting views appear in Creating Advisor Roles on page 70.

To add users to Advisor roles:

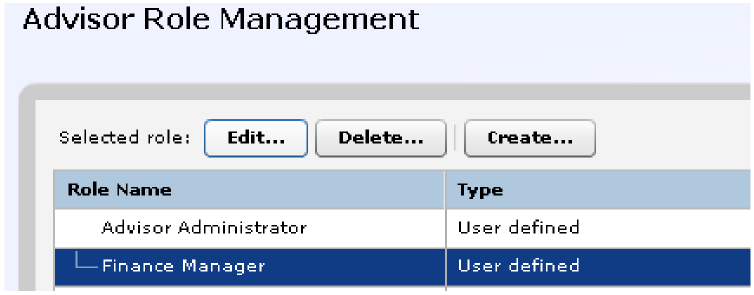
1. Log into 170 MarkView home as the Advisor Administrator.
2. Select **Advisor > Configuring > Role Management**.

   Note: If you do not have Adobe Flash Player 9 or above installed, the application generates a message and prompts you to install it. Use the link and install Flash. You cannot add users to Advisor roles until you do so.

   The window displays the roles defined for Advisor (Advisor Administrator, Finance Manager, Advisor Reports User).

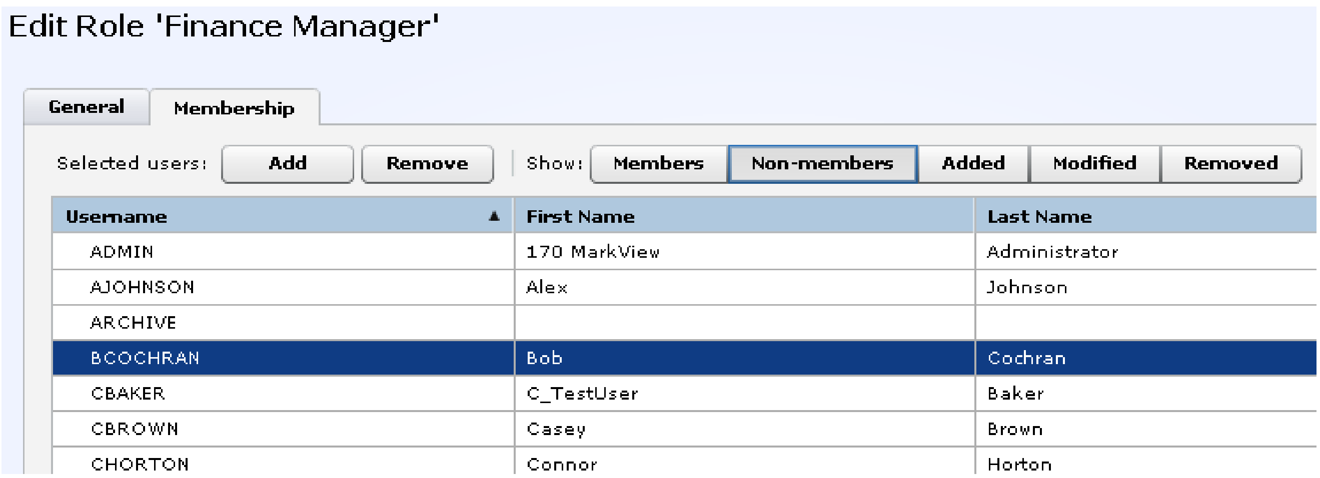


3 From the list, select a *role*, and click **Edit**. The Edit Role window opens.



4 Select the **Membership** tab and add members as follows:

a Click the **Non-members** button. The table displays employees in the 170 MarkView system who are not assigned to the role.



b Select the *employees* to assign and click **Add**.

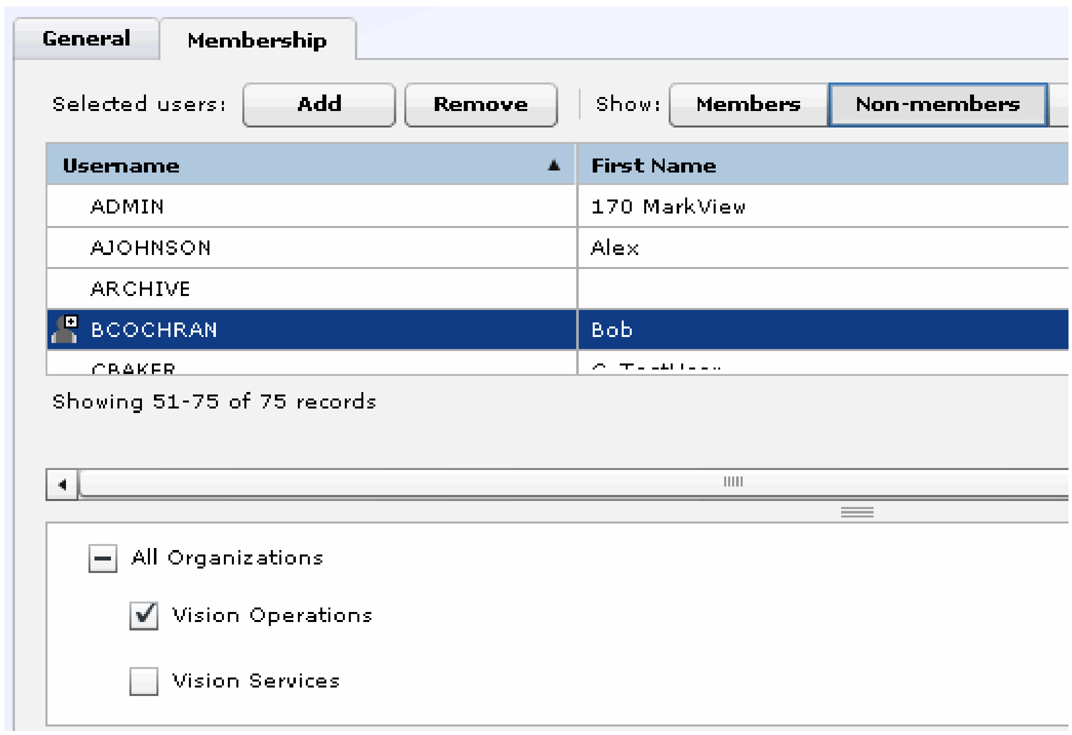
Membership Tab Element	Description
Selected users	• Add–adds the selected employees to the role • Remove–removes the selected employees from the role
Show	• Members–lists the current employees assigned to the role • Non-members–lists employees who are not members of the role • Added–lists employees being added to the role • Modified–shows the members for whom the organization assignments changed. • Removed–lists employees being removed from the role
Filter (not shown)	• Text field–lets you enter a name or part of a name to search for a specific employee. • Apply–initiates a search for employees with names that meet the filter criteria.

Membership Tab Element	Description
Username	The User ID specified for the employee in 170 MarkView.
First name	The employee's first name.
Last name	The employee's last name.

5 Specify the organizations for which an employee can view information as follows:

a In the Selected Users list in the top pane, select an *employee* or multiple *employees*.

b In the bottom pane, select organizations.



Use the organizations option to restrict the Business Units for which an employee can see reports.

6 Click **OK**.

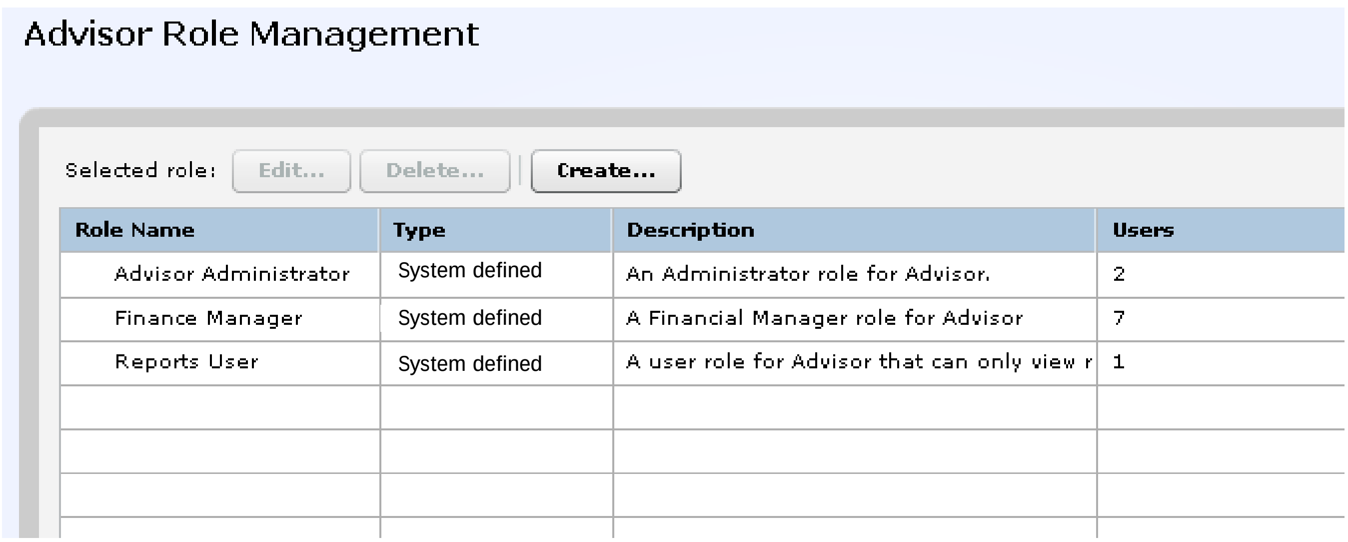
Creating Advisor Roles

When you create an Advisor role, you add information to a General and a Membership page. For example, if you create an Advisor role to prevent a manager from viewing productivity reports, you add authorization to view only dashboards and reports that do not track productivity.

The information that you add to these pages appears in the related tabs that appear when you edit the role.

1 Log in to 170 MarkView home as the Advisor Administrator and select **Advisor > Configuring > Role Management**. The window displays the roles defined for Advisor.

The type column specifies whether the system or a user defined the role. You cannot edit a system-defined role, however, you can base a new role on a system-defined role.

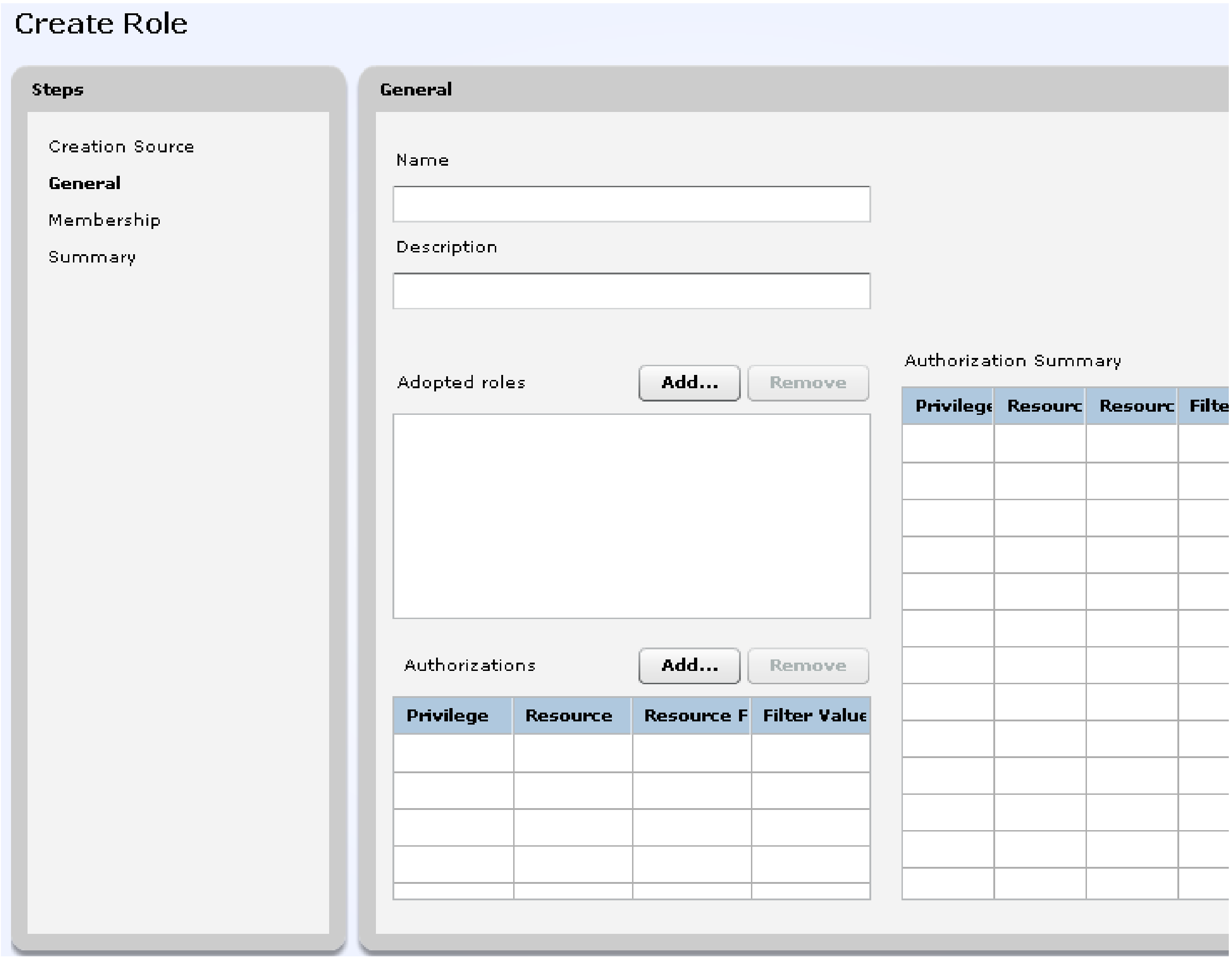


2 Click **Create**. The Create Role window opens to the Creation Source page.

3 Select an option on the page:

- Empty role—creates a new role without including settings from an existing role.
- Copy authorizations and adopted roles from an existing role—creates a role with settings based on an existing role. If you select this option, select the role to use as the basis of the new role from the list.

4 Click **Next**. The General page opens.



5 Complete the fields on the General page as follows:

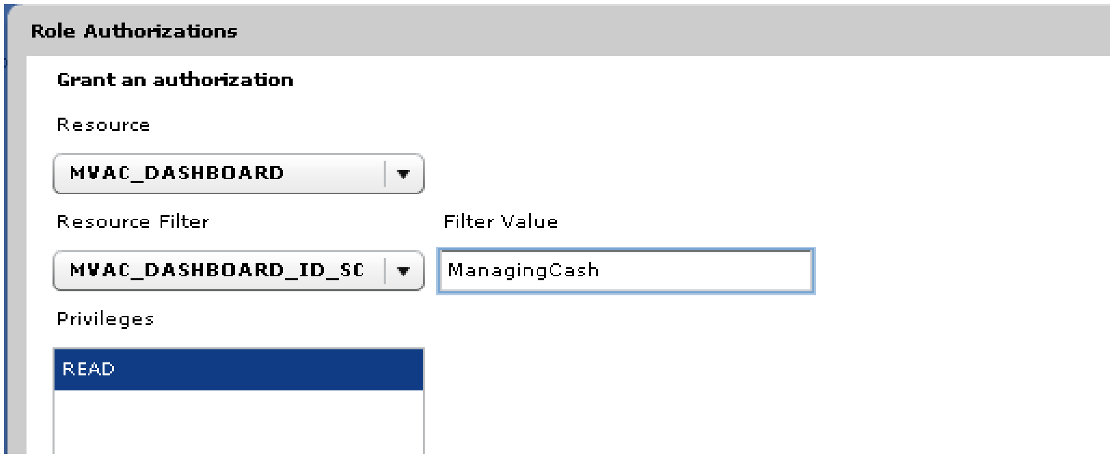
a Enter a unique *name* for the role.

b (optional) To describe the purpose of the role, enter *text*.

c (optional) To specify that the new role inherit privileges from an existing role, click **Add**, select the *role*, and click **OK**. The Role Authorizations and Authorization Summary tables show the privileges granted to the new role.

Note: To restrict the privileges of a role that you base on an existing role, remove the authorizations and privileges from the Role Authorizations table.

d To set authorizations for a role, click **Add**.



6 Complete the fields in the Role Authorizations form as follows:

a Select the Resource, Resource Filter and Privilege type (READ).

Role authorizations define what role can view which dashboards and reports. To prevent users in a role from viewing a dashboard, do not assign the filter or filter value for the dashboard to that role.

b Select a *Resource* and *Resource Filter* from the drop-down lists.

c Enter *Filter Values* exactly as shown in the following table. Filter Values are case-sensitive.

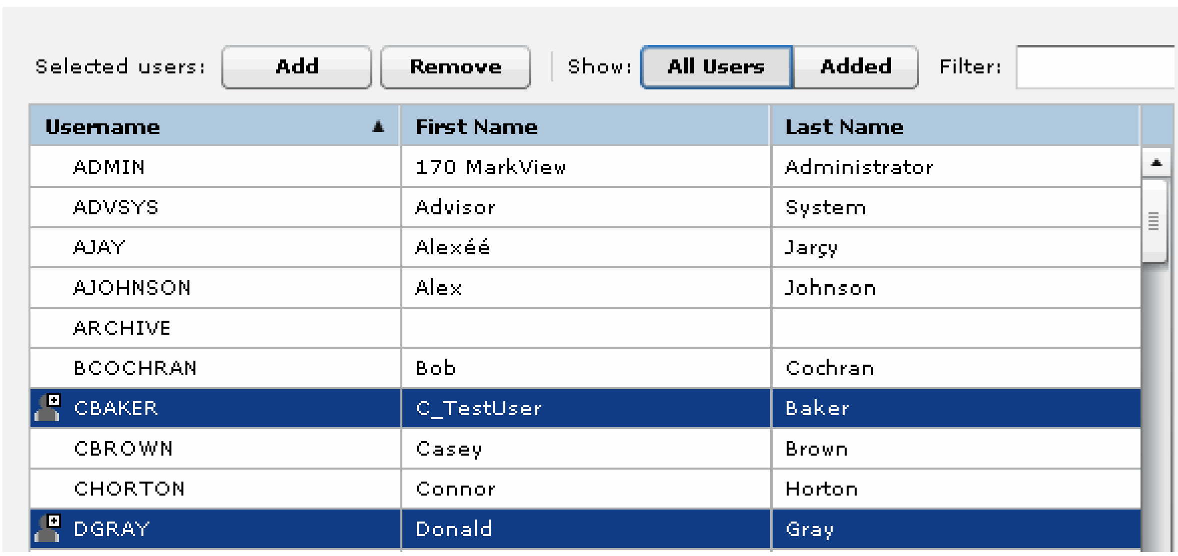
Resource	Description	Filter Menu	Filter Values Field
MVAC_DASHBOARD	Permits view access to the selected dashboard and related reports. To prevent a user from viewing a dashboard, do not assign the filter and filter value for the dashboard.	MVAC_DASHBOARD_ID_SCOPE	ManagingCash ManagingCompliance ManagingProductivity MarkviewAdvisor
MVAC_CONFIG_PAGE	Permits access to the selected configuration page.	MVAC_PAGE_ID_SCOPE	SystemConfigPage ReportThresholdPage AlertConfigPage AutoActionPage FilterConfigPage

Resource	Description	Filter Menu	Filter Values Field
MVAC_ALERT_TYPE	Permits the configuration of alert types.	MVAC_ALERT_TYPE_SCOPE	NonAPWorkingFolderByItem DiscountsComingDue DuplicateInvoice InvoiceComingDue HighDollarInvoicesOutStanding InvoiceOnHold APWorkingFolderByItem APWorkingFolderByTime InvoiceNotEntered SODV NonAPWorkingFolderByTime
MVAC_ADMIN_AUTH	Permits access to managing public filters.	MVAC_ADMIN_AUTH_SCOPE	EditPublicFilter

d Click **OK**. Complete the page for each authorization being granted to the role.

7 Click **Next**.

8 Select *members* to add to the role and click **Add**.



9 At the bottom of the page, select the *organizations* for which the member can see information and click **Next**.

10 Verify your settings in the Summary window and click **Finish**.

CHAPTER 8

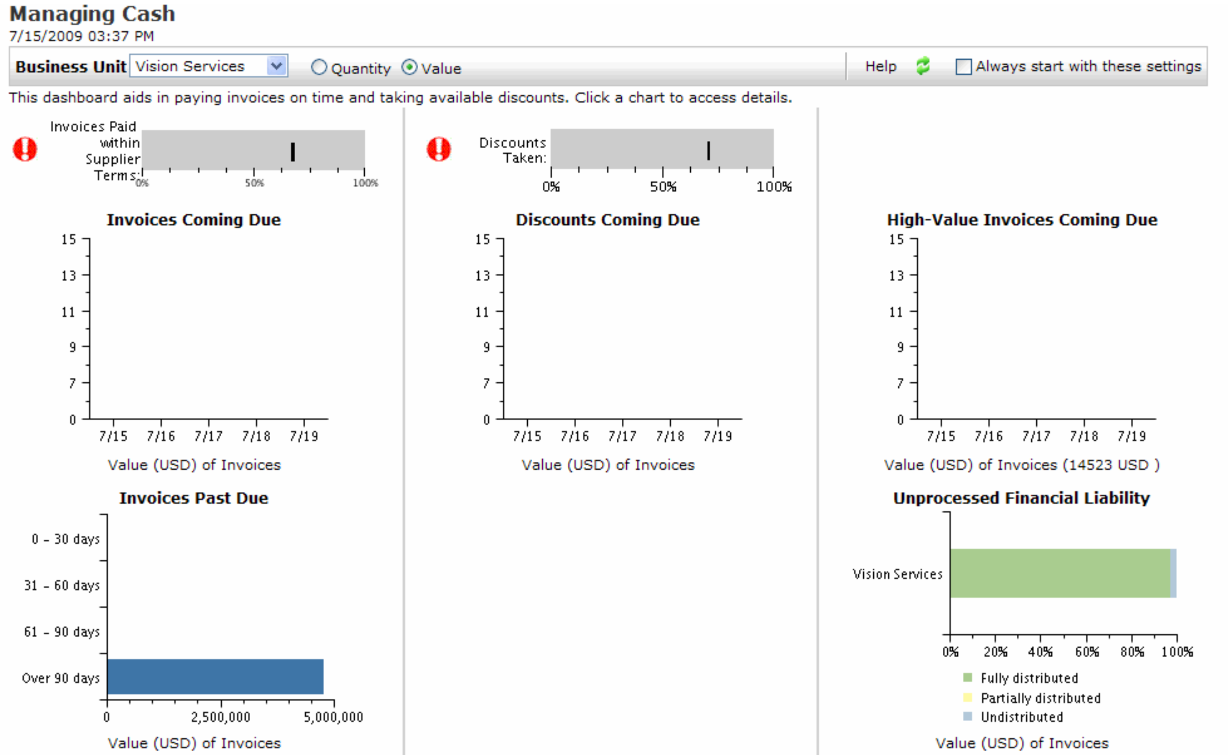
Verifying and Maintaining Advisor Installation and Configuration

Verifying the Installation and Configuration

Verify that your users are set up correctly and that the Oracle, MarkView, and Advisor databases are communicating.

To run the following test, you might need help from an AP Entry Processor and one of the Finance Managers that you added to Advisor.

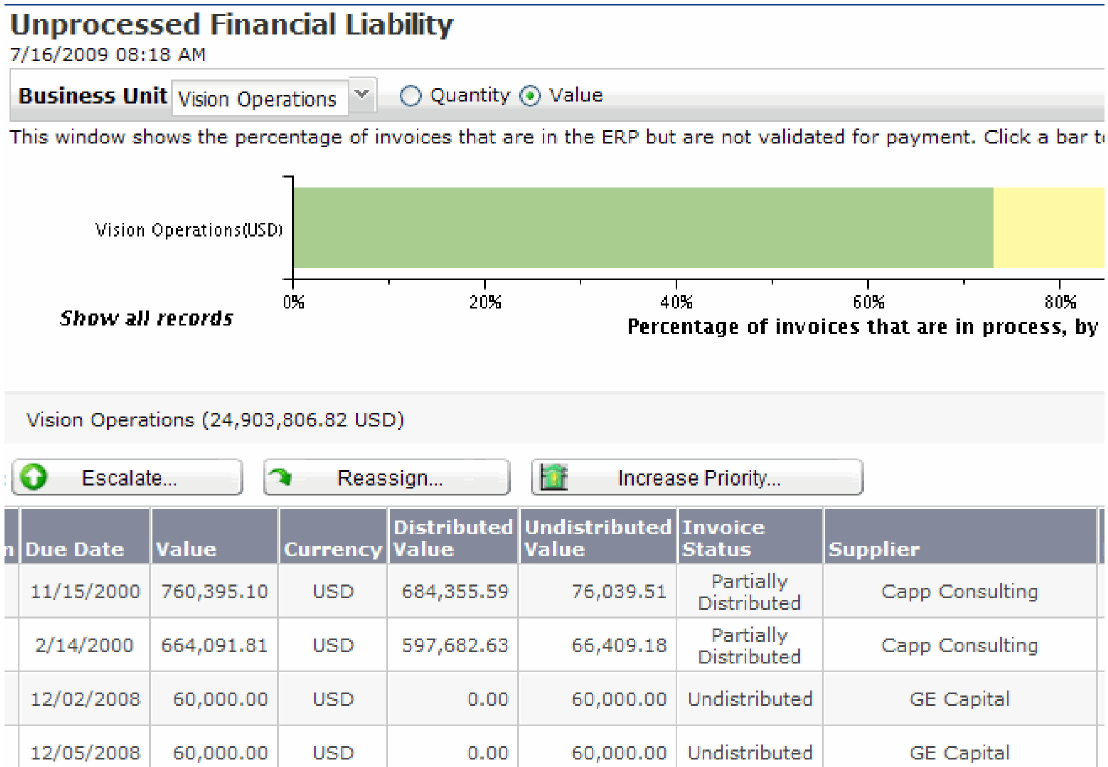
1. Have the AP Entry Processor create an invoice in Oracle. The processor can attach a MarkView document image to the record, but doing so is not required for this test.
2. Have the Finance Manager do the following:
   a. Log in to MarkView Home and select **Advisor > Managing Cash**.
   b. From the Business Unit menu, select the *business unit* associated with the invoice.



c Click the **Unprocessed Financial Liability** chart to access the associated report.

d Click the bar in the bar chart to populate the Details Table.

The invoice should appear in the Unprocessed Financial Liability report that opens.



The Finance Manager set up is correct if the manager can access the Advisor menu and submenus from MarkView Home.

The databases are communicating properly if the invoice appears in the Unprocessed Financial Liability report.

Maintaining Advisor

On a daily basis, check the Advisor (advisor.log) and Hot Sync (hot-sync) logs:

- Look for any failed message processing errors.
- Ignore any duplicate messages.

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Index

Symbols

$JAVA_HOME 30

Numerics

170 MarkView Advisor Actionable Module 25

A

access to information 11
actions 10, 18
  automatic 18
  dialog box 12
  manual 18
administrator, adding Advisor 64
Advisor 52, 58, 59
  Actionable Module 25
  automatic actions 57
  coldsync 45
  dashboards 25
  filters 60
  hot sync 49
  Hot Sync settings 53
  roles 66, 68
  scorecards 54
  successful configuration 63
  thresholds 53
Advisor Administrators 10
Advisor group 35, 39
Advisor installation 36
  directory 36
  UNIX 36
  Windows 36
Advisor instance 35, 39
Advisor Reports Users 10
Advisor Role Management 68
Advisor roles 63
Advisor schema user 29
Advisor user, database server 29
Advisor users 10
alert notifications, Advisor 52, 59
Alerts 58
alerts 11
  configuration 58
  notification settings 52, 59
alerts, Advisor 58
Alternate Users 20
application server
  components 25
  environment variables 30
  pre-installation tasks 29
  set JAVA_HOME 30
  set ORACLE_HOME 30
  update PATH 30
  verify JDK version 30
  verify OAS 29
  verify TRS 30
application server information 35, 39
audience for this guide 7

automatic actions 57
- hours to run 53

B

business unit 12

Business Unit access, restriction 69

C

calculator, Cold Sync import time 46

Cold Sync 43, 44
- add a new organization to Advisor 46
- Export 45
- Import Time Calculator 46
- Linux/UNIX command 45
- single file 46
- variables 45
- Windows command 45

communication 24

configuration
- Advisor 51
- alerts 58
- Automatic Actions 57
- filters 60
- Thresholds 53

D

dashboards 14
- Advisor 25
- using 12

data synchronization
- Cold Sync 43
- Hot Sync 43
- Real-Time Sync 44

Database clean up 53

database communications test 75

database server
- create Advisor user 29
- create tablespaces 28
- grant MarkView privileges 29
- grant privileges to Advisor user 29
- pre-installation tasks 28

Database Sizing 26

Day ranges 55

Details Table 16

E

Email Message 20, 21

environment variables 30

environments, hosted 24

Escalate 19

Export, Cold Sync 45

F

features 10

filters, Advisor 10, 60

Finance Managers 10

G

goals, Advisor scorecards 54

guide, audience 7

H

Header 13

hosted environments 24

Hot Sync 43
- hours to run 53
- running 49

hours to run
- automatic actions 53
- database clean up 53
- Hot Sync 53

I

import time, Cold Sync calculator 46

Increase Priority 21

information synchronization 44

installation
- files 27
- prerequisites 27
- test 41
- users 23
- verification 75

installation application
- location 36
- running 37
- starting 36

J

Java Virtual Machine 30
JAVA_HOME 30
JDK version, verify 30

M

Management Dashboard 12
MarkView schema connection 34, 38
Membership tab 68
Messages 19

O

OAS, verify status 29
Oracle Application Server 33
ORACLE_HOME 30
Overview Dashboard 12

P

PATH, updating 30
planning 23
pre-installation tasks
  application server 29
  database server 28
prerequisites 27
privileges, granting MarkView 29
purpose of this book 7

R

Real-Time Sync 44
Reassign 20
reports 10, 12, 17
Reports User, Advisor 10
restricting access to Business Units 69
Role Authorizations 72
roles 66
  Advisor, Membership tab 68
  authorization settings 72

S

schema user
  Advisor 29
  MarkView 29
scorecard, Advisor 54
scorecards 13, 14
scripts 28
starting MarkView Home 45
Summary graph 13, 16
Summary Table 16

T

tablespaces, database server 28
Target Registry Service (TRS) 30, 36
targets, Advisor scorecards 54
test, installation 75
thresholds 10, 53
  Advisor 53
  Advisor scorecards 54
TRS 30

U

upgrading 170 MarkView Products 36
users, Advisor 10

V

variables
  Cold Sync 45
  environment 30
verification of installation 75