

*170 MarkView Advisor™  
Operation and Administration*

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# Preface

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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 ensure that a user hierarchy is set up in MarkView to enable the Escalate feature, configure Advisor user management and roles, and add Advisor users to groups.

## 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 SAP and Oracle, 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.



# About 170 MarkView Advisor

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170 MarkView Advisor is a management interface that brings together data from SAP 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 Company Codes.
- **Finance Managers** configure alerts and filters for their view of Advisor, and use Advisor dashboards and reports to:
  - Ensure that their operating unit meets targets and SLAs.
  - Monitor invoice processing and productivity in their operating unit
  - 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 Managers with report access and permission can act on invoices through the Details Table.

## Interface features

- An **Overview Dashboard** provides a high-level look at your AP business activities as they relate to managing productivity, cash, and compliance.
- **Management Dashboards** provide graphs and charts that present a graphical view into related reports, and display scorecards that indicate compliance against established SLAs.

- **Reports** display the same graph or chart as the dashboard with access to more details about the items being reported. From reports, a Finance manager can act on invoices to keep them moving through the 170 MarkView workflow.
  - Escalate—moves an invoice requiring attention to the Console or Web Inbox of the next person in the hierarchy that is set up in 170 MarkView for invoice approval.
  - Increase Priority—increases the priority of any invoice that has an associated 170 MarkView document.
  - Reassign—lets you assign an invoice to a different employee who has the correct authorization set up in 170 MarkView.

The following components control what appears on the screen:

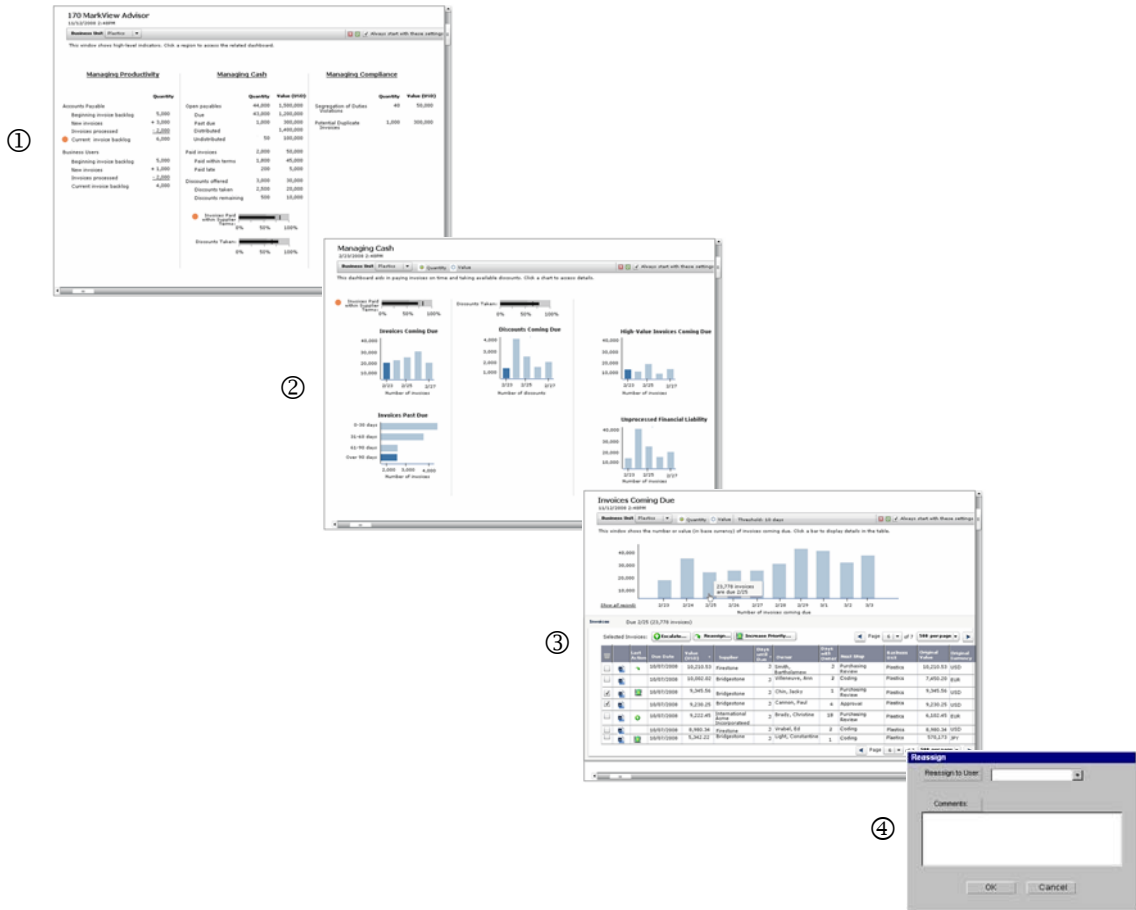
- **Thresholds** define settings associated with a report or an alert. The Advisor Administrator sets thresholds during system configuration. For example, the Advisor Administrator can set a threshold to show all invoices coming due within the next 10 days, where 10 days is the configured threshold.
- **Filters** provide control of the information that appears within a dashboard or report. Advisor Administrator, Finance Managers, and Advisor Reports Users can create filters to view information about a group of selected company codes 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, Finance Managers or Advisor Reports Users can activate alerts to notify them if invoices remain blocked for a configurable number of days. They can also access alerts through the Advisor menu.

## 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 SAP. 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 company code, the dashboard shows a high-level view of the AP activities for that company code. The Overview Dashboard provides summary data and scorecards that show how the company code is performing against goals.

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

Company Codes in Advisor are equivalent to Company Codes in SAP.

- 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 management 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 Console 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.

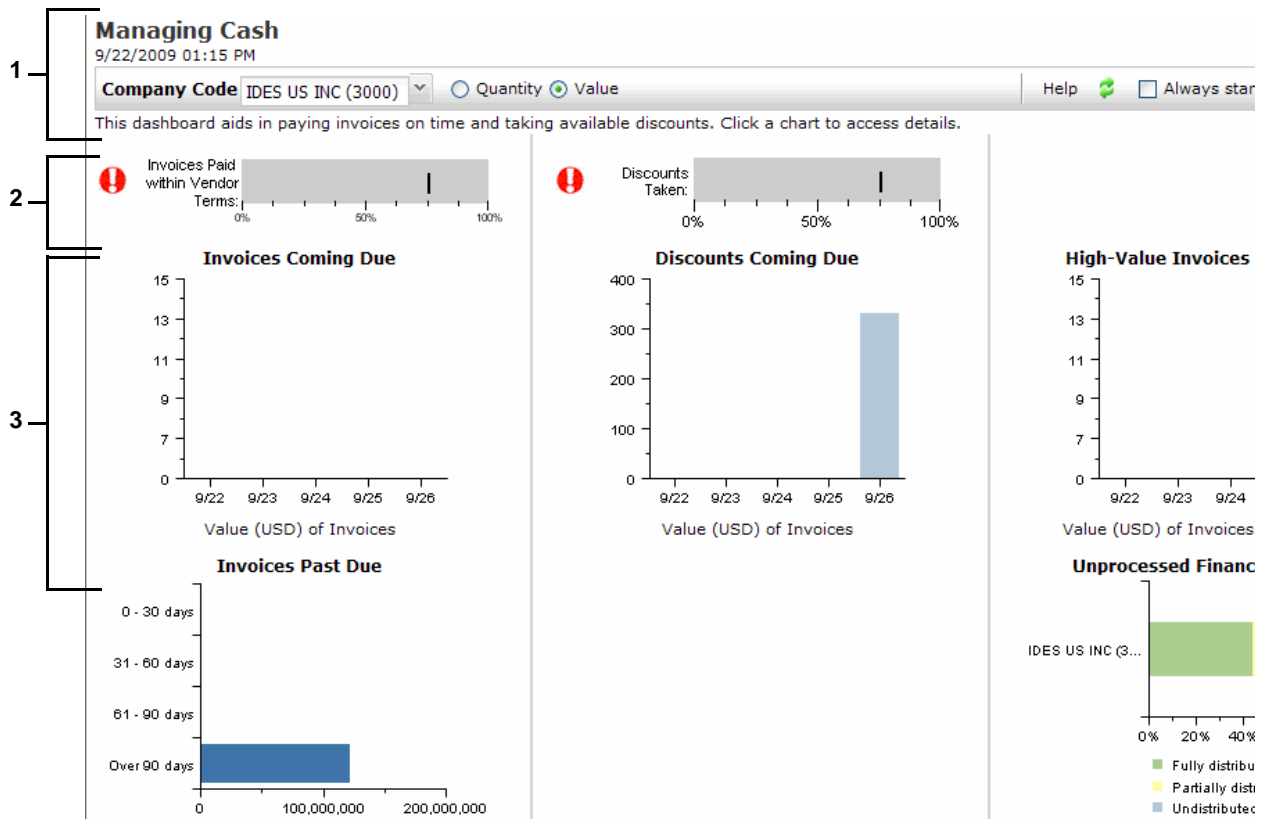
Some reports, for example those that show possible fraud violations, do not include any actions available from within Advisor. However, these reports provide insight into actions required outside of the system.

## 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 company codes from Company codes configured in SAP 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 company code is performing against target goals. An exclamation point indicates that a company code 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. If you fail to select a Company Code, if you have not yet synchronized the databases, or if there are no items that fit the report criteria, a message “No Data to Display” appears.

## Dashboards

**Table 1-1. Dashboards**

Dashboard	Description
Advisor Overview*	The highest-level view of AP business activities. Select a company code for which to see information. If you select <b>Always start with these settings</b> , the information for that company code 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 or less 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. (This dashboard does not include invoices with zero or less dollar values.)
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 Company Codes, you can only access information for one Company Code at a time.

## Scorecards

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

A scorecard:

- Measures metrics per company code.
- Can alert 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 Vendor 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.

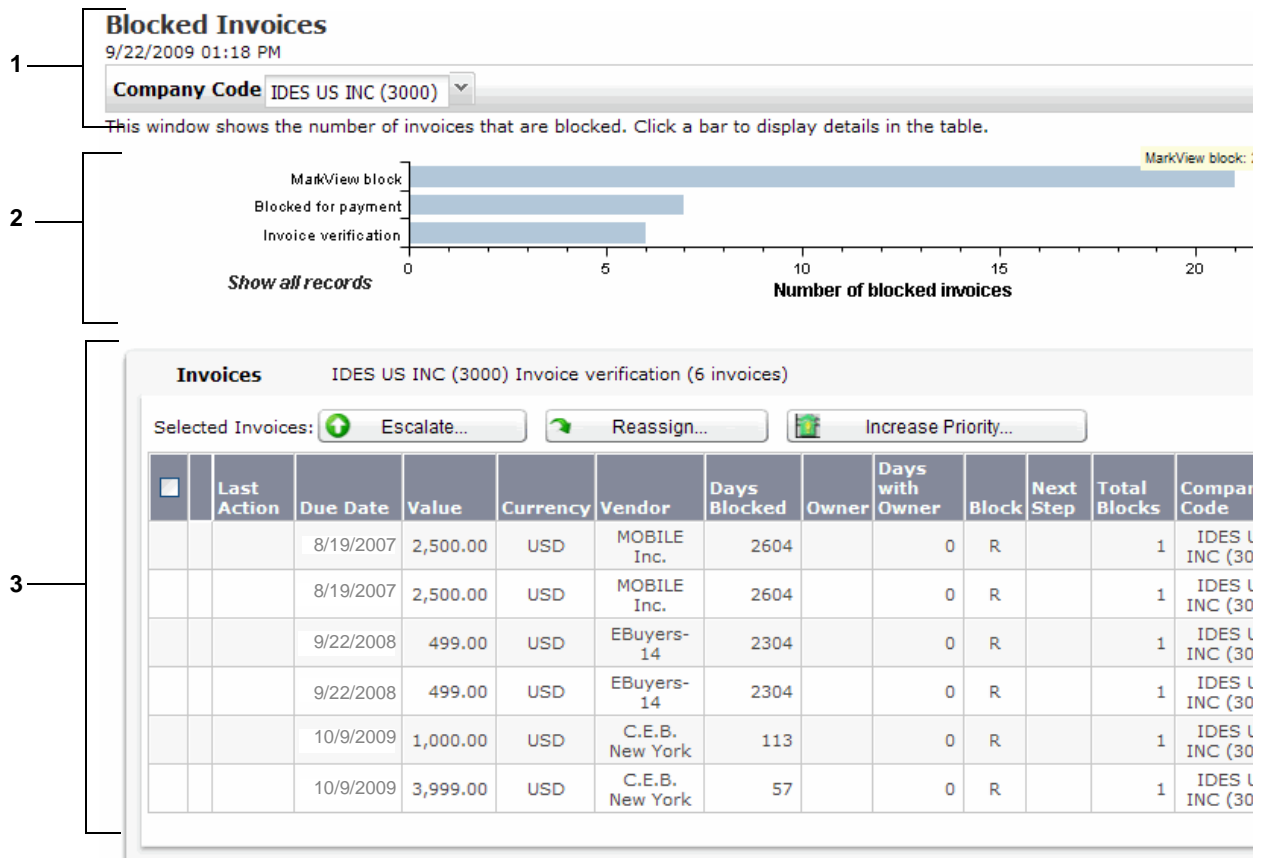


Figure 1-3. Report features



- 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 company code.

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 the check box next to the qualified table entry to act on the selected entry.
- 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 a table cell 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 SAP 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: <ul style="list-style-type: none"> <li>• how many days of information to display (from 1 to 31).</li> <li>• the minimum amount that defines an invoice as high-value for each company code. This amount differs from the MarkView workflow setting that requires Additional Review.</li> </ul>
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 company code to specify the target or SLA for entering invoices.
Blocked Invoices	Shows how many invoices are currently blocked.
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.

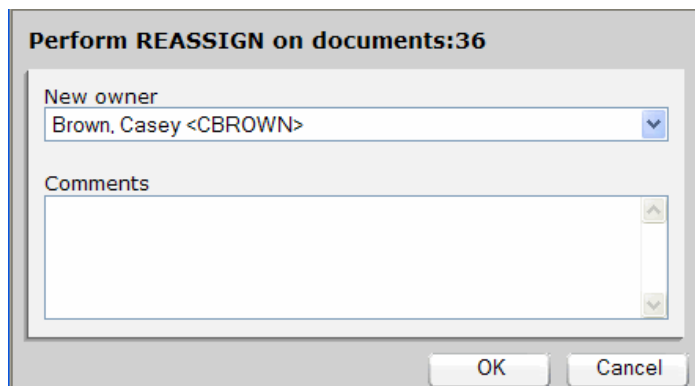
### Automatic actions

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 Console 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 SAP 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 vendor 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 Console 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 Console 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 Console 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 170 MarkView.

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

- The employee has a supervisor defined in the MarkView or SAP 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 Console 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 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 Console 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 Console 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 Console 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**

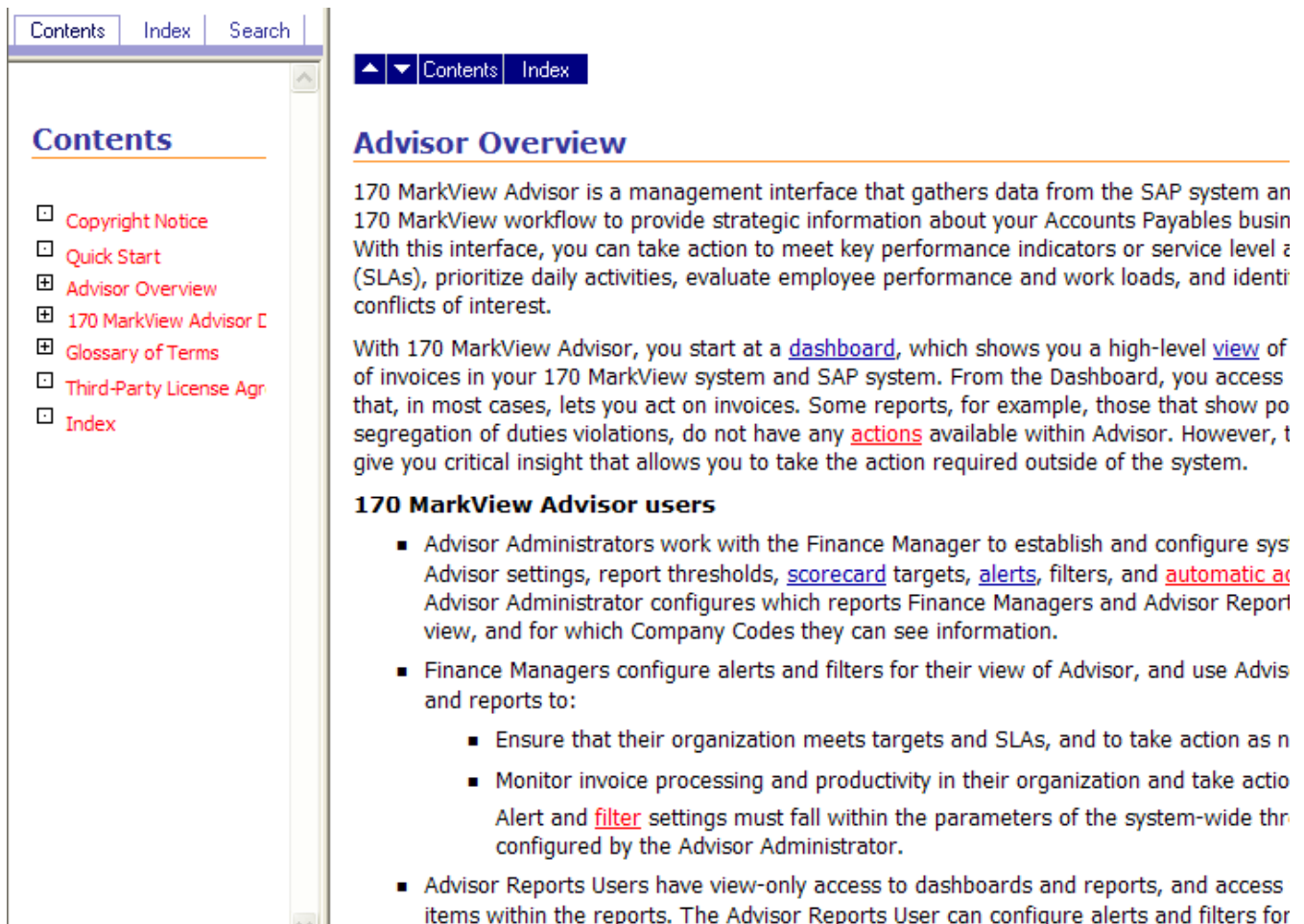
Advisor notifies the AP processor (either the owner of the invoice or the AP processor who retrieved the invoice) by email about the increase in priority assigned to the invoice. The email identifies the invoice and the name of the person who increased the priority. For example:

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.



The screenshot shows the help interface for 170 MarkView Advisor. On the left, there is a 'Contents' sidebar with a tree view containing the following items: Copyright Notice, Quick Start, Advisor Overview, 170 MarkView Advisor C, Glossary of Terms, Third-Party License Agr, and Index. The main content area is titled 'Advisor Overview' and contains the following text:

170 MarkView Advisor is a management interface that gathers data from the SAP system and the 170 MarkView workflow to provide strategic information about your Accounts Payables business. With this interface, you can take action to meet key performance indicators or service level agreements (SLAs), prioritize daily activities, evaluate employee performance and work loads, and identify conflicts of interest.

With 170 MarkView Advisor, you start at a [dashboard](#), which shows you a high-level [view](#) of invoices in your 170 MarkView system and SAP system. From the Dashboard, you access reports that, in most cases, lets you act on invoices. Some reports, for example, those that show poor segregation of duties violations, do not have any [actions](#) available within Advisor. However, they give you critical insight that allows you to take the action required outside of the system.

**170 MarkView Advisor users**

- 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 configures which reports Finance Managers and Advisor Report Users can view, and for which Company Codes they can see information.
- Finance Managers configure alerts and filters for their view of Advisor, and use Advisor reports to:
  - Ensure that their organization meets targets and SLAs, and to take action as needed.
  - Monitor invoice processing and productivity in their organization and take action as needed. Alert and [filter](#) settings must fall within the parameters of the system-wide thresholds configured by the Advisor Administrator.
- Advisor Reports Users have view-only access to dashboards and reports, and access to items within the reports. The Advisor Reports User can configure alerts and filters for their view of Advisor.

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





## Planning for Installation

---

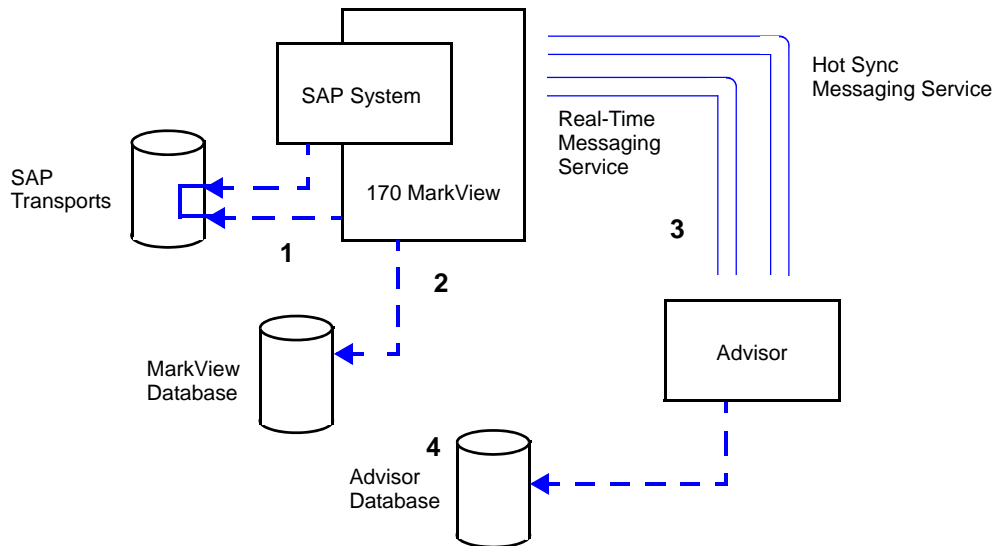
An Advisor installation requires changes to the database server, connection information for communication between 170 MarkView and Advisor, and Application Server information for Advisor.

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 6, Performing Post-Installation Tasks](#)).
- Advisor Administrator—configures Advisor once installation and data synchronization is completed ([Chapter 9, Performing Additional Advisor Set Up](#)), 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 SAP, 170 MarkView, and Advisor.



- 1 170 MarkView and the SAP system communicate through the SAP transports.
- 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

Advisor used the following J2EE applications to communicate with 170 MarkView Application Server components:

- 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.
- Application Server Filesystem—contains additional Advisor-related logs within the Application Server 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

## Installation information

Before you run the 170 Advisor verification and installation applications, complete the *170 MarkView Advisor Worksheet*. The worksheet ensures that you have all of the information you need to complete pre-installation, installation, and post-installation tasks. Completing the worksheet also helps you to proactively address system connection or access issues that you must solve before installation.

## Before You Install

---

- 1 Verify that 170 MarkView 6.4 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 the database pre-installation tasks (page 30) 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 (page 33).
- 5 Verify that all pre-installation tasks are completed before you install 170 MarkView Advisor.

### Downloading Advisor distribution 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 compressed Advisor distribution files.
- 2 Log in as the operating system user who runs the application server.
- 3 Create a temporary distribution directory for the compressed Advisor installation and verification files. For example, create a directory called `$HOME/advisordist`.

4 In the distribution directory, create the following subdirectories:

- \$HOME/advisordist/verify
- \$HOME/advisordist/installer

5 Download the following file into the verify directory:

**install-image-sap-verify-x.x.x.zip**

6 Download the following file into the installer directory:

**install-image-sap-x.x.x-with-advisor.zip**

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.

7 Decompress the files.

## Performing Database server pre-installation tasks

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

- create\_tablespace.sql
- create\_account.sql
- markview\_grant\_privileges.sql
- advisor\_grant\_privileges.sql

**Note:** The folder also contains scripts that you do not need to run for the Advisor installation.

Except for gencomp.sql, you log in as the SYSDBA on the database server to run the scripts.

### Creating tablespaces for Advisor

1 Connect to the database server that contains the MarkView schema as the SYSDBA. For example:

```
sys/pass@instance as sysdba
```

- 2 Select one of the following methods and continue:
  - Create locally managed tablespaces using the **create tablespace** SQL command. Use the provided `create_tablespace.sql` script as a guideline.
  - Use the **create\_tablespace.sql** 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 stored 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 temporary tablespace

### 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.

## Verifying the TRS

The Target Registry Service (TRS) must be running so that the install 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, enter the URL. A window opens indicating that the TRS is running. If the TRS is not running, restart it as follows:

- 1 Log in to the Oracle Application Server Enterprise Manager console and expand the instance where the MarkView applications are running.
- 2 Locate and select the **mvastrs** application. (A red down-arrow indicates that the TRS is not running.)
- 3 Click **Start**.

To verify that the TRS is running on the WebLogic Application Server:

- 1 Log in to the WebLogic Admin Console and navigate to **Deployment**.
- 2 Verify that the mvastrs status is **Active**.
- 3 Restart the TRS if necessary.

## Creating organization records

If you have not already done so as part of your 170 MarkView for Accounts Payable installation, create organization records that map SAP Company Codes to MarkView organizations:

**Note:** This procedure is part of the standard 170 MarkView for Accounts Payable configuration process.

- 1 Log in to 170 MarkView Home with administrative privileges.
- 2 Select **Administration > Module Admin**.
- 3 Select **Organization**. The Org Admin form appears.
- 4 Click **Insert**. The Org Admin - Create a New Org Record form appears.
- 5 In the Org Short Name field, select the short name for the Company Code for which to create a record.
- 6 Click **Insert**.

These records populate the ERP Org ID drop-down list from which you select approval organizations when setting up approval hierarchies.



## Performing Application server pre-installation tasks

After completing the Database server pre-installation tasks, and verifying that the TRS is running and that organizations are set, perform the pre-installation tasks described in this section.

- Configure the SAP Java Connector (SAP Jco) location for both OAS and WebLogic application servers.
- Complete the pre-installation tasks that apply to your application server (OAS or WebLogic).

Perform the pre-installation tasks immediately before running the verification or the installation application.

### Configuring environment variables for the SAP Jco location

Verify that the following environment variables include the location of the SAP JCo shared libraries:

- For Linux/UNIX, shared libraries include the \*.so files, for example, librfccm.so, libsapjcorfc.so:

LD\_LIBRARY\_PATH

- For Windows shared libraries include .dll files:

PATH

- For AIX shared libraries include the .o and .so files, for example, librfccm.o, libsapjcorfc.so:

LIBPATH

### OAS pre-installation 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 the following command:

```
opmnctl -help
```

To start the OAS, run the following command:

```
opmnctl startall
```

## Verifying the JDK version and Java Virtual Machine availability

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

```
java -version
```

For the MarkView Application Server, Java 1.5 is distributed with OAS.

- 1 Verify that the path to ORACLE\_HOME is configured properly. To set \$ORACLE\_HOME:  

```
export ORACLE_HOME=/projects/home/oraias01/product/10.3.1.4.0/OracleAS_1
```
- 2 Verify the \$JAVA\_HOME path:  

```
export JAVA_HOME=$ORACLE_HOME/jdk
```
- 3 Verify the JAVA\_HOME path  

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

## WebLogic pre-installation tasks

### Setting up environmental variables

Log in to the server with the WebLogic Admin account and set \$WL\_HOME to your WebLogic installation directory. For example:

```
export WL_HOME=~/.bea/wlserver_10.0
```

Verify that the NodeManager is running on every platform and that the WebLogic user has the permissions required to access it.

- On Windows:  

```
%WL_HOME%\server\bin\startNodeManager.bat
```

If you run the NodeManager as a service, verify the service is running and that the WebLogic user has the correct permissions required to access it.

- On UNIX:
  - a Verify that the LD\_ASSUME\_KERNEL is *not* set.
  - b Verify that the NodeManager is running:  
`${WL_HOME}/server/bin/startNodeManager.sh`

### Restarting the Admin Server

Log in to the server with the WebLogic Admin account and execute the one of the following commands to start the markview\_console.

- On Windows:  
`~/bea/markview/startWebLogic.cmd`
- On UNIX:  
`~/bea/markview/startWebLogic.sh`

### Verifying the JDK version and Java Virtual Machine availability

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

```
java -version
```

For the MarkView Application Server, Java 1.5 is distributed with WebLogic.

- 1 Verify the WL\_HOME path:  
`export WL_HOME=~/bea_install_directory/wlserver_10.0`
- 2 Verify the \$JAVA\_HOME path:  
`export JAVA_HOME=$WL_HOME/jdk`
- 3 To add the JAVA\_HOME to your path  
`export PATH=$JAVA_HOME/bin:$PATH`

### Moving Oracle RDBMS files for Advisor on WebLogic

Locate the following files on a system where the Oracle RDBMS resides:

```
$ORACLE_HOME/RDBMS/jlib/aqapi13.jar  
$ORACLE_HOME/jdbc/lib/nls_charset12.jar
```

Copy the files into the WebLogic domain lib directory. For example, ~/bea/markview/lib.



# Verifying the Environment and Installing Advisor

---

Verify that you have the completed 170 MarkView Advisor Worksheet available. You need information from the worksheet to complete the installation.

Immediately before running the verification or the installation application, complete the pre-installation tasks described in page 33. You must complete these tasks just before running either application.

**Caution:** The application that installs Advisor restarts the Application Server. Before running the installer, notify any users who might be working with the Application 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 Select the *application server type* and click **Next**.
- 6 Select the target installation directory, which is the same as the directory where 170 MarkView for Accounts Payable is installed, and click **Next**.

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

**Enter MarkView Schema Connection information**

Schema Username	markview
Schema Password	*****
Enter host with fully qualified domain	
Host	r4ebsr12.170systems.com
Port	1522
SID	vis01
Tablespace	MVD
Indexspace	MVX
Enter logging directory used by database jobs	
Logging Directory	/usr/tmp

Cancel Back Next Install

- 7 Using the installation worksheet, complete any fields that are empty and click **Next**.
- 8 Complete the Advisor schema connection information and click **Next**.
- 9 If prompted for the location of the TRS, enter the path, for example, *app-server hostname:port/mvstrs/markview* and click **Next**.

Whether or not the prompt appears depends on your MarkView system setup.

An App Server information window opens.

- 10 Continue as follows:
  - For OAS systems, go to [Verifying an OAS system on page 39](#).
  - For WebLogic systems, go to [Verifying a WebLogic system on page 41](#).

## Verifying an OAS system

- 1 Using the installation worksheet, complete any fields that are empty in the App Server window, and click **Next**.

**Enter App Server information for MarkView applications**

Enter host with fully qualified domain

OAS Host: r4ebsr12.170systems.com

HTTP Port: 7777

OPMN Request Port: 6003

Enter instance information created during OAS install

OAS Admin Instance: home

OAS Admin Group: default\_group

OAS Admin User: oc4jadmin

OAS Admin Password: [REDACTED]

Enter MarkView instance information. If instance doesn't exist, you will be prompted to create it.

MarkView Instance: markview

MarkView Group: default\_group

Clustering Environment:  false  true

Buttons: Cancel, Back, Next, Install

- 2 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**. The verify process does not create an instance of Advisor; that occurs during the installation.

- 3 Enter a communications *passphrase* and click **Next**.

This phrase enables communication between 170 MarkView and Advisor. Use any alphanumeric phrase. You only need to enter the phrase once.

- 4 Enter the SAP Java Connection information and click **Next**.

**Enter the SAP Java Connector communication information**

SAP User ID	MV_COMM_USER
SAP User Password	*****
SAP JCO Jar Location	jco-ntintel-2.1.8\sapjco.jar <input type="button" value="Select File"/>
SAP System	00
Host Name	r4sap60.170systems.com
Client ID	800
Default Language	EN
Maximum Connections	10
Enter the group used for load balancing. Leave this field blank if load balancing is not required.	
Logon Group	

Buttons:

- 5 Enter the SAP RFC Connection information and click **Next**.
- 6 Select the *directory* in which to install the Advisor dashboards and click **Next**. For example, *target install directory*/dashboards. Advisor uses this directory to store information needed for the user interface.
- 7 Specify whether to integrate the user logon with the SAP Portal and click **Next**.
- 8 Verify your settings and click **Next**.
- 9 (Optional) To see verification progress, click **Show Details**.
- 10 Click **Verify**.
- 11 When the verification process finishes, review the generated report, which is located in the MarkView *target install directory* that you selected during the verification:
 

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

Save the report in another directory to keep from being overwritten.



- 12 Make changes as indicated in the report before you begin the actual installation, which starts on [page 43](#).

## Verifying a WebLogic system

- 1 Using the installation worksheet, complete any fields that are empty in the App Server window, and click **Next**.

**Enter App Server information for MarkView applications**

Admin Username	weblogic
Admin User Password	
Domain Name	markview
Domain Directory	C:\bea\markview <input type="button" value="Select Folder"/>
Host Name	r4sap60.170systems.com
Admin Port	7001
HTTP Port	8001
NodeManager Port	5556
weblogic.jar Location	C:\bea\wlserver_10.0\servi <input type="button" value="Select File"/>
Java Home Directory	C:\Program Files\Java\jdk1. <input type="button" value="Select Folder"/>

- 2 Enter a communications *passphrase* and click **Next**.

This phrase enables communication between 170 MarkView and Advisor. Use any alphanumeric phrase. You only need to enter the phrase once.

- 3 Enter the SAP Java Connection information and click **Next**.

**Enter the SAP Java Connector communication information**

SAP User ID	MV_COMM_USER
SAP User Password	*****
SAP JCO Jar Location	jco-ntintel-2.1.8\sapjco.jar <input type="button" value="Select File"/>
SAP System	00
Host Name	r4sap60.170systems.com
Client ID	800
Default Language	EN
Maximum Connections	10
Enter the group used for load balancing. Leave this field blank if load balancing is not required.	
Logon Group	

- 4 Enter the SAP RFC Connection information and click **Next**.
- 5 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.
- 6 Specify whether to integrate the user logon with the SAP Portal and click **Next**.
- 7 Verify your settings and click **Next**.
- 8 Click **Verify**.
- 9 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 report in another directory to keep from being overwriting it.
- 10 Make changes as indicated in the report before you begin the installation.

## 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.

**Note:** If any interruption occurred between verifying the environment and starting the installer, repeat the procedures defined in [Performing Application server pre-installation tasks on page 33](#). (You do not need to recopy the Oracle RDBMS files if you completed the process before the interruption.)

- 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 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.



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.

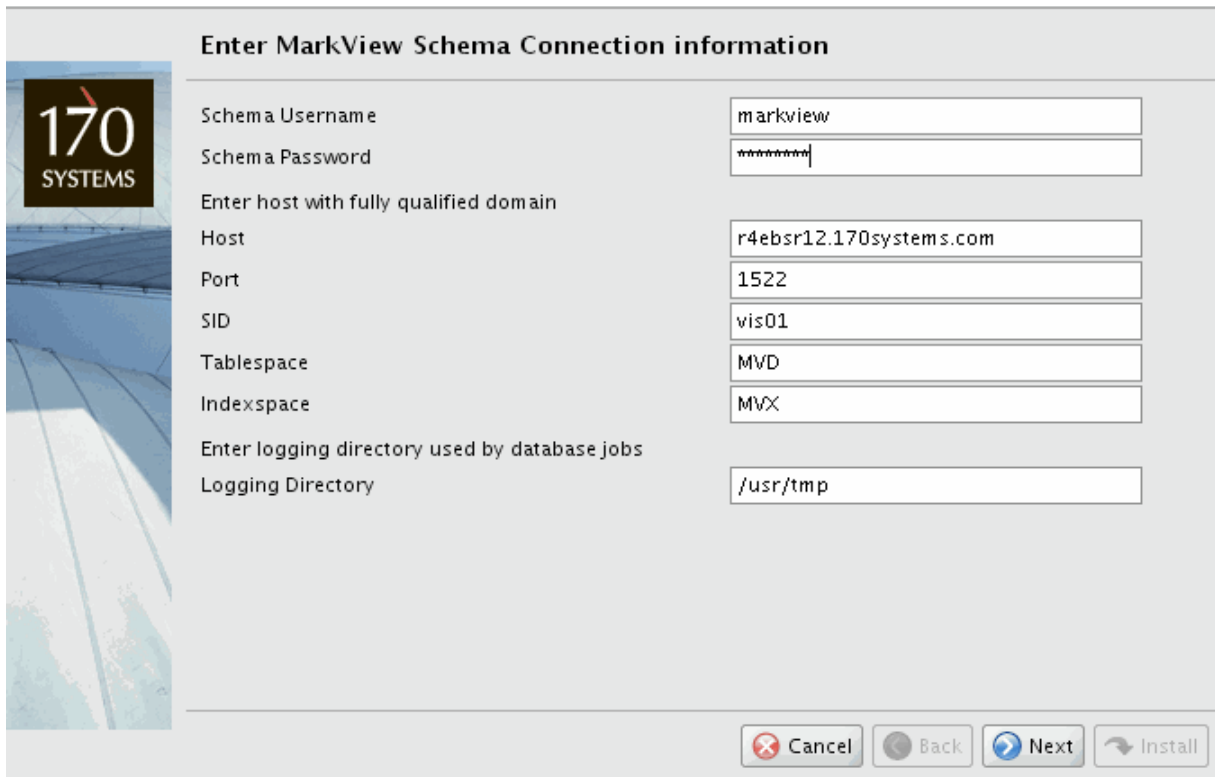
If you allow the installer to install or upgrade 170 MarkView for Accounts Payable, you might miss completing some required 170 MarkView pre-installation processes. The 170 MarkView installation and upgrade documents define those processes.

**2** Continue as follows:

- a** For installation type, select **Standard Full Install** and click **Next**.
- b** Select the *application server type* and click **Next**.
- c** Select the target installation directory, which is the same as the directory where 170 MarkView for Accounts Payable is installed, and click **Next**.

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

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



**Enter MarkView Schema Connection information**

Schema Username	markview
Schema Password	*****
Enter host with fully qualified domain	
Host	r4ebsr12.170systems.com
Port	1522
SID	vis01
Tablespace	MVD
Indexspace	MVX
Enter logging directory used by database jobs	
Logging Directory	/usr/tmp

Cancel Back Next Install

- 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 Continue as follows:
  - For OAS systems, go to [Installing on an OAS system on page 46](#).
  - For WebLogic systems, go to [Installing on a WebLogic system on page 48](#).

## Installing on an OAS system

- 1 Using the installation worksheet, complete any fields that are empty in the App Server window, and click **Next**.

**Enter App Server information for MarkView applications**

Enter host with fully qualified domain

OAS Host: r4ebsr12.170systems.com

HTTP Port: 7777

OPMN Request Port: 6003

Enter instance information created during OAS install

OAS Admin Instance: home

OAS Admin Group: default\_group

OAS Admin User: oc4jadmin

OAS Admin Password: [masked]

Enter MarkView instance information. If instance doesn't exist, you will be prompted to create it.

MarkView Instance: markview

MarkView Group: default\_group

Clustered Environment:  false  true

Buttons: Cancel, Back, Next, Install

- 2 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**. The installer creates the instance.

- 3 Enter a communications *passphrase* and click **Next**.

This phrase enables communication between 170 MarkView and Advisor. Use any alphanumeric phrase. You only need to enter the phrase once.

- 4 Enter the SAP Java Connection information and click **Next**.

- 5 Enter the SAP RFC Connection information and click **Next**.
- 6 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.
- 7 Specify whether to integrate the user logon with the SAP Portal and click **Next**.
- 8 Verify your settings and click **Next**.
- 9 (Optional) To see installation progress, click **Show Details**.
- 10 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.

- 11 Click **Exit**.
- 12 When prompted, restart the Oracle Application Server (OPMN).

## Verifying Advisor deployment

- 1 On the OAS, open the Oracle Console 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 the 170 MarkView Supported Platform Matrix.
- 3 Verify that the information on the installation worksheet is correct.
- 4 Retry the installation.

## Installing on a WebLogic system

- 1 Using the installation worksheet, complete any fields that are empty in the App Server window, and click **Next**.



**Enter App Server information for MarkView applications**

170 SYSTEMS

Admin Username	weblogic
Admin User Password	
Domain Name	markview
Domain Directory	C:\bea\markview <input type="button" value="Select Folder"/>
Host Name	localhost
Admin Port	7001
HTTP Port	8001
NodeManager Port	5556
weblogic.jar Location	C:\bea\wserver_10.0\serv <input type="button" value="Select File"/>
Java Home Directory	C:\Program Files\Java\jdk1. <input type="button" value="Select Folder"/>

Cancel Back Next Verify

- 2 Enter a communications *passphrase* and click **Next**.

This phrase enables communication between 170 MarkView and Advisor. Use any alphanumeric phrase. You only need to enter the phrase once.

- 3 Enter the SAP Java Connection information and click **Next**.

**Enter the SAP Java Connector communication information**

170 SYSTEMS

SAP User ID	MV_COMM_USER
SAP User Password	*****
SAP JCO Jar Location	jco-ntintel-2.1.8\sapjco.jar <input type="button" value="Select File"/>
SAP System	00
Host Name	r4sap60.170systems.com
Client ID	800
Default Language	EN
Maximum Connections	10
Enter the group used for load balancing. Leave this field blank if load balancing is not required.	
Logon Group	

Cancel Back Next Verify

- 4 Enter the SAP RFC Connection information and click **Next**.
- 5 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.
- 6 Specify whether to integrate the user logon with the SAP Portal and click **Next**.
- 7 Verify your settings and click **Next**.
- 8 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.

- 9 Click **Exit**.
- 10 When prompted, restart the WebLogic Application Server.

### Installing temporary files for dashboards

- 1 On the WebLogic server, navigate to the following location:
  - UNIX: *target\_install\_directory/dashboards\_directory/*
  - Windows: \Server\doc\_root\themes\170-System-Dashboard-Theme
- 2 Unzip the following file into the directory:

*target\_install\_directory*\conf\advisor\_32282.zip

Where *target\_install\_directory* is the location where you installed 170 MarkView and the dashboard files as specified during installation.

### Verifying Advisor deployment

- 1 Log in to the WebLogic Admin Console and navigate to **Deployment**.
- 2 Verify that the status of the following applications is **Active**.
  - analytics-actionable
  - analytics-core
  - analytics-markview
  - framework

## Loading 170 MarkView SAP Transports

---

You can find the SAP transport files that you need for 170 MarkView Advisor in directories under the `mvsap` folder on the distribution media. Use the transports for the version of SAP that you are running.

170 MarkView transports, contained in zip files, are located in the following directory: *distribution\_directory*/transports.

170 MarkView Transports	Zip file name	Transport directory name
SAP 46C Advisor	46c_sap_advisor_transports.zip	46c_sap_advisor_transports
SAP 47 Advisor	47_sap_advisor_transports.zip	47_sap_advisor_transports
SAP 60 Advisor	60_sap_advisor_transports.zip	60_sap_advisor_transports



When you unzip a 170 MarkView transports zip file, the process saves the transport files in a directory structure similar to the following: `\60_sap_advisor_transports`.

- 1 Unzip the `xxx_sap_advisor_transports.zip` file for your installation.
- 2 Load and transport the files in the following order (each folder contains one set of transport files).
  - 1\_mv sap\_s170\_core\_components
  - 3\_mv sap\_core\_configuration

**Note:** The unzip command includes the `2_mv sap_required_core_components` folder, which contains no files and requires no action.

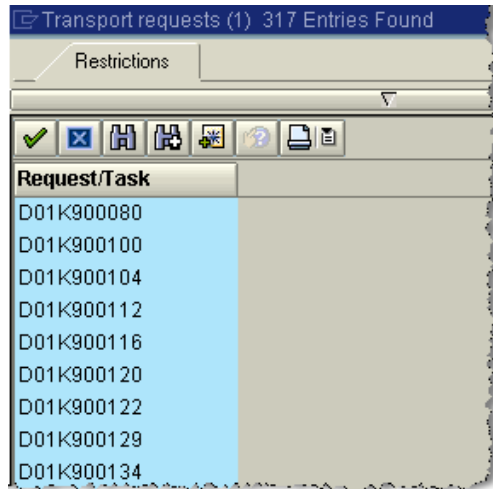
Instructions for loading the files follow.

## Importing Transport Files

- 1 Locate the directories that contain files required for your system.  
Each directory contains a pair of files, one with a file name that starts with K, the other with a file name that starts with R. Files of both types have a suffix that begin with D, E, or Q.  
Record the file names that begin with K and note of the directory where each file resides. You need this information later in the procedure.
- 2 Transfer the files to the following directories on the SAP machine:
  - Transfer files that begin with K to the following directory:  
/usr/sap/trans/cofiles
  - Transfer files that begin with R to the following directory:  
/usr/sap/trans/data
- 3 Log in to SAP as a user with authorization to import SAP transports, or contact an SAP Administrator who can to import the MarkView SAP transport files. Navigate to the Transport Management System screen (transaction code STMS).
- 4 Click the **Import Overview** icon in the top left corner of the window. The Import Overview screen appears, displaying the import queues for your system.  

- 5 To ensure that you are viewing the latest queue contents, click the **Refresh** icon.  

- 6 Double-click the import queue row to use for the transfer. The system displays the Import Queue window. Select the import queue that matches your system.
- 7 To load all transport files, select **Extras > Other Requests > Add**. The system displays the Add Transport Request to Import Queue dialog box.

**8** Press **F4**.

The system displays a dialog box that lists possible transport requests.

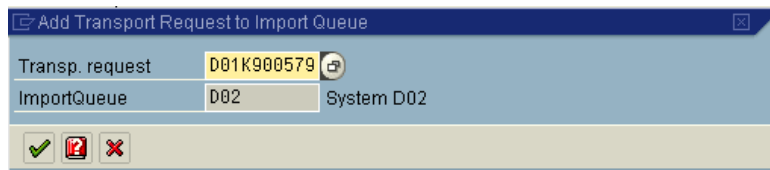


The names of the requests are based on the K file names, but they no longer in the original format, K#####.D##, K#####.E##, or K#####.Q##.

The list under Request/Task puts the D, E, or Q suffix first and omits the decimal point. For example, the file name K900579.D01 changes to D01K900579.

If F4 does *not* produce a list of possible transports:


- a Type each name into the Add Transport Request to Import Queue dialog box.
  - b Move the D, E, or Q suffix the front of the name, but do *not* include a decimal point. For example, D01K900579.
- 9** Select the request and click the green arrow above the Request/Task label. The system adds your selection to the Add Transport Request to Import Queue dialog box.



Select the file.

- 10** After you enter the text into the Transp. request field, click the green check mark. The Import Queue window reopens, including the new transport request.
- 11** Repeat steps 7 through 10 until you load all the transport files.

To verify the import:

- 1 Select a transport request on the Import Queue screen.
- 2 Click the Import Request icon. The **Start Import** dialog box appears.
  - For client-dependent transports, select the target client and a time for the import to take place.  

  - Click the green check mark to start the transfer.
- 3 Repeat steps 1 and 2 for each transport request.

# Performing Post-Installation Tasks

---

Before performing the required post-installation tasks:

- Verify that your environment is set up as described on [page 33](#).
- Verify that you created organization records for 170 MarkView as described on [page 32](#).

## Synchronizing the databases

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

- **Cold Sync**—exports information from the 170 MarkView and SAP databases and imports the information into the Advisor database. You only run this process once per Company Code 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.

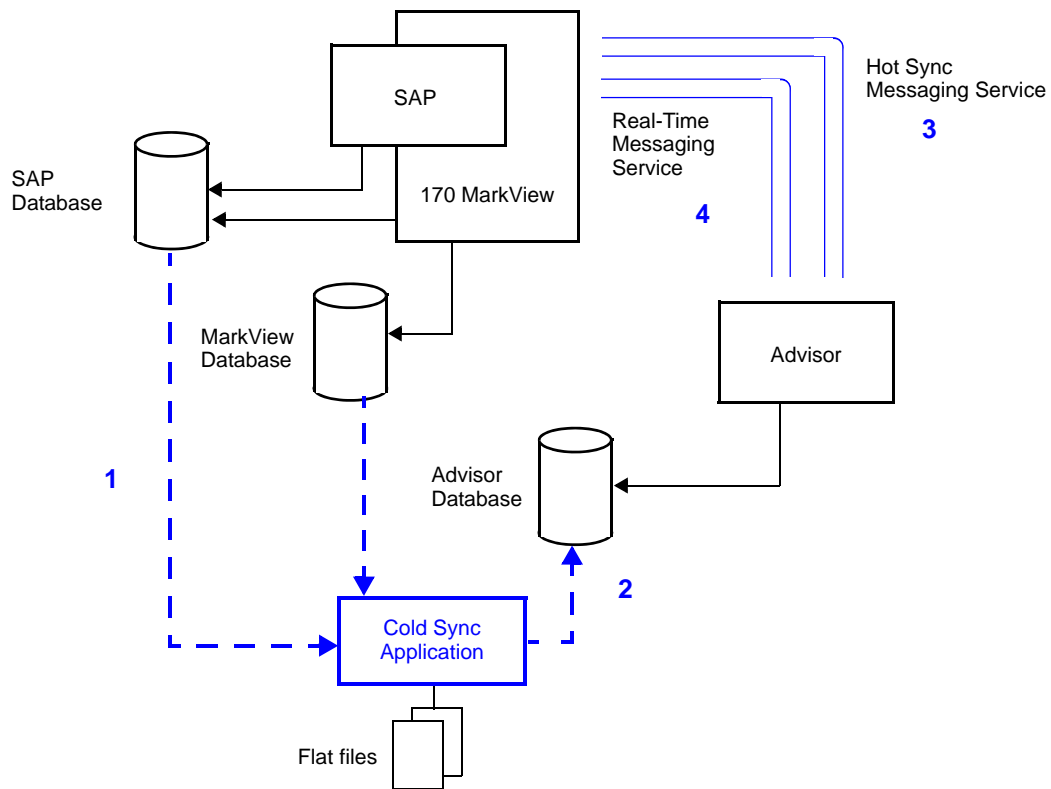
- **Hot Sync**—updates the Advisor database with information that was not captured in the original export. Because invoices can be modified or created in the 170 MarkView database during the import and export process, you must run this process after completing the Cold Sync import process to ensure that 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 63](#).

- **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 26](#).



- 1 Cold sync exports information from the SAP 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 SAP 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.

### Setting SAP JCo libraries for Cold Sync

Before running Cold Sync export, configure SAP JCo:

- 1 Verify that the following environment variables include the location of the SAP JCo shared libraries:
  - For Linux/UNIX, shared libraries include the \*.so files, for example, librfccm.so, libsapjcorfc.so:  
LD\_LIBRARY\_PATH
  - For Windows shared libraries include .dll files:  
PATH
  - For AIX shared libraries include the .o and .so files, for example, librfccm.o, libsapjcorfc.so:  
LIBPATH
- 2 Copy the sapjco.jar file to the *target install directory/lib*, where the *target install directory* is the directory where you installed the 170 MarkView.

### 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 Log in to the Application Server as the owner and run the following command to change to the tools directory.  
**cd *target install directory*/tools**

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

**Caution:** The first time you run Cold Sync, you must collect data for all organizations at once. Do not use the “orgShortNames” parameter the first time you run Cold Sync export.

For UNIX:

```
coldsync-export.sh dbHost dbPort dbServicename mvDBUser mvDBPassword sapSystemId
sapHostName sapClientId sapUser sapPassword sapMaxConnections sapDefaultLanguage
exportDir “orgShortNames”
```

For example:

```
./coldsync-export.sh db.170systems.com 1521 ora01 markview markview 00
sap.170systems.com 800 MV_COMM_USER init01 5 en ~/exportDir “myOrg”
```

For Windows:

```
coldsync-export.bat dbHost dbPort dbServicename mvDBUser mvDBPassword
sapSystemId sapHostName sapClientId sapUser sapPassword sapMaxConnections
sapDefaultLanguage exportDir “orgShortNames”
```

For example:

```
./coldsync-export.bat db.170systems.com 1521 ora01 markview markview 00
sap.170systems.com 800 MV_COMM_USER init01 5 en ~/exportDir “myOrg”
```

where:

- dbHost—database server host for the MarkView schema
- dbPort—database server port for the MarkView schema
- dbServicename—database service name (oracle) for the MarkView schema
- mvDBUser—MarkView user with which to connect to dbHost
- mvDBPassword—MarkView password credentials for dbUser
- sapSystemId—SAP system id
- sapHostName—SAP host name
- sapClientId—SAP client id
- sapUser—SAP user name
- sapPassword—SAP user password
- sapMaxConnections—SAP maximum connections
- sapDefaultLanguage—SAP default language
- exportDir—the directory location of the extract from Markview

**Caution:** The export directory cannot contain any files when performing Cold Sync export. The cold sync export process fails if the directory is not empty.

- “orgShortNames”—(optional) a comma-separated list of Company Code short names within quotation marks. Only use this option to add Company Codes after completing the initial coldsync process.

**Caution:** The first time you run Cold Sync, you must collect data for all organizations at once. Do not use the “orgShortNames” parameter the first time you run Cold Sync export.

- **To export data for all Company Codes**—Do not use this parameter or enter any orgShortNames.
- **To export data for multiple Company Codes**—For this parameter, use double quotation marks to enclose a comma-separated string of orgShortNames (without spaces) to run.
- **To export data for a single Company Code**—For this parameter, use double quotation marks to enclose the orgShortNames to run.

To find orgShortNames, go to MarkView Home, select Administration > Module Admin, and click Organization. OrgShortNames appear in the Short Name column.

**Note:** To add new Company Codes to Advisor, re-execute the Cold Sync export and import processes, specifying only the orgShortNames for the new Company Codes.

Create a new empty directory and specify that directory for the export and import commands for the added Company Codes.

- 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:

```
distribution_directory/installer/modules/analytics-core-dist-1.1.1/tools/  
Cold-Sync Import Time Calculator.xls
```

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

```
cd target install directory/tools
```

- 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 Log in to the Application Server as the owner and run the following command to change to the tools directory.  
  
**cd** *target 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 in the table (from top to bottom).

If you run only selected files, for example, `cold-sync-createuserinfo` and `cold-sync-createdoctype`, maintain the following order.

Sequence and files run by the process during initial import	Sequence and files to import when importing selected orgShortNames
<code>cold-sync-createuserinfo</code>	<code>cold-sync-createuserinfo</code>
<code>cold-sync-createbusinessunit</code>	<code>cold-sync-workitemcreate</code>
<code>cold-sync-createdoctype</code>	<code>cold-sync-workitemretrieved</code>
<code>cold-sync-createmarkviewcall</code>	<code>cold-sync-workitemtransition</code>
<code>cold-sync-createqueue</code>	<code>cold-sync-createholdtype</code>
<code>cold-sync-createworkflow</code>	<code>cold-sync-vendorcreate</code>
<code>cold-sync-createworkitemclass</code>	<code>cold-sync-vendorupdate</code>
<code>cold-sync-workitemcreate</code>	<code>cold-sync-vendordetailcreate</code>
<code>cold-sync-workitemretrieved</code>	<code>cold-sync-vendordetailupdate</code>
<code>cold-sync-workitemtransition</code>	<code>cold-sync-invoiceheadercreate</code>
<code>cold-sync-createholdtype</code>	<code>cold-sync-invoiceheaderupdate</code>
<code>cold-sync-createpaymentterm</code>	<code>cold-sync-invoicedetailcreate</code>
<code>old-sync-createpaymenttermdetail</code>	<code>cold-sync-invoicedetailupdate</code>
<code>cold-sync-vendorcreate</code>	<code>cold-sync-invoiceholdcreate</code>
<code>cold-sync-vendorupdate</code>	<code>cold-sync-invoiceworkitemattach</code>
<code>cold-sync-vendordetailcreate</code>	
<code>cold-sync-vendordetailupdate</code>	
<code>cold-sync-invoiceheadercreate</code>	
<code>cold-sync-invoiceheaderupdate</code>	
<code>cold-sync-invoicedetailcreate</code>	
<code>cold-sync-invoicedetailupdate</code>	
<code>cold-sync-invoiceholdcreate</code>	
<code>cold-sync-invoiceworkitemattach</code>	

- 3 Locate and enter the command for your import type and operating system, where *file names* specifies the files to run and *DB* parameters relate to the Advisor schema:

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

For UNIX:

```
./coldsync-import.sh dbHost dbPort dbSid advisorDBUser advisorDBPassword
exportDir
```

For Windows:

```
./coldsync-import.bat dbHost dbPort dbSid advisorDBUser advisorDBPassword
exportDir
```

- **To import 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
exportDir "Filenames1,Filename2,Filename3..."
```

For Windows:

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

- **To import 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
exportDir "File name1"
```

For Windows:

```
./coldsync-import.bat dbHost dbPort dbSid advisorDBUser advisorDBPassword
exportDir "File name1"
```

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

The Cold Sync import process may generate a number of warnings. The coding that generates these warnings assumes that Advisor is fully operational.

- 4 Check the following import log file for errors (if the process did not generate any errors, the log file does not exist):

```
target install directory/log/coldsync-import-error.log
```

### Dealing with \*.bad files

A \*.bad file that appears in your export directory indicates a failure to properly process one or more records in the export file. After you identify and correct the problem lines in the \*.bad file, rerun the cold-sync process on the corrected file as describe next.

### *Troubleshooting a .bad file with a “work item does not yet exist” message*

If a work item does not have an attached invoice, a \*.bad file appears in the export directory. The most likely cause is that the invoice was paid or canceled, but the associated work item has not yet transitioned to an end-state queue. For errors that appear with the following text, go to SAP to determine if the invoice transitioned to an end-state because it was paid or canceled. If the invoice transitioned, you do not need to rerun cold-sync.

The following is a sample cold-sync-invoiceworkitemattach.bad file

```
# gentime: 2009-09-17T13:26:06Z
# sep: ,
# invoice-id,workitem-id,timestamp,userid
"# Unable to attach invoice and workitem because invoice
 [190000001530002009] for invoice workItem attach message
 does not exist yet."
"190000001530002009", "1", "2009-09-17T13:12:26Z", "Q_NP_ENT"
```

### *Troubleshooting other \*.bad files*

- 1 Using a text editor, open the \*.bad file. The file contains messages for any lines that the import could not process.
- 2 Open the corresponding cold-sync file in the export directory.  
For example, if the process generates a cold-sync-create-userinfo.bad file, open the original cold-sync-create-userinfo file.
- 3 Try to determine the problem by comparing the line that failed in the \*.bad file against a line that did not fail in the original file.  
For example, if the line failed because the process could not convert a date, check a good line for the correct date format.
- 4 Correct the failed line in the \*.bad file and save the file to another directory.
- 5 Remove the **.bad** extension from the file and rerun the cold-sync process on the corrected file.

## Running Hot Sync

During the Cold Sync export and import process, events may occur in SAP 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.

You enable Hot Sync when you configure Advisor system processes.

## 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**.

**Configure time zone**  
 (GMT-5:00)America/New\_York

**Alert Configuration**  
 Enable alert configuration

Mail from

Mail subject

Mail SMTP host

Mail SMTP port

**SMTP authenticate**  
 Mail SMTP AUTH

Mail user

Mail password

**Hot Sync hours to run**

<input type="checkbox"/> 0000	<input type="checkbox"/> 0400	<input checked="" type="checkbox"/> 0800	<input checked="" type="checkbox"/> 1200	<input type="checkbox"/> 1600	<input type="checkbox"/> 2000
<input type="checkbox"/> 0100	<input type="checkbox"/> 0500	<input type="checkbox"/> 0900	<input type="checkbox"/> 1300	<input checked="" type="checkbox"/> 1700	<input type="checkbox"/> 2100
<input type="checkbox"/> 0200	<input type="checkbox"/> 0600	<input type="checkbox"/> 1000	<input type="checkbox"/> 1400	<input type="checkbox"/> 1800	<input type="checkbox"/> 2200
<input type="checkbox"/> 0300	<input type="checkbox"/> 0700	<input type="checkbox"/> 1100	<input type="checkbox"/> 1500	<input type="checkbox"/> 1900	<input type="checkbox"/> 2300

**Automatic actions hours to run**

<input type="checkbox"/> 0000	<input type="checkbox"/> 0400	<input checked="" type="checkbox"/> 0800	<input checked="" type="checkbox"/> 1200	<input checked="" type="checkbox"/> 1600	<input type="checkbox"/> 2000
<input type="checkbox"/> 0100	<input type="checkbox"/> 0500	<input type="checkbox"/> 0900	<input type="checkbox"/> 1300	<input type="checkbox"/> 1700	<input type="checkbox"/> 2100
<input type="checkbox"/> 0200	<input type="checkbox"/> 0600	<input type="checkbox"/> 1000	<input type="checkbox"/> 1400	<input type="checkbox"/> 1800	<input type="checkbox"/> 2200
<input type="checkbox"/> 0300	<input type="checkbox"/> 0700	<input type="checkbox"/> 1100	<input type="checkbox"/> 1500	<input type="checkbox"/> 1900	<input type="checkbox"/> 2300

**Database clean up hours to run**

<input type="checkbox"/> 0000	<input type="checkbox"/> 0400	<input type="checkbox"/> 0800	<input type="checkbox"/> 1200	<input type="checkbox"/> 1600	<input type="checkbox"/> 2000
<input checked="" type="checkbox"/> 0100	<input type="checkbox"/> 0500	<input type="checkbox"/> 0900	<input type="checkbox"/> 1300	<input type="checkbox"/> 1700	<input type="checkbox"/> 2100
<input type="checkbox"/> 0200	<input type="checkbox"/> 0600	<input type="checkbox"/> 1000	<input type="checkbox"/> 1400	<input type="checkbox"/> 1800	<input type="checkbox"/> 2200
<input type="checkbox"/> 0300	<input type="checkbox"/> 0700	<input type="checkbox"/> 1100	<input type="checkbox"/> 1500	<input type="checkbox"/> 1900	<input type="checkbox"/> 2300

- 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".
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. You must set at least one hour for the process to run.

Run Hot Sync at a different time than database clean up.

**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.

- 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 real-time sync messages that are older than 7 days.

- 8 Click **OK**.
- 9 Restart the Application Server.

Monitor the following log files for **Failed message processing** errors; ignore messages about duplicates:

- For OAS:

`$ORACLE_HOME/j2ee/advisor_oc4j_instance_name/log/hotsync.log`

`$ORACLE_HOME/j2ee/advisor_oc4j_instance_name/log/mvac-analytics*log`

- For BEA WebLogic:

`<bea_install_home>/<markview_instance_name>/log/hotsync.log`

`<bea_install_home>/<markview_instance_name>/log/mvac-analytics*log`

## About MarkView User Groups and Advisor Roles

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 user 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:

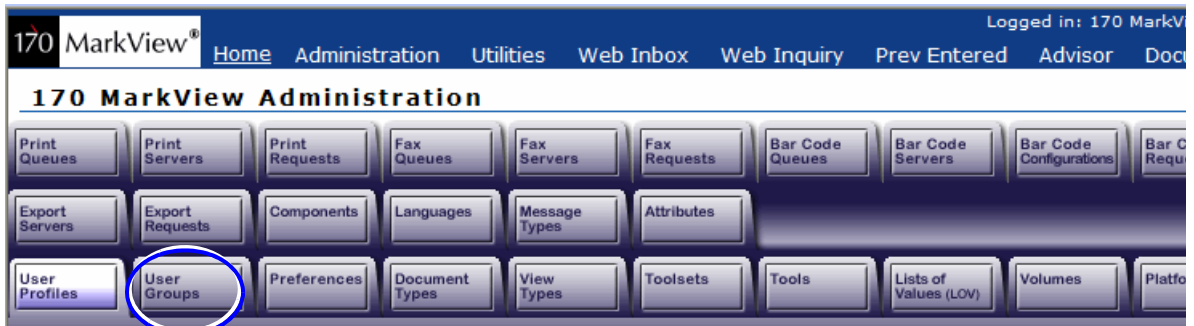
<b>User Type</b>	<b>MarkView User Group</b>	<b>Advisor Role</b>
Advisor Administrator	170 MODULE ADMINISTRATOR	Advisor Administrator
Finance Manager	ADVISOR FINANCE MANAGER	Finance Manager
Advisor Reports User	ADVISOR REPORTS USER	Advisor Reports User

# Adding users to groups

After you add Advisor Administrator, Finance Manager, and Advisor Reports Users to 170 MarkView User Groups, the users have access from MarkView home to the Advisor menu.

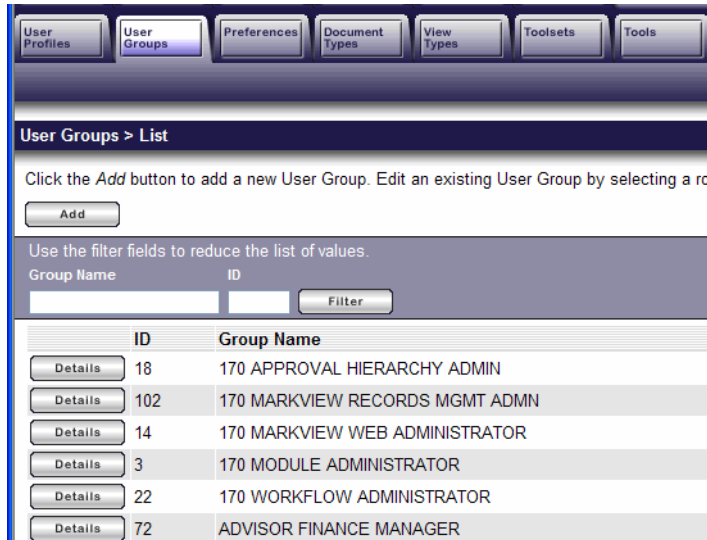
## Adding an Advisor Administrator

- 1 Log into 170 MarkView home with administrator privileges and select **Administration > 170 MarkView Admin.**
- 2 Click the **User Groups** tab.



User Groups tab

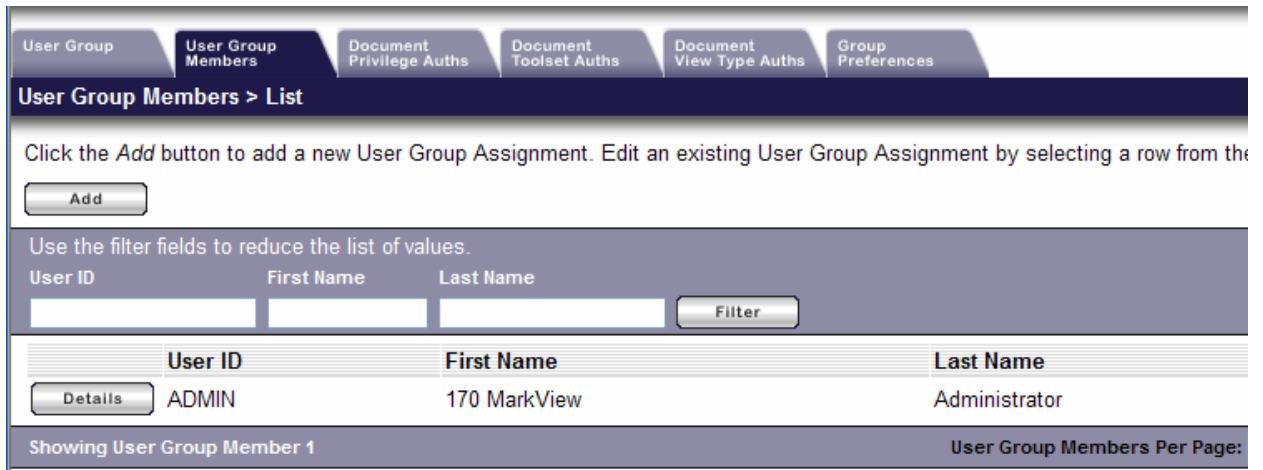
The User Groups page opens, listing existing user groups.



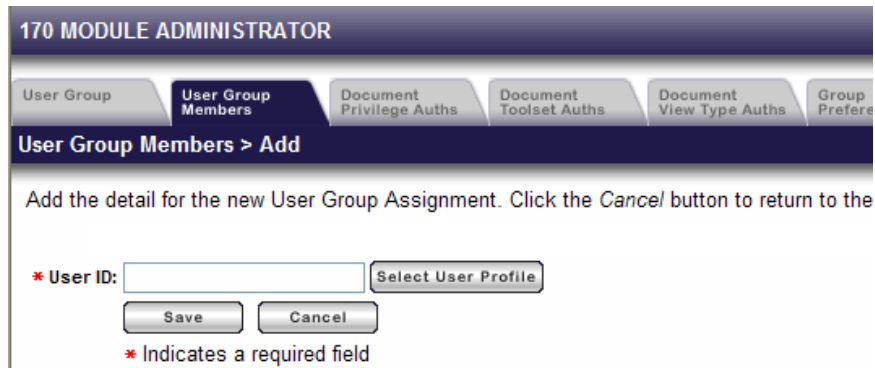
- 3 Continue as follows:
  - To add an Advisor Administrator, locate **170 MODULE ADMINISTRATOR** in the list and click the **Details** button in that row.

- 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**.

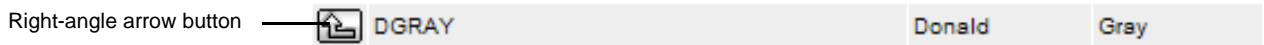
4 Select the **User Group Members** tab and click **Add**.



5 Click **Select User Profile**.



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



7 Click **Save**.

**User Group Members > Add**

Add the detail for the new User Group Assignment. Click t

\* User ID:

First Name: Donald

Last Name: Gray

\* Indicates a required field

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

## Adding users to Advisor roles

When first configuring roles, the MarkView Administrator (ADMIN) must assign an employee to the Advisor Administrator role. Until an employee is a member of the role, the employee cannot access role management or other Advisor configuration windows.

The Advisor Administrator uses role management to control which employees have access to Advisor dashboards and reports, and for which the Company Codes they can see information. To use role management, an employee must be an Advisor Administrator.

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

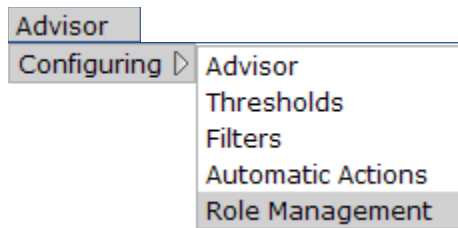
**Note:** With Advisor, you can remove access to selected dashboards by role. Although doing so is uncommon, some corporate policies require such restrictions. To do so, see [Creating Advisor roles on page 73](#).

To add users to Advisor roles:

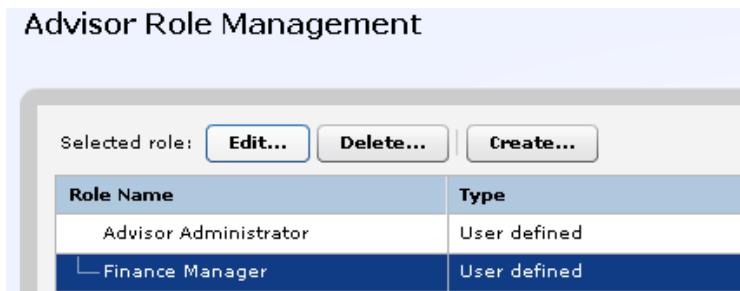
- 1 Log in to 170 MarkView home as the Advisor Administrator or the MarkView ADMIN user.
- 2 Select **Advisor > Configuring > Role Management**.

**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.

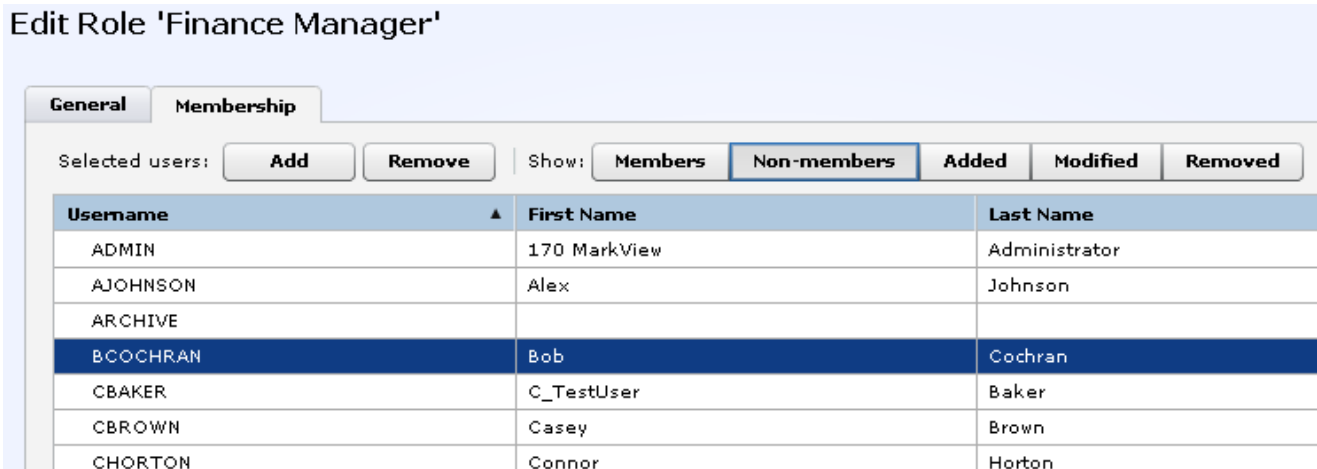
The window displays the roles defined for Advisor (Advisor Administrator, Finance Manager, Advisor Reports User).



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

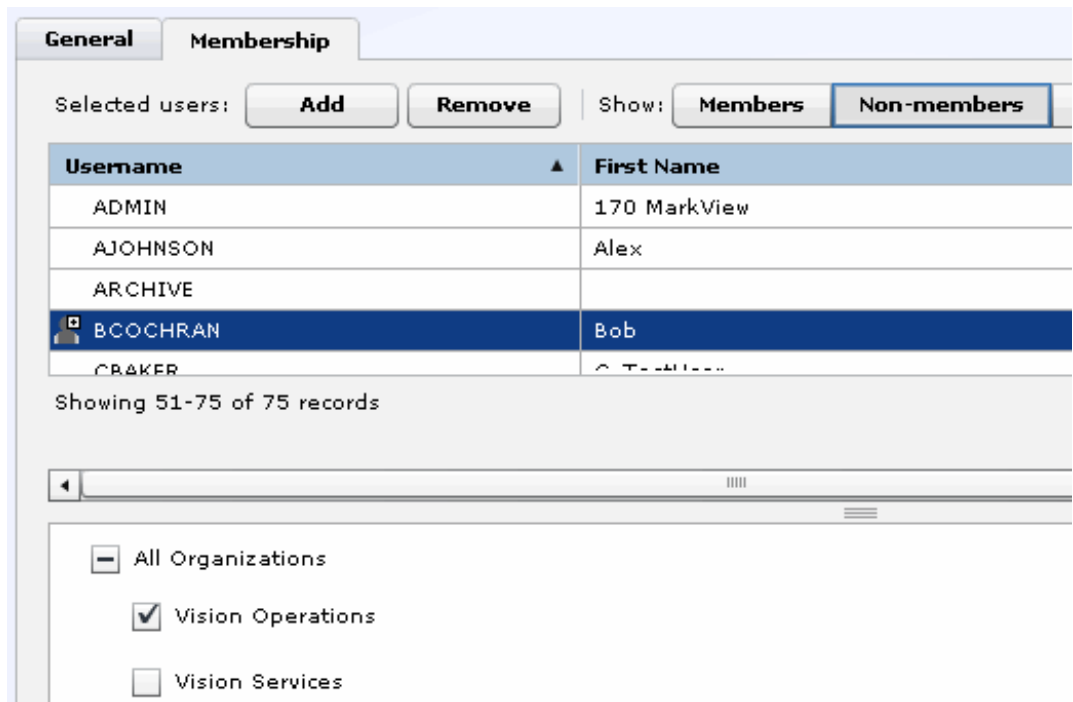


- Select the *employees* to assign and click **Add**.

Membership Tab Element	Description
Selected users	<ul style="list-style-type: none"> <li>Add—adds the selected employees to the role</li> <li>Remove—removes the selected employees from the role</li> </ul>

Membership Tab Element	Description
Show	<ul style="list-style-type: none"> <li>• Members—lists the current employees assigned to the role</li> <li>• Non-members—lists employees who are not members of the role</li> <li>• Added—lists employees being added to the role</li> <li>• Modified—shows the members for whom the organization assignments changed.</li> <li>• Removed—lists employees being removed from the role</li> </ul>
Filter (not shown)	<ul style="list-style-type: none"> <li>• Text field—lets you enter a name or part of a name to search for a specific employee.</li> <li>• Apply—initiates a search for employees with names that meet the filter criteria.</li> </ul>
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 Company Codes (called “Organizations” in interface) 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 Company Codes for which an employee can see reports.

- 6 Click **OK**.



## Creating Advisor roles

The installation process provides the Advisor roles needed for your organization to use the product. Creating Advisor roles is only needed for exceptional cases.

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.

**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 follow.

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.

### Advisor Role Management

Selected role: Edit... Delete... Create...

Role Name	Type	Description	Users
Advisor Administrator	System defined	An Administrator role for Advisor.	2
Finance Manager	System defined	A Financial Manager role for Advisor	7
Reports User	System defined	A user role for Advisor that can only view r	1

- 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.

### Create Role

**Steps**

Creation Source

**General**

Membership

Summary

**General**

Name

Description

Adopted roles Add... Remove

Authorizations Add... Remove

Privilege	Resource	Resource F	Filter Value

Authorization Summary

Privilege	Resourc	Resourc	Filter

- 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.

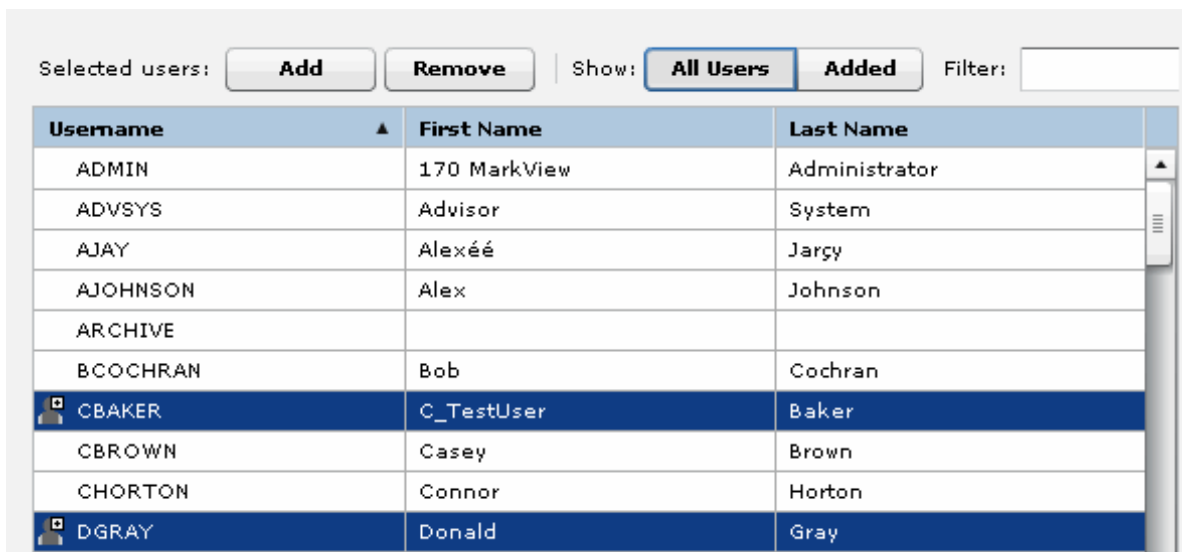
- b Select a *Resource* and *Resource Filter* from the drop-down lists.

- 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**.

# Verifying and Maintaining Advisor Installation and Configuration

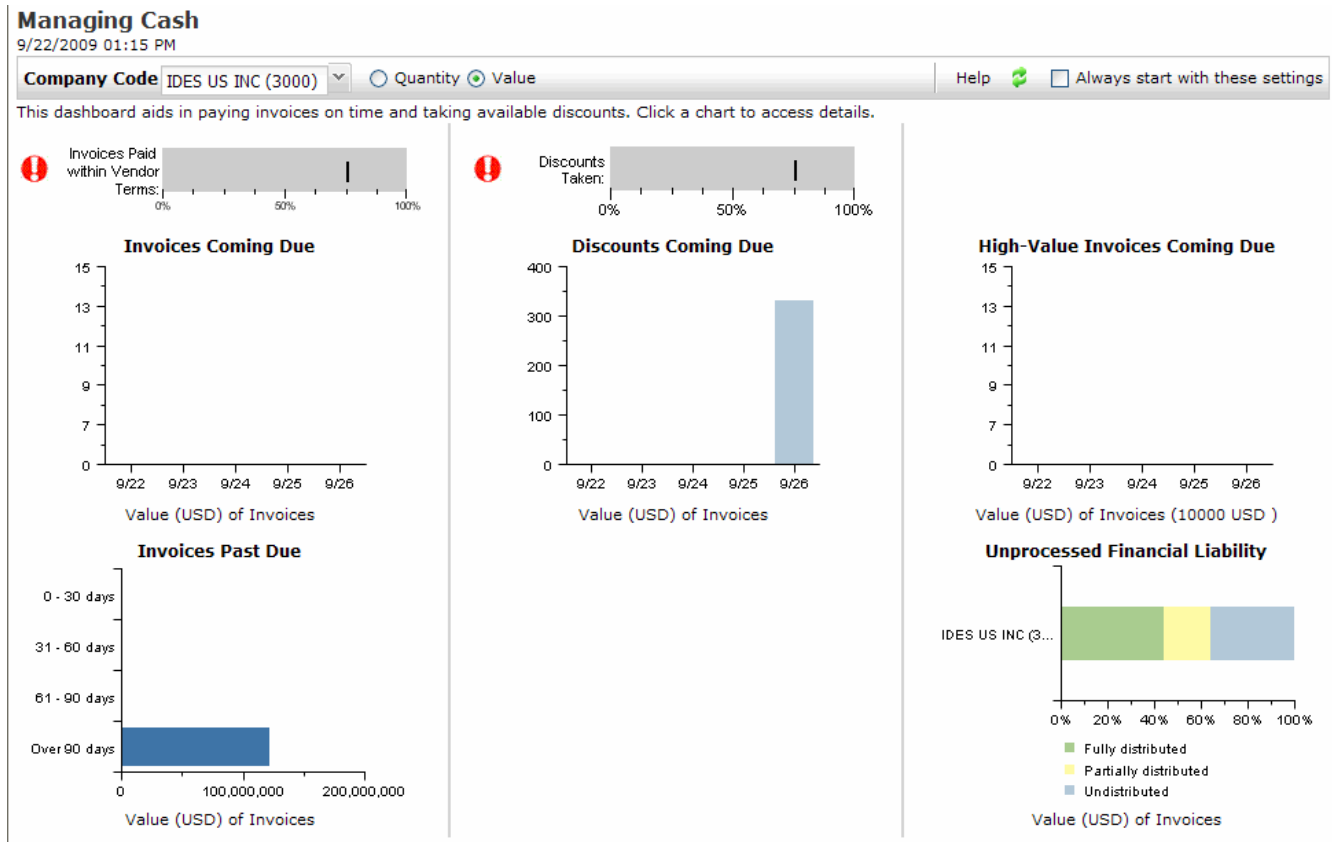
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## Verifying the Installation and Configuration

Verify that your users are set up correctly and that the SAP, 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 SAP. 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 Company Code menu, select the Company Code 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.

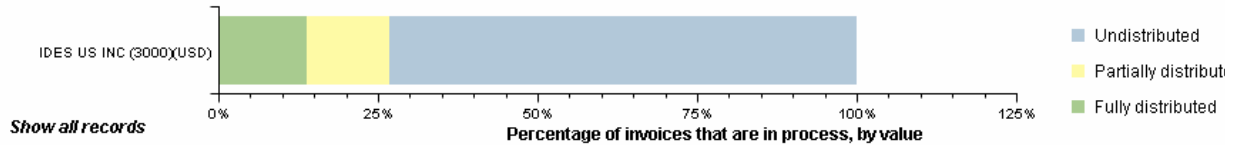
The invoice should appear in the Unprocessed Financial Liability report that opens.

**Unprocessed Financial Liability**

9/22/2009 01:50 PM

Company Code: IDES US INC (3000)  Quantity  Value

This window shows the percentage of invoices that are in the ERP but are not validated for payment. Click a bar to display details in the table.

[Show all records](#)

Invoices												
IDES US INC (3000) (1,546,671.53 USD)												
Selected Invoices: <input type="button" value="Escalate..."/> <input type="button" value="Reassign..."/> <input type="button" value="Increase Priority..."/>												
	Last Action	Due Date	Value	Currency	Distributed Value	Undistributed Value	Invoice Status	Vendor	Retrieved By	Next Step	Company Code	Origin Value
<input type="checkbox"/>		10/16/2009	11,651.17	USD	0.00	11,651.17	Undistributed	C.E.B. New York			IDES US INC (3000)	11,65
<input type="checkbox"/>		10/16/2009	1,717.17	USD	0.00	1,717.17	Undistributed	9917 Q_NP_ENT 0917			IDES US INC (3000)	1,71

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.

## Verifying members of AP user groups

Verify that employees who are AP Users belong to at least one of the following 170 MarkView user groups:

- 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.

## Maintaining Advisor

On a daily basis, monitor the following log files for **Failed message processing** errors; ignore messages about duplicates:

- For OAS:  
\$ORACLE\_HOME/j2ee/advisor\_oc4j\_instance\_name/log/hotsync.log  
\$ORACLE\_HOME/j2ee/advisor\_oc4j\_instance\_name/log/mvac-analytics\*log
- For BEA WebLogic:  
<bea\_install\_home>/<markview\_instance\_name>/log/hotsync.log  
<bea\_install\_home>/<markview\_instance\_name>/log/mvac-analytics\*log



# Performing Additional Advisor Set Up

---

The Advisor Administrator configures settings that apply to all Advisor users. For example, the Advisor Administrator sets the time of day when Advisor processes automatic actions.

## Configuring Thresholds

Before specifying settings for thresholds and scorecards, meet with the Finance Managers to discuss the settings to use in Advisor. The thresholds you set affect all Advisor users. For information about thresholds, see [page 11](#).

- 1 Log in to 170 MarkView home as the Advisor Administrator.
- 2 From the 170 MarkView menu bar, select **Advisor > Configuring > Thresholds**.

### Threshold Configuration

The screenshot shows the 'Managing Cash' configuration page. It includes sections for 'Scorecard targets', 'Invoices coming due', 'Invoices past due', and 'High-Value invoices coming due'. Each section has input fields for numerical values and dropdown menus.

Managing Cash			
<b>Scorecard targets</b>			
Percentage of invoices paid within terms	Percentage of discounts taken		
<input type="text" value="75"/>	<input type="text" value="75"/>		
<b>Invoices coming due</b>			
Number of days until due			
<input type="text" value="7"/> ▼			
<b>Invoices past due</b>			
Day ranges			
<input type="text" value="0-30"/>	<input type="text" value="31-60"/>	<input type="text" value="61-90"/>	Over 90 days
<b>High-Value invoices coming due</b>			
Number of days until due			
<input type="text" value="7"/> ▼			
Minimum value (in base currency)			

- 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 vendor 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. <ul style="list-style-type: none"> <li>• The default is 7 days.</li> <li>• Use a value from 1 to 31 days.</li> </ul>
Invoices past due	Day ranges	Define 3 ranges of days for reporting past-due invoices: <ul style="list-style-type: none"> <li>• Range values must progress from lowest values (left) to the highest (right)</li> <li>• Range values cannot overlap, for example, 0-30, and 30-60 (use 0-30 and 31-60).</li> </ul> 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. <ul style="list-style-type: none"> <li>• The default is 7 days.</li> <li>• Use a value from 1 to 31 days.</li> </ul>

Report	Field Name	Description
High-value invoices coming due <i>(continued)</i>	Minimum Value (in base currency)	Specify the minimum value, in the base currency of the Company Code, that constitutes a high-value invoice. The default is 10,000 for each Company Code. Each Company Code must have an entry. <ul style="list-style-type: none"> <li>To set the same value for all Company Codes, enter a <i>number</i> in the <b>Set value for all Company Codes</b> field and click <b>Apply to all Company Codes</b>.</li> <li>To set a value for individual Company Codes, enter a <i>number</i> in the Value field next to the Company Code.</li> </ul>
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. <ul style="list-style-type: none"> <li>The default is 7 days.</li> <li>Use a value from 1 to 31 days.</li> </ul>

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

**Managing Productivity**

**BU Working folder**

Number of users on whom to report

**Invoices not entered**

Target or SLA for entering invoices

Set number of hours for all company codes

Company Codes ▲	Currency	Number of hours
IDES AG	EUR	<input style="width: 80px;" type="text" value="24"/>
IDES US INC	USD	<input style="width: 80px;" type="text" value="24"/>
IDES US INC 2	USD	<input style="width: 80px;" type="text" value="24"/>
IDES US INC New GL	USD	<input style="width: 80px;" type="text" value="24"/>

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).

Report	Field Name	Description
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	<p>Specify the number hours by which AP processors must enter invoices to meet the target or SLA</p> <ul style="list-style-type: none"> <li>• To set the same target for all Company Codes, enter a <i>number</i> in the <b>Set number of hours for all Company Codes</b> field and click <b>Apply to all Company Codes</b>.</li> <li>• To set a value for individual Company Codes, enter a <i>number</i> in the <b>Number of hours</b> field next to the Company Code.</li> </ul> <p>The default is 48.</p>

6 Click **OK**.

## Configuring Automatic Actions

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

- 1 Log in to 170 MarkView home with administrative privileges.
- 2 From the 170 MarkView menu bar, select **Advisor > Configuring > Automatic Actions**.

## Automatic actions configuration

[Managing Cash](#) | [Managing Productivity](#) | [Help](#)

**Managing Cash**

Enable  
10 days before the invoice due date, increase the priority of any work item

Enable  
10 days before the invoice due date, escalate any work item retrieved by a user more than 10 hours ago

Enable  
10 days after the invoice due date, increase the priority of any work item

Enable  
10 days after the invoice due date, escalate any work item retrieved by a user more than 10 hours ago

Enable  
10 days before losing the invoice discount, increase the priority of any work item

Enable  
10 days before losing the invoice discount, escalate any work item retrieved by a user more than 10 hours ago

Increase the priority of any work item that remains in the designated queue for more than the number of hours specified

<input type="checkbox"/> Enable	Queue▲	Hours
<input type="checkbox"/>	170 Verification Process for PO Invoices	
<input type="checkbox"/>	AP Non-PO Invoice External Entry	
<input checked="" type="checkbox"/>	AP PO Invoice External Entry	4
<input checked="" type="checkbox"/>	AP PO Invoice Process Resolution	8
<input type="checkbox"/>	AP Pre-Approved Invoice External Entry	
<input type="checkbox"/>	AP Resolution	

Escalate any work item that remains in the designated queue for more than the number of hours specified

- 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**.

The administrator sets the times when automatic actions run when [Configuring Advisor system processes](#) as described on page 64.

## Configuring Filters

All Advisor users can create Company Code and AP Processor filters for their own use and can use public filters.

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

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 Company Code Filter**
  - **Add AP Processor Filter**

- 3 In the Name field, enter a *unique name*. The field accepts up to 50 alphanumeric characters, but does not accept spaces.

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 Company Codes or AP processors, select the *operating units* or *AP processors* to include in the filter.
  - Click **Add** to include an individual Company Code or processor in the filter.
  - Click **Add All** to include all Company Codes or processors in the filter.
 The selections move to the list of selected Company Codes or AP processors.
- 6 Click **OK**.

### Filter Configuration

[Compan](#)

Set up filters containing company codes or AP processors on which you want to report.

**Company Code Filters**

Add Company Code Filter

<input type="checkbox"/> Remove	Filter▲	Public	Company Codes	Edit
<input type="checkbox"/>	avp-test_filter	no	IDES US INC 2 IDES US INC New GL	<input type="button" value="Edit"/>

**AP Processor Filters**

Add AP Processor Filter

<input type="checkbox"/> Remove	Filter▲	Public	AP Processors	Edit
<input type="checkbox"/>	prv-filter	no	TestUser Q_PRE_ENT2	<input type="button" value="Edit"/>

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

## Configuring Alerts

Finance Managers and Advisor Reports Users can configure 170 MarkView Advisor to send notifications when invoices meet the conditions of an alert. For example, Advisor can send email when an invoice remains in a Console 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**.

### Alert Configuration

[Managing Cash](#) | [Managing Productivity](#) | [Managing Compliance](#) | [Help](#)

Enable email notification

---

**Email notification**

Email address  
 Frequency  
 Use HTML format

Send email if no alerts

---

**Managing Cash**

**Discounts coming due**

Enable discounts coming due  
 Number of days before discount is lost

**Invoices coming due**

Enable invoices coming due  
 Number of days before invoice is due

- 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 <i>email address</i> (name@mydomain.com) to receive notification. You must provide an email address.
Use HTML format	<ul style="list-style-type: none"> <li>• <b>Select</b> to receive HTML-formatted email.</li> <li>• <b>Deselect</b> to receive plain-text email.</li> </ul>
Send email if no alerts	<ul style="list-style-type: none"> <li>• <b>Select</b> to specify that Advisor send you email notifications when no invoices meet the alert criteria.</li> <li>• <b>Deselect</b> to specify that Advisor only send email notification if invoices meet the alert criteria.</li> </ul>
Frequency	Select <i>how often</i> to receive email notifications: <ul style="list-style-type: none"> <li>• Once a day</li> <li>• Twice a day</li> <li>• Once an hour</li> </ul>
What time to send	If you select a frequency of once or twice a day, select the <i>time of day</i> , 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 vendor for **Invoices coming due**, click **Add Exception**, select the *vendor*, and specify the *number of days* to use for the exception.
    - To add rows to the exception list, click **Add Exception** again.

**Invoices coming due**

Enable invoices coming due

Number of days before invoice is due

Exceptions by vendor

<input type="checkbox"/> Remove	Vendor	Number of days
<input type="checkbox"/>	Abbot Supplies Inc. <input type="button" value="v"/>	<input type="text" value="5"/>
<input type="checkbox"/>	1099 Vendor <input type="button" value="v"/>	<input type="text" value="4"/>

- 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 Company Code.
- 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**.



# Third-Party License Agreements

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## BEA Public License Version 2.1

### TERMS AND CONDITIONS FOR USE, REPRODUCTION, AND DISTRIBUTION

#### 1 Definitions.

- “License” shall mean the terms and conditions of this agreement.
- “Licensor” shall mean BEA Systems, Inc.
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