

Orchid

Training Guide:



Info-Explorer

Work Smarter with Orchid

This page intentionally left blank.

Table of Contents

Installing Info-Explorer	8
Next Steps:	8
Installing Info-Explorer	8
Enter License Details	8
Upgrading from a Prior version	9
License Agreement	9
Using the File Menu	9
Request Activation Codes	10
Licencing method	10
To Request an activation code:	11
Use Get One Here link	12
Next steps	12
Register Info-Explorer	12
Enter an activation code:	12
Next steps	13
Info-Explorer Lite	14
Using Info-Explorer Lite with Demo Cubes:	14
Other Limitations of Info-Explorer Lite	14
Getting Started Steps	15
For more details, See Also:	15
Ten Steps to Implement a Business Intelligence Solution using Orchid Info-Explorer	15
Step 1. Clarify the objectives you expect from Info-Explorer	16
Step 2. Review the Sample cubes provided with Info-Explorer	16
Step 3. Source the data that isn't in the sample cubes	16
Step 4. Confirm your facts and dimensions	16
Step 5. Drag and drop dimensions	17
Step 6. Add Filters	17
Step 7. Setup Dashboard	17
Step 8. Setup writeback	17
Step 9. Setup security	18
Step 10. Refresh data and distribute the cube	18
Security Considerations	18
Configure Lock Options in Info-Explorer	18
Options : Security options for the cube.	19
Remove the Lock	19
When to use Lock options	20
Getting Started with Info-Explorer for Sage 300	20

Step 1. Download sample cubes	20
Step 2. Update connection details	22
Using Sage 300	23
Step 3. Refresh the data	23
Step 4. Start Analysing Your data	23
Getting Started with Info-Explorer for Spire	24
Step 1. Download sample cubes	24
Step 2. Update connection details	26
Prerequisite to setup Spire ODBC	26
Install 64-bit PostgreSQL ODBC Driver	27
Create an ODBC Connection to the PostgreSQL database	27
Update Connection Details in Info-Explorer	28
Option 1: Use ODBC Connection	28
Option 2: Use full connection string	28
Test the Connection	29
Troubleshooting the connection	29
Save the cube	29
Step 3. Refresh the data	29
Step 4. Start Analysing Your data	29
Using Info-Explorer	29
Download Sample Cubes	30
Cubes are available for:	30
Steps to use the cubes	30
Open a cube	32
Save a cube	33
Connect cube to your database	34
Connect to a database	35
Database Type = Microsoft SQL Server	35
Using Sage 300	36
Database Type = ODBC	36
Spire ODBC Detailed steps	37
Prerequisite to setup Spire ODBC	37
Install 64-bit PostgreSQL ODBC Driver	37
Create an ODBC Connection to the PostgreSQL database	37
Update Connection Details in Info-Explorer	38
Option 1: Use ODBC Connection	38
Option 2: Use full connection string	39
Test the Connection	39
Troubleshooting the connection	39

Save the cube	39
Noteworthy	39
Refresh data	40
Connect to Sage 300	40
Refresh Info-Explorer Cubes	40
Refresh cube manually	40
Refresh Cube with Command Line	41
Command line syntax	41
Functions	41
Parameters	42
Example	42
Refresh and Do not open Info-Explorer UI	42
Refresh and open Info-Explorer UI	42
Set parameters to the cube	42
Info-Explorer Analysis Tools	43
Reorder and Reorganise your views and charts	43
Drag and Drop Dimensions and Facts	44
Sort a dimension	47
Select the AsC/Desc order	47
Select a fact	48
Viewing Facts	50
Filter a dimension or fact	51
Filter using a tick box :	51
Filter using a prefilter on the underlying dimension values :	52
Filter using Calculated fact values	55
Filter Calculated Fact Values Details	56
Format a cube - Using Styles	58
RuLes for the Cube	58
Traffic Light Reporting Example	60
To delete a style	62
Format a fact - Caption and Styles	63
Changing the caption	63
Changing the Style	64
Create / Amend /Delete a fact	65
To Create a Fact	65
To Delete a Fact	66
To Amend a Fact	67
Viewing Percent of column in a cube	67

Facts vs Dimensions in a cube	68
Can Database String columns be a fact?	69
Drill down to view details.	69
Drill Through to Sage 300 screens	70
Drill through options available	72
Advanced Analysis Tools (Home Tab)	73
Working with Info-Explorer - Home Tab	74
Home tab "quick links"	74
Home tab "view" links	75
Home tab "new" links	75
Home tab "export" links	75
Swap rows and columns	76
Collapse rows and columns (hierarchy)	77
Expand rows and columns (hierarchy)	79
Formula Fact	81
Valid Operators & their relative priorities:	82
Amend a formula fact	82
Using Display Tab	84
Info-Explorer titles	85
Display tab, "Totals" links	85
Display tab "scale" links	86
Create a cube	87
From Database	87
From Accpac (Sage 300),	88
Using Charts and Dashboards	89
Create a dashboard	90
Amend size of views and charts	90
Add and remove views and charts to dashboard	90
Using Dashboard Tab	92
Dashboard tab "quick links"	92
Create a New Chart	93
Working with Info-Explorer – Chart Tab	96
Chart tab "quick links" :	96
From the Chart tab "style" links	96
Chart tab "Labels" links	97
Chart tab "Legend " links	97
Chart tab "Data points " links	97
Chart Properties	98

Export Overview	99
Export to CSV	100
Export to HTML	100
Export to MS Excel	101
Properties: Security, Connections and Parameters	102
Security options for the cube.	102
Remove the Lock	103
When to use Lock options	103
Parameters :	103
Connections :	104
Cubes:	104
+Views	104
+Write back	104
Auto Refresh:	104
Amend cube query	105
Using Query Builder:	105
Updating the cube Properties	105
Viewing query error	106
Query Builder	106
Overview	106
How to use	107
Troubleshooting	108
What causes the error?	108
Solution: Amend the query in the Cube > Properties	109
Define Key Fields	109
Using Parameters in the Query	109
Create a new connection	112
Auto Refresh	114
Configure Auto-Refresh while using the cube:	114
Configure Refresh on Opening the cube -	114
Info-Explorer Writeback	115
Using Info-Explorer Writeback with Optional Tables	116
Budgeting using the Workset Tab	117
From the Workset tab, "Workset" links you can	118
Spread methods	118
Writeback to Sage 300	119
Example SQL queries:	120

Installing Info-Explorer

The steps below apply to Info-Explorer Lite as well as the Full and Writeback edition.

Next Steps:	8
Installing Info-Explorer	8
Using the File Menu	9
Request Activation Codes	10
Register Info-Explorer	12
Info-Explorer Lite	14

NEXT STEPS:

Getting Started Steps on page 15

Refer to Info-Explorer Training Guide for further details

INSTALLING INFO-EXPLORER

Info Explorer is installed by executing the EXE program downloaded from the Info-Explorer website.

Use the following link: <https://www.info-explorer.com/resources/downloads>

InstallShield will execute and guide you through the installation steps.

Re-installations over-write existing installations on the target directory.

Note: You can change the default installation directory by clicking on the Change button and browsing to a new directory if required.

Enter License Details

You can run Info-Explorer without an activation code for a 30-day trial period.

You can continue using Info-Explorer Lite beyond the trial period by requesting an activation code.

If you have purchased the product and have an activation code, enter it

For details on requesting an activation code, refer to Register Info-Explorer on page 12

Note: If installing with a 30 day trial period, additional re-installations will not extend the trial period.

Upgrading from a Prior version

1. Download the new version install program from the Orchid website
2. Backup your existing cubes and programs
3. Execute the EXE program downloaded (as above for a new install).

You can also choose to Remove a prior version before installing the latest version.

License Agreement

For Orchid End-User License & Service Agreement, refer to [Orchid EULA](#)

USING THE FILE MENU

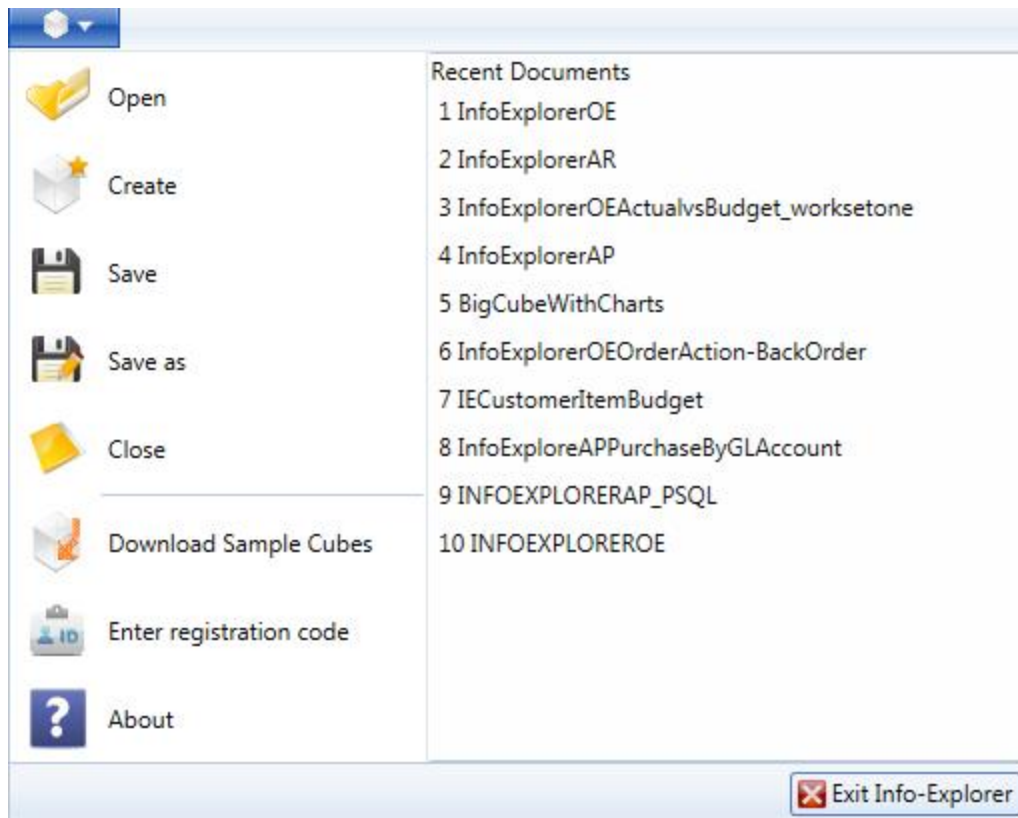
To run Info-Explorer, Start > All Programs > Info-Explorer. You can add a shortcut to the taskbar or to the desktop. Click Open Cube or File > Open and open one of the sample cubes.



The Info-Explorer > File menu

The File Menu allows you to:

- [Open an existing cube](#)
- [Create a new cube](#)
- [Save](#) an existing cube
- [Save](#) the existing cube as a new file name
- [Close the open cube](#)
- [Download Sample Cubes](#)
- Enter your Info-Explorer [registration code](#)
- Read the release notes in the About option



Requirement!

if you are using Info-Explorer Lite, then "create cube", "export to CSV", "export to HTML", "export to MS Excel" and "Worksets" are not available.

Worksets and Writeback are only available if the Info Explorer - Write back licence has been purchased and activated. If you are using "info-Explorer - Full", then "Worksets" and Writeback are not available.

REQUEST ACTIVATION CODES

If you are using Info-Explorer Lite (free version of Info-Explorer), you can apply for an activation code to continue using the demonstration cubes after the 30 day trial.

If you have purchased a licence for Info-Explorer Full or Writeback, you can follow the same steps to request an activation code.

To enter the activation code for all versions of Info-Explorer, refer to Register Info-Explorer on page 12.

Licencing method

Info-Explorer activation codes depend on the Company Name and the Computer Name on which the programs are installed. If you upgrade your machine or get a new machine (i.e. change the Company Name or Computer Name on which Info-Explorer is installed), you do need to apply for a new activation code.

Info-Explorer activation codes are not dependent on the database that you are connecting to or the version of the ERP Application you are running.

Note: You do not need a new activation code when you upgrade from one version of Sage 300 to another.

To Request an activation code:

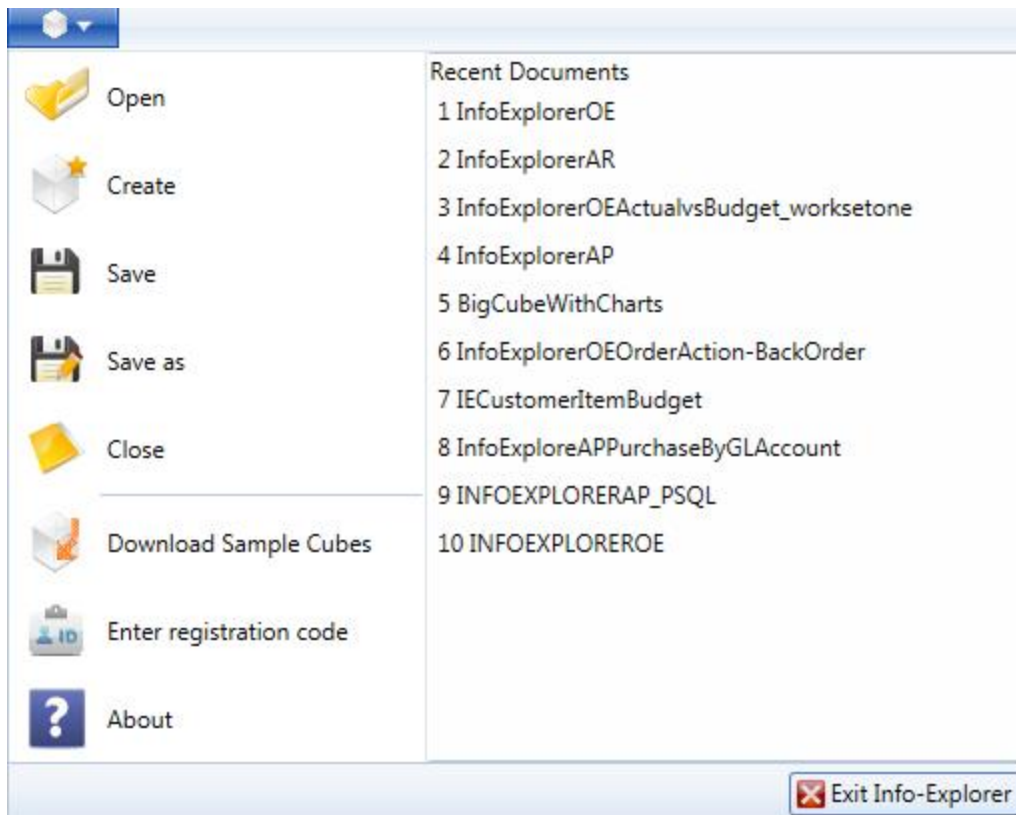
After installing Info-Explorer, Select the "**File**" option (small white cube on the top left hand side of the main menu in Info-Explorer)

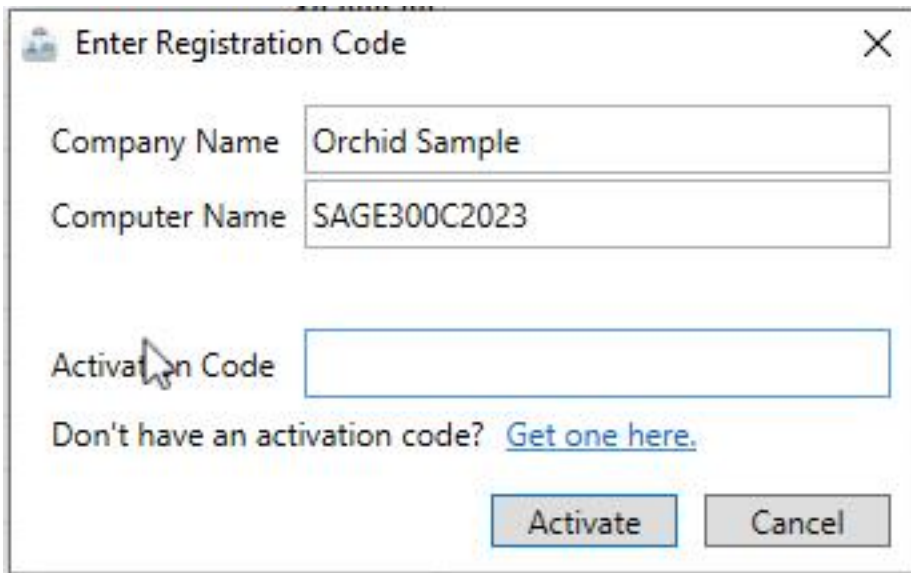
Select **File** > **Enter Registration code**

Note the Computer Name.

You can send the screenshot of the Registration screen with the computer name to your business partner or to Orchid directly.

Note: If using Info-Explorer on a Terminal Server, you only install on the server and have a licence for the required number of users.





Enter Registration Code

Company Name: Orchid Sample

Computer Name: SAGE300C2023

Activation Code:

Don't have an activation code? [Get one here.](#)

Activate Cancel

Use Get One Here link

Gather the required information and click on the "**get one here**" hyperlink and complete the website registration form on <https://www.info-explorer.com/resources/info-explorer-registration-form>

An activation code will be sent to you within 48 hours.

Next steps

Enter the Activation Code: Register Info-Explorer below

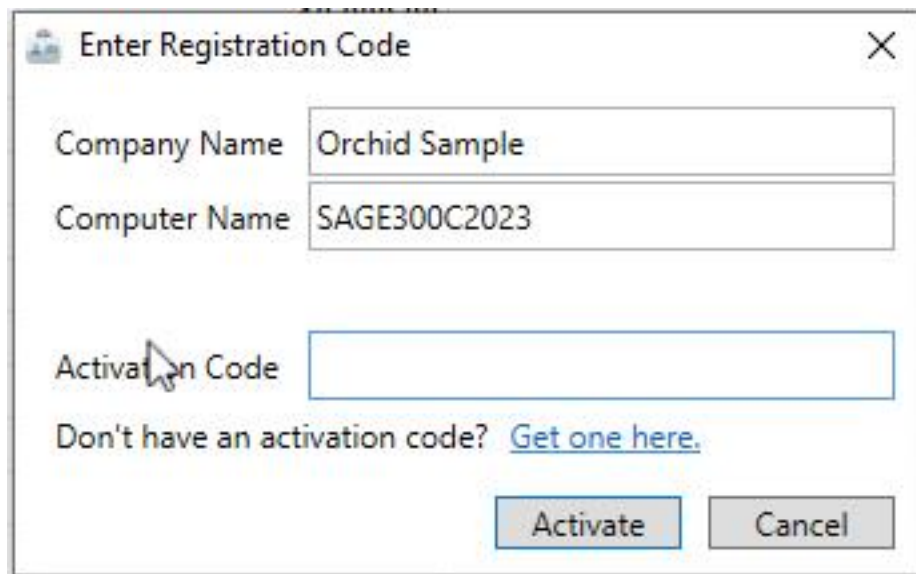
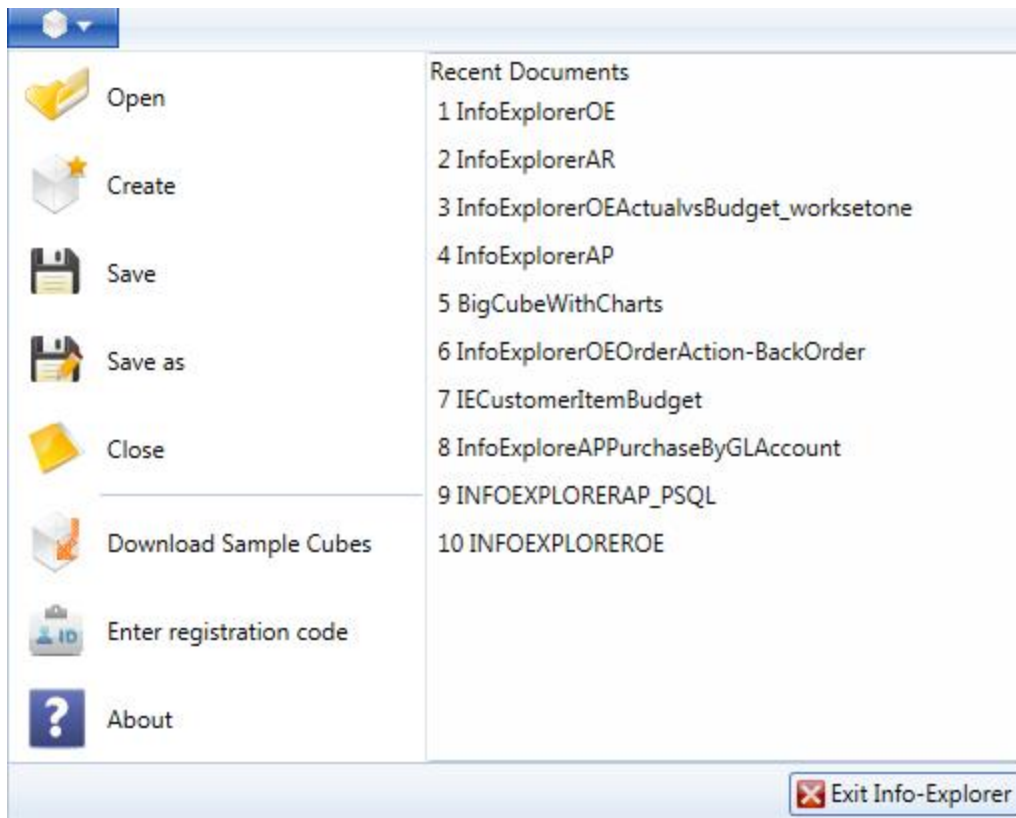
Getting started with Info-Explorer - Refer to Using Info-Explorer on page 29

REGISTER INFO-EXPLORER

Enter an activation code:

When you have received your activation code, from InfoExplorer menu:

- Select **File > Enter Registration code**
- Copy and paste the activation code sent by Orchid Systems in the Activation Code box,
- Click "**Activate**"



Next steps

Getting started with Info-Explorer - Refer to Using Info-Explorer on page 29

INFO-EXPLORER LITE

Refer to the Info-Explorer.com website for details.

To use Info-Explorer Lite (free version of Info-Explorer) after the 30 day trial, you need an activation code. To request an activation code, refer to Request Activation Codes on page 10

Using Info-Explorer Lite with Demo Cubes:

With Info-Explorer Lite, you can only open and refresh Orchid demo cubes available from Info-Explorer menu > Download sample cubes or the Orchid website.

Note: Some cubes in the Info-Explorer Sample cubes are not available with Info-Explorer Lite as they require features not available in Info-Explorer Lite.

Other Limitations of Info-Explorer Lite

1. You cannot "Create Cube"
2. You can only view a single query cube at one time
3. Result sets not being able to be exported to Excel, CSV or HTML.
4. The cube SQL query cannot be amended

Note: Contact your business partner to purchase Info-Explorer Full licence to create your own cubes, modify the queries or Info-Explorer Write Back for budgeting and write back to the database functionality.

Getting Started Steps

The steps below apply to Info-Explorer Lite as well as the Full and Writeback edition.

After installing Info-Explorer, Start > All Programs > Info-Explorer. You can also add a shortcut to the taskbar or to the Sage 300 desktop.

Requirement!

if you are using Info-Explorer Lite, then "create cube", "export to CSV", "export to HTML", "export to MS Excel" and "Worksets" are not available.

Worksets and Writeback are only available if the Info Explorer - Write back licence has been purchased and activated. If you are using "info-Explorer - Full", then "Worksets" and Writeback are not available.

For more details, See Also:	15
Ten Steps to Implement a Business Intelligence Solution using Orchid Info-Explorer	15
Security Considerations	18
Configure Lock Options in Info-Explorer	18
Getting Started with Info-Explorer for Sage 300	20
Getting Started with Info-Explorer for Spire	24

FOR MORE DETAILS, SEE ALSO:

Info-Explorer Analysis Tools on page 43

Working with Info-Explorer - Home Tab on page 74

Using Charts and Dashboards on page 89

Export Overview on page 99

Info-Explorer Writeback on page 115

Tip:

Process Scheduler Level 1 is required to refresh and distribute cubes automatically.

Refer to Process Scheduler documentation for details on how to refresh the Info Explorer automatically

TEN STEPS TO IMPLEMENT A BUSINESS INTELLIGENCE SOLUTION USING ORCHID INFO-EXPLORER

Getting started with Info-Explorer is really easy as it comes with some pre-defined cubes to analyse your data including sales analysis, Purchase analysis, GL detail analysis, AP aged analysis, AP analysis by GL

account, AR aged analysis, AR analysis by GL Account.

To ensure you get the most of Info-Explorer beyond the sample cubes, we have developed the following 10 steps:

Step 1. Clarify the objectives you expect from Info-Explorer

What are the key drivers of your business that you want to monitor, what areas of the business are cause for concern, what matters to your clients (Response time to support cases, low level of back orders,) what questions are you always asked by senior management, is budgeting and forecasting part of the project.

Will you need to write data back to an accounting application for budgeting and forecasting purposes?

Who needs to receive updated cubes? How often do you need to refresh the data?

Step 2. Review the Sample cubes provided with Info-Explorer

There is a wide range of sample cubes on Sage 300 and Spire data and new sample cubes are added regularly. All you need to do is setup the connection to your data from a workstation that can connect to the database.

Determine which cubes answer the questions from Step 1 and what additional info is required.

Refer to the following tutorials to get started with the demo cubes:

Getting Started with Info-Explorer for Spire on page 24

Getting Started with Info-Explorer for Sage 300 on page 20

Step 3. Source the data that isn't in the sample cubes

Make sure what you want to report on is captured in a database, ERP, CRM or other. Spreadsheets are great to store data, but not so great to put in a cube for on-going analysis.

If some elements of the data are missing, consider adding a field to CRM, using Optional fields in Sage 300, a new dimension in other accounting applications.

Write your query or get consultants to help. Generally once the basic query to return the data is written, it doesn't need to be done again. Generally, the query should only return the records you are interested in for performance reasons and to keep the cube as small as possible. If you have many rows being returned by your query, it is a good idea to group the data by the relevant columns (dimensions) by which you want to analyse your data.

Step 4. Confirm your facts and dimensions

Create the first view of the data, facts and dimension. For example, sales by customer and year.

Dimensions include region, department, type of customer, type of product, type of cases, reseller, all dates for example transaction date, date the case is created, expected due date of an order

Note about Date dimensions – Generally Year /Quarter and Months are created automatically if the underlying field is a date.

If doing Fiscal year and fiscal period, you need to write the formula in the query to retrieve the Fiscal Year and Fiscal period and add a new dimension to calculate quarter if it is required.

Facts from ERP include number of companies, sales, cost, quantity sold, number of cases, number of transactions.

Calculated facts include margin, margin %,

If required, create new formulas, for example margin, margin %, show each category as a % of the total row.

Step 5. Drag and drop dimensions

If the default view shows Sales by month and region, you can Swap the rows and columns to show Sales by Region and Month in 1 click. If you want to keep both views, you can copy the view and then swap, creating two quite different representations of the information in just 2 clicks.

Step 6. Add Filters

Filters allow you to focus on some particular records.

Simple dimension filter works well if there are only a few values in a dimension. This is selected by clicking on the "blue highlighted filter" on the appropriate dimension.

Pre-filters are useful if you are want to focus a view on a particular year or a particular category of items or group of customers. They allow you to select multiple conditions and can be turned on/off with a single tick.

Refer to :

Filter a dimension or fact on page 51

Filter Calculated Fact Values Details on page 56

Step 7. Setup Dashboard

Dashboards are a group of cube views and charts and can include information from various cubes and queries. So you could use the dashboard to show sales by product in 2 different ERP companies by placing the view or graph from the one company beside the view or graph from the second company.

Step 8. Setup writeback

If using Info Explorer for budgeting purposes, create the view that will serve as the basis for the forecast and budget. Identify how the first budget version will be estimated (for example last year sales + %). Determine where the budget should be stored, GL budget, Inventory – sales by item, custom entity.

Step 9. Setup security

If required, determine who should be able to refresh the data, update the cube, write data back to ERP and setup the cube security properties.

Refer to Security Considerations below

Step 10. Refresh data and distribute the cube

If the cube is saved on a shared drive, all colleagues with Info-Explorer with access to the drive can view the data.

There are several ways to refresh cubes, depending on your requirements and the databases you are connecting to. Refer to Refresh Info-Explorer Cubes on page 40

SECURITY CONSIDERATIONS

When the data is extracted from your ERP Application and put into a cube, then any data in the cube will be visible to that Info Explorer user.

It is advised to use a database user that has Read-Only rights to the database (except where you are using Info-Explorer Writeback to update budget figures). This is configured outside of Info-Explorer.

You can lock Files and Cubes to protect data once it is being extracted. You can also lock the actual query to ensure that users only view the data they are entitled to see.

Example: So if you are concerned about a user seeing GL data in Info Explorer, you need to ensure the user only has access to cubes that don't include GL data and lock the query so that they can't amend the query. Typically, this requires a unique data cube for that user that only shows data you want them to see.

Note: If you were Drilling through the cube into Sage 300 underlying screens, then you would need to log into Sage 300 with an ID and Password and the security settings in Sage 300 would apply any restrictions on what that user could see. only applicable to Sage 300



Clicking Properties on the Home Ribbon will allow you to define and change the existing properties of the cube.

Use the Options > **Lock** buttons to set passwords on selected functions in Info-Explorer.

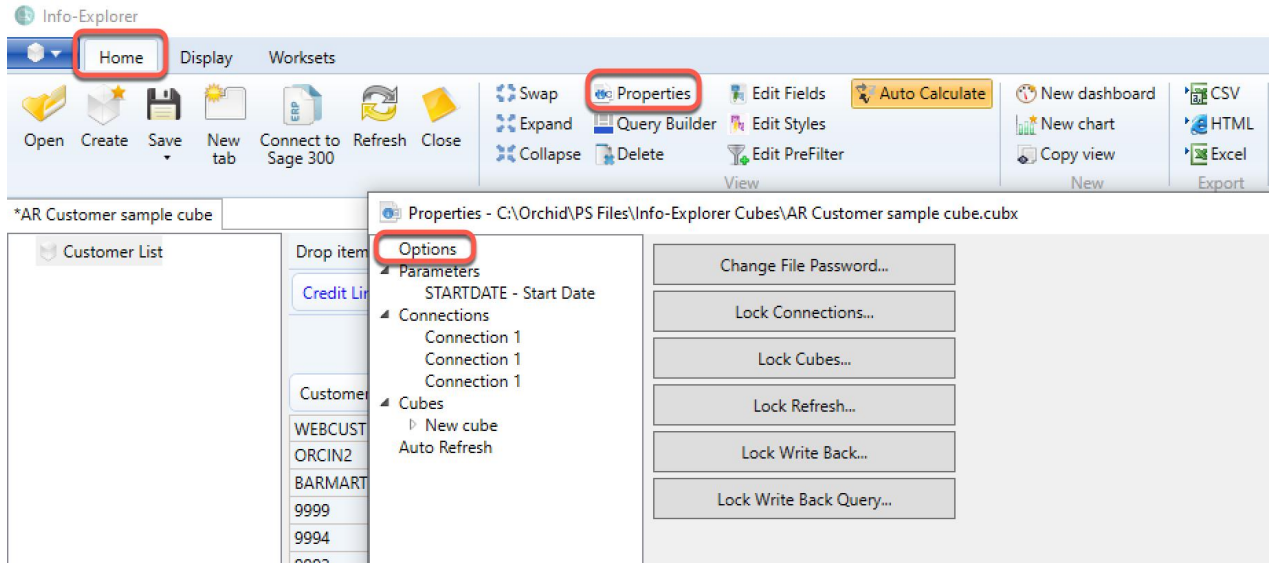
Refer to Configure Lock Options in Info-Explorer below for details.

CONFIGURE LOCK OPTIONS IN INFO-EXPLORER



Clicking Properties on the Home Ribbon will allow you to define and change the existing properties of the cube.

Use the Options > **Lock** buttons to set passwords on selected functions in Info-Explorer.

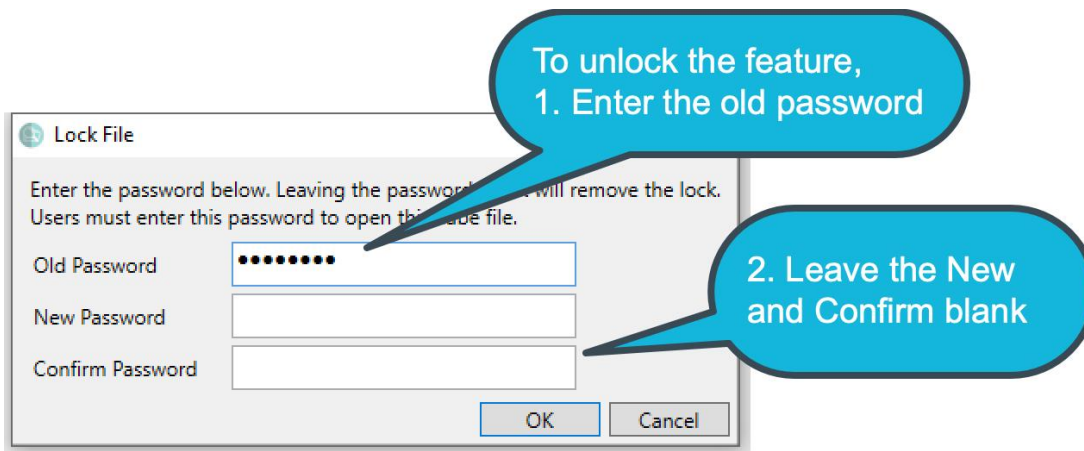


Options : Security options for the cube.

You can set a password for the following function in Info-Explorer. Users are prompted to enter the password before they can change the cube configuration or run the locked process, such as Refreshing the cube.

Remove the Lock

To remove the lock, enter the Old Password and leave the password blank (for New and Confirm).



Tip: There is no master password. If you don't remember the password, the file may become unusable. We suggest to save a copy of the unprotected file in a secure folder that only Admin users have access to. You need to enter the existing

When to use Lock options

- **Lock File:** Users need a password to open an entire .cubx file
- **Lock Connections:** Users need to enter the password to view/change the connection parameters. This is useful to ensure users cannot change the database that the cube is pointing to.
- **Lock Cubes:** Users need to enter the password before viewing or amending the query. This is relevant when you want to restrict what tables/entities are included in the cube.
- **Lock Refresh:** Users need to enter the password to refresh the cube. This is often used for large cubes and in conjunction with using automated processes to refresh the cubes outside of business hours.
- **Lock Writeback:** Users need a password to write to the ERP Application database and update the budget/forecast data with the currently selected Workset.
- **Lock Writeback Query:** Users need a password to change the query being used and therefore the data being updated in the ERP Application when using the Writeback function.

See Also:

Properties: Security, Connections and Parameters on page 102

Security Considerations on page 18

GETTING STARTED WITH INFO-EXPLORER FOR SAGE 300

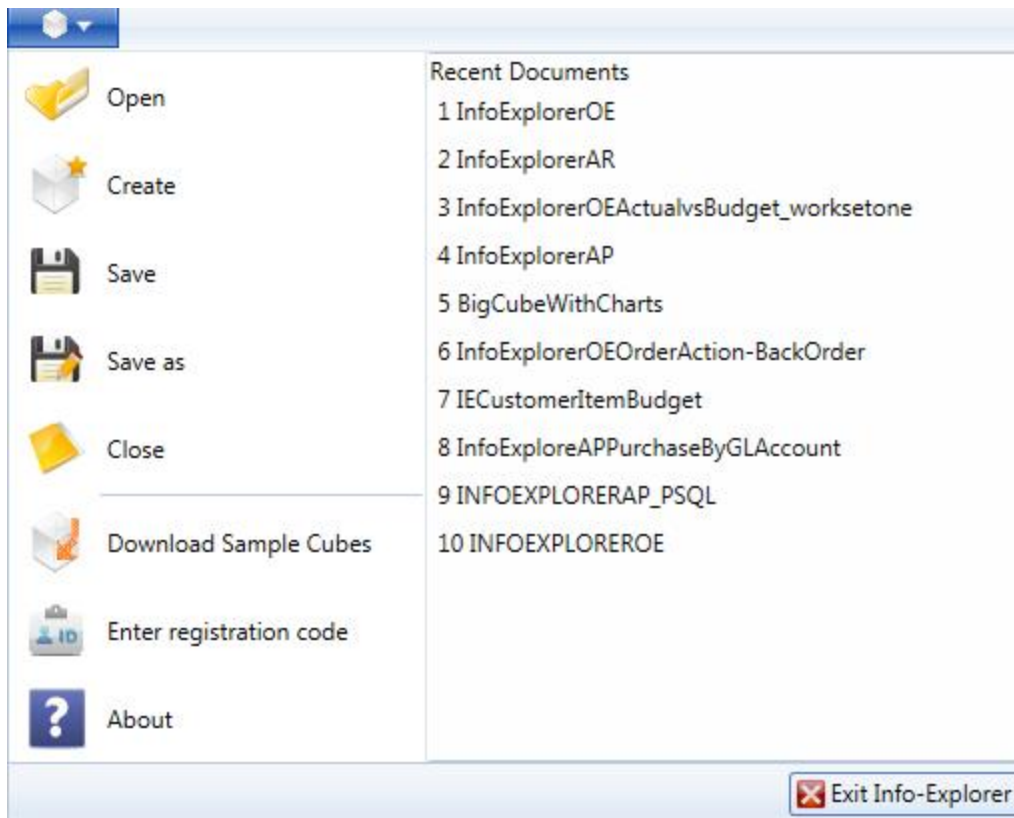
Sample cubes are provided for Sage 300 databases. They include standard queries relevant for Sage 300 users. When you open the sample cube, you will see data from the Sage 300 sample data to illustrate the dashboard, charts and analysis capabilities of Info-Explorer.


Step 1. Download sample cubes

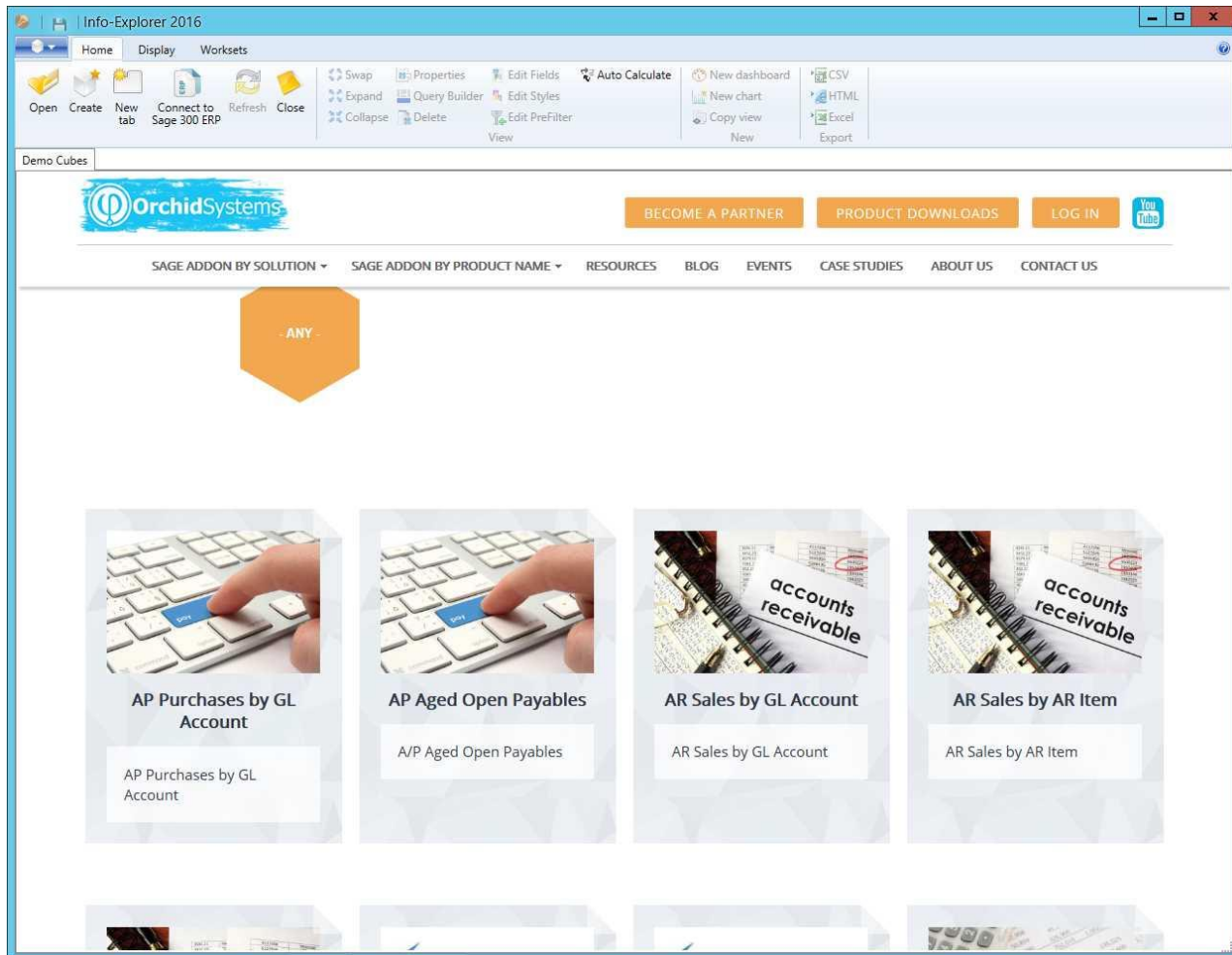
Cubes are available for:

- Sage 300 GL, AR, AP, PO, PJC, IC, OE/Sales Analysis
- Sage 300 US & Canadian Payroll
- Orchid Extender, RMA, Bin Tracking
- Budget Analysis
- Selected 3rd Party products

From Info-Explorer, Click File > Download Sample Cubes



- To download the cube, click on the cube you would like, this will open the cube in Info-Explorer.
- Save the cube using File > Save as .  and choose where to save the cube.



Step 2. Update connection details

You can connect the sample cubes to your data.

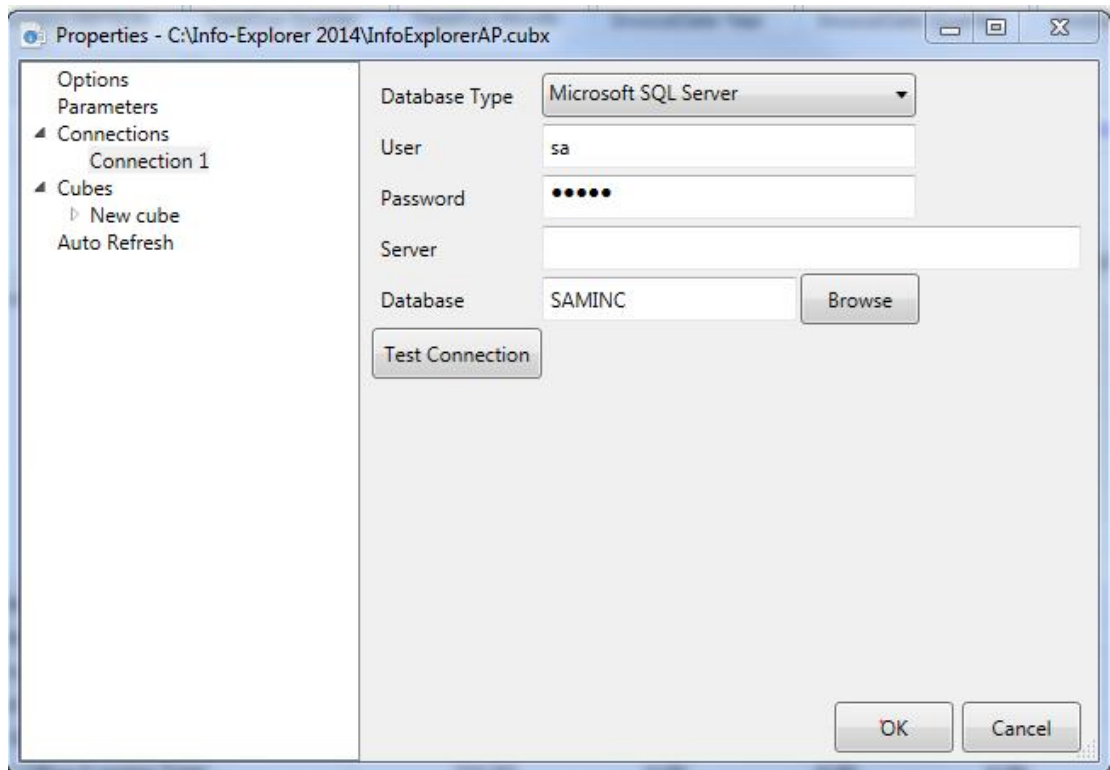
Select Properties  on the Home Ribbon:

- Click on the appropriate connection
- Amend the connection details.
- The details to provide depend on the database type.
- Database Type = Microsoft SQL Server
- Database User ID - It is recommended to create a dedicated user in the database with the minimum security rights required to read data in the appropriate databases.
- Database Password
- Server / Datasource
- Database - Name of the SQL Server database

Note: When using Sage 300, the Database name can be different from the Sage Database ID. The user name and password are not the details you use to login to Sage 300 application. They are details to connect to the SQL database.

Example:


Using Sage 300



Refer to Connect to a database on page 35 for details.

Save the cube using File > Save as .  and choose where to save the cube.

Step 3. Refresh the data

 to refresh the cube data.

Refresh cube manually on page 40

Step 4. Start Analysing Your data

You can Change what you view in Info-Explorer by changing the dimensions, creating new views, charts and dashboards.

You can view details using Drill-down to underlying records: Drill down to view details. on page 69
In many cubes, you can also Drill-through to open the Sage 300 screens: Drill Through to Sage 300 screens on page 70

GETTING STARTED WITH INFO-EXPLORER FOR SPIRE

To start using Info-Explorer, you need a cube file. In most cases, you start with Orchid demo cubes.

Note: Available since May 2023 on the Info-Explorer website <https://www.info-explorer.com/resources/cubes>.

Step 1. Download sample cubes

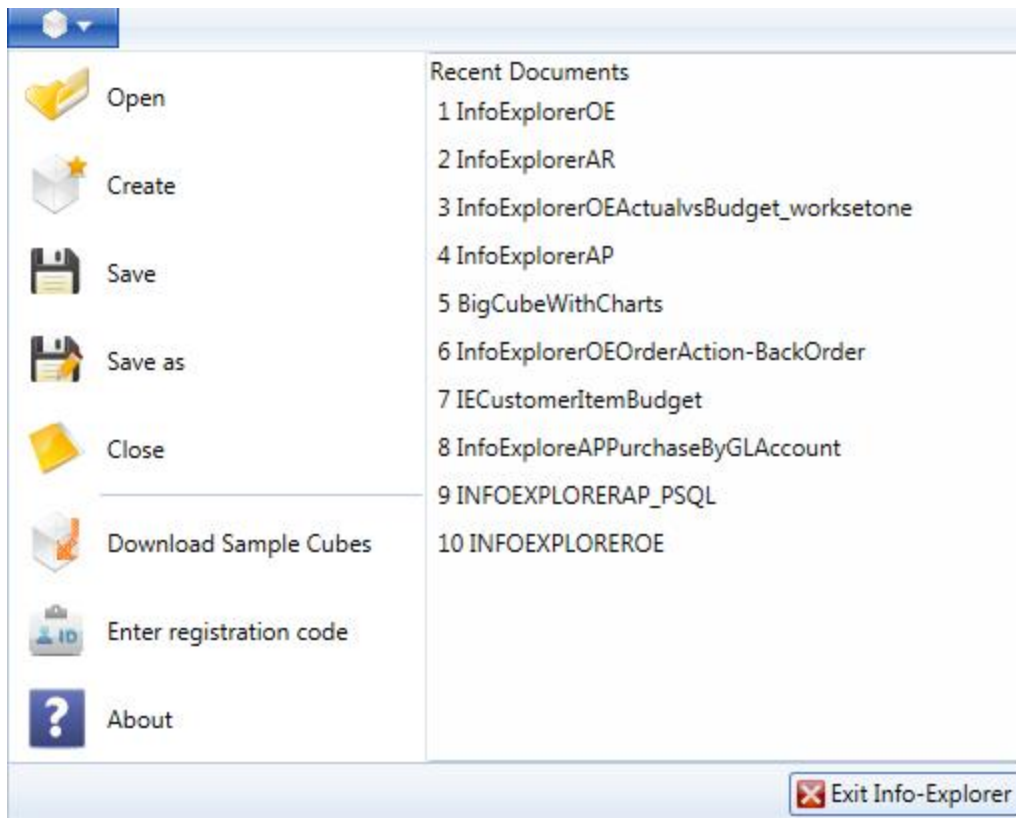
Sample cubes are provided for Spire databases. They include standard queries relevant for Spire users. When you open the sample cubes, you will see data from the Spire sample data to illustrate the dashboard, charts and analysis capabilities of Info-Explorer.


You can create your own cubes and connect to the Spire databases using ODBC.

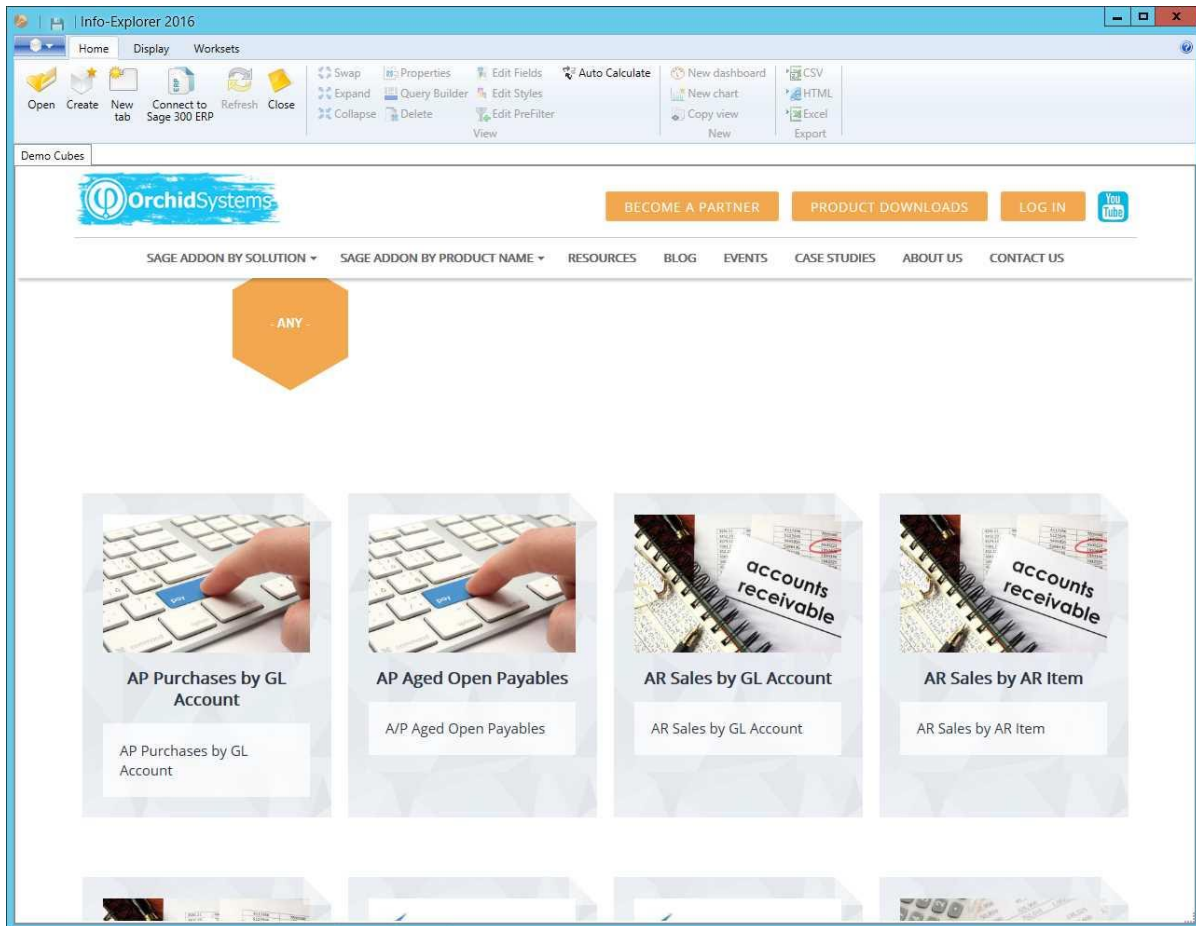
Cubes are available for:

- Spire GL, AR, AP, Purchase Orders, Inventory, Order/Sales Analysis

From Info-Explorer, Click File > Download Sample Cubes

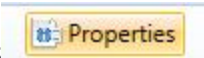


- To download the cube, click on the cube you would like, this will open the cube in Info-Explorer.
- Save the cube using File > Save as .  and choose where to save the cube.



Step 2. Update connection details

You update the connection details to connect the sample cubes to your data.

Select Properties  on the Home Ribbon:

- Click on the appropriate connection
- Amend the connection details.
- The details to provide depend on the database type.

Connection Details when Using Spire

Prerequisite to setup Spire ODBC

You need a 64-bit ODBC connection to the Spire database to use Info-Explorer. You can use an existing connection or create a new one.

In most cases, you need to add some lines to the Spire pg_hba file on the Spire server as follows:

File: "C:\ProgramData\Spire\PostgreSQL\14\pg_hba.conf"

Spire pg_hba file

host	all	spireapp	fe80::/64	md5
host	all	spireapp	samenet	md5

The ODBC Credentials can be found in the spire.ini file in C:\ProgramData\Spire for spireapp

Note: Contact your Spire partner for assistance with setting up the ODBC connection.

Install 64-bit PostgreSQL ODBC Driver

As Info-Explorer is a 64-bit application, you need to download and install the 64-bit ODBC driver on machines used to refresh the cube.

Refer to PostgreSQL site to download the ODBC driver. <https://www.postgresql.org/ftp/odbc/versions/msi/>

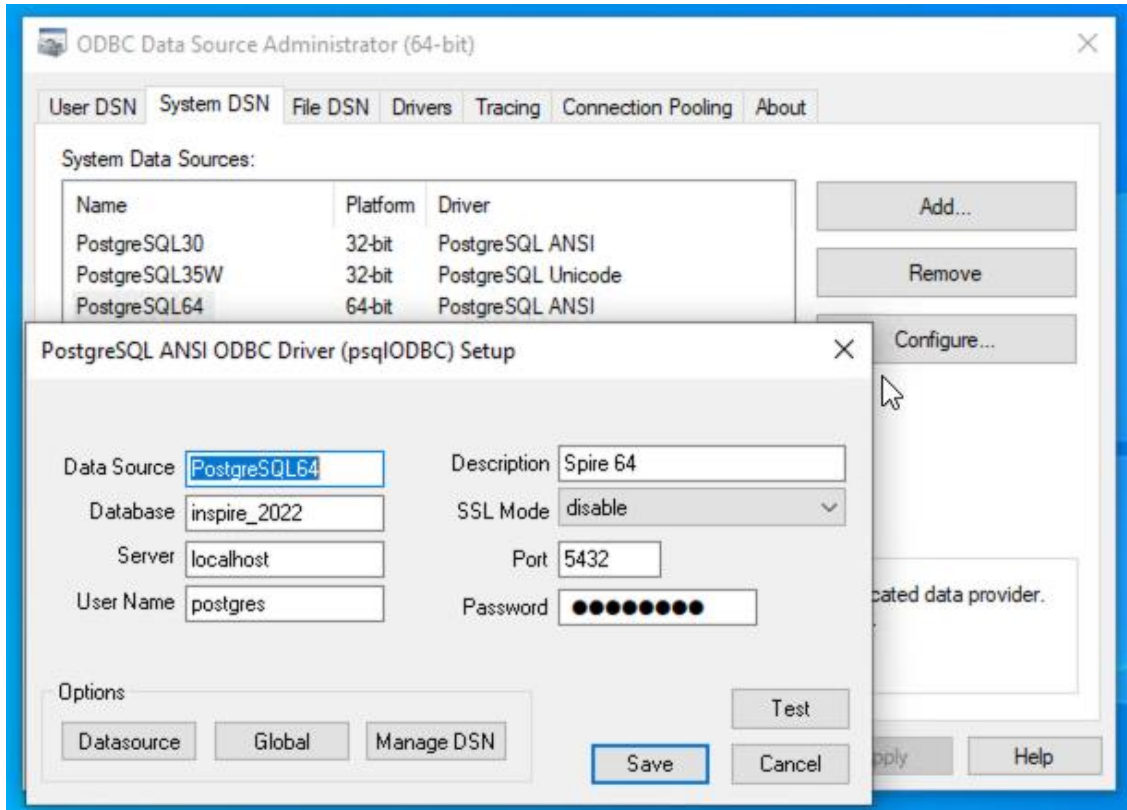
Create an ODBC Connection to the PostgreSQL database

Data Source Name: This name will be used in Info-Explorer

Database: Enter the Database Name that you want to analyse with Info-Explorer

User: Enter a database user that has rights to read the database.

Tip: You can use the credentials found in the spire.ini file in the c:\ProgramData\Spire folder on spireapp mentioned above or create a dedicated user with sufficient rights to the database.



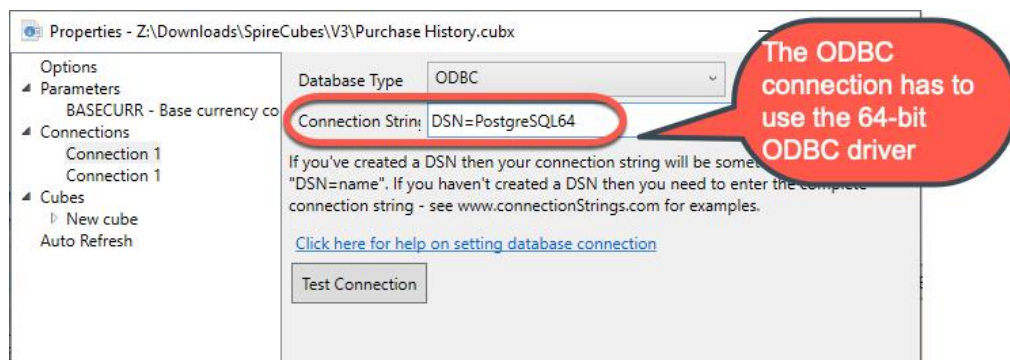
Update Connection Details in Info-Explorer

Database Type : ODBC

Option 1: Use ODBC Connection

Connection String: If you have setup an ODBC connection, enter DSN-Name=ConnectionName in Info-Explorer > Properties > Connection

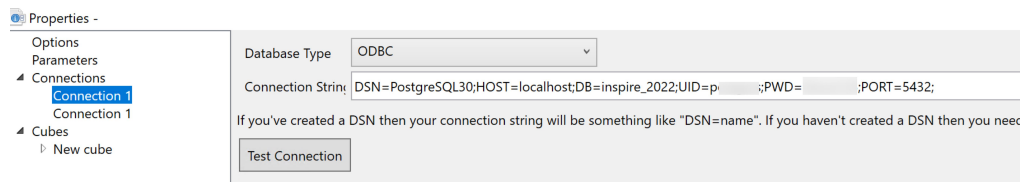
In the example below, the DSN is called PostgreSQL64



Option 2: Use full connection string

Alternatively, you can enter the full Connection String with the following details

```
DSN=PostgreSQL30;HOST=localhost;DB=inspire+2022;UID=user;  
PWD=passwd;PORT=5432;
```



Test the Connection

Use the Test Connection button to ensure the connection is successful.

Troubleshooting the connection

If you get an ODBC error 22P05, error: character with byte sequence in encoding UTF8 has no equivalent in encoding WIN1252, change the driver from "PostgreSQL ANSI(x64)" to "PostgreSQL Unicode(x64)", then restart Info-Explorer and check if it works ok.

Save the cube

Save the Cube and Refresh the Data.

Refer to Connect to a database on page 35 for details.

Save the cube using File > Save as .  and choose where to save the cube.

Step 3. Refresh the data



to refresh the cube data.

Refer to Refresh cube manually on page 40

Step 4. Start Analysing Your data

You can Change what you view in Info-Explorer by changing the dimensions, creating new views, charts and dashboards.

You can view details using Drill-down to underlying records: Drill down to view details. on page 69

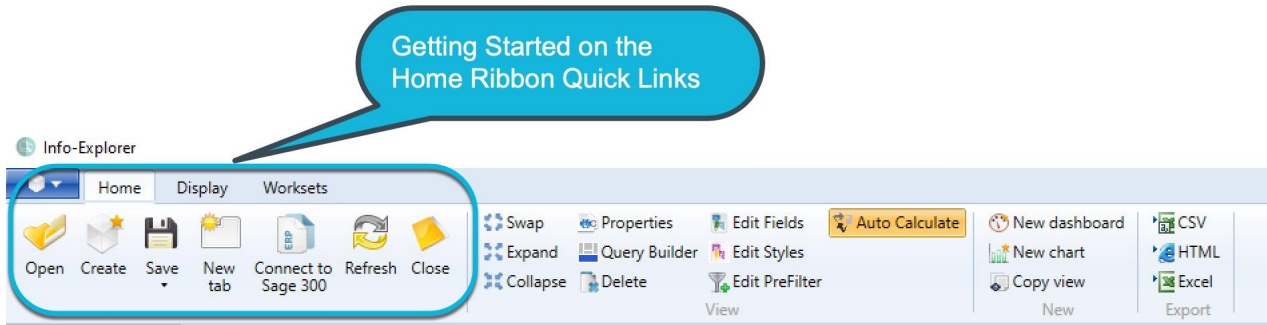
Using Info-Explorer

To start using Info-Explorer, you need a cube file. In most cases, you start with Orchid demo cubes.

To download sample cubes, save, open and close cubes, refer to the topics below:

Download Sample Cubes	30
Open a cube	32
Save a cube	33
Connect cube to your database	34

Most of the actions above are accessible on the Home Ribbon > Quick Links



DOWNLOAD SAMPLE CUBES

Sample Info-Explorer cubes are available on the Info-Explorer website <https://www.info-explorer.com/resources/cubes>.

They can also be accessed from the application.


Sample cubes are provided for Sage 300 and Spire databases. They include standard queries relevant for users of those applications. When you open the sample cube, you will see data from sample data to illustrate the dashboard, charts and analysis capabilities of Info-Explorer.

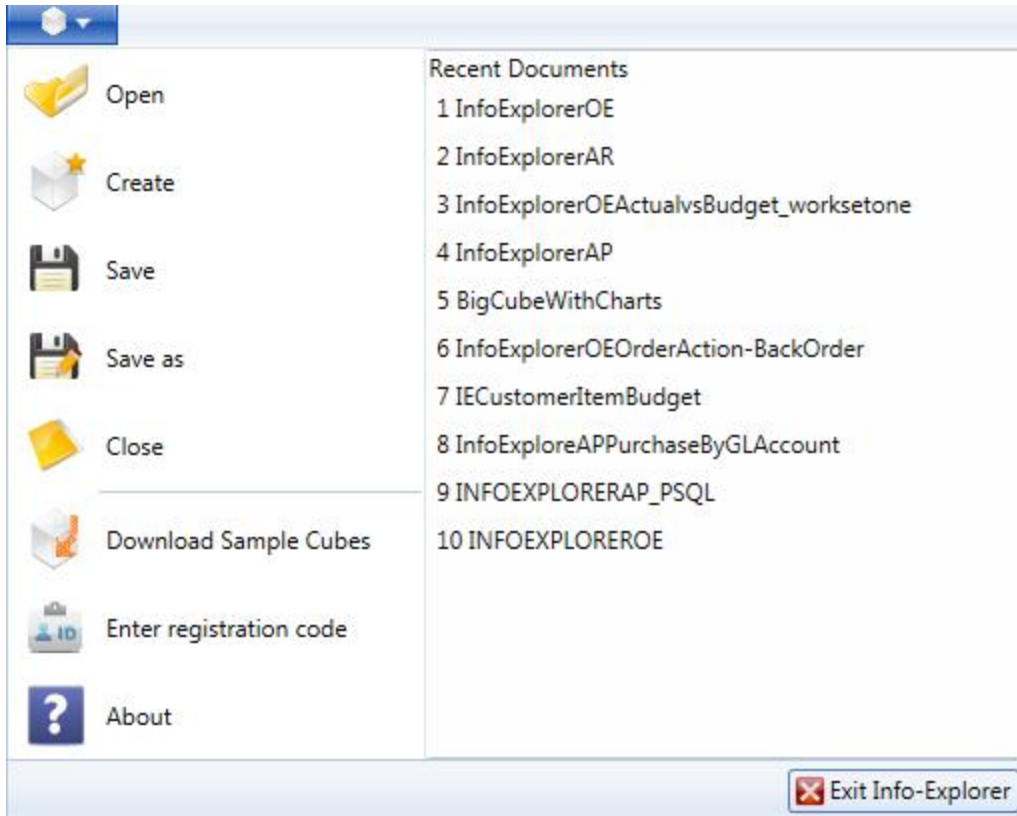
Cubes are available for:

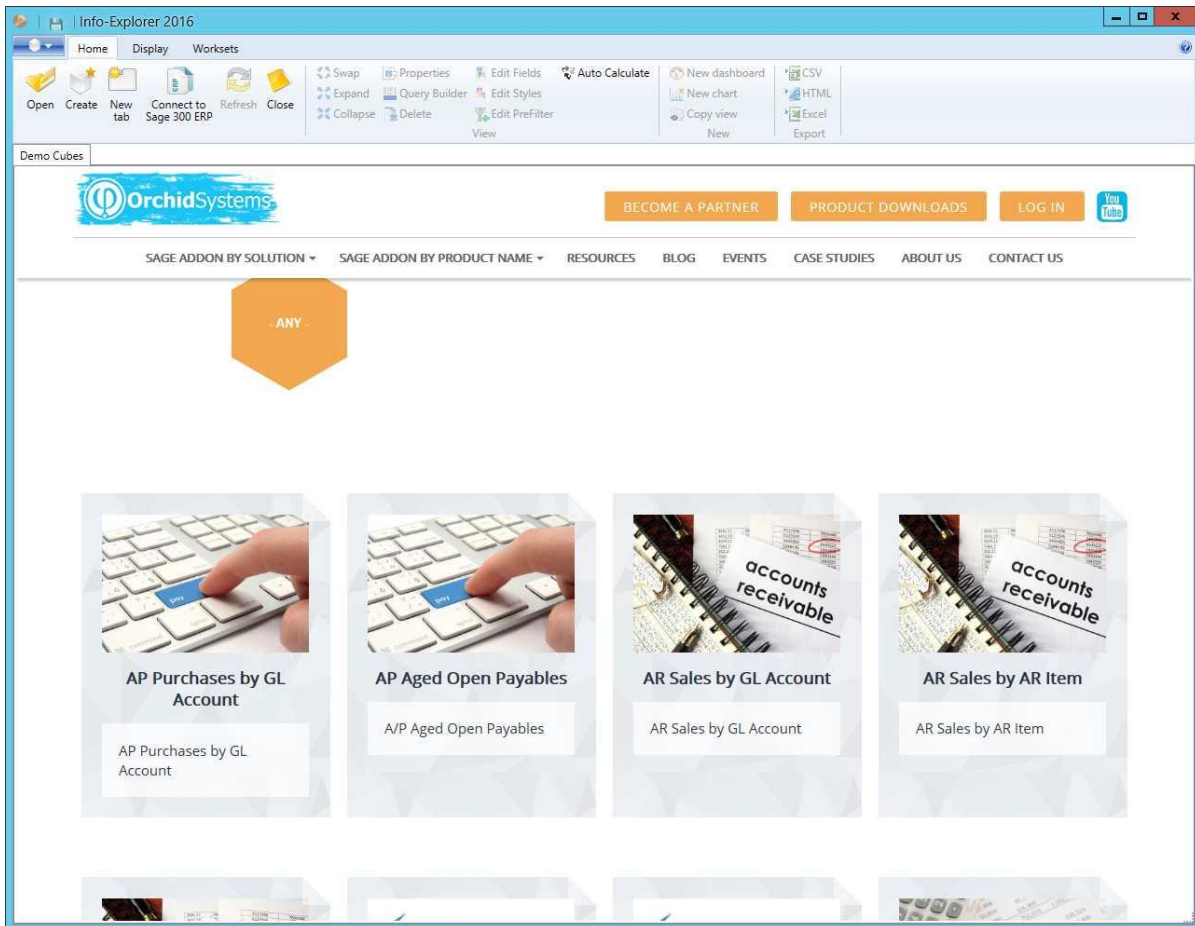
- Spire Order Sales analysis, Purchase Order Analysis, Accounts Payable, Accounts Receivable and General Ledger.
- Sage 300 GL, AR, AP, PO, PJC, IC, OE/Sales Analysis
- Sage 300 US & Canadian Payroll
- Orchid Extender, RMA, Bin Tracking
- Budget Analysis
- Selected 3rd Party products

Steps to use the cubes

1. From Info-Explorer, Click File > Download Sample Cubes
2. To download the cube, click on the cube you would like. This will open the cube in Info-Explorer.

3. Save the cube using File > Save as .  and choose where to save the cube.
4. You can connect the sample cubes to your data. Connect cube to your database on page 34





OPEN A CUBE

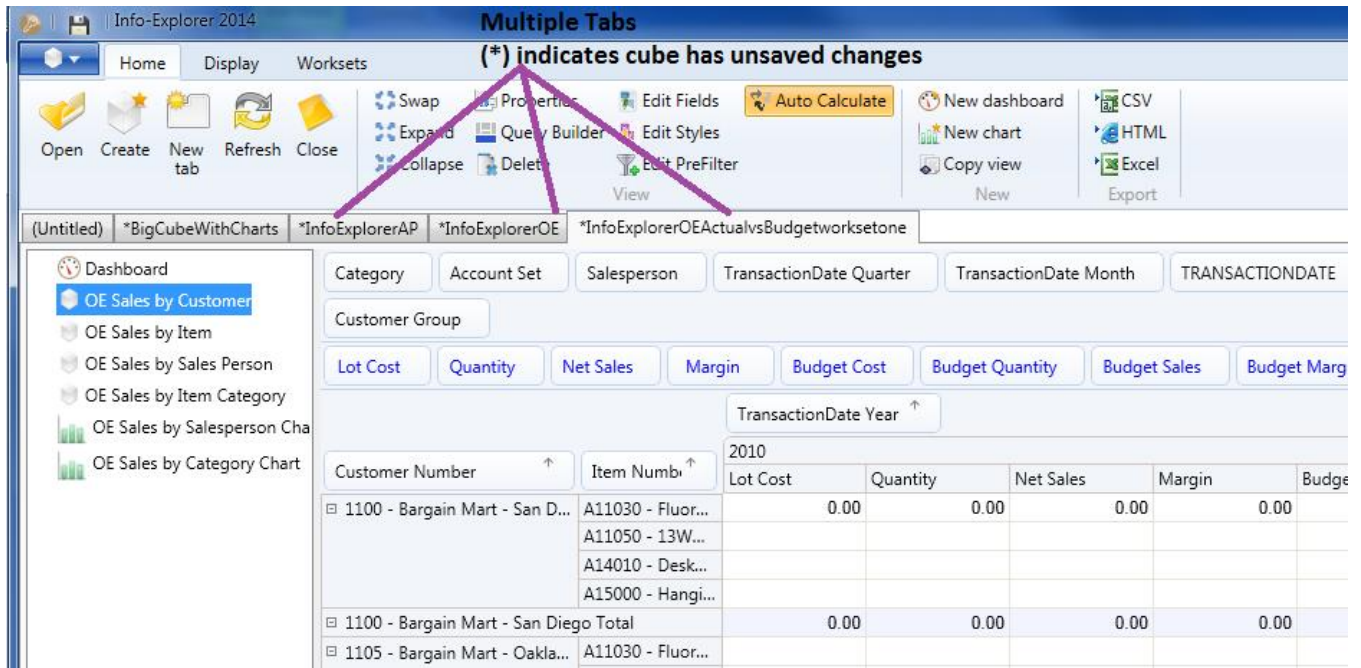


To open a cube, go File>Open . , and select the cube (.cubx file extension).


To open an existing cube, click File>Open File and specify the file path and cube name accordingly, or select the required document from the Recent Documents list.

If you open multiple cubes files, you will have multiple tabs, one per cube file.

Tip: The asterisk "*" beside a cube file name indicates unsaved changes have been made. If you close this cube file without saving, you will be prompted if you want to lose the changes.



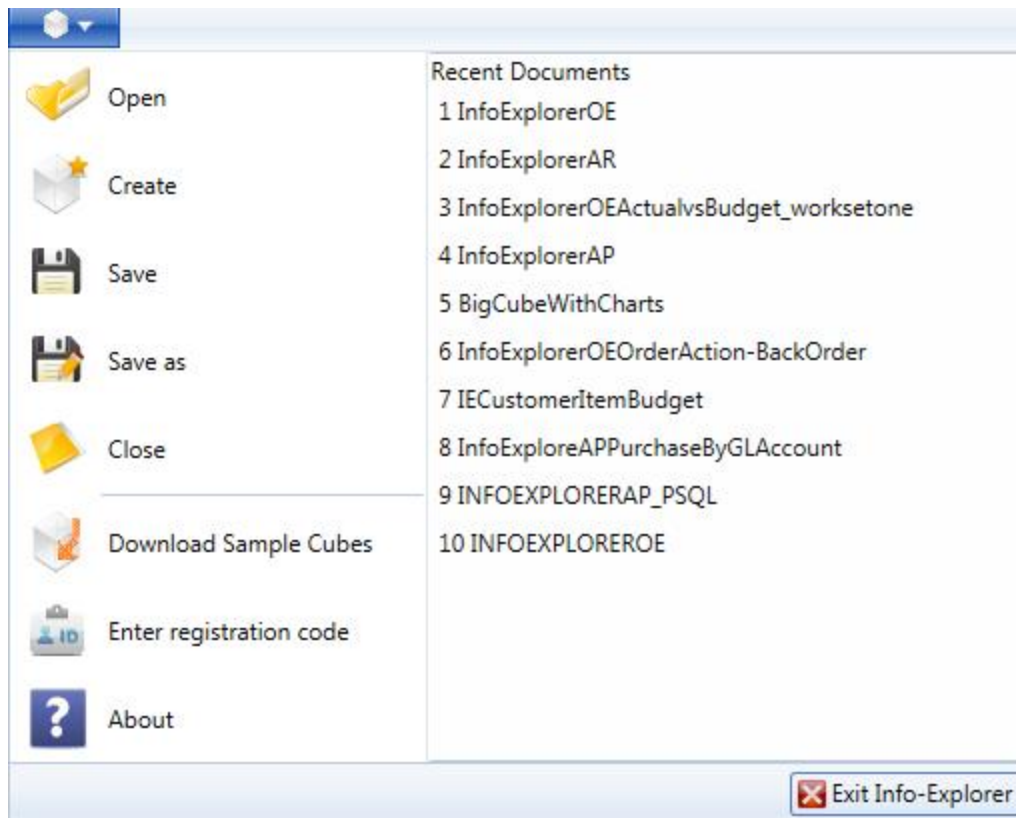
SAVE A CUBE

To save a new configuration of a cube, click File> Save or click on  (to overwrite the existing cube) or File> Save As (to create a new cube and provide a new file name)

You should save a cube after

- you have [configured your cube](#) to point to a new database
- new [formatting](#) has been applied
- a [new cube](#) has been created
- a [new view](#) has been created
- a [new chart](#) has been created
- a [new dashboard](#) has been created
- an existing view, chart or dashboard has been amended or re-configured
- the data has been [refreshed](#)

if these changes are required to be preserved



Close a cube



will close the currently active cube.

CONNECT CUBE TO YOUR DATABASE

Info-Explorer reads data and populates the cube through a connection to the database.

For most users, the database is Microsoft SQL Server or an ODBC connection.

To connect to your databases, review the content below.

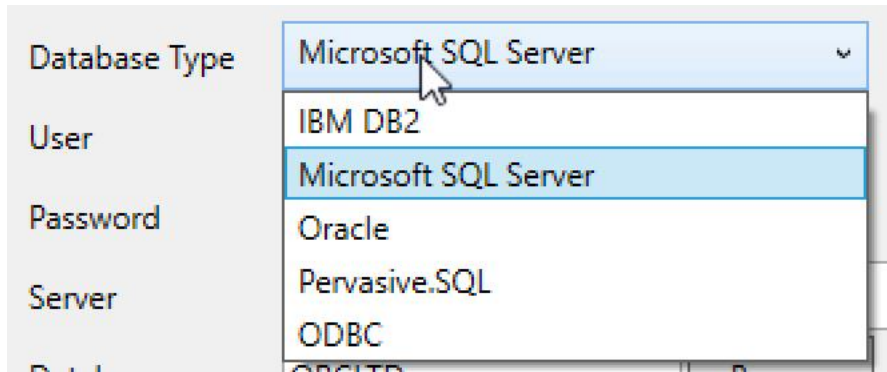
Tip: The same steps are used to change the connection details from one database to another and when your database connection details change.

Important! if you are using Info-Explorer Lite, you can connect to your own databases, but you need to use the queries defined in Orchid's demo cube.

Connect to a database

Info-Explorer needs a connection to the database to read and refresh data.

Info-Explorer supports the following connections: Microsoft SQL Server, IBM DB2, Oracle, Pervasive.SQL and ODBC



To configure an existing cube to a database, you need to update the connection details, save the cube and refresh the data.

Select Properties  on the Home Ribbon:

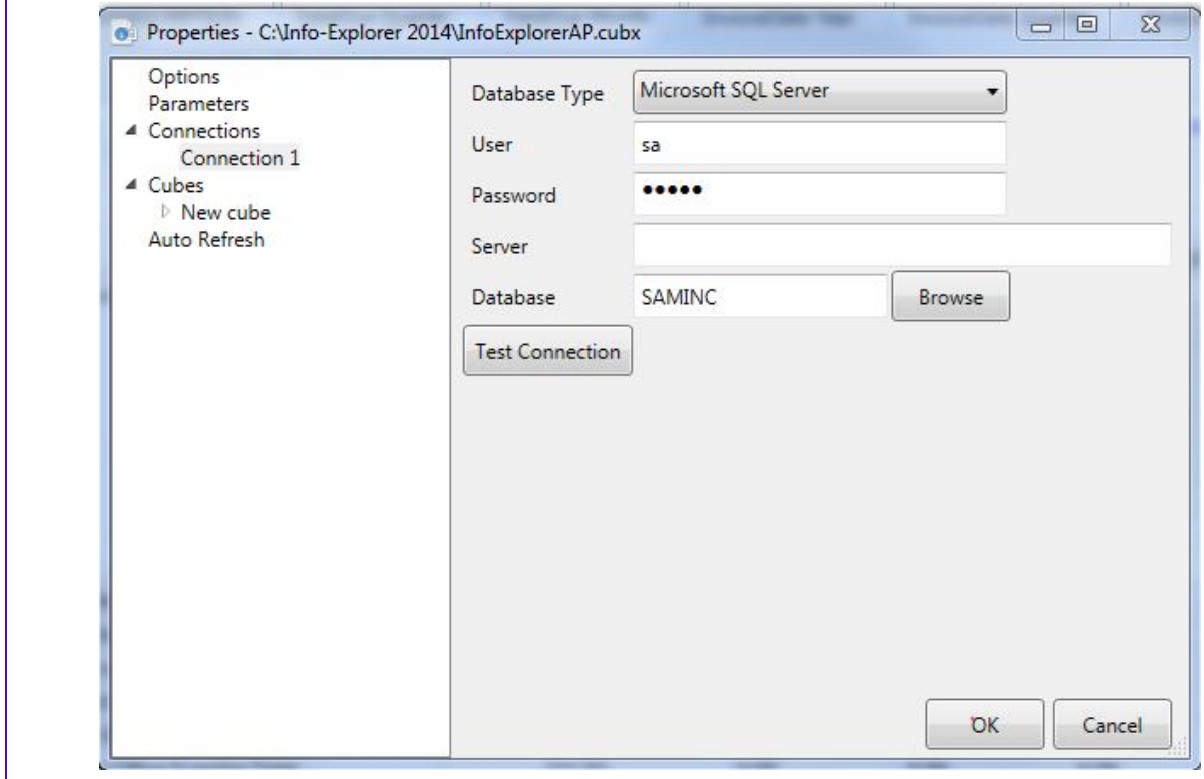
- Click on the appropriate connection
- Amend the connection details.
- The details to provide depend on the database type.

Database Type = Microsoft SQL Server

This is used for Sage 300 data, Sage CRM data or other Microsoft SQL Server databases.

- Database Type = Microsoft SQL Server
- Database User ID - It is recommended to create a dedicated user in the database with the minimum security rights required to read data in the appropriate databases.
- Database Password
- Server / Datasource
- Database - Name of the SQL Server database

Note: When using Sage 300, the Database name can be different from the Sage Database ID. The user name and password are not the details you use to login to Sage 300 application. They are details to connect to the SQL database.

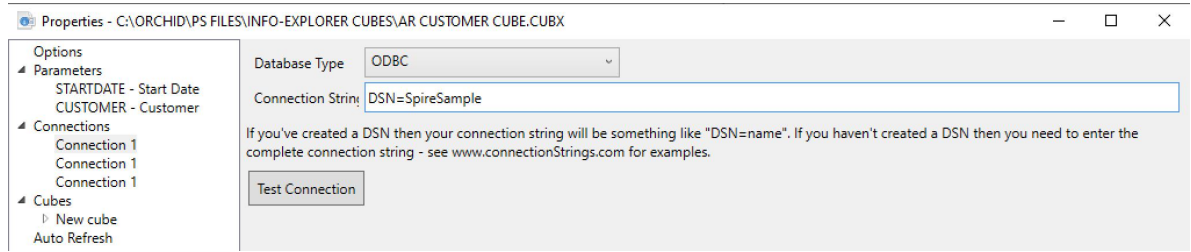
Example:**Using Sage 300****Database Type = ODBC**

This is used for Spire database.

Important!

As Info-Explorer is a 64-bit application, you need to download and install the 64-bit ODBC driver for the database you use on machines used to refresh the cube.

1. Create an ODBC Connection using the 64-bit ODBC driver. Enter details of a database user that has rights to read the database on the server/machine where you need to connect to the database and refresh the data.
2. In Info-Explorer > Properties > Connections, Select Database Type = ODBC
3. Enter the ODBC connection name



4. You can also enter the full details in the connection string. In most cases, the connection string includes the DSN Name, the HOST, DB, UID, PWD and PORT Number.

Spire ODBC Detailed steps

Prerequisite to setup Spire ODBC

You need a 64-bit ODBC connection to the Spire database to use Info-Explorer. You can use an existing connection or create a new one.

In most cases, you need to add some lines to the Spire pg_hba file on the Spire server as follows:

File: "C:\ProgramData\Spire\PostgreSQL\14\pg_hba.conf"

Spire pg_hba file

host	all	spireapp	fe80::/64	md5
host	all	spireapp	samenet	md5

The ODBC Credentials can be found in the spire.ini file in C:\ProgramData\Spire for spireapp

Note: Contact your Spire partner for assistance with setting up the ODBC connection.

Install 64-bit PostgreSQL ODBC Driver

As Info-Explorer is a 64-bit application, you need to download and install the 64-bit ODBC driver on machines used to refresh the cube.

Refer to PostgreSQL site to download the ODBC driver. <https://www.postgresql.org/ftp/odbc/versions/msi/>

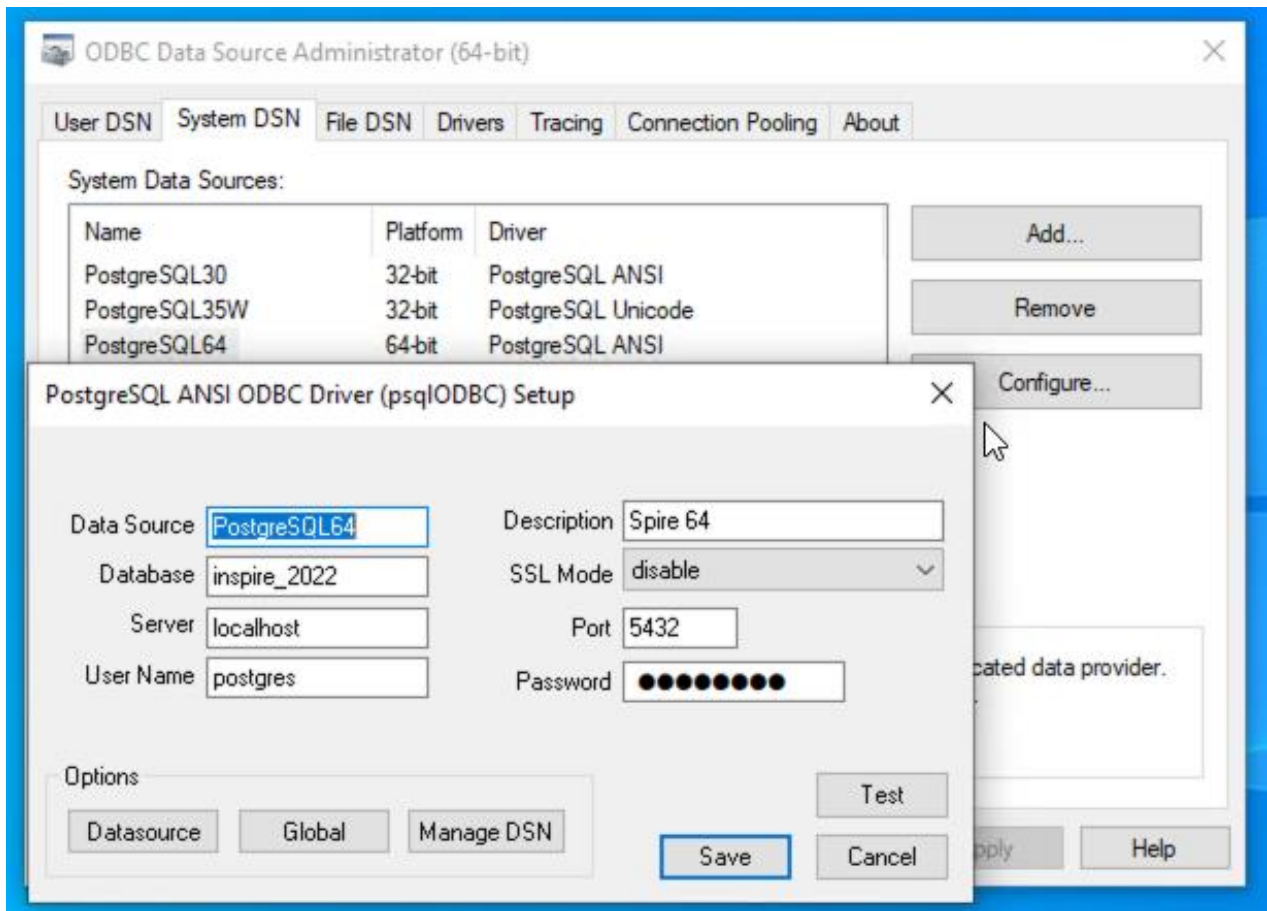
Create an ODBC Connection to the PostgreSQL database

Data Source Name: This name will be used in Info-Explorer

Database: Enter the Database Name that you want to analyse with Info-Explorer

User: Enter a database user that has rights to read the database.

Tip: You can use the credentials found in the spire.ini file in the c:\ProgramData\Spire folder on spire-app mentioned above or create a dedicated user with sufficient rights to the database.



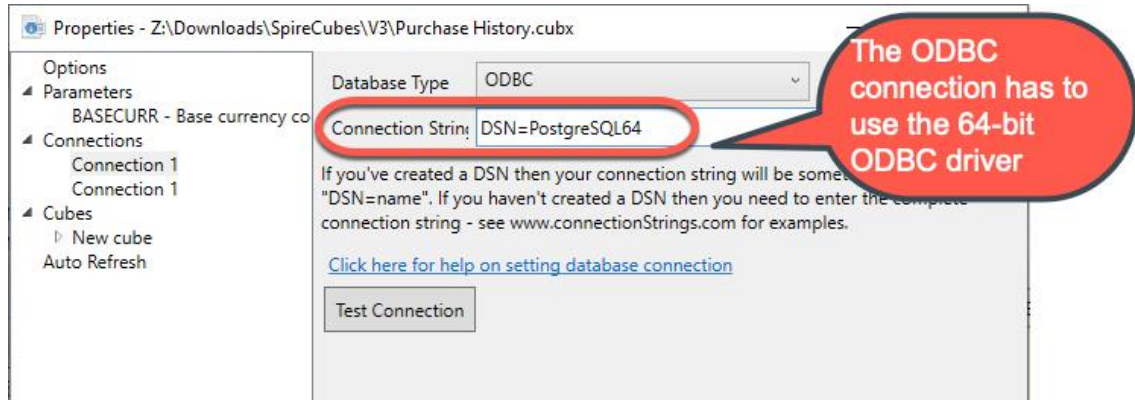
Update Connection Details in Info-Explorer

Database Type : ODBC

Option 1: Use ODBC Connection

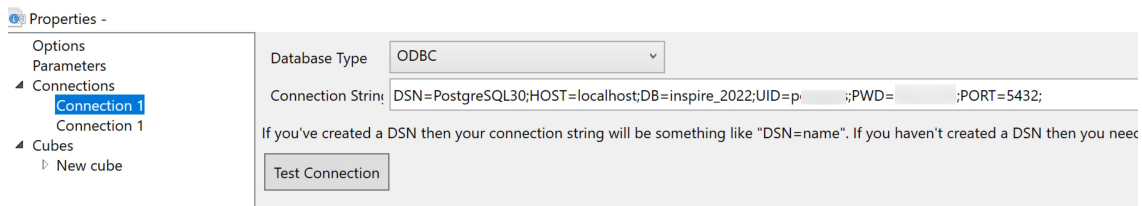
Connection String: If you have setup an ODBC connection, enter DSN=ConnectionName in Info-Explorer > Properties > Connection

In the example below, the DSN is called PostgreSQL64



Option 2: Use full connection string

Alternatively, you can enter the full Connection String with the following details
 DSN=PostgreSQL30;HOST=localhost;DB=inspire+2022;UID=user;
 PWD=passwd;PORT=5432;



Test the Connection

Use the Test Connection button to ensure the connection is successful.

Troubleshooting the connection

If you get an ODBC error 22P05, error: character with byte sequence in encoding UTF8 has no equivalent in encoding WIN1252, change the driver from "PostgreSQL ANSI(x64)" to "PostgreSQL Unicode(x64)", then restart Info-Explorer and check if it works ok.

Save the cube

Save the Cube and Refresh the Data.

Noteworthy

- Use "test connection" to verify your details.
- The connection details are used when refreshing the data. If you send an existing cube to a user who doesn't have access to the SQL Database or the ODBC Connection, they can still analyse the data in the cube, but they can't refresh the data.
- It is recommended to save the cube after updating the database properties to save the database settings. Refer to Save a cube on page 33

Refresh data

Then click "refresh" to update the cube's data. Refer to Refresh cube manually below

Connect to Sage 300

This is used to drill-down to the Sage 300 screen when configured in the cube.

Note: This is not used to refresh the data.



Click this icon to connect to Sage 300 (formerly Accpac). You will only see this icon if a Sage 300 workstation setup has been run on the workstation.

Enter the Sage 300 Database ID (not the SQL database name), User name and password you use to log on to Sage 300.

Refresh Info-Explorer Cubes

There are several options to refresh Info-Explorer cubes:

1. Manually in Info-Explorer : Refer to Refresh cube manually below
2. Configure Auto-Refresh while using the cube: Refer to Auto Refresh on page 114 Option.
3. Configure Refresh on Opening the cube - Go to the Home > Properties > Cubes > Select a cube.
4. Refresh automatically without using the application: Refresh Cube with Command Line on the facing page
5. If using Sage 300, you can use Process Scheduler Level 1 to refresh and email the cubes to selected users. Refer to Process Scheduler Help for details:

[Process Scheduler help - Refresh Info-Explorer Cube](#)

Tip:

You can lock the Refresh Option if you don't want all users to connect to the database too often.

Refer to Configure Lock Options in Info-Explorer on page 18

REFRESH CUBE MANUALLY



to refresh the cube data.

If you have multiple queries, you will see a "down arrow" below Refresh, allowing you to refresh "All Cubes" or each individual cube in your cube file.



All current formatting, views etc will be preserved.

Tip: You can lock the ability to refresh the data with a password. Refer to [Configure Lock Options in Info-Explorer](#) on page 18

REFRESH CUBE WITH COMMAND LINE

You can run Info-Explorer from the command line, by passing the cube name, and if required Passwords and Parameters to refresh the cube.

Tip: If using Sage 300, you can use Process Scheduler Level 1 to refresh and email the cubes to selected users. Refer to [Process Scheduler Help](#) for details:

[Process Scheduler help - Refresh Info-Explorer Cube](#)

There are two main options to run the program, with the UI or without:

- Refresh the cube without opening a UI. This is useful to refresh the cube overnight unattended. Users can then open the cube with the latest data without having to refresh manually.
- Refresh and leave the cube open for analysis. This makes the parameters hidden, so you are not prompted and don't have to click OK. If you have parameters for the cube, you have an option to refresh, close and re-open the cube with the correct parameters.

Command line syntax

Run the CMD program and navigate to where Info-Explorer is installed.

The program to run is InfoExplorer.exe

Enter the full path and cube file name, surrounded by double quotes ("") to cater for spaces in file path and file names.

```
c:\Program Files\Orchid Systems\Info-Explorer>InfoExplorer.exe /NOUI /REFRESH /CLOSE "c:\orchid\ps files\Info-Explorer C  
ubes\ARCustomerCube.cubx"
```

Functions

/REFRESH - Refreshes the cube

/CLOSE - Closes Info-Explorer after refreshing

/NOUI - Does not show any UI for parameters or passwords or the refreshed cube for analysis

Parameters

Parameters are passed by specifying the parameter name, equals sign and then the parameter value.

Example

- Info-Explorer is installed in the Default folder c:\Program Files\Orchid Systems\Info-Explorer
- Cubes are in a folder called c:\Orchid\InfoExplorerCubes
- To refresh the ARCustomerCube.cubx file, without opening the Info-Explorer application, use the following command line
- This assumes the ARCustomerCube file doesn't have any parameters or the parameters are hidden and the default values will be used when refreshing

Refresh and Do not open Info-Explorer UI

In the example below, use /REFRESH /CLOSE /NOUI

Refresh cube at command line - no UI

```
>c:\Program Files\Orchid Systems\Info-Explorer>infoexplorer.exe /REFRESH /NOUI  
/CLOSE  
"c:\Orchid\InfoExplorerCubes\ARCustomerCube.cubx"
```

Refresh and open Info-Explorer UI

In the example below, use /REFRESH -

The cube will be refreshed and Info-Explorer application opened.

Refresh cube and open UI at command line

```
>c:\Program Files\Orchid Systems\Info-Explorer>infoexplorer.exe /REFRESH  
"c:\Orchid\InfoExplorerCubes\ARCustomerCube.cubx"
```

Set parameters to the cube

If the cube has 2 parameters called CUSTOMER and STARTDATE, you can set the parameters in the command line, using the parameter name.

Refresh cube with parameters

```
>c:\Program Files\Orchid Systems\Info-Explorer>infoexplorer.exe  
STARTDATE=2020 CUSTOMER=1200 /REFRESH  
"c:\Orchid\InfoExplorerCubes\ARCustomerCube.cubx"
```

Info-Explorer Analysis Tools

Using Info-Explorer, you can change what you view in Info-Explorer. The most commonly used features are described below:

Reorder and Reorganise your views and charts	43
Drag and Drop Dimensions and Facts	44
Sort a dimension	47
Viewing Facts	50
Filter a dimension or fact	51
Filter Calculated Fact Values Details	56
Format a cube - Using Styles	58
Format a fact - Caption and Styles	63
Create / Amend /Delete a fact	65
Facts vs Dimensions in a cube	68
Drill down to view details.	69
Drill Through to Sage 300 screens	70

REORDER AND REORGANISE YOUR VIEWS AND CHARTS

The views, charts and dashboards within a cube can be reordered and reorganized by dragging and dropping the view/chart/dashboard.

Select the required view/chart/dashboard (by clicking and holding the mouse button down, and the selected view/chart/dashboard will go blue) and drag the view/chart/dashboard to the required position as shown by the dark blue line and deselect (let go of the mouse button).

The screenshot shows the Info-Explorer software interface. At the top, there is a ribbon with tabs for 'Home', 'Display', and 'Worksets'. Below the ribbon are various tool icons for file operations (Open, Create, New tab, Refresh, Close), data manipulation (Swap, Expand, Collapse, Delete), and analysis (Properties, Query Builder, Edit Fields, Edit Styles, Edit PreFilter, Auto Calculate). On the right, there are options for 'New dashboard', 'New chart', 'Copy view', and export formats (CSV, HTML, Excel).

The main workspace contains several views and a table. On the left, a navigation pane lists views such as 'Dashboard', 'AP Outstanding Transactions', 'Outstanding by Vendor Group', 'Outstanding with Aging', 'AP Outstanding by Vendor' (which is selected), 'Outstanding Aging Chart', and 'Outstanding by Vendor Group'. The main area shows a grid of dimension buttons: 'APDOCUMENTDESCRIPTION', 'DateDue Quarter', 'DateDue Month', 'InvoiceDate Year', 'InvoiceDate Qu', 'VENDORGROUP', 'APDOCUMENTNUMBER', 'DUECURRENTMONTH', 'DUENEXTMONTH', and 'DUENEXT2M'. Below these are buttons for 'Amount Due' and 'Vendor Rank'. A 'DateDue Year' dropdown is set to '2020'.

Vendor	Amount Due	Vendor Rank	%
2300 - Torrington Ltd.	10,175.51	1	
1200 - Chloride Systems	8,156.36	2	
7300 - New Look Interiors of Lond...	6,846.58	3	
7200 - Leon's Catering	5,148.63	4	
2150 - Marshall-Davidson Ltd.	3,979.30	5	

DRAG AND DROP DIMENSIONS AND FACTS


To change your visible rows and columns on any one view, you can click on a dimension, hold your mouse button down and drag the dimension to the area you want it to be. For example, if you wish to see which vendor groups the vendors belong to, you click on Vendor Group, hold your left hand mouse button down, drag the Vendor Group dimension to the Left of Vendor and let it go.

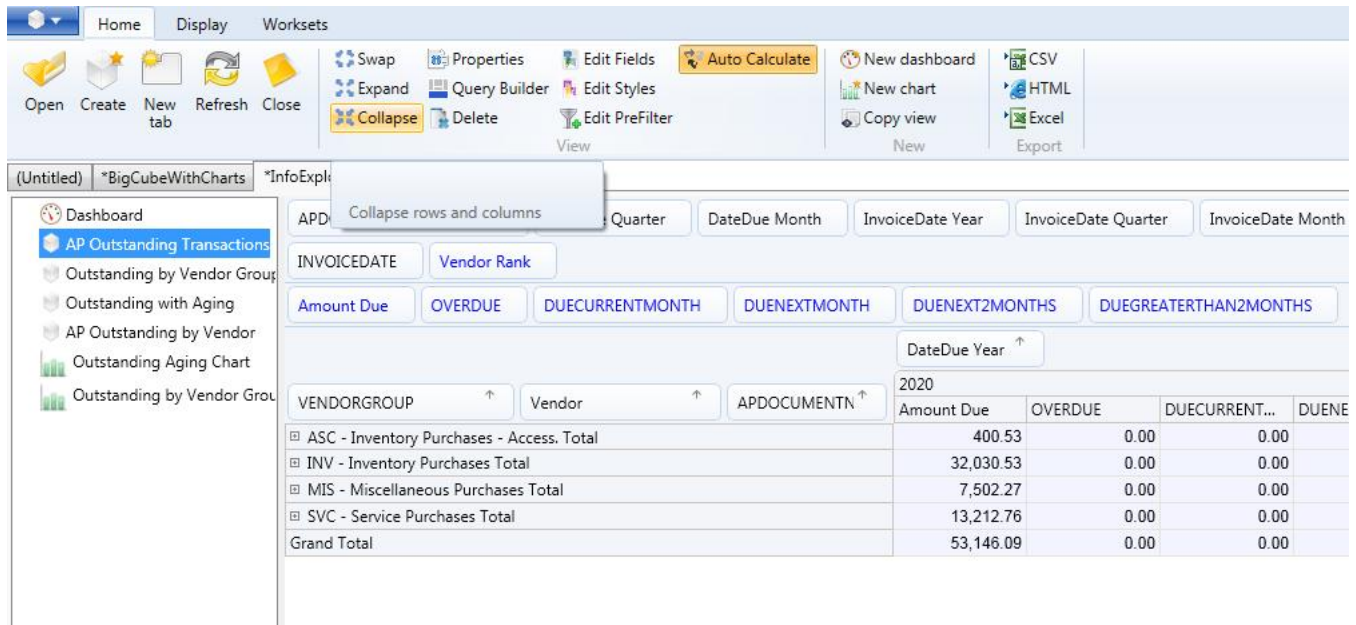
The screenshot shows the Info-Explorer interface for AP Outstanding Transactions. The interface includes a sidebar with navigation options, a top menu bar with various filters, and a main data table. Callouts identify key UI elements: 'Title Bar' at the top right, 'Fact List' for the filter buttons, 'Columns' for the table headers, and 'Rows' for the data entries.

Vendor	APDocumentNum	AmountDue	OverDue	DueCurrentMo...	DueNextMonth	DueNext2M
1200 - Chloride Systems	1200 - 100-01	0.13	0.00	0.00	0.00	0.00
	1200 - IN120111	202.97	0.00	0.00	0.00	0.00
	1200 - IN120121	304.46	0.00	0.00	0.00	0.00
	1200 - IN120131	304.46	0.00	0.00	0.00	0.00
	1200 - IN120141	243.56	0.00	0.00	0.00	0.00
	1200 - IN120151	315.28	0.00	0.00	0.00	0.00
	1200 - INV100	1,082.50	0.00	0.00	0.00	0.00
	1200 - INV101	5,953.75	0.00	0.00	0.00	0.00
	1200 - SO-12345	-250.75	0.00	0.00	0.00	0.00
1350 - Excide Industrial...	1350 - CN135100	-105.00	0.00	0.00	0.00	0.00
	1350 - IN135092	1,066.26	0.00	0.00	0.00	0.00
	1350 - IN135112	254.39	0.00	0.00	0.00	0.00
	1350 - IN135122	127.19	0.00	0.00	0.00	0.00
	1350 - IN135132	127.19	0.00	0.00	0.00	0.00
1400 - Coastal Heating...	1400 - 231-0054	990.15	0.00	0.00	0.00	0.00
1450 - Intercontinental...	1450 - 85665	181.32	0.00	0.00	0.00	0.00
	1450 - 85670	906.59	0.00	0.00	0.00	0.00

This screenshot shows the same Info-Explorer interface but with a different filter configuration. A red arrow points to the 'VendorGroup' filter in the top menu bar, which is currently set to 'ASC - Inventory Purchases...'. The data table below shows transactions grouped by VendorGroup.


VendorGroup	Vendor	APDocumentNum	AmountDue	OverDue	DueCurrentMo...
ASC - Inventory Purchases...	1540 - Hart Batteries	1540 - IN154114	100.13	0.00	0.00
		1540 - IN154124	150.20	0.00	0.00
		1540 - IN154134	150.20	0.00	0.00
INV - Inventory Purchases	1200 - Chloride Systems	1200 - 100-01	0.13	0.00	0.00
		1200 - IN120111	202.97	0.00	0.00
		1200 - IN120121	304.46	0.00	0.00
		1200 - IN120131	304.46	0.00	0.00
		1200 - IN120141	243.56	0.00	0.00
		1200 - IN120151	315.28	0.00	0.00
		1200 - INV100	1,082.50	0.00	0.00
		1200 - INV101	5,953.75	0.00	0.00
		1200 - SO-12345	-250.75	0.00	0.00
			1350 - Excide Industrial...	1350 - CN135100	-105.00
1350 - IN135092	1,066.26			0.00	0.00
1350 - IN135112	254.39			0.00	0.00
1350 - IN135122	127.19			0.00	0.00
1350 - IN135132	127.19			0.00	0.00
	1350 - IN135142	152.63	0.00	0.00	

To collapse all vendors and vendor documents, click on  Collapse icon on the Home Tab > View Ribbon



The screenshot shows the Info-Explorer interface with the 'Home' tab selected. In the 'View' ribbon, the 'Collapse' button is highlighted. The main window displays a dashboard for 'AP Outstanding Transactions' with various filters and a data table.

VENDORGROUP	Vendor	APDOCUMENTN	Amount Due	OVERDUE	DUECURRENT...	DUENE
ASC - Inventory Purchases - Access. Total			400.53	0.00	0.00	
INV - Inventory Purchases Total			32,030.53	0.00	0.00	
MIS - Miscellaneous Purchases Total			7,502.27	0.00	0.00	
SVC - Service Purchases Total			13,212.76	0.00	0.00	
Grand Total			53,146.09	0.00	0.00	

To expand all vendor groups, vendors and document numbers, click on  Expand icon on the Home Tab > View

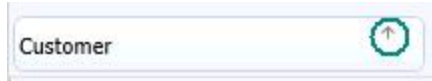
VENDORGROUP	Vendor	APDOCUMENTN	Amount Due	OVERDUE	DUECURRENT...	DUENEXTMON...	DUENE
ASC - Inventory Purchases...	1540 - Hart Batteries	1540 - IN154114	100.13	0.00	0.00	0.00	0.00
1540 - IN154124	150.20	0.00	0.00	0.00	0.00		
1540 - IN154134	150.20	0.00	0.00	0.00	0.00		
INV - Inventory Purchases	1200 - Chloride Systems	1200 - 100-01	0.13	0.00	0.00	0.00	0.00
1200 - IN120111	202.97	0.00	0.00	0.00	0.00		
1200 - IN120121	304.46	0.00	0.00	0.00	0.00		
1200 - IN120131	304.46	0.00	0.00	0.00	0.00		
1200 - IN120141	243.56	0.00	0.00	0.00	0.00		
1200 - IN120151	215.28	0.00	0.00	0.00	0.00		


SORT A DIMENSION

To sort a dimension, you need to select what fact you will use to sort and the sorting order.

If you don't select a particular fact, the dimension is sorted in alphabetical order of the dimension name.

Select the AsC/Desc order



The  sort by dimension icon toggles between sorting the dimension in ascending and descending order.

For example below, the Customer dimension is sorted in ascending order, the Item Number dimension in ascending order.

Info-Explorer

The screenshot shows the Info-Explorer interface with a data table. The table has columns for 'Customer Number', 'Item Number', 'Lot Cost', 'Quantity', 'Net Sales', and 'Margin'. The 'Customer Number' and 'Item Number' columns are circled in red. The table data is as follows:

Customer Number	Item Number	Lot Cost	Quantity	Net Sales	Margin
1100 - Bargain Mart - San D...	A15000 - Hangi...				
	A14010 - Desk...				
	A11050 - 13W...				
	A11030 - Fluor...	0.00	0.00	0.00	
1100 - Bargain Mart - San Diego Total		0.00	0.00	0.00	
1105 - Bargain Mart - Oakla...	A14010 - Desk...				
	A11050 - 13W...				

Select a fact

You can also sort the dimension based on one of the facts in the view.

Right Hand Mouse button(RHMB) on the fact name and then select which dimension you want to sort by.

To sort Customer Number by the Credit Limit, add the Credit Limit to the view, RHMB on the Credit Limit fact name and select Sort Customer Number by this dimension.

Customer List

Drop items here

Credit Limit (Cust. Curr.) Balance Due in Cust. Curr.

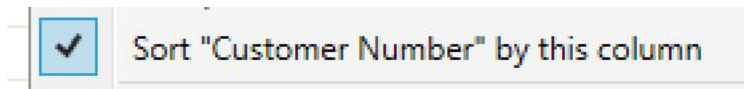
Group Code ↑

Customer N ↑	RTI	WHL
1100	Credit Limit (Cust. Curr.)	
1105	18,500	
1200	10,000	
1600	7,000	
1890	3,500	
1970	3,000	
2130		
2235		
2240		
4030		
7100		
7200		
7300		
7400		
8830		
9002		

1. RHMB on the fact name
2. Select Sort "XYZ" dimension by this column

- Refresh Data
- Edit Prefilter
- Edit AMTCRLIMIT
- Scale default
- Scale 1x1
- Scale 1x10
- Scale 1x100
- Scale 1x1,000
- Expand All
- Collapse All
- Sort "Customer Number" by this column
- Hide Available Fields Area
- Hide Displayed Fields Area
- Hide Column Area
- Hide Row Area
- Hide Tree
- Show Column Totals
- Hide Column Grand Totals
- Show Row Totals
- Hide Row Grand Totals

The "Sort by this column" is now selected.



You can see the Sort Icon next to the fact name in the view

Indicates that dimensions are sorted by this fact

Customer N	Credit Limit (Cust. Curr.)	%	Balance Due in Cust. Curr.
WEBCUST	999,999,999,999,999.00		3,451.71
1200	18,500.00		117,476.61
9999	10,000.00		0.00
1520	10,000.00		1,189.36
1600	7,000.00		10,447.99
1970	3,500.00		5,438.80
2130	3,000.00		6,709.10
ORCIN2	2,345.00		0.00

See also [Working with Info-Explorer - Home Tab](#)

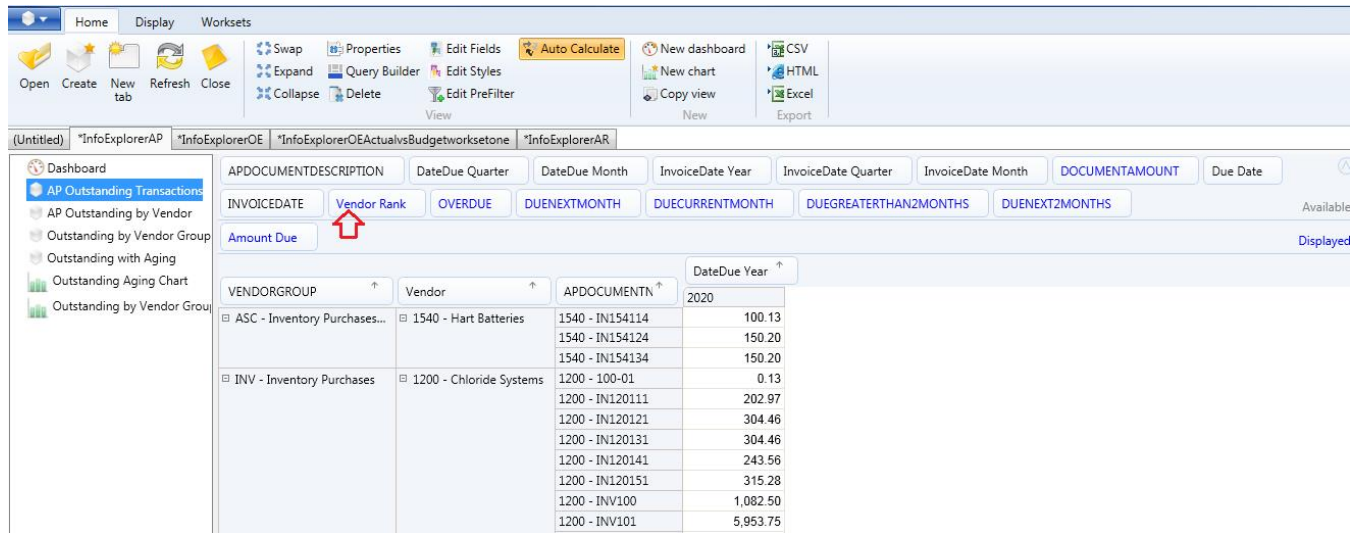
VIEWING FACTS

Drag and drop the dimension you want visible from the facts list to the title bar

Dashboard: AP Outstanding Transactions

Title Bar			Fact List					
Rows	Columns		Amount Due	OVERDUE	DUECURRENT...	DUENEXTMON...	DUENEXT2MO...	DUEGREATERT...
ASC - Inventory Purchases...	1540 - Hart Batteries	1540 - IN154114	100.13	0.00	0.00	0.00	0.00	100.13
		1540 - IN154124	150.20	0.00	0.00	0.00	0.00	150.20
		1540 - IN154134	150.20	0.00	0.00	0.00	0.00	150.20
INV - Inventory Purchases	1200 - Chloride Systems	1200 - 100-01	0.13	0.00	0.00	0.00	0.00	0.13
		1200 - IN120111	202.97	0.00	0.00	0.00	0.00	202.97
		1200 - IN120121	304.46	0.00	0.00	0.00	0.00	304.46
		1200 - IN120131	304.46	0.00	0.00	0.00	0.00	304.46
		1200 - IN120141	243.56	0.00	0.00	0.00	0.00	243.56
		1200 - IN120151	245.28	0.00	0.00	0.00	0.00	245.28

By dragging all the facts except amount due to the title bar, you will achieve :



FILTER A DIMENSION OR FACT

There are three ways to filter a dimension

- filter using a tick box (on/off)
- filter using a prefilter on the underlying dimension values
- filter using calculated fact values

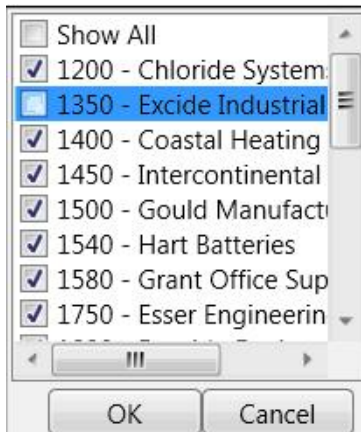
Filter using a tick box :

To filter a dimension, hover over the required dimension to activate that dimension and then click on the



small filter icon on the dimension title

and then selectively turn on or off the items required.

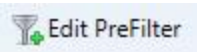


If a dimension is already filtered, then the filter icon will always be visible. If a dimension is not already filtered, then the filter icon will only be visible when you click on the dimension title.

**Tip:**

When you refresh the data, the filter can get reset if the selected value doesn't exist in the data and new data are selected by default. You can use Pre-filter if you want the filter to be constant. See below.

Filter using a prefilter on the underlying dimension values :

Alternatively, click on Edit Prefilter  on the Home Tab > View Ribbon to filter using a pre-filter on the underlying dimension values, right hand mouse button on the dimension and select Show Prefilter

The screenshot shows the Info-Explorer software interface. At the top, there is a menu bar with 'Home', 'Display', and 'Worksets'. Below this is a toolbar with various icons for file operations (Open, Create, New tab, Refresh, Close) and data manipulation (Swap, Expand, Collapse, Properties, Query Builder, Delete, Edit Fields, Edit Styles, Edit PreFilter, Auto Calculate). On the right side of the toolbar, there are options for 'New dashboard', 'New chart', 'Copy view', 'CSV', 'HTML', and 'Excel' (Export).

The main area is titled '*InfoExplorerOE'. On the left, there is a 'Dashboard' sidebar with several options: 'OE Sales by Customer', 'OE Sales by Item', 'OE Sales by Sales Person', 'OE Sales by Item Category', 'OE Sales by Salesperson Chart', and 'OE Sales by Category Chart'. The main content area displays a table with columns: 'Item Number', 'Category', 'Account Set', 'Salesperson', 'TransactionDate Quarter', and 'TransactionDate'. The table has three tabs: 'Cost', 'Quantity', and 'Net Sales'. The 'Net Sales' tab is active, showing a table with columns 'Customer Group' and 'Customer Number'. The data rows are:

Customer Group	Customer Number
RTL - Retail Sales Group	1200 - Mr. Ror
	1520 - Mr. Stey
	1600 - Dr. Dan
	1970 - Mr. Ror
WHL - Wholesale Sales Group Total	
Grand Total	

 A context menu is open over the table, listing actions: 'Refresh Data', 'Edit PreFilter', 'Edit Customer', 'Expand All', 'Collapse All', 'Sort "TransactionDate Year" by "Cost" in this row', 'Sort "TransactionDate Year" by "Quantity" in this row', 'Sort "TransactionDate Year" by "Net Sales" in this row', 'Sort "TransactionDate Year" by "Margin" in this row', 'Sort "TransactionDate Year" by "Margin %" in this row', 'Drill through to A/R Customer Activity (1200)', 'Hide Available Fields Area', and 'Hide Displayed Fields Area'.

Build the filter string as required :

- You can apply multiple conditions
- The current filter shows at the bottom of the screen
- The text filter is case sensitive

Example:

In the example below, the filter is on both the Vendor dimension (Vendor Equals 1200) and AmountDue fact.

The screenshot shows the Info-Explorer interface with a data table and a filter dialog. The data table is as follows:

Vendor	APDocumentNum	DateDue Year	AmountDue
1200 - Chloride Systems	1200 - IN120111	2020	202.97
	1200 - IN120121		304.46
	1200 - IN120131		304.46
	1200 - IN120141		243.56
	1200 - IN120151		315.28
	1200 - INV100		1,082.50
	1200 - INV101		5,953.75

The filter dialog box contains the following conditions:

- All conditions must be true
- [Vendor] Equals 1200 - Chloride Systems
- [AmountDue] is greater than 100

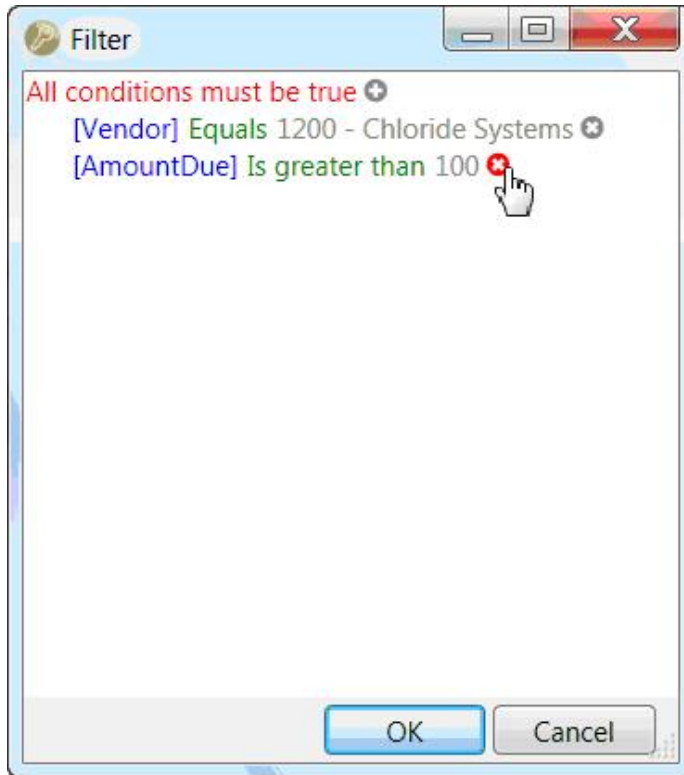
The dropdown menu for the second condition lists the following operators:

- Equals
- Does not equal
- Is greater than
- Is greater than or equal to
- Is less than
- Is less than or equal to
- Is between
- Is not between
- Is null
- Is not null
- Is any of
- Is none of

The status bar at the bottom shows the filter expression: `(Vendor = '1200 - Chloride Systems') AND (AmountDue > '100')` with an "Edit Prefilter" button.

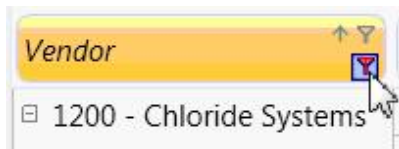
To remove a filter, click the red x on the appropriate row.

If you remove AmountDue row, the view will show all transactions for Vendor = 1200.



Filter using Calculated fact values

Alternatively, to filter using a filter applied to calculated values and totals, click on the Calculated values filter on the required dimension .



and build the filter string as required. In this case the Facts you can select from are based on the visible columns, and you can select "Any one" or "All" or "one specific" column.

Example:

Filter All vendors where for Every year, the Amount Due > 100 (not any one year or a specific year). As with the prefilter, the current filter shows at the bottom of the screen and works in conjunction with the prefilter (if any).

CustomerGroup	Customer	Cost	Quantity	NetSales	Margin
RTL - Retail Sales Group	1200 - Mr. Ronald Black	4,502.90	173.00	9,774.47	5,271.57
	1520 - Mr. Stephen Kershaw	2,730.93	130.00	6,161.35	3,430.42
WHL - Wholesale Sales...	1100 - Bargain Mart - San Diego	1,461.24	70.00	4,200.43	2,739.19
	1105 - Bargain Mart - Oakland	959.24	55.00	2,885.49	1,926.25
	1210 - ACME Plumbing	1,836.32	83.00	4,267.90	2,431.58
Grand Total		11,490.63	511.00	27,289.64	15,799.01

Filter Customer dialog box content:

- All conditions must be true
- Every TransactionDate Year [NetSales] Is greater than 500
- Every TransactionDate Year [Cost] Is greater than 600

Filter string at the bottom: (Every TransactionDate Year[NetSales] > '500') AND (Every TransactionDate Year[Cost] > '600')

FILTER CALCULATED FACT VALUES DETAILS



The **Customer** filter calculated fact values allows you to build filters on columns by row data, or rows by column data.

Click on the red calculated values filter and build the filter string as required.

When selected on a row dimension, you can filter all the rows based on

- The grand total being compared to your condition
- Every column compared to your condition
- At least one column compared to your condition
- A specific column compared to your condition

You can apply multiple calculated fact filters, and are shown at the bottom of the Info-Explorer screen.

To amend an existing filter, click on the blue hyperlink at the bottom of the screen, or click on the red "Filter" on the dimension.

Example:

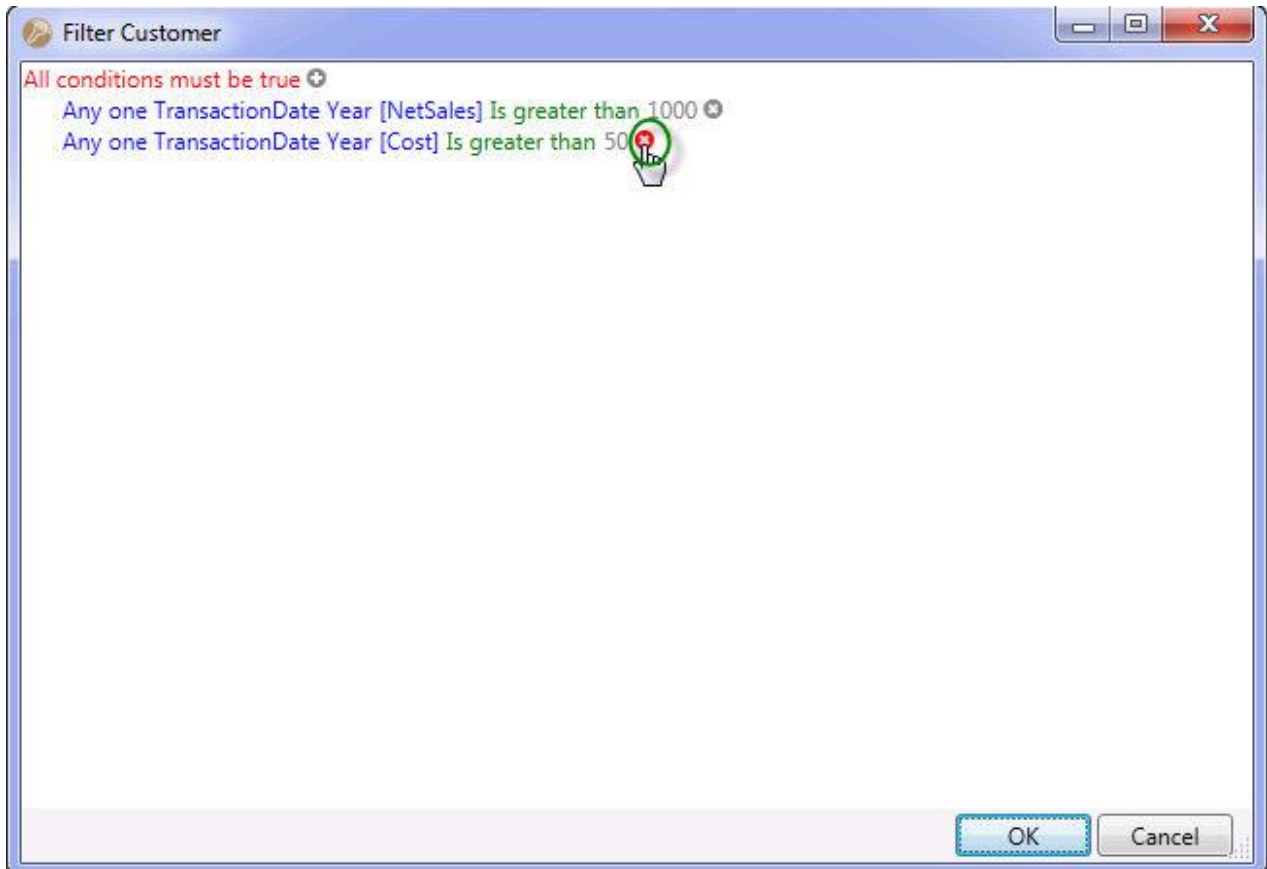
In the following example:

- NetSales > 500 for every year (calculated fact filter show in blue)
- Cost > 600 for every year (calculated fact filter shown in blue)

The screenshot displays the Info-Explorer interface. On the left is a navigation pane with options like 'Dashboard', 'OE Sales by Customer', etc. The main area shows a data table for the year 2019. A 'Filter Customer' dialog box is open, showing two conditions: 'Every TransactionDate Year [NetSales] Is greater than 500' and 'Every TransactionDate Year [Cost] Is greater than 600'. At the bottom of the main window, a blue bar contains the filter expression: '(Every TransactionDate Year[NetSales] > '500') AND (Every TransactionDate Year[Cost] > '600')' with an 'Edit Prefilter' button.


CustomerGroup	Customer	Cost	Quantity	NetSales	Margin
RTL - Retail Sales Group	1200 - Mr. Ronald Black	4,502.90	173.00	9,774.47	5,271.57
	1520 - Mr. Stephen Kershaw	2,730.93	130.00	6,161.35	3,430.42
WHL - Wholesale Sales...	1100 - Bargain Mart - San Diego	1,461.24	70.00	4,200.43	2,739.19
	1105 - Bargain Mart - Oakland	959.24	55.00	2,885.49	1,926.25
	1210 - ACME Plumbing	1,836.32	83.00	4,267.90	2,431.58
Grand Total		11,490.63	511.00	27,289.64	15,799.01

To remove a filter, click the red x on the appropriate row



FORMAT A CUBE - USING STYLES

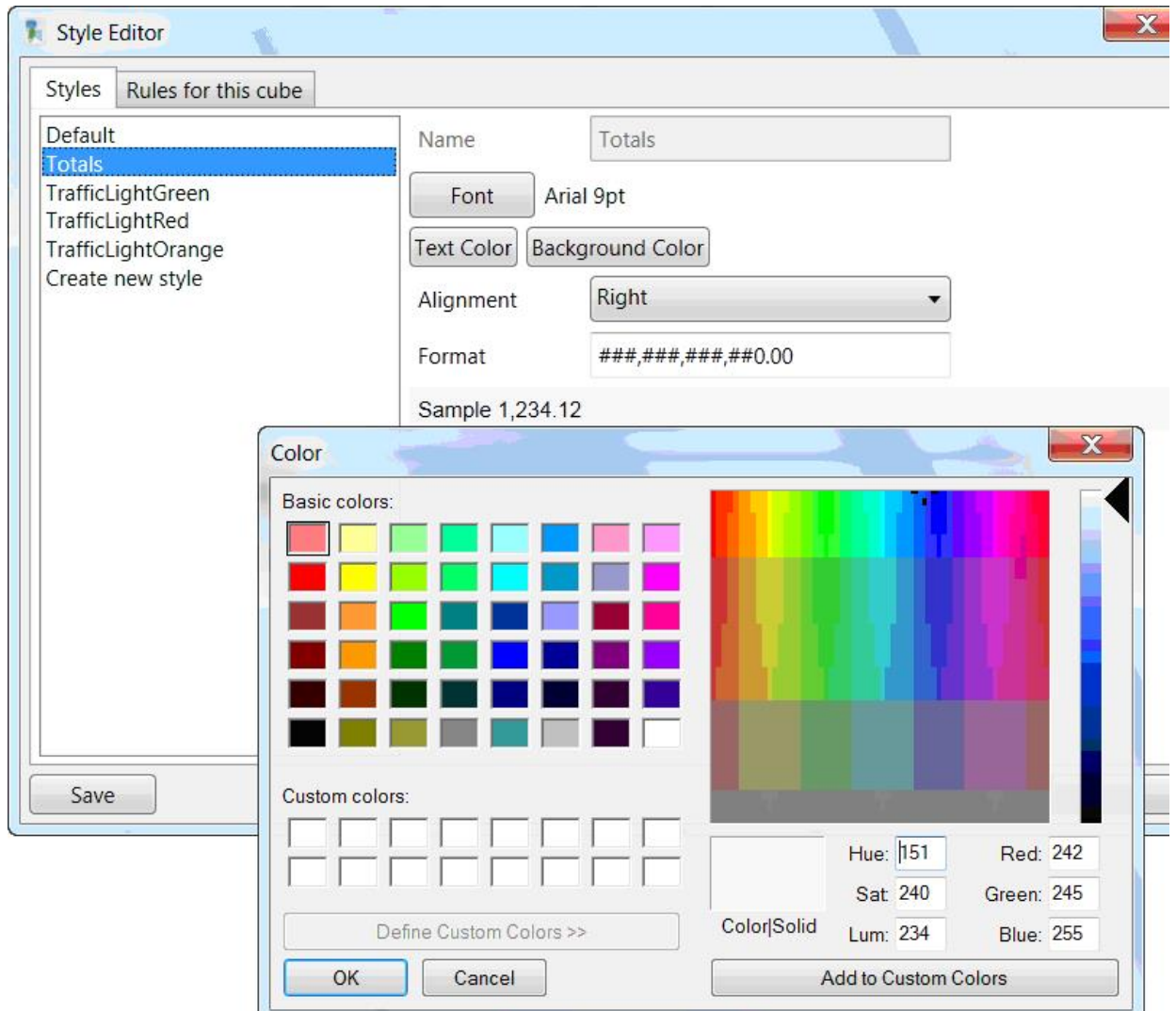
Rules for the Cube

 **Edit Styles** To change the format (appearance) of a fact or all facts, click on the Edit button on the Home tab>View Ribbon.

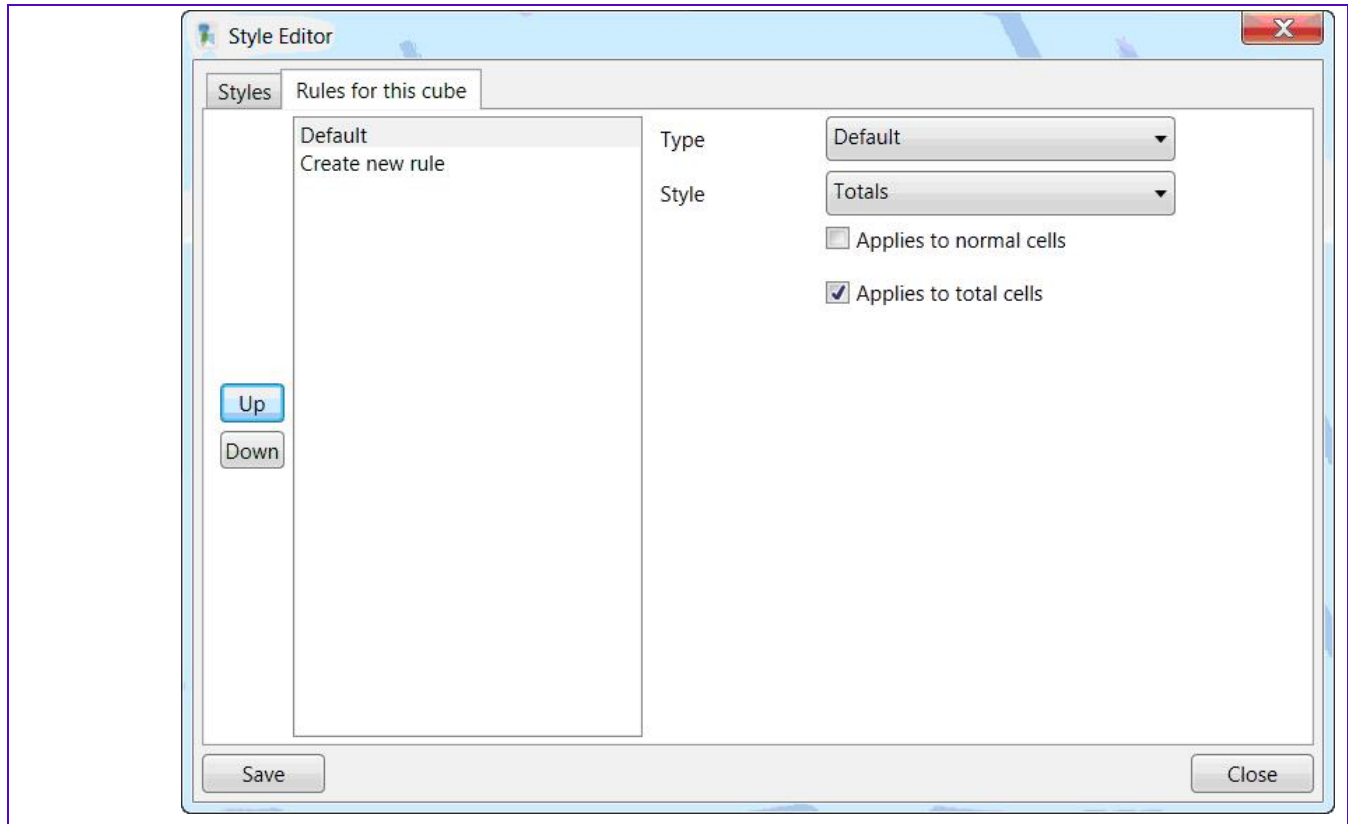
Create the styles required and apply the style to the cube by selecting "Rules for this cube" to change the format for all facts.

Example:

To create a style for totals with a blue background colour

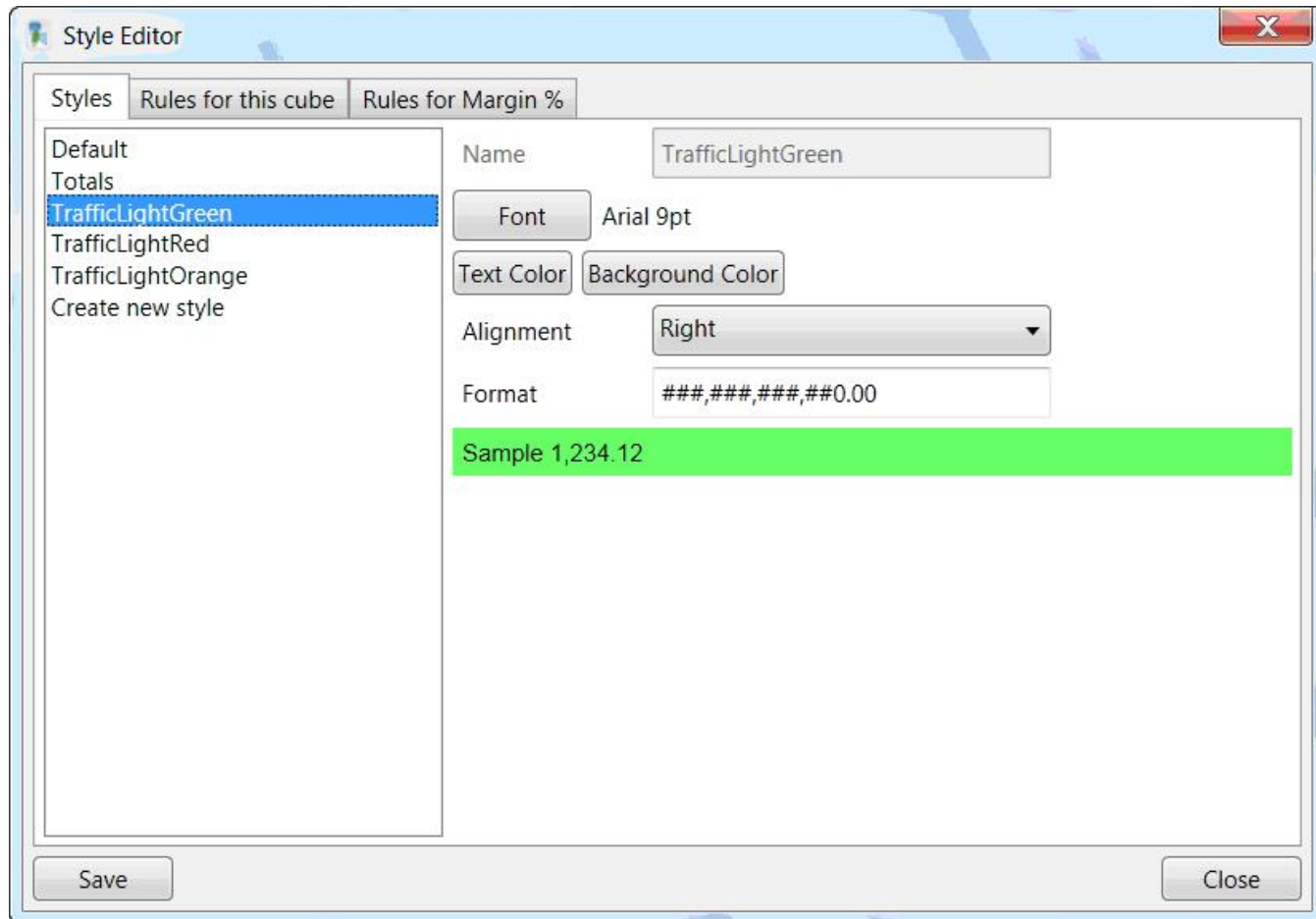


and apply the style to the cube by selecting "Rules for this cube"



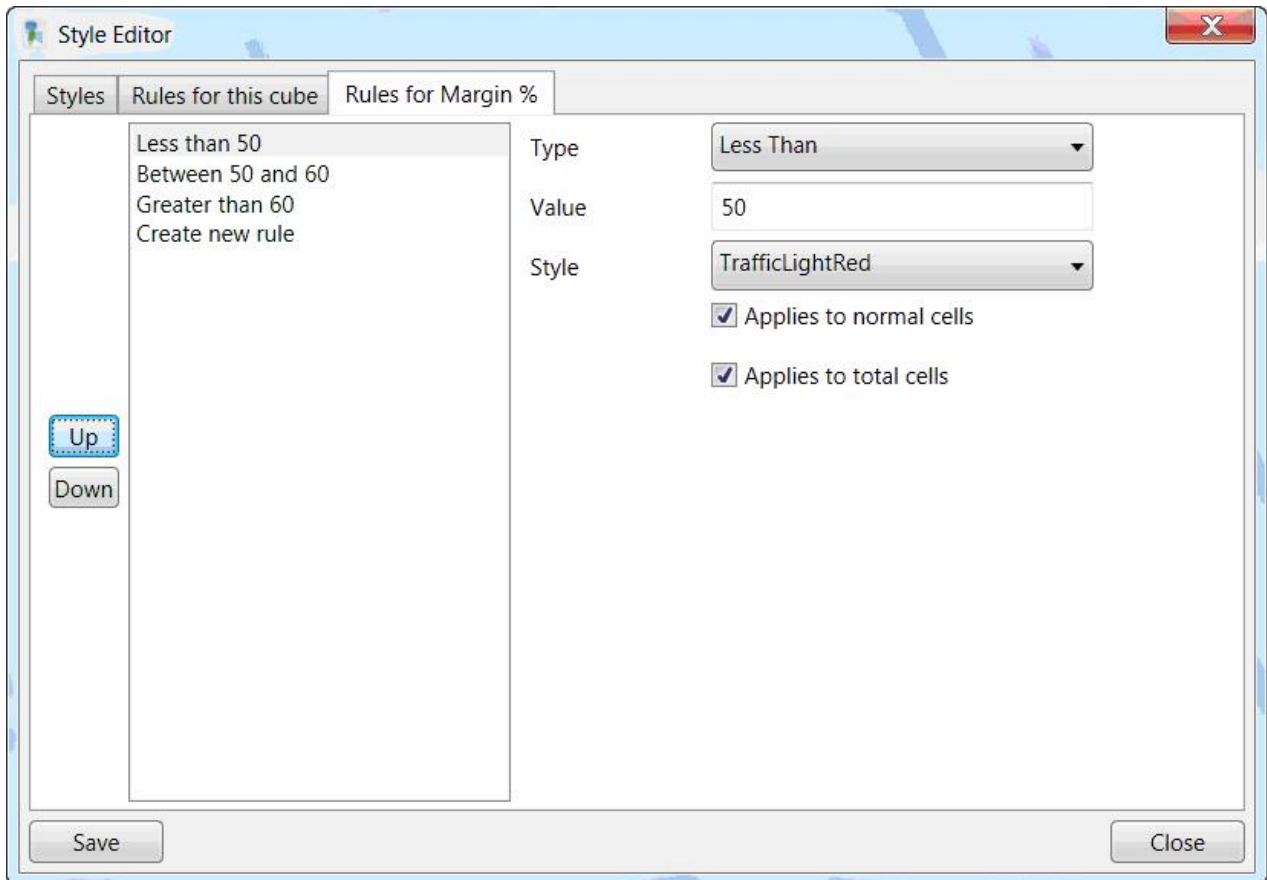
Traffic Light Reporting Example

For Traffic light reporting, create 3 Styles for TrafficLightGreen, TrafficLightOrange and TrafficLightRed and apply the new style to the required fact:



Set the rules for the field / fact:

- If less than 50, apply TrafficLightRed style
- If between 50 and 60, apply TrafficLightOrange style
- If greater than 60, apply TrafficLightGreen style



To delete a style

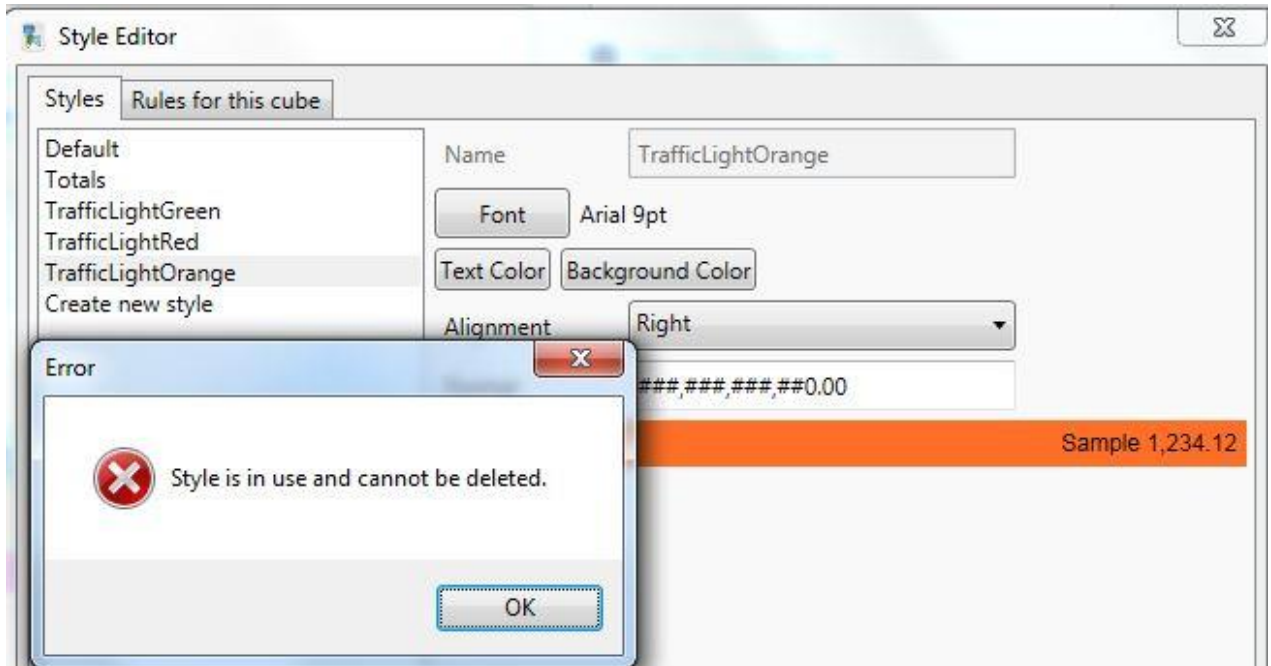
If you have created a style in Info Explorer and you want to remove it for any reason, either it is not required, or you may have a wrong spelling), press Delete key on keyboard to delete the selected style from the cube.

Tip:

If the style is used in the Cube, Info Explorer will not allow it to be deleted and will display an error message a message that the **Style is in use and cannot be deleted.**


Remove the style or replace with another style in the Rules for this cube or Rules for this field.

You can then delete it.

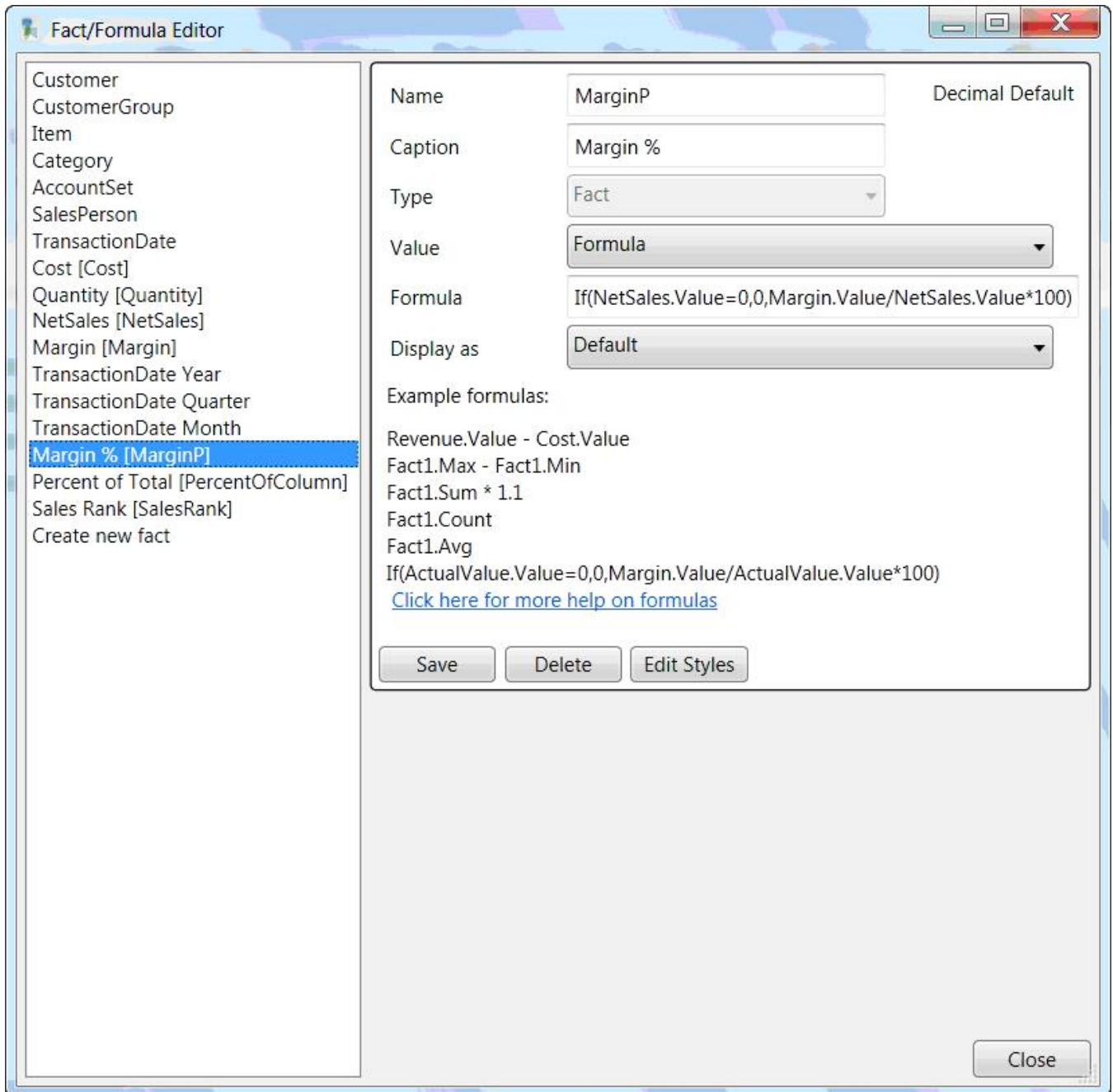


FORMAT A FACT - CAPTION AND STYLES


Changing the caption

To change the caption of a fact, click on the Edit Fields  button on the Home Tab > View Ribbon

Select a Fact and change the caption. Click Save after changing



Changing the Style

Change the style of any Fact (or the whole cube) click on the  Edit Styles button on the Home Tab > View Ribbon . First create the required style, and then apply it to the required fact.

For details, refer to Format a cube - Using Styles on page 58

CREATE / AMEND /DELETE A FACT



To change the format (appearance) of a fact or create a fact, click on the Edit button

Name	VendorRank	Decimal Default
Caption	Vendor Rank	
Type	Fact	
Value	Descending rank	
Of field	AmountDue	
Display as	Default	

Save Delete Edit Styles

Close

To Create a Fact

Select "Create New fact" on the fact list on the left hand side of the Fact/Formula edit window and fill in the details as are required

- Assign the Fact a Name (for example MarginPC)
- Assign the Fact a Caption (for example Margin %)

Value Field: Select the **Aggregation** type, such as SUM, AVERAGE, MINIMUM

Details of Aggregation Types:

- **Formula** - to define your own calculation in the Formula box (for example Margin % shown below)
- **Sum** - to total the fact defined in the "Of Field"
- **Number of records** in "Of Field"
- **Minimum** - to display the minimum of values in "Of Field"
- **Maximum** - to display the maximum of values in "Of Field"
- **Average** - to display the average of values in "Of Field"
- **Ascending Rank** - to display the relative rank of values in "Of Field", lowest is 1
- **Descending Rank** - to display the relative rank of values in "Of Field", highest is 1

In the **Formula / Of Field** options:

Formula : Type in the mathematical formula as required based on the facts retrieved by the query. Refer to Formula Fact on page 81 for details

Of Field : Select the fact required. These are the numeric values retrieved by the query, not formulas themselves.

Display as field, select the display type for the field selected

Default - to show as calculated

Absolute variation - shows the absolute variation of the current column against the prior (visible) period

Percent variation - shows the percentage variation of the current column against the prior (visible) period

Percent of column - to show the calculated field as a percentage of the column it is in (for example Percent of Total shown below)

Percent of row - to show the calculated field as a percentage of the row it is in

Click Save to save changes made on the Fact/Formula editor

To Delete a Fact

- Select the appropriate fact from the fact list on the left hand side of the Fact/Formula edit window
- Click the Delete button.
- Click Save after deleting.

To Amend a Fact

- Select the appropriate fact from the fact list on the left hand side of the Fact/Formula edit window
- Change the caption of the Fact.
- Change the Value of the field if required
- Change the Display as of the field as required
- Click Save after changing

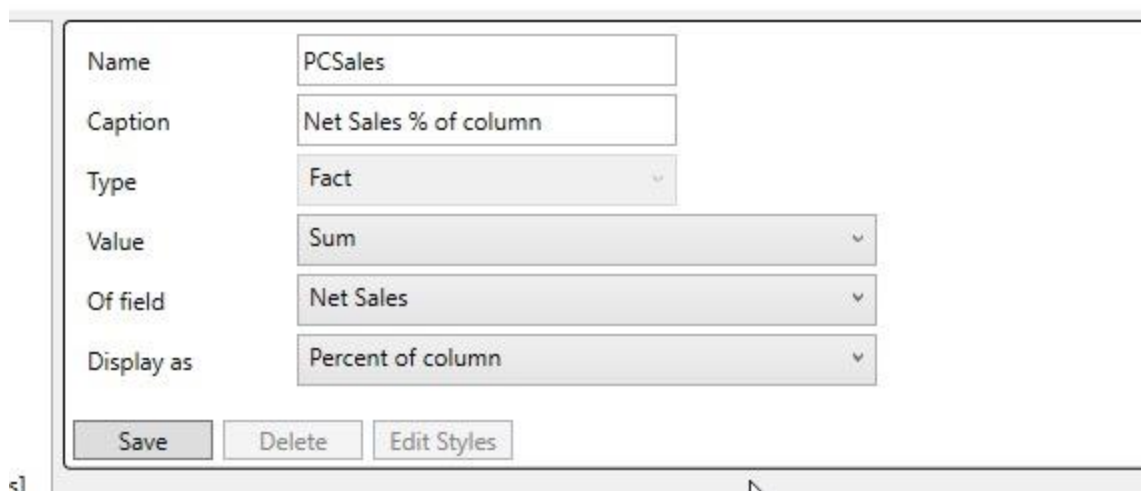
Viewing Percent of column in a cube

In a sales analysis cube, you have a Net Sales fact and a customer dimension.

If you want to know how much each customer represents as the % of the total, you can do the following:

- Create a view in the cube with Customer as a Row dimension
- Add Net Sales as a fact to the view
- Add a Field to the cube, select Value = Sum, Of Field = Net Sales and Display As = Percent of column
- The new field now displays the % of the total column

If you change the row dimensions, for example, select Item instead of Customer, the % of column now shows the percentage of each item.



The screenshot shows a configuration window for a fact. The fields are as follows:

Name	PCSales
Caption	Net Sales % of column
Type	Fact
Value	Sum
Of field	Net Sales
Display as	Percent of column

At the bottom of the window, there are three buttons: Save, Delete, and Edit Styles.

Net Sales		Net Sales % of column	
Fiscal Year ↑▼			
Customer Number ↑	2020	Net Sales % of co...	Total
	Net Sales	Net Sales % of co...	Net Sales
1240 - The Courtyard	13,779.85	20.50	13,779.85
1200 - Mr. Ronald Black	10,109.27	15.04	10,109.27
1105 - Bargain Mart - Oakland	7,006.20	10.42	7,006.20
1580 - Break-Away Designs	6,416.80	9.55	6,416.80
1100 - Bargain Mart - San Diego	5,998.57	8.92	5,998.57
1210 - ACME Plumbing	4,691.64	6.98	4,691.64
1500 - Custom Comfort	4,610.12	6.86	4,610.12
1400 - Coastal Electric Company	3,419.25	5.09	3,419.25
1520 - Mr. Stephen Kershaw	3,206.09	4.77	3,206.09
7300 - The Royal Cavendish Co.	2,522.07	3.75	2,522.07
4030 - The House Doctors	2,397.48	3.57	2,397.48
1600 - Dr. Dan Penn	1,644.38	2.45	1,644.38
7400 - The Yoshida Gardens	1,191.69	1.77	1,191.69
1970 - Mr. Ronald English	232.68	0.35	232.68
Grand Total	67,226.09	100.00	67,226.09

If Customer is the row dimension, the fact shows the Sales % of each

See Also [Working with Info-Explorer - Home Tab](#)

FACTS VS DIMENSIONS IN A CUBE

Dimensions are the axes used to organise and categorise the data.

Facts are the data points you want to analyze. They are numeric and are aggregated using functions like SUM, AVERAGE, COUNT, etc.

Refer to Create / Amend /Delete a fact on page 65 for details.

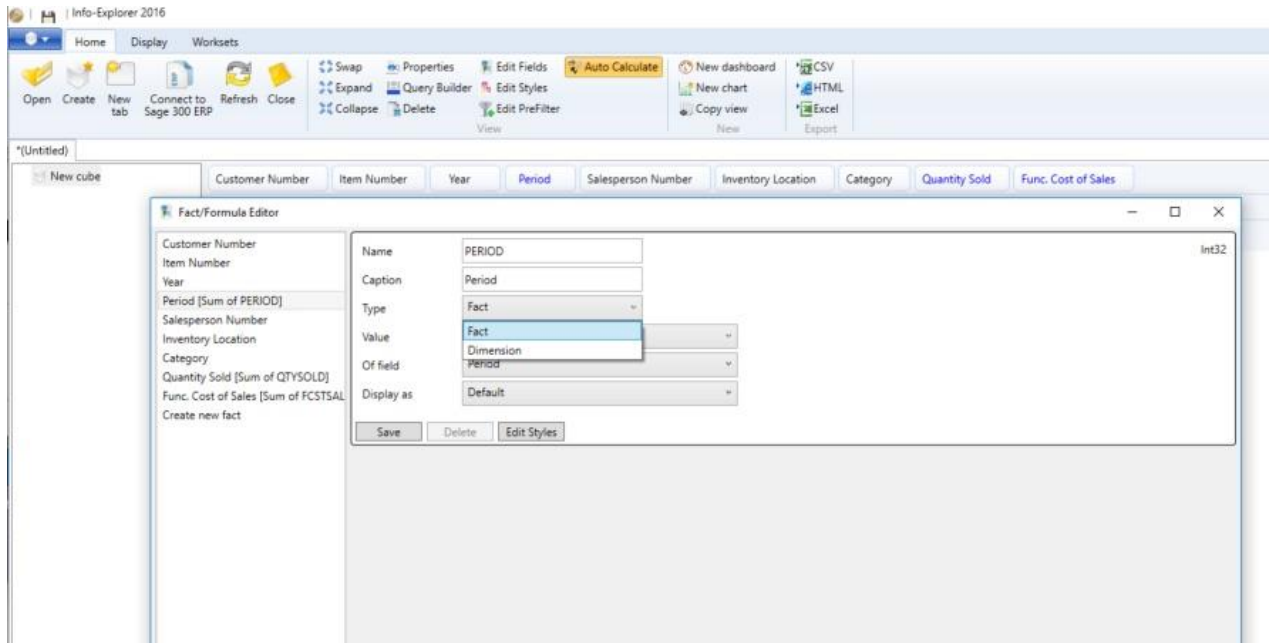
When Info-Explorer builds a cube from a SQL query, it assumes String columns in the queries will become Dimensions and Numeric columns in the queries will become Facts.

Note:

Dimensions are displayed in black letters in the Available Fields Area.

Facts are displayed in blue letters.

You might want some numeric columns (Facts by default) to be a Dimension (for example Fiscal Period). In this case you can edit the Field, and switch the type from "Fact" to "Dimension".



Can Database String columns be a fact?

You might want some Dimensions (string columns) to be a Fact.

Info-Explorer only sees the database field type - which is a string. If you want the string column to be a Fact, you will need to convert the string to a number in the SQL Query (using cast or convert).

This is only a valid option if the underlying values are always numeric.

Note: If the values are not numeric, you may need to use a different formula in the query, such as the length of the string, and use this as a fact.

Example: In Sage 300, optional fields are always stored as Strings in the database, and the optional field type tells Sage whether to display the field as a String, Date, Number or Boolean. You need to convert the datatype in the SQL Query.

DRILL DOWN TO VIEW DETAILS.

Right click on any total value, and select Drill down to view the underlying transactions and records that make up the total.

The level of details depends on how the cube query is designed.

Click the Control button and "C" at the same time will copy the contents of the data grid to the clipboard. You can then paste the details into another application if required for quick one-off analysis.

Tip:

When using Sage 300, you can also drill-through and open the underlying screens in the application. Refer to Drill Through to Sage 300 screens below

The screenshot shows the Info-Explorer application interface. At the top, there are tabs for '*InfoExplorerAP' and '*InfoExplorerOE'. Below the tabs are several filter buttons: 'Item Number', 'Category', 'Account Set', 'Salesperson', 'TransactionDate Quarter', 'TransactionDate Month', and 'TRANSACTIONDATE'. There are also buttons for 'Cost', 'Quantity', 'Net Sales', and 'Margin'. A 'TransactionDate Year' dropdown is set to 2011. The main data table has columns for 'Customer Group', 'Customer Number', '2011', '2019', and 'Qu'. A context menu is open over the 'Cost' value of 4,502.90 for the first row (1200 - Mr. Ronald Black). The menu options are: Refresh Data, Edit Prefilter, Drilldown, Show Column Totals, Hide Column Grand Totals, Show Row Totals, Hide Row Grand Totals, Filter Customer Number by 2019-Cost..., Filter TransactionDate Year by RTL - Retail Sales Group-1200 - Mr. Ronald Black-Cost..., and Edit Cost.

The screenshot shows the Info-Explorer application interface with a 'Data - 17 rows' window overlaid. The window title is 'Data - 17 rows (Press Control-C to copy contents to clipboard)'. The window contains a table with the following columns: CUSTOMER, CUSTOMERGR..., ITEM, CATEGORY, ACCOUNTSET, SALESPERSON, and TRANSACTION... The data rows are as follows:

CUSTOMER	CUSTOMERGR...	ITEM	CATEGORY	ACCOUNTSET	SALESPERSON	TRANSACTION...
1200 - Mr. Ronal...	RTL - Retail Sale...	A11030 - Flores...	A1 - Accessories	AVG - Moving Av...	BB - Bill Bhaissou	20190217
1200 - Mr. Ronal...	RTL - Retail Sale...	A13100 - Haloge...	A1 - Accessories	FIFO - FIFO	BB - Bill Bhaissou	20190217
1200 - Mr. Ronal...	RTL - Retail Sale...	A13200 - 50W/1...	A1 - Accessories	LIFO - LIFO	BB - Bill Bhaissou	20190217
1200 - Mr. Ronal...	RTL - Retail Sale...	A14000 - Desk N...	A1 - Accessories	MRC - Most Rec...	BB - Bill Bhaissou	20190217
1200 - Mr. Ronal...	RTL - Retail Sale...	A14500 - Bulletin ...	A1 - Accessories	AVG - Moving Av...	BB - Bill Bhaissou	20190217
1200 - Mr. Ronal...	RTL - Retail Sale...	A13100 - Haloge...	A1 - Accessories	FIFO - FIFO	BB - Bill Bhaissou	20190508
1200 - Mr. Ronal...	RTL - Retail Sale...	A2IMAGE1500G ...	A2 - Accessories ...	AVG - Moving Av...	BB - Bill Bhaissou	20190508
1200 - Mr. Ronal...	RTL - Retail Sale...	A13100 - Haloge...	A1 - Accessories	FIFO - FIFO	BB - Bill Bhaissou	20190807
1200 - Mr. Ronal...	RTL - Retail Sale...	A2IMAGE1500G ...	A2 - Accessories ...	AVG - Moving Av...	BB - Bill Bhaissou	20190807
1200 - Mr. Ronal...	RTL - Retail Sale...	A11030 - Flores...	A1 - Accessories	AVG - Moving Av...	BB - Bill Bhaissou	20190904
1200 - Mr. Ronal...	RTL - Retail Sale...	A13100 - Haloge...	A1 - Accessories	FIFO - FIFO	BB - Bill Bhaissou	20190904

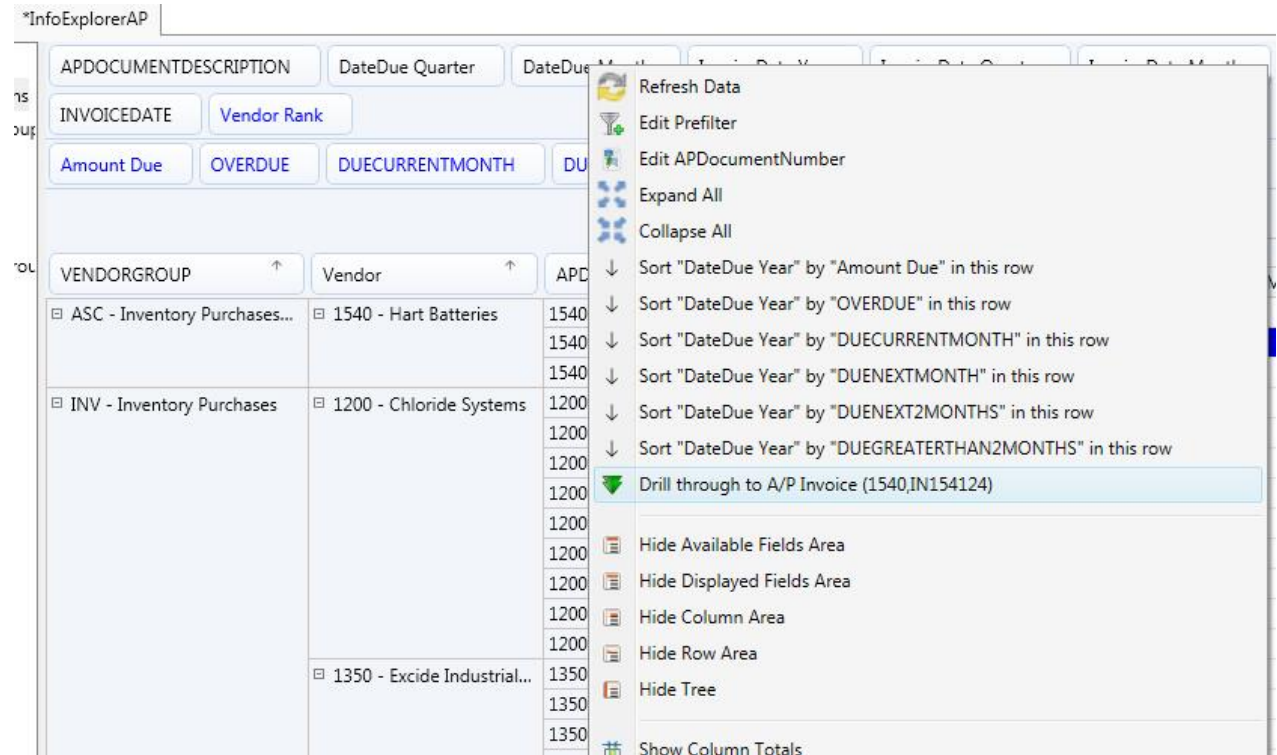
DRILL THROUGH TO SAGE 300 SCREENS

To drill through to the relevant Sage 300 screen for a dimension value, right hand mouse button on the value. If a "drill through" option is available, click to drill through to the appropriate Batch / Master file /

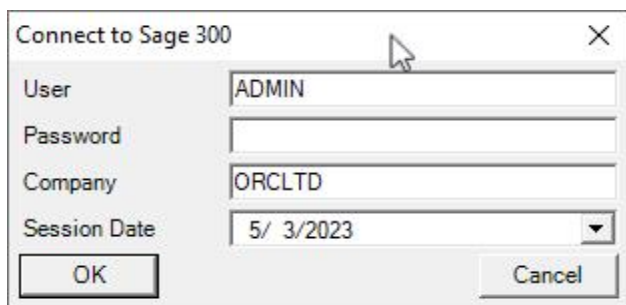
Transaction in Sage 300.

Important! This feature is currently only available for Sage 300 classic desktop screens

For example, on the Batch Entry dimension below, drill through is enabled to the A/P Invoice Batch listing:



The first time you click "drill through" during a session in the Info-Explorer, you will be prompted to connect to a Sage 300 Company. This company will be the active drill down company until the next time the Info-Explorer is opened.



Note: At the time of release of Info-Explorer 64-bit (May 2023), you need to log on to Sage 300 before selecting the Drill-through option.

The screenshot displays the Info-Explorer interface. On the left, a list of vendors is shown with columns for Vendor and APDocumentNum. The vendor '1200 - Chloride Systems' is selected, and its document number '1200 - 100-01' is highlighted. A red arrow points from this document number to the 'Document Number' field in the 'SAMINC - A/P Invoice Entry' form on the right. The form shows various fields for invoice entry, including Batch Number (19), Batch Date (31/05/2020), Vendor Number (1200), and Document Type (Invoice). The Document Number field is populated with '100-01'. Below the form, a table shows the invoice line items:

Lin...	Dist. Code	Description	G/L Account
1	INV	Purchase of inventory	1300

Drill through options available

Drill through is configurable in the drilldown.ini file and / or in the Home Tab > Edit Fields to link Dimensions to drill through configurations.

By default, Info Explorer is configured to drill through to :

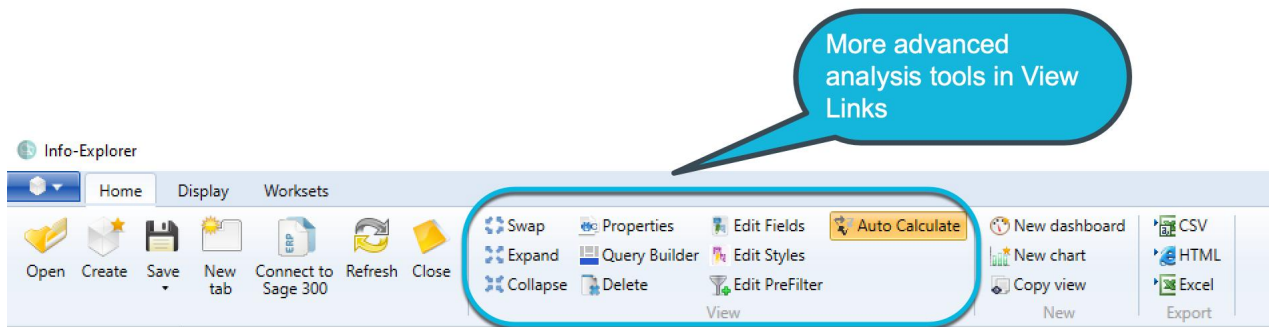
- I/C Item Number : Dimension label : ITEM, ITEMNO, FMTITEMNO
- A/R Customer Activity : Dimension label CUSTNO, IDCUST, CUSTOMER
- *A/R Customer : Dimension label CUSTNO, IDCUST, CUSTOMER
- A/P Vendor Activity : Dimension label : VENDNO, IDVEND, VENDOR
- *A/P Vendor Number : Dimension Label : VENDNO, IDVEND, VENDOR
- O/E Order Number : Dimension Label : ORDNUMBER
- O/E Shipment Number : Dimension Label : SHINUMBER
- O/E Invoice Number : Dimension Label : INVNUMBER
- R/A RMA Number : Dimension Label : RMANUMBER
- O/E Credit/Debit Note Number : Dimension Label : CRDNUMBER
- P/O Requisition Number : Dimension Label : RQNNUMBER
- P/O Purchase Order Number : Dimension Label : PONUMBER
- P/O Purchase Receipt Number : Dimension Label : RCPNUMBER
- P/O Purchase Invoice Number : Dimension Label : POINVNUMBER
- P/O Purchase Return Number : Dimension Label : RETNUMBER

- P/O Purchase Credit/Debit Note Number : Dimension Label : CRNNUMBER
- A/R Invoice Number : Dimension Label : ARIDINVC, ARDocumentNumber
- A/P Invoice Number : Dimension Label : APIDINVC, APINVDC, APDocumentNumber
- G/L Account Number : Dimension Label : GLACCOUNT,ACCOUNT,ACCTID
- G/L Batch Entry : Dimension Label : BATCHENTRY

Tip: *If Drill down to customer and vendor (as opposed to Vendor Activity and Customer Activity) is required, switch the two drill down groups in the drilldown.ini file

Advanced Analysis Tools (Home Tab)

The Home Tab includes more advanced functions, on the View Link:

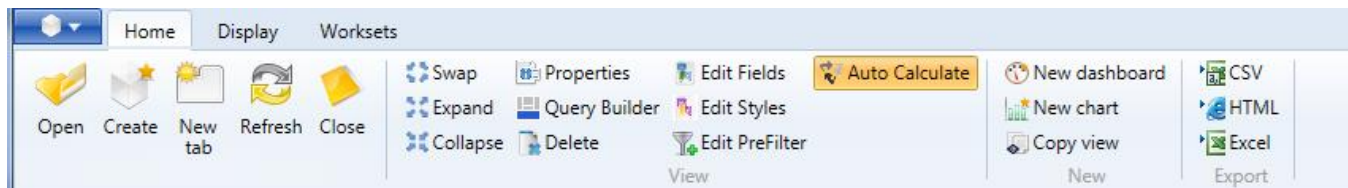


Working with Info-Explorer - Home Tab	74
Swap rows and columns	76
Collapse rows and columns (hierarchy)	77
Expand rows and columns (hierarchy)	79
Formula Fact	81
Amend a formula fact	82
Using Display Tab	84
Create a cube	87

WORKING WITH INFO-EXPLORER - HOME TAB

Tip: You can either work with the full ribbon (as shown in first screenshot), or to maximise the screen for data you can double click on the Home tab and work with a minimised ribbon as shown in the second screenshot.

Full Ribbon to view all the menu options:



Minimised ribbon to maximise the data view



Tip: Double clicking on the Home tab again will maximise the ribbon

Home tab "quick links"

You can :



[Open a cube](#)



[Create a new cube](#)



[Create a new tab](#)



[Connect to Sage 300 ERP](#)



[Refresh an existing cube](#)



[Refresh all or selected existing cubes](#)



[Close an existing cube](#)

Home tab “view” links

You can:



[swap rows and columns](#) of the active view



[collapse rows and columns](#) (hierarchy) of the active view



[expand rows and columns](#) (hierarchy) of the active view



[Properties](#) to View/Amend the cube’s properties and to set [Auto Refresh](#)



[Query Builder](#) to View/Amend the active cube’s query



[Edit Fields](#) to [Create/Amend/Delete](#) a fact



[Edit Styles](#) to change the appearance of a fact



[Edit Prefilter](#) to create a Prefilter



[Auto Calculate](#) to view dimension changes immediately



[Calculate](#) to view dimension changes when clicked

Home tab “new” links

You can



[Create a new dashboard](#)



[Create a new chart](#)



[Copy view](#)

Home tab “export” links

Functionality not available with Info Explorer Lite.

You need to have a valid licence for Info-Explorer Standard or Writeback to:



[export the current slice to HTML](#)



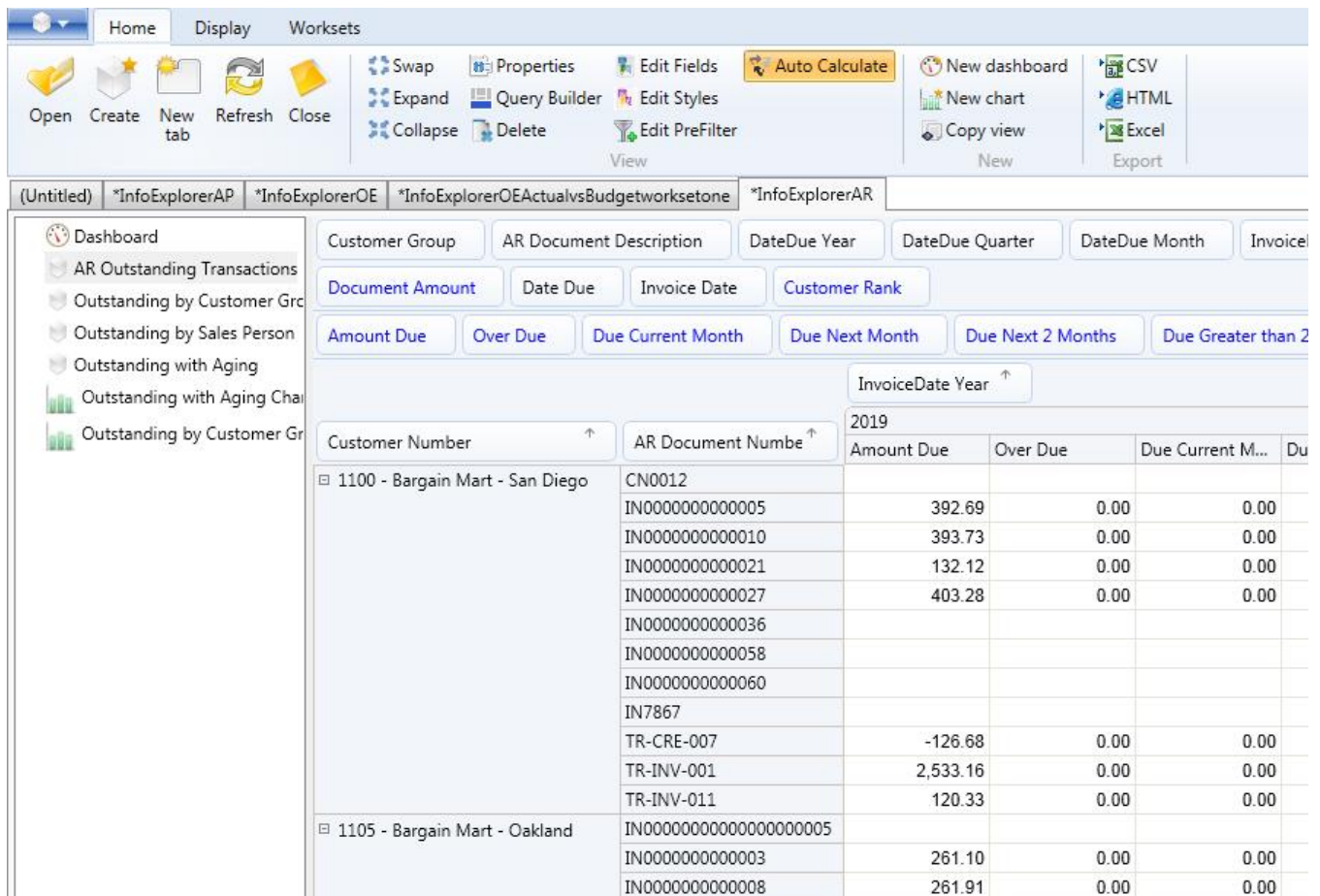
[export the current slice to CSV](#)

 [export the current slice to MS Excel](#)

SWAP ROWS AND COLUMNS



Swap row/column icon allows you to toggle the rows and columns. For example below, customer is the rows and year the column. Clicking swap rows and columns you get year as the row and customer as the column.



The screenshot shows the Info-Explorer interface with a data table. The ribbon includes buttons for 'Swap', 'Auto Calculate', 'Expand', 'Collapse', 'Query Builder', 'Delete', 'Edit Fields', 'Edit Styles', 'Edit PreFilter', 'New dashboard', 'New chart', 'Copy view', 'CSV', 'HTML', and 'Excel'. The table displays data for two customer groups: '1100 - Bargain Mart - San Diego' and '1105 - Bargain Mart - Oakland'. The columns are 'Customer Number', 'AR Document Number', 'Amount Due', 'Over Due', and 'Due Current M...'. The data is filtered for the year 2019.


Customer Number	AR Document Number	Amount Due	Over Due	Due Current M...
1100 - Bargain Mart - San Diego	CN0012			
	IN00000000000005	392.69	0.00	0.00
	IN00000000000010	393.73	0.00	0.00
	IN00000000000021	132.12	0.00	0.00
	IN00000000000027	403.28	0.00	0.00
	IN00000000000036			
	IN00000000000058			
	IN00000000000060			
	IN7867			
	TR-CRE-007	-126.68	0.00	0.00
TR-INV-001	2,533.16	0.00	0.00	
TR-INV-011	120.33	0.00	0.00	
1105 - Bargain Mart - Oakland	IN0000000000000005			
	IN00000000000003	261.10	0.00	0.00
	IN00000000000008	261.91	0.00	0.00

The screenshot shows the Info-Explorer interface with a toolbar at the top containing icons for Open, Create, New tab, Refresh, Close, Swap, Properties, Edit Fields, Auto Calculate, New dashboard, CSV, Expand, Query Builder, Edit Styles, New chart, HTML, Collapse, Delete, Edit PreFilter, Copy view, and Excel. Below the toolbar are several tabs: (Untitled), *InfoExplorerAP, *InfoExplorerOE, *InfoExplorerOEActualvsBudgetworksetone, and *InfoExplorerAR. A sidebar on the left lists dashboard options like AR Outstanding Transactions and Outstanding by Customer Group. The main area displays a dashboard with filters for Customer Group, AR Document Description, Date Due Year, Date Due Quarter, Date Due Month, Invoice Date, Document Amount, Date Due, Invoice Date, and Customer Rank. Below these are filters for Amount Due, Over Due, Due Current Month, Due Next Month, Due Next 2 Months, and Due Greater than 2 Months. A table shows data for Customer Number 1100 - Bargain Mart - San Diego and AR Document Number CN0012. The table has columns for Invoice Date, Amount Due, Over Due, Due Current M..., Due Next Month, Due Next 2 Mo..., and Due Greater th... with rows for 2019, 2020, and Grand Total.

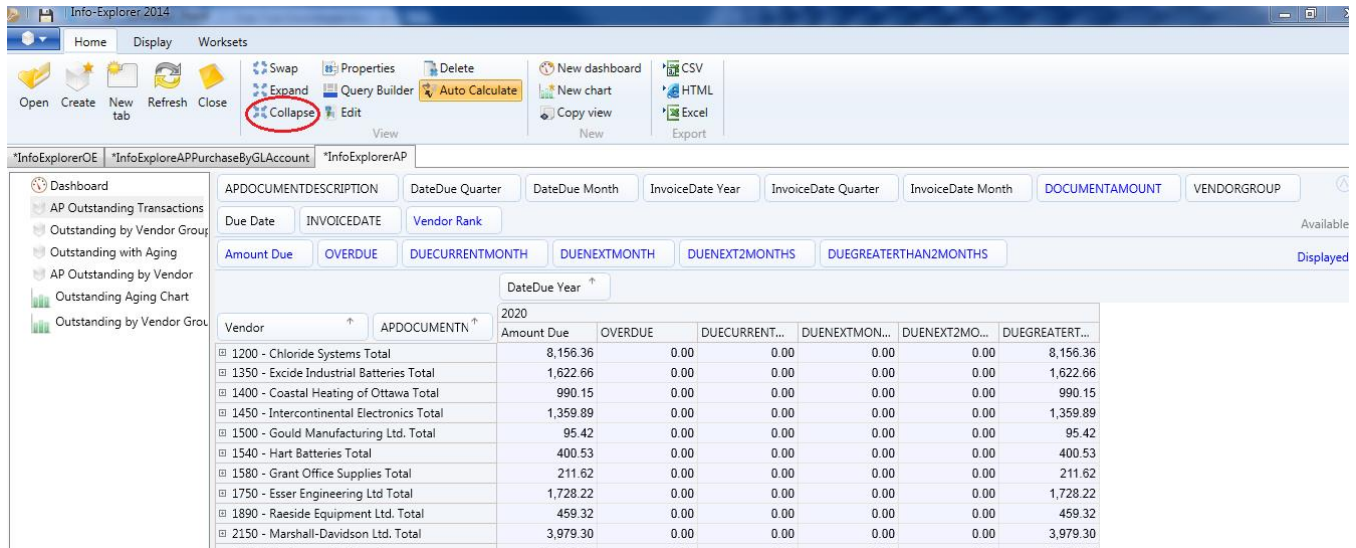
InvoiceDate ^	Amount Due	Over Due	Due Current M...	Due Next Month	Due Next 2 Mo...	Due Greater th...
2019						
2020	-106.02	0.00	0.00	0.00	0.00	-106.02
Grand Total	-106.02	0.00	0.00	0.00	0.00	-106.02

See also [Working with Info-Explorer - Home Tab](#)

COLLAPSE ROWS AND COLUMNS (HIERARCHY)

Clicking the collapse hierarchy icon  will automatically collapse all hierarchies for all dimensions as the rows and columns.

Info-Explorer



For Example, the Customers have been "collapsed" per customer group, and can be selectively "expanded" by clicking on the + sign beside the vendor

Vendor	APDocumentNum	2020 AmountDue
+ 1200 - Chloride Systems Total		8,156.36
+ 1350 - Excide Industrial Batteries Total		1,622.66
+ 1400 - Coastal Heating of Ottawa Total		990.15
+ 1450 - Intercontinental Electronics Total		1,359.89
+ 1500 - Gould Manufacturing Ltd. Total		95.42


		DateDue year	
		2020	
Vendor ↑	APDOCUMENTN ↑	Amount Due	OVER
▣ 1200 - Chloride Systems	1200 - 100-01	0.13	
	1200 - IN120111	202.97	
	1200 - IN120121	304.46	
	1200 - IN120131	304.46	
	1200 - IN120141	243.56	
	1200 - IN120151	315.28	
	1200 - INV100	1,082.50	
	1200 - INV101	5,953.75	
	1200 - SO-12345	-250.75	
▣ 1350 - Excide Industrial Batteries Total		1,622.66	
▣ 1400 - Coastal Heating of Ottawa Total		990.15	
▣ 1450 - Intercontinental Electronics Total		1,359.89	
▣ 1500 - Gould Manufacturing Ltd. Total		95.42	
▣ 1540 - Hart Batteries Total		400.53	
▣ 1580 - Grant Office Supplies Total		211.62	

Clicking on the Expand rows and columns  would expand all dimension elements.

See also [Expand rows and columns](#)

See also [Working with Info-Explorer](#)

EXPAND ROWS AND COLUMNS (HIERARCHY)

Clicking the expand hierarchy icon  will automatically expand all hierarchies for all dimensions as the rows and columns.

Info-Explorer

The screenshot shows the Info-Explorer interface with a menu bar containing options like 'Expand', 'Query Builder', 'Delete', 'Edit PreFilter', 'Auto Calculate', 'New dashboard', 'New chart', 'Copy view', 'CSV', 'HTML', and 'Excel'. Below the menu, there are several data tables. One table is titled 'AP Outstanding Transactions' and shows columns for 'VENDORGROUP', 'Vendor', 'APDOCUMENTN', and '2020 Amount Due'. A tooltip 'Expand rows and columns' is visible over the 'Expand' button in the menu.

For example all customer groups and customers can be "expanded" by clicking the "expand rows and columns" button, and can be selectively "collapsed" by clicking the - sign beside the required customer group

Vendor	APDocumentNum	2020 AmountDue
<input checked="" type="checkbox"/> 1200 - Chloride Systems	1200 - 100-01	0.13
	1200 - IN120111	202.97
	1200 - IN120121	304.46
	1200 - IN120131	304.46
	1200 - IN120141	243.56
	1200 - IN120151	315.28
	1200 - INV100	1,082.50
	1200 - INV101	5,953.75
	1200 - 50-12345	-250.75
<input checked="" type="checkbox"/> 1350 - Excide Industrial Batteries Total		1,622.66
<input checked="" type="checkbox"/> 1400 - Coastal Heating of Ottawa Total		990.15




Clicking on the Expand rows and columns  would expand all dimension elements.

See also [Collapse rows and columns](#)

See also [Working with Info-Explorer](#)

FORMULA FACT

If the query doesn't include the values you need, you can add calculations in a formula in the cube.

To create a formula fact, click on the Edit Fields Icon  Edit Fields on the button on the Home Tab > View Ribbon and choose the type of fact being "formula".

- Type in the field name
- Type in the field caption
- Choose the value as "formula"
- Type in the formula, using existing Factname.Value

Note: Fact names are case sensitive

Example: BUDGETSALES.VALUE-BUDGETCOST.VALUE for a budget margin calculation.

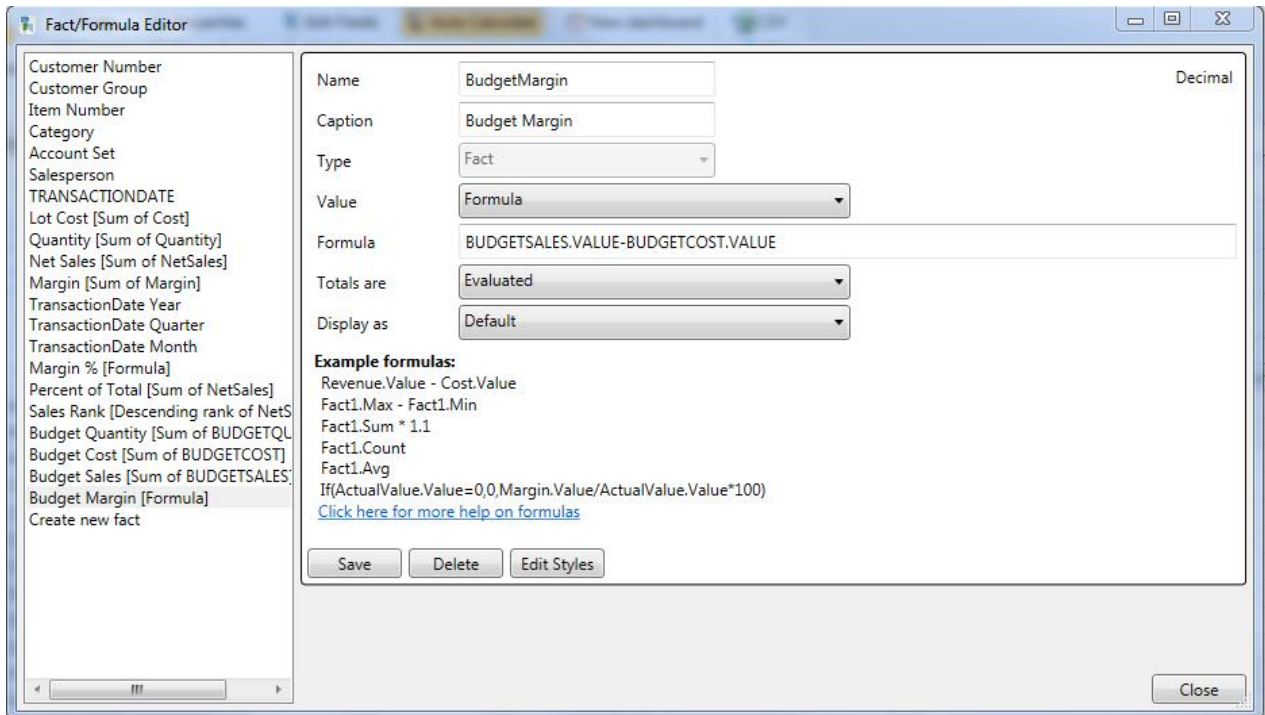
Select whether the **totals** are evaluated (recalculated based on the formula) or **summed** (the row/-column is added not recalculated by formula)

Example: A % formula is generated evaluated, a margin calculation can be either.

Display as: use Default or Select how you would like the figure displayed (absolute/percent variation, percent of column/row)

Note: Refer to Viewing Percent of column in a cube on page 67

Click **Save**



Valid Operators & their relative priorities:

Operators	Priority and Example
+ , -	8 (Highest) . Eg 10+2 gives 12
^	7 raise to the power. EG 2^4 gives16
/, *, div, mod, *, /%	6
+ , - , +%, -%	5
<, >, <=, >=, =, !=	4. Comparisons return 1 if true, 0 if false
not	3
and	2
or, xor	1
eqv	0 (Lowest)

AMEND A FORMULA FACT

To change a fact, click on the Edit Fields Button  and make the change required

InfoExplorerOE

Dashboard

- OE Sales by Customer
- OE Sales by Item
- OE Sales by Sales Person
- OE Sales by Item Category
- OE Sales by Salesperson Cha
- OE Sales by Category Chart

Item Number Category Account Set Salesperson TransactionDate Quarter TransactionDate Month TRANSACTIONDATE Percent of Total Margin

Cost Quantity Net Sales Margin

TransactionDate Year ↑

		2011				2019		
Customer Group	Customer Number	Cost	Quantity	Net Sales	Margin	Cost	Quantity	Net Sales
RTL - Retail Sales Group	1200 - Mr. Ronald Black					4,502.90	173.00	
	1520 - Mr. Stephen Kershaw					2,730.93	130.00	
	1600 - Dr. Dan Penn					136.44	6.00	
	1970 - Mr. Ronald English							
WHL - Wholesale Sales Group Total		-39,524.16	-204.00	-136,288.83	-96,764.67	5,431.13	283.00	1
Grand Total		-39,524.16	-204.00	-136,288.83	-96,764.67	12,801.40	592.00	3

Info-Explorer 2014

InfoExplorerOE

Dashboard

- OE Sales by Customer
- OE Sales by Item
- OE Sales by Sales Person
- OE Sales by Item Category
- OE Sales by Salesperson Cha
- OE Sales by Category Chart

Item Number Category Account Set Salesperson TransactionDate Quarter TransactionDate Month TRANSACTIONDATE Percent of Total Margin

Lot Cost Quantity Net Sales Margin

TransactionDate Year ↑

		2011		
Customer Group	Customer Number	Lot Cost	Quantity	Net Sales
RTL - Retail Sales Group	1200 - Mr. Ronald Black			
	1520 - Mr. Stephen Kershaw			
	1600 - Dr. Dan Penn			
	1970 - Mr. Ronald English			
WHL - Wholesale Sales Group Total		-39,524.16	-204.00	
Grand Total		-39,524.16	-204.00	

Info-Explorer

See also [Creating a Fact](#)

See also [Working with Info-Explorer](#)

Auto-calculate



Click this icon to ensure that each time you drag & drop a dimension, the visible grid will re-calculate.



Deselect this option if you want to do a number of dimension changes, and re-calculate when all the changes have been done.



If the button is highlighted "gold" it is selected.



If the button is not highlighted it is deselected.



If Auto Calculate is deselected and changes have been made, the Calculate button is shown. Click it to refresh the cube and view dimension changes.

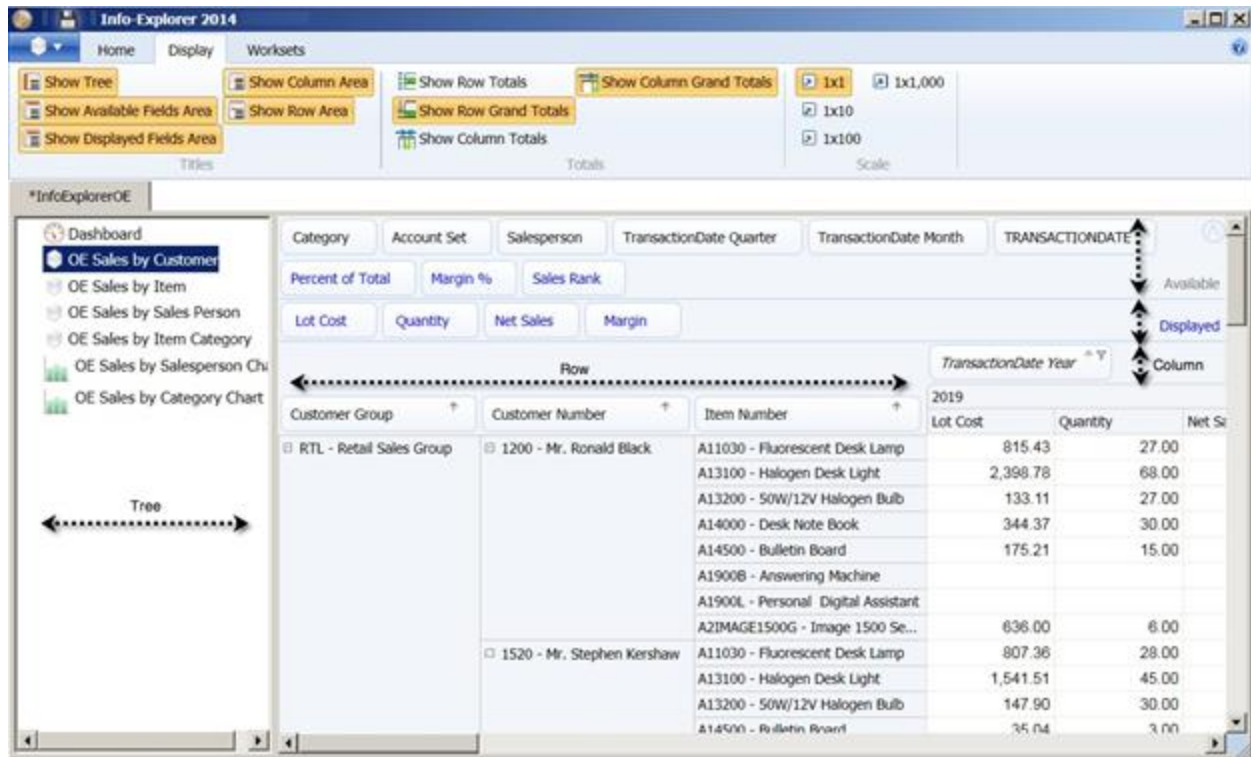
See also [Calculate](#)

USING DISPLAY TAB

Use the Display Tab to show or hide totals, show or hide panels in Info-Explorer screen.

From the Display tab, you can control what Info-Explorer panels are displayed and how the information is presented. :

- Which titles are visible
- Which totals are visible
- If the entire view is scaled to the nearest one (1), ten (10), hundred (100) or thousand (1,000)








Info-Explorer titles

For all options, when "Selected" or "on", the option will be highlighted in orange, and the option will be shown







When "De-Selected" or "off", the option will not be highlighted and the option will not be shown.

You can configure the following Title options:

-  Show the Tree : shows or hides the list of views, charts and dashboards in the cube
-  Show the Available Fields area: this is the list of fields available to be added to a view and is determined by the cube query.
-  Show the Displayed Fields area: the fields currently included in the view
-  Show the Column titles: This shows or hides the field names configured as columns in the view
-  Show the Row titles: This shows or hides the field names configured as rows in the view.

Display tab, "Totals" links

You can

-  Show the Row Totals
-  Show the Row Grand Totals
-  Show the Column Totals
-  Show the Column Grand Totals

Display tab "scale" links

You can change the scale used to display the data



1x1 scale the data

This is the default selection and implies no scaling. For example 4,304.84 is displayed as 4,304.84



1x10 scale the data

To see your data rounded to 10's. For example, 4,304.84 is displayed as 430.48



1x100 scale the data

To see your data rounded to 100's. For example, 4,304.84 is displayed as 43.05



1x1,000 scale the data

To see your data rounded to 1000's. For example 4,304.84 is displayed as 4.30

Calculate



Click this icon to re-calculate the dimension and view changes made since Calculate was last clicked. This icon is only shown when Auto Calculate is not selected.



Auto Calculate

If the button is highlighted "gold" it is selected.



Auto Calculate

If the button is not highlighted it is not selected

See also [Auto Calculate](#)

CREATE A CUBE

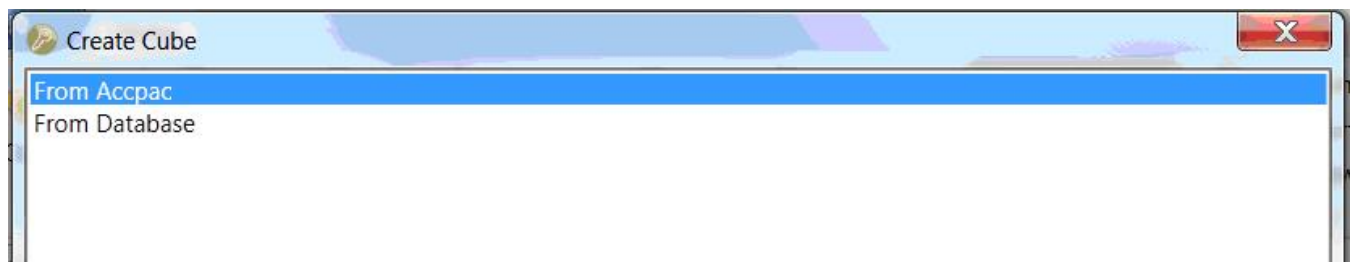
To create a new cube, click File>Create and follow the prompts to connect to a database and define the required query.

Note, if you are using Info-Explorer Lite, then "create cube", "export to CSV" and "export to MS Excel" are not available



Click Create Cube from the Home tab or File > Create to create a new cube

Select the required source :



From Database

Select an existing connection string or define a new connection string, and then build a query

Create Cube

Use an existing connection

Connection

Create a new connection

Database Type

User

Password

Server

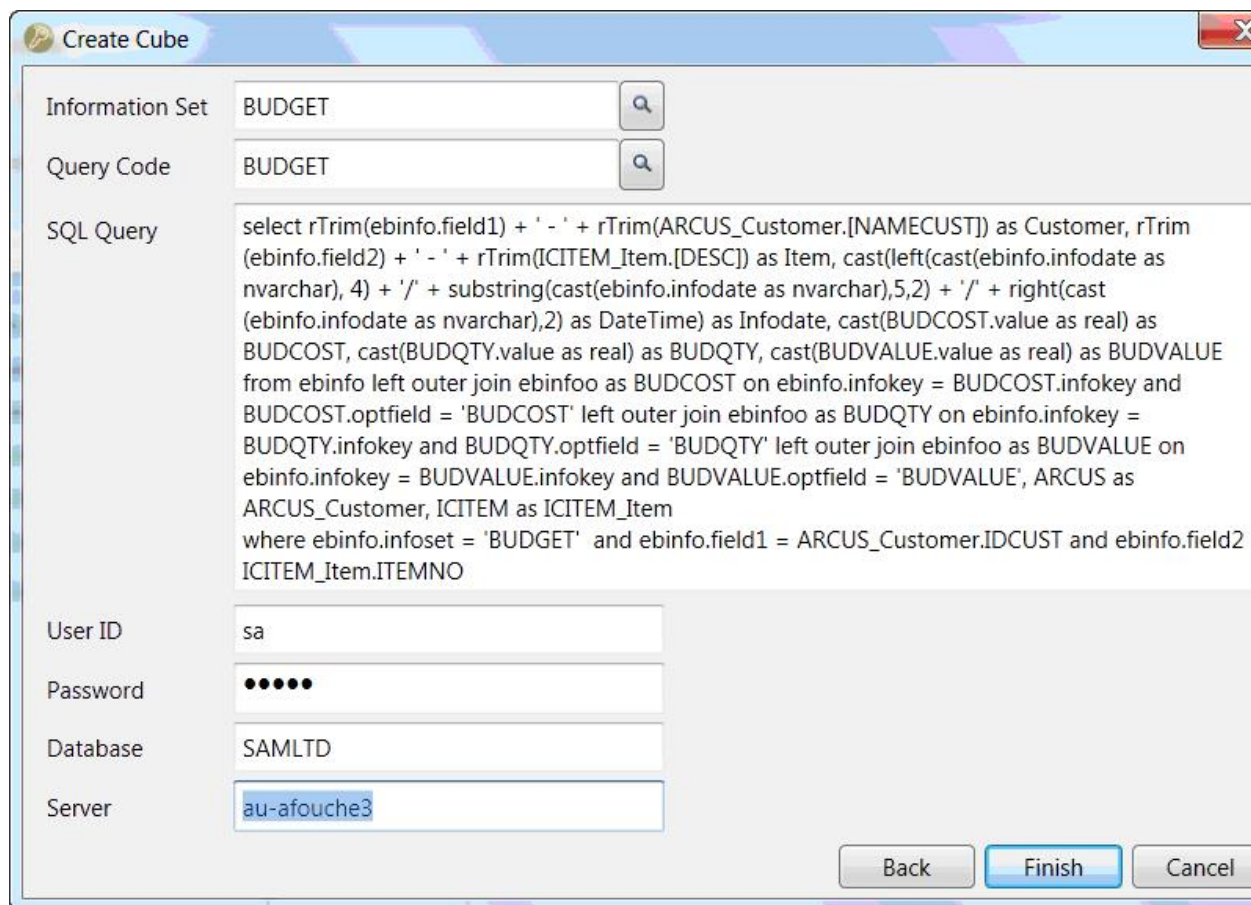
Database

From Accpac (Sage 300),

Requirement! This is only available if using Optional Table module. It assumes that an InfoSet exists in Sage 300 > Information Manager > Optional Tables.

FROM ACCPAC DETAILS:

Select a Sage 300 database, and then select the InfoSet/Query and check the Database Connection details from the Create Cube Screen



Information Set BUDGET

Query Code BUDGET

SQL Query

```
select rtrim(ebinfo.field1) + ' - ' + rtrim(ARCUS_Customer.[NAMECUST]) as Customer, rtrim(ebinfo.field2) + ' - ' + rtrim(ICITEM_Item.[DESC]) as Item, cast(left(cast(ebinfo.infodate as nvarchar), 4) + '/' + substring(cast(ebinfo.infodate as nvarchar),5,2) + '/' + right(cast(ebinfo.infodate as nvarchar),2) as DateTime) as Infodate, cast(BUDCOST.value as real) as BUDCOST, cast(BUDQTY.value as real) as BUDQTY, cast(BUDVALUE.value as real) as BUDVALUE from ebinfo left outer join ebinfo as BUDCOST on ebinfo.infokey = BUDCOST.infokey and BUDCOST.optfield = 'BUDCOST' left outer join ebinfo as BUDQTY on ebinfo.infokey = BUDQTY.infokey and BUDQTY.optfield = 'BUDQTY' left outer join ebinfo as BUDVALUE on ebinfo.infokey = BUDVALUE.infokey and BUDVALUE.optfield = 'BUDVALUE', ARCUS as ARCUS_Customer, ICITEM as ICITEM_Item where ebinfo.infokey = 'BUDGET' and ebinfo.field1 = ARCUS_Customer.IDCUST and ebinfo.field2 = ICITEM_Item.ITEMNO
```

User ID sa

Password ●●●●

Database SAMLTD

Server au-afouche3

Back Finish Cancel

Use the Query builder to assist in creating your query. Refer to Query Builder on page 106

See also [Using Parameters in the query](#)

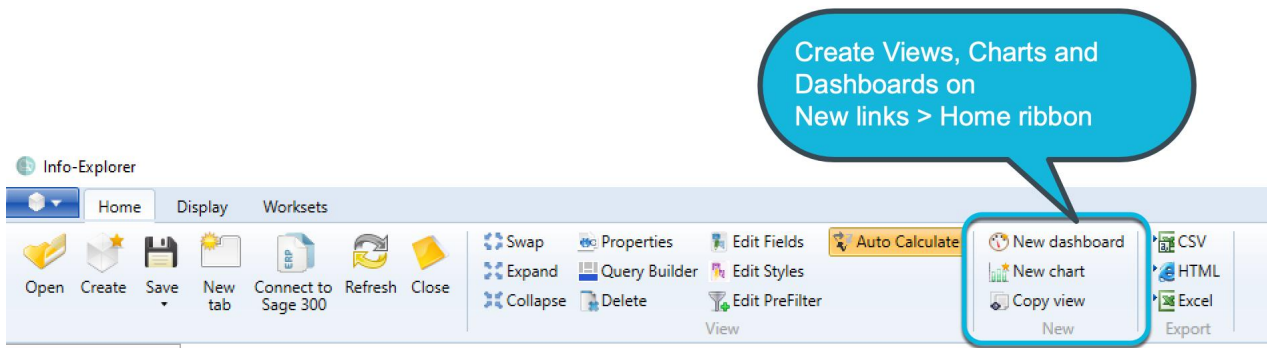
See also

Using Charts and Dashboards

You can create Charts and Dashboards in the Home Ribbon > New links.

When the active view is a chart, use the Chart tab to format charts and change the chart type.

The Dashboard Tab is available when the active view is a Dashboard and lets you add and remove rows and columns from a dashboard section in Info-Explorer.




Create a dashboard	90
Using Dashboard Tab	92
Create a New Chart	93
Working with Info-Explorer – Chart Tab	96
Chart Properties	98

CREATE A DASHBOARD

You can create multiple dashboards in a cube to display separate views and charts in a single page. If the cube has multiple queries, you can add views relating to the different queries in a single dashboard.

To create a new dashboard :

- Click Create dashboard icon  on the Home Tab > New Ribbon or
- Right Hand Mouse Button on a View or chart name and Select New dashboard

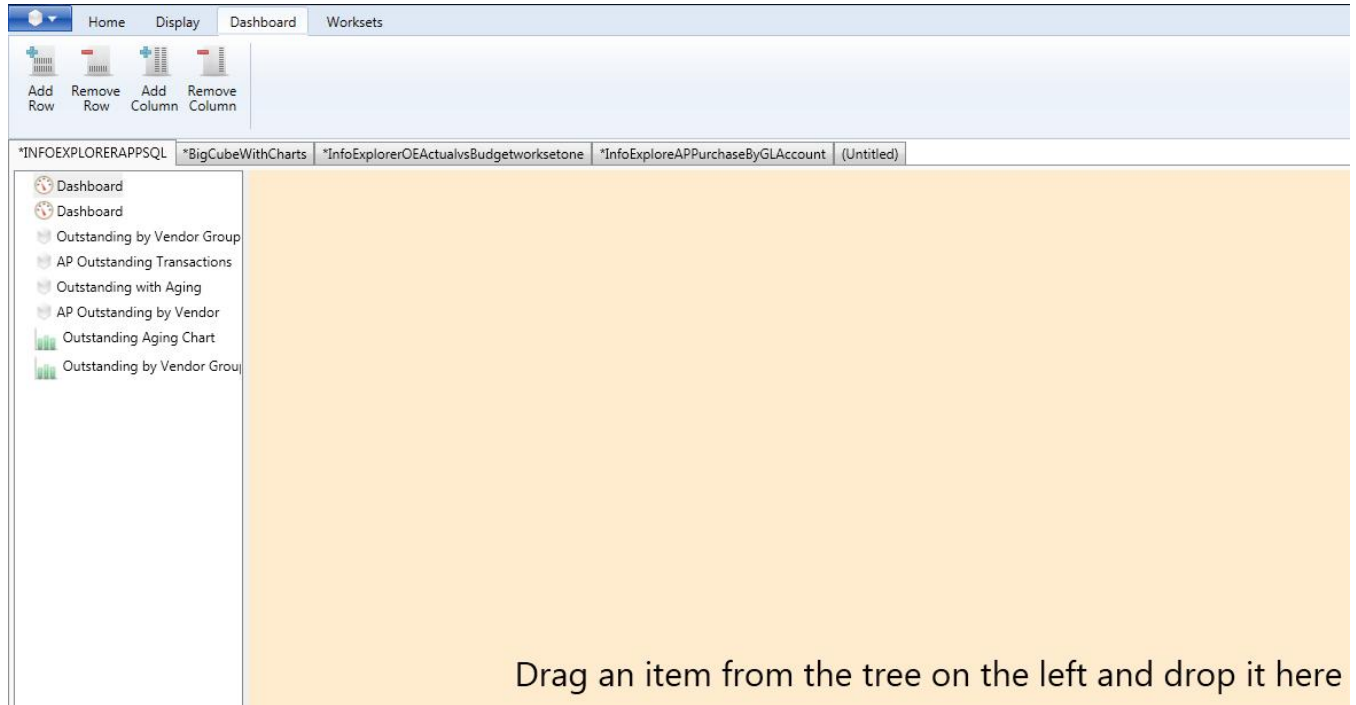
Amend size of views and charts

By default a New dashboard has 3 rows and 3 columns, allowing you to drag & drop 9 views or charts from the current cube to the dashboard.

Use “Create Row”, “Create Column”, “Remove Row” and “Remove Column” to adjust the dashboard size to have as many rows and columns as are required.

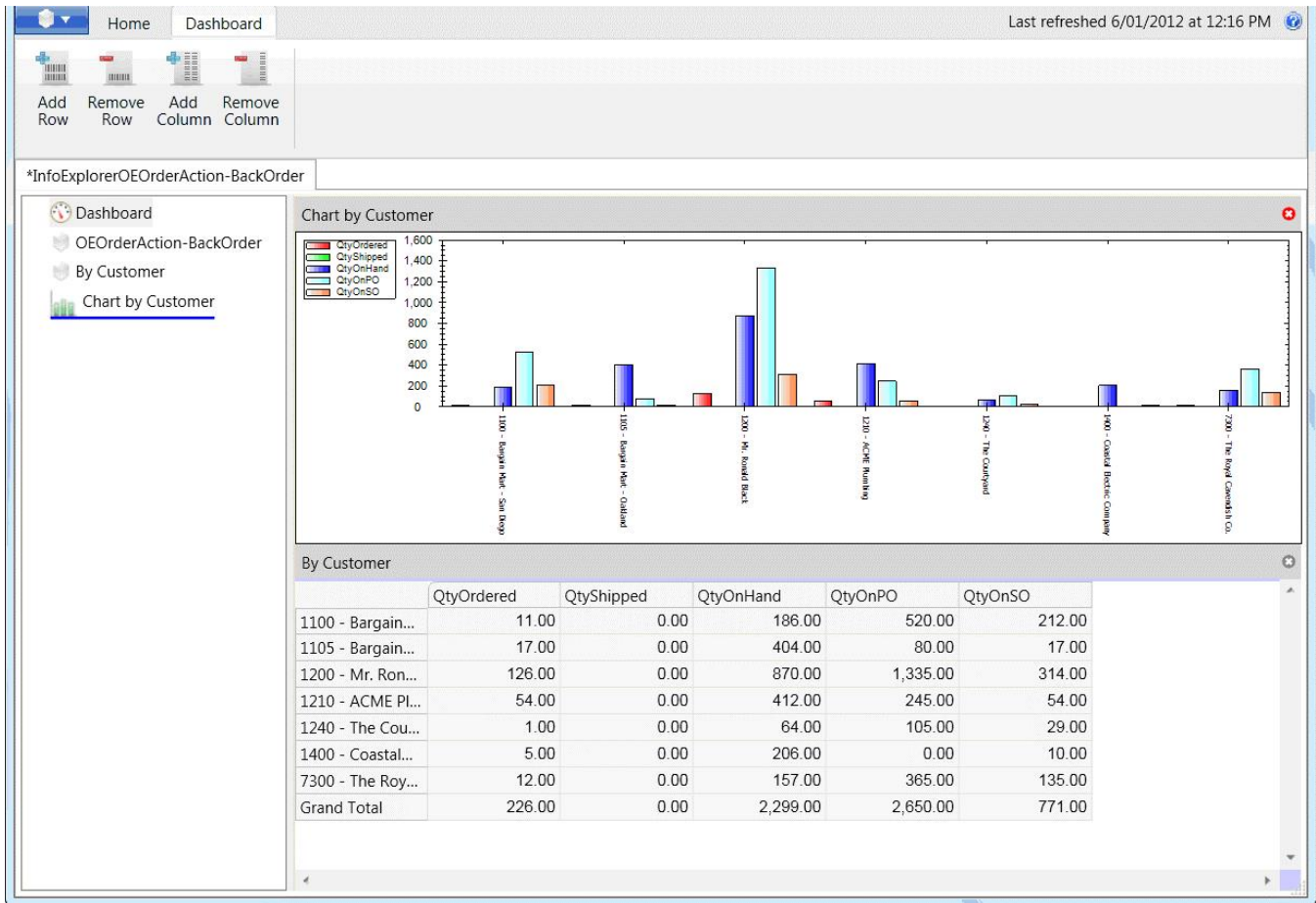
Add and remove views and charts to dashboard

- Drag and drop the required views & charts from the available cube to the dashboard.
- Select the Close icon on the top right on any individual dashboard view or chart to deselect this item.



For example, the following dashboard has 2 rows, and 1 column

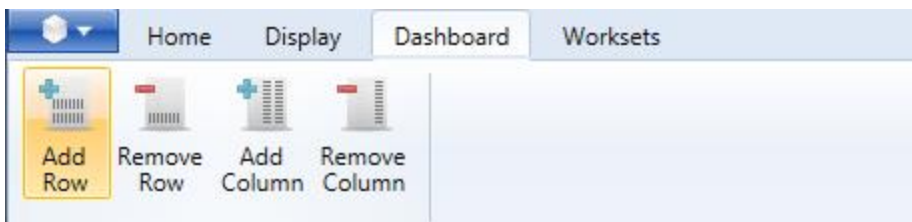
Info-Explorer



USING DASHBOARD TAB

When the active view is a dashboard, the dashboard tab is visible

The Dashboard Tab lets you add and remove rows and columns from a dashboard section in Info-Explorer.



Dashboard tab "quick links"

You can :



Add Row : add a row to the currently active dashboard



Remove Row : remove a row from the currently active dashboard



Add Column: add a column to the currently active dashboard



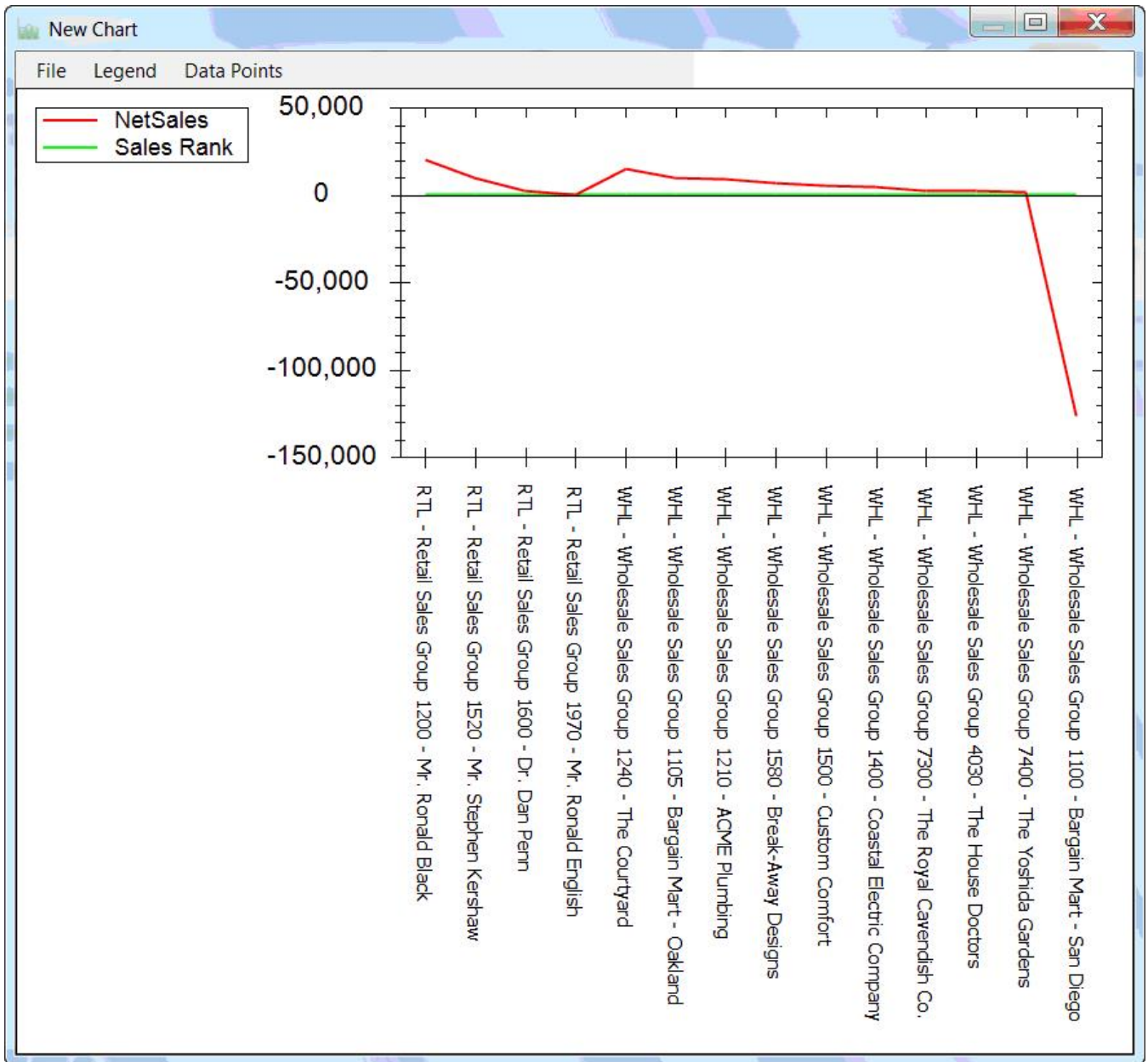
Remove Column: remove a column from the currently active dashboard

CREATE A NEW CHART

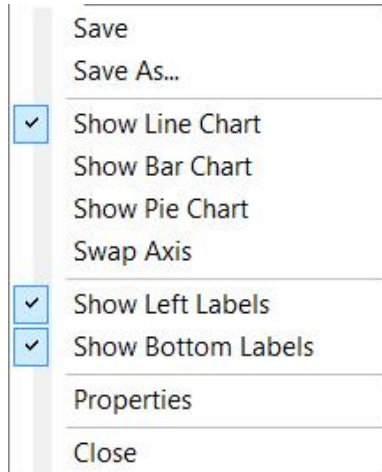


Create a new chart by first selecting the View you want to base the chart on, and then

- Clicking Create chart icon on the Home tab > New ribbon
- Right Hand Mouse Button on the selected View and selecting New Chart, or Click New Chart on the Home Tab > New Ribbon.



From the New Chart window, you can select the File menu and :



Save the new chart

Save as the new chart to assign a name and add the chart to the cube file

Change the Chart Type to one of Line, Bar or Pie

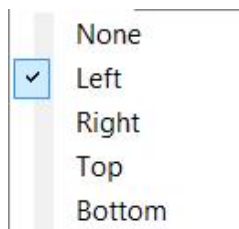
Swap the Chart axis (i.e. swap the x and y axes)

Selectively show the Chart Labels

Change the Chart Properties

Close the chart

From the New Chart window, you can select the Legend menu and select where the legend is to show



From the New Chart window, you can select the Data points menu and select what data points are to show



WORKING WITH INFO-EXPLORER – CHART TAB

When the active view is a chart, the Chart tab is visible



Chart tab “quick links” :



Save : to save the current chart



Save as: to save the current chart to a new name



Properties : to review the chart properties



Swap Axis : to swap the x and y axis of the current line chart

From the Chart tab “style” links

You can change the current chart style to :



Line : to select a Line Chart



Bar : to select a Bar Chart



Pie : to select a Bar Chart

Chart tab "Labels" links

You can selectively show labels :



Left : to select a left or x axis labels



Bottom: to select a bottom or y axis labels

Chart tab "Legend " links

you can change the legend position on the currently active chart:



None: to have no chart legend



Left: to the chart legend on the left



Right: to the chart legend on the right



Top: to the chart legend on the top



Bottom: to the chart legend on the bottom

Chart tab "Data points " links

you can selectively show symbols for the data points on a line chart :



None: no symbol for data points shown



Square: square symbol for data points shown



Circle: square symbol for data points shown



Diamond: diamond symbol for data points shown



Triangle up: triangle up symbol for data points shown



Triangle down: triangle down symbol for data points shown



Cross: cross symbol for data points shown



Plus: plus symbol for data points shown



Star: star symbol for data points shown



Vertical Dash: vertical dash symbol for data points shown

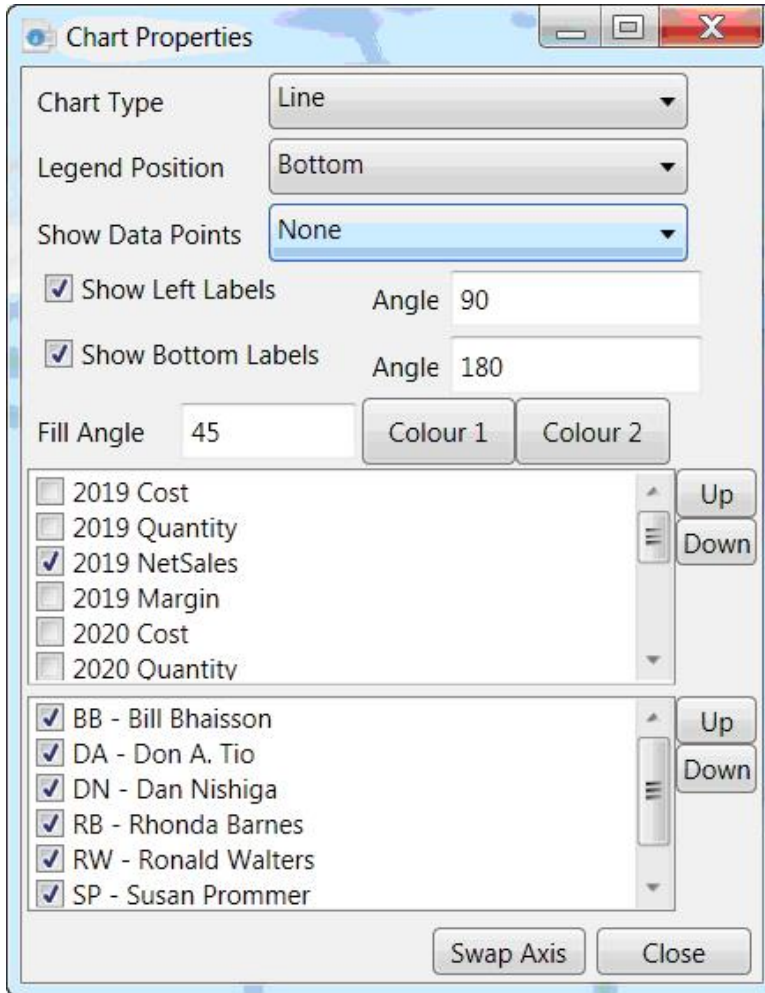


Horizontal Dash: horizontal dash symbol for data points shown

CHART PROPERTIES

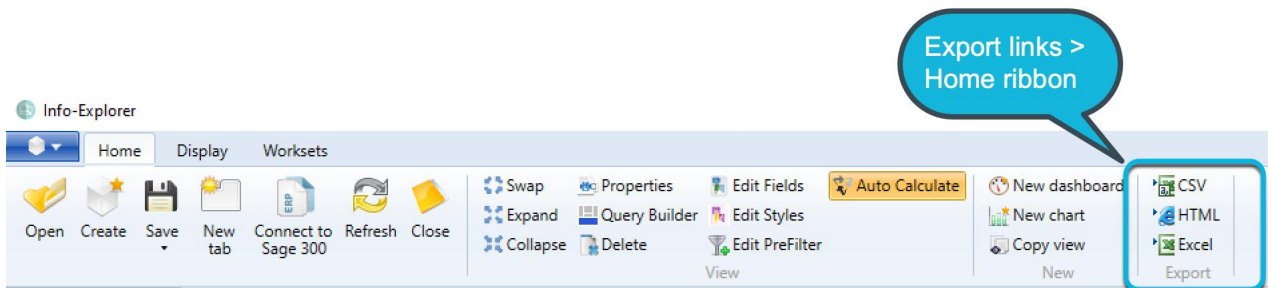
Chart Properties allows you to

- Change the Chart Type
- Change the background colour
- Change legend positions
- Show/hide data points and select the data point shape
- Swap the axis
- Select the values to be shown



Export Overview

Using Info-Explorer with a Full or Writeback licence, you can export cube views.



Export to CSV	100
Export to HTML	100
Export to MS Excel	101

Warning! If you are using Info-Explorer Lite, then "create cube", "export to CSV", "export to HTML" and "export to Excel" are not available.

EXPORT TO CSV

Warning! If you are using Info-Explorer Lite, then "create cube", "export to CSV", "export to HTML" and "export to Excel" are not available.

To export the current slice to a CSV (comma separated values) file, click the Export to CSV icon and provide the appropriate file path and file name.

The screenshot shows the Info-Explorer interface with a dashboard titled 'AP Outstanding Transactions'. The dashboard includes a table with the following data:

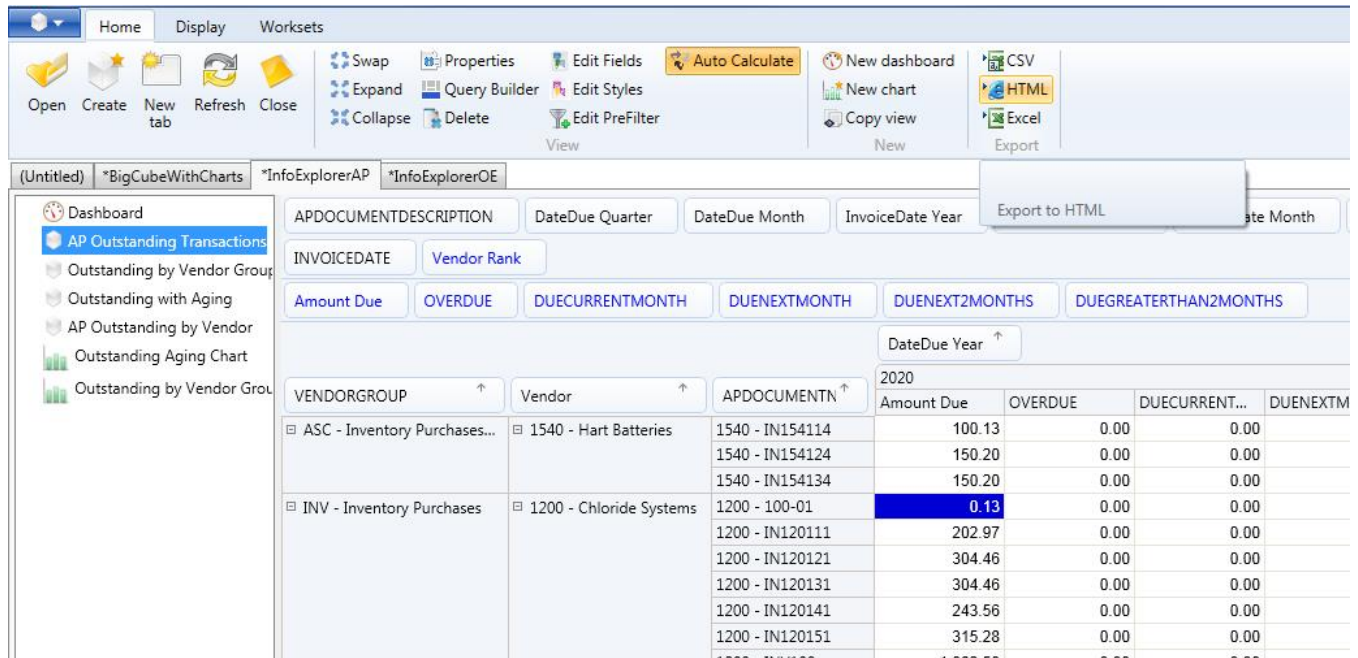
VENDORGROUP	Vendor	APDOCUMENTN	Amount Due	OVERDUE	DUECURRENT...
ASC - Inventory Purchases...	1540 - Hart Batteries	1540 - IN154114	100.13	0.00	0.00
		1540 - IN154124	150.20	0.00	0.00
		1540 - IN154134	150.20	0.00	0.00
INV - Inventory Purchases	1200 - Chloride Systems	1200 - 100-01	0.13	0.00	0.00
		1200 - IN120111	202.97	0.00	0.00
		1200 - IN120121	304.46	0.00	0.00
		1200 - IN120131	304.46	0.00	0.00
		1200 - IN120141	243.56	0.00	0.00
		1200 - IN120151	315.28	0.00	0.00

See Also [Working with Info-Explorer - Home Tab](#)

EXPORT TO HTML

Note, if you are using Info-Explorer Lite, then "create cube", "export to CSV", "export to HTML" and "export to Excel" are not available

To export the current slice to a HTML file, click the Export to HTML icon and provide the appropriate file path and file name.



See Also [Working with Info-Explorer - Home Tab](#)

EXPORT TO MS EXCEL

Requirement!

if you are using Info-Explorer Lite, then "create cube", "export to CSV", "export to HTML", "export to MS Excel" and "Worksets" are not available.

Worksets and Writeback are only available if the Info Explorer - Write back licence has been purchased and activated. If you are using "info-Explorer - Full", then "Worksets" and Writeback are not available.

To export the current slice to a MS Excel file, click the Export to MS Excel icon or the Home Tab > Export Ribbon and provide the appropriate file path and file name

Info-Explorer

The screenshot shows the Info-Explorer interface with a dashboard titled 'AP Outstanding Transactions'. The dashboard includes several filters and a data table. The filters are: APDOCUMENTDESCRIPTION, DateDue Quarter, DateDue Month, InvoiceDate Year, and DOCUMENTAMOUNT. The data table has columns for VENDORGROUP, Vendor, APDOCUMENTN, Amount Due, OVERDUE, DUECURRENT..., DUENEXTMON..., and DUENEXT2MO... The table contains data for two vendor groups: ASC - Inventory Purchases... and INV - Inventory Purchases... with various document numbers and amounts.

VENDORGROUP	Vendor	APDOCUMENTN	Amount Due	OVERDUE	DUECURRENT...	DUENEXTMON...	DUENEXT2MO...
ASC - Inventory Purchases...	1540 - Hart Batteries	1540 - IN154114	100.13	0.00	0.00	0.00	0.00
		1540 - IN154124	150.20	0.00	0.00	0.00	0.00
		1540 - IN154134	150.20	0.00	0.00	0.00	0.00
INV - Inventory Purchases	1200 - Chloride Systems	1200 - 100-01	0.13	0.00	0.00	0.00	0.00
		1200 - IN120111	202.97	0.00	0.00	0.00	0.00
		1200 - IN120121	304.46	0.00	0.00	0.00	0.00
		1200 - IN120131	304.46	0.00	0.00	0.00	0.00
		1200 - IN120141	243.56	0.00	0.00	0.00	0.00
		1200 - IN120151	315.28	0.00	0.00	0.00	0.00

Properties: Security, Connections and Parameters



Clicking Properties on the Home Ribbon will allow you to define and change the existing properties of the cube.

Use the Options > **Lock** buttons to set passwords on selected functions in Info-Explorer.

SECURITY OPTIONS FOR THE CUBE.

The screenshot shows the Info-Explorer interface with the 'Home' ribbon selected. The 'Properties' button is highlighted. The Properties dialog box is open, showing the 'Options' tab. The 'Options' tab has a tree view with the following structure:

- Parameters
 - STARTDATE - Start Date
- Connections
 - Connection 1
 - Connection 1
 - Connection 1
- Cubes
 - New cube
 - Auto Refresh

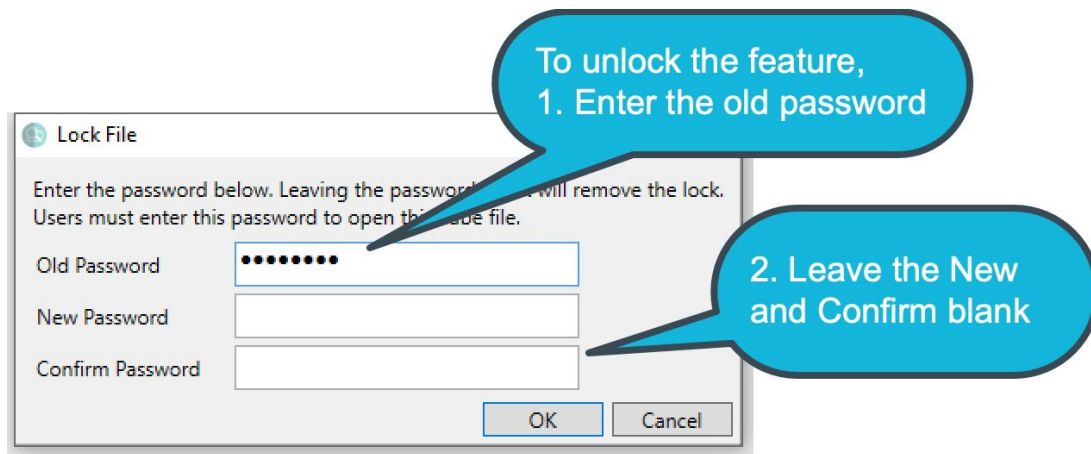
On the right side of the dialog box, there are several buttons for locking functions:

- Change File Password...
- Lock Connections...
- Lock Cubes...
- Lock Refresh...
- Lock Write Back...
- Lock Write Back Query...

You can set a password for the following function in Info-Explorer. Users are prompted to enter the password before they can change the cube configuration or run the locked process, such as Refreshing the cube.

REMOVE THE LOCK

To remove the lock, enter the Old Password and leave the password blank (for New and Confirm).



Tip: There is no master password. If you don't remember the password, the file may become unusable. We suggest to save a copy of the unprotected file in a secure folder that only Admin users have access to. You need to enter the existing

WHEN TO USE LOCK OPTIONS

- **Lock File:** Users need a password to open an entire .cubx file
- **Lock Connections:** Users need to enter the password to view/change the connection parameters. This is useful to ensure users cannot change the database that the cube is pointing to.
- **Lock Cubes:** Users need to enter the password before viewing or amending the query. This is relevant when you want to restrict what tables/entities are included in the cube.
- **Lock Refresh:** Users need to enter the password to refresh the cube. This is often used for large cubes and in conjunction with using automated processes to refresh the cubes outside of business hours.
- **Lock Writeback:** Users need a password to write to the ERP Application database and update the budget/forecast data with the currently selected Workset.
- **Lock Writeback Query:** Users need a password to change the query being used and therefore the data being updated in the ERP Application when using the Writeback function.

PARAMETERS :

Define parameters and default values when running queries. See [Using Parameters in a query](#)

CONNECTIONS :

Define the database connections for each query.

See [Create a new connection](#)

See [Configure to a different database](#)

CUBES:

For background, refer to Amend cube query on the facing page

Click on the cube name (or "new cube" if the cube has not been renamed), and you will be able to

- Review and change the connection for this query
- Review and amend the SQL query for the cube
- Click on Query Builder to use the Query Builder to amend the SQL Query. See [Query Builder](#)

Tip: If there is an error when running the query, you can press CTRL + C to copy the query and error content to SQL Management Studio or Notepad.

Select "Refresh Automatically on open" to refresh the data when opening the file.

+Views

Expand the + beside Views under each cube and you will see all the views defined on the current query.

+Write back

Expand the + beside Writeback to see all the facts in the current cube. By clicking on any one of the facts you will be able to define a SQL query to write the selected fact back from a workset to the underlying ERP database. See [Writeback](#)

Requirement! Please note: Write Back is not standard feature and requires a separate licence.

The total number of records in the cube will be displayed.

The current key defined for the networks will be displayed (the relevant dimensions will be in bold).

To view the records, click "view records"

To define the key dimensions, click "Define Key Fields". See [Define Key Fields](#)

AUTO REFRESH:

Enter the number of minutes after which the currently active cube view will refresh.

If zero, then the cube will not auto refresh. The "count down" clock on the top right hand side of the ribbon will show when the cube will next refresh.

See Also [Working with Info-Explorer – Home Tab](#)

AMEND CUBE QUERY

You can amend the cube query to add / remove fields from database tables or calculated fields to the cube. There two methods:

Using Query Builder:

The "Query Builder" generates a diagrammatic representation of your SQL query, showing the things that provide your cube with Dimensions (things to analyse data by) and Facts (the data to analyse). E.g. the relevant tables with their associated joins, the selected fields, and any formatting and calculations applied to those fields.

Refer to Query Builder on the next page

Updating the cube Properties

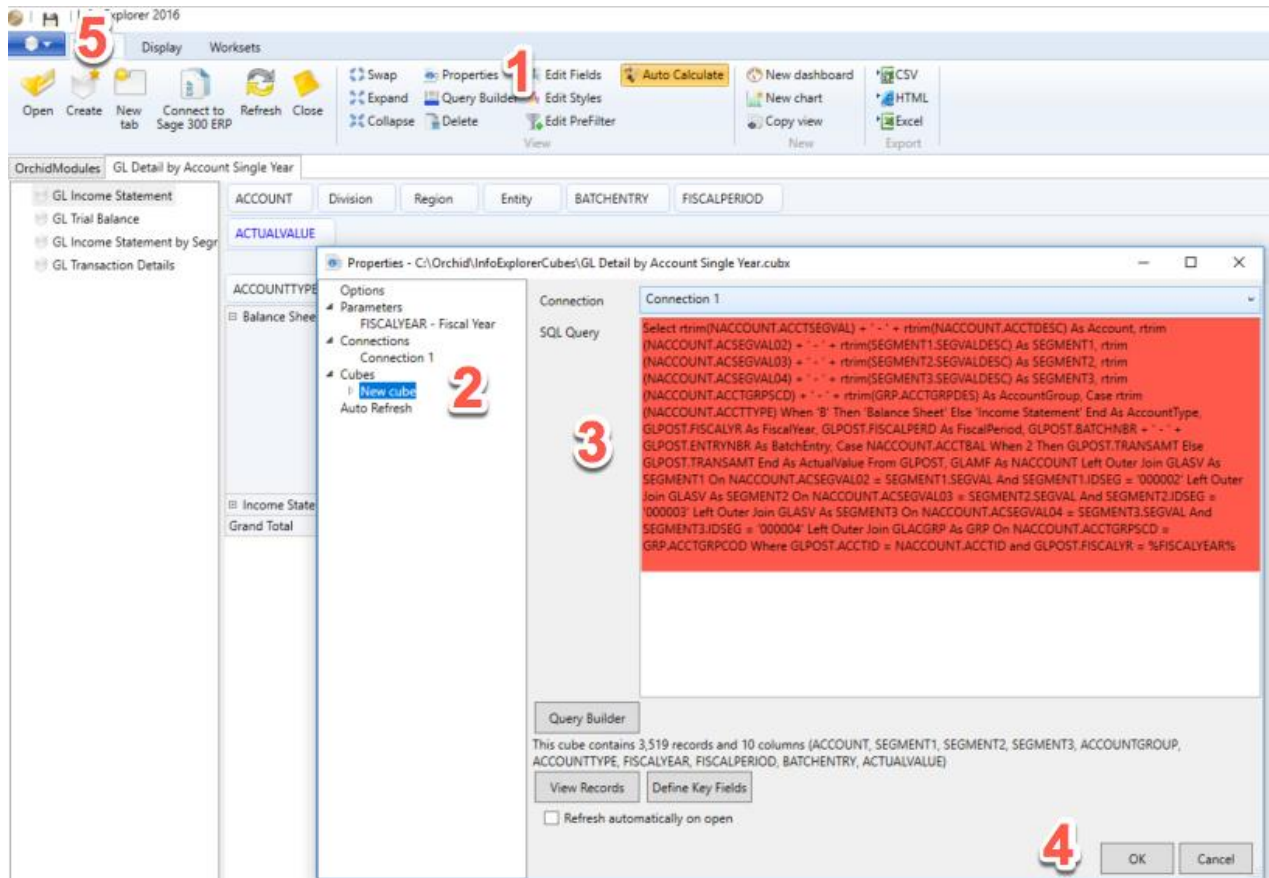
You can also update the cube queries without using Query Builder.

For example, if you are converting an existing report with a query that you want to use in Info-Explorer or in cases where the query is too complex to represent diagrammatically in Query Builder.

If you want to amend the query (or queries) in your cube without using the in-built Query Builder

1. Click on Properties
2. Click on the required Query in the "Cube" node, .e.g. "New cube".
3. Amend the query and/or copy and paste from SQL Management Studio
4. Click OK
5. Click to save your cube

Note: If you have multiple queries, you will have multiple entries under the node "Cube". You need to select each query one at a time.

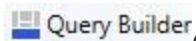


Viewing query error

If there is an error when refreshing the cube, the error message is displayed. In some cases, the error message may be truncated.

To see the full error, please try using CTRL-C when on the error message and CTRL-V to paste into Notepad or other editor.

QUERY BUILDER



Click this icon to view and amend the existing query for the active cube.

Overview

The "Query Builder" generates a diagrammatic representation of your SQL query, showing the things that provide your cube with Dimensions (things to analyse data by) and Facts (the data to analyse). E.g. the relevant tables with their associated joins, the selected fields, and any formatting and calculations applied to those fields.

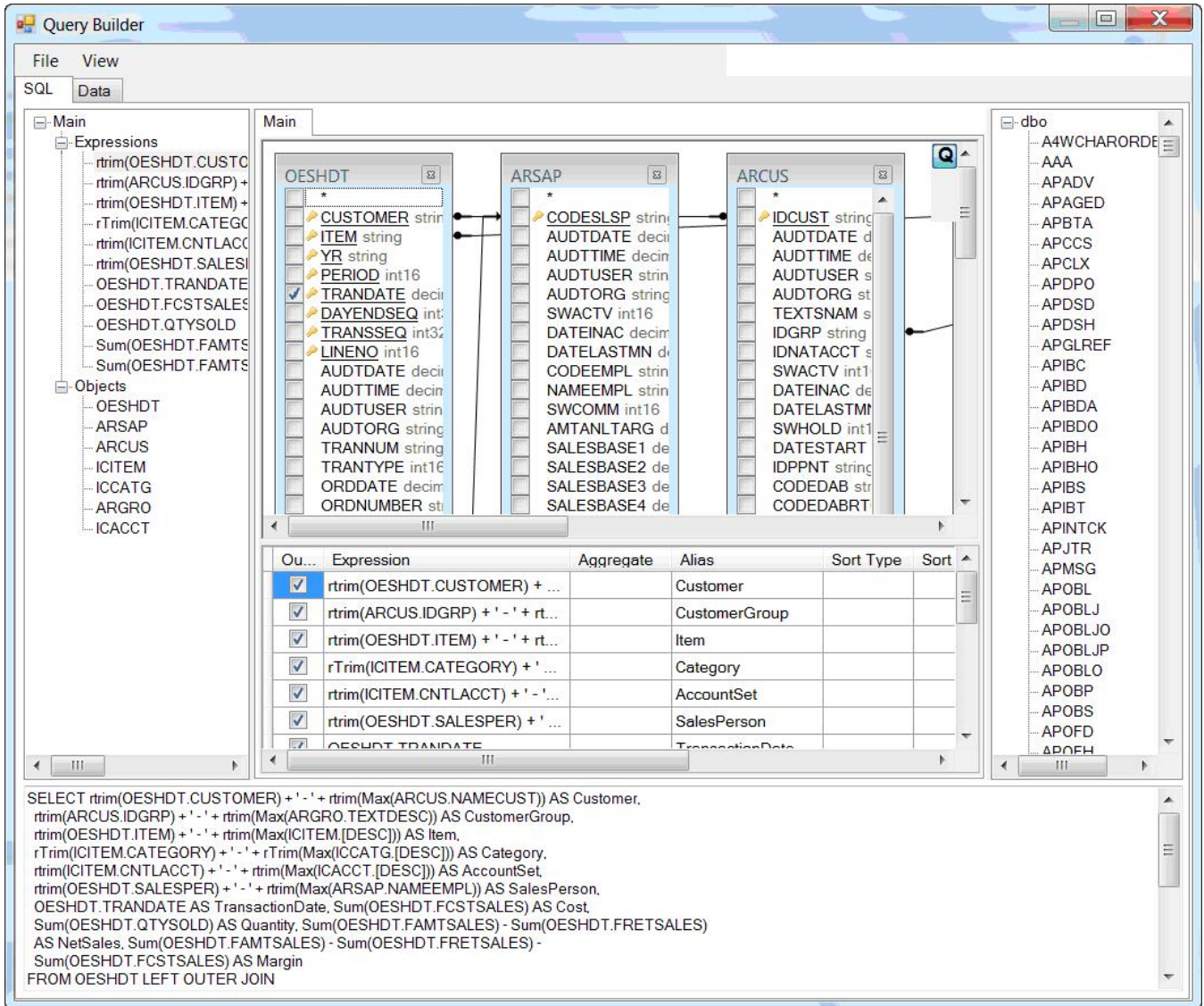
If the connections between the tables aren't too many or too complex, the selected tables and joins will be shown in the Query Builder. You can "visually" link/join the tables by selecting the relevant field from

one table and dragging the link to the other table/field, then selecting fields from tables to be added into the SQL Query for Info-Explorer.

How to use

Use the Query builder to assist in creating your query. Here you can :

- Double click on the table name to add the table to your query
- Select the columns required by clicking on the tick box to the left of the column name or type the column name in the expression box
- Type in the aggregate function (if required)
- Type in an Alias (if required)
- Select Sort Type and Sort Order and Group by if required
- Test the query by clicking on the data tab to view the results
- To join tables, click on the column in the first table and drag to the second table. The join type can be amended by double clicking on the line joining the tables
- Type in functions (for example Rtrim) in the Expressions window
- When complete, click File > OK and the new cube will be created in the workbook
- The SQL query can also be typed and amended in the SQL Pane



Troubleshooting

When using the Query Builder in Orchid Info-Explorer the following error message may be displayed:

'Invalid SELECT statement. Unexpected token "%" at line x'.

Info-Explorer will still be able to execute the SQL Query and display the result, as long as the syntax of the SQL Query is correct.

What causes the error?

The error occurs if the SQL Query has too many tables, and/or the syntax of the query is too complex, for the Query Builder to generate a diagrammatic representation of the query.

Typical examples occur when the query includes an Info-Explorer parameter, or when using the CAST function in SQL.

Solution: Amend the query in the Cube > Properties

If you receive this error message, you won't be able to make changes to the SQL Query 'visually' using the Query Builder. Instead, any changes will have to be done directly by editing the SQL Query box in the Properties of the cube.

If you want to amend the query (or queries) in your cube without using the in-built Query Builder

1. Click on Properties
2. Click on the required Query in the "Cube" node, .e.g. "New cube".
3. Amend the query and/or copy and paste from SQL Management Studio
4. Click OK
5. Click to save your cube

Note: If you have multiple queries, you will have multiple entries under the node "Cube". You need to select each query one at a time.

See also [Using Parameters in the query](#)

See also [Working with Info-Explorer – Home Tab](#)


DEFINE KEY FIELDS

All the dimensions from the current cube will be displayed. Select those dimensions which make up the key to each of the budget records. This is only required if you need to refresh the cube (to get up-to-date actual figures) in a cube where you already have a workset (or networks defined) which are based on the actuals, but you do not want to lose the budget, forecast or scenario data already entered.

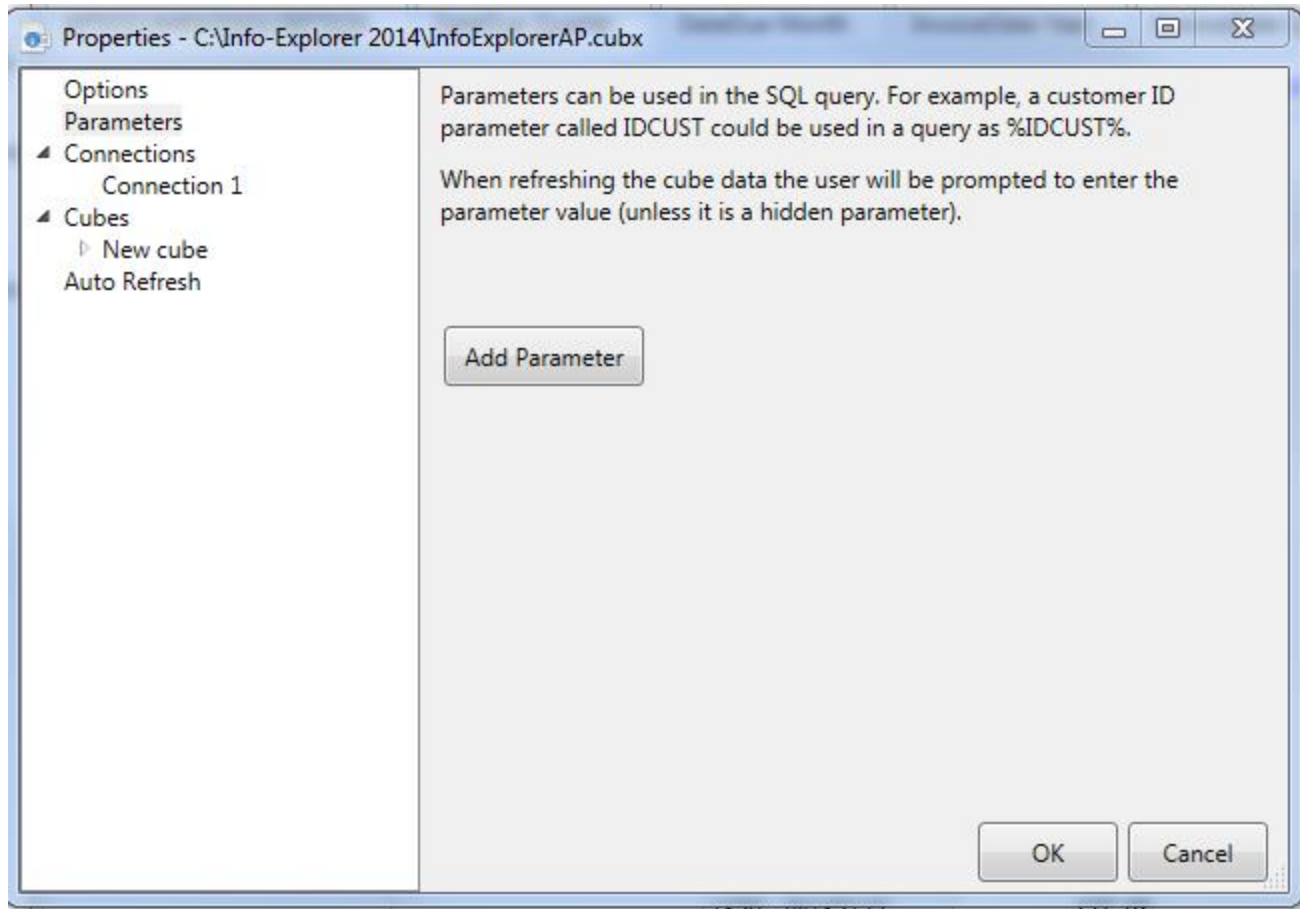
See also [Working with Info-Explorer – Home Tab](#)

USING PARAMETERS IN THE QUERY

After building the query (or pasting in the query from another query builder tool), you can add parameters which can restrict the data to be viewed. The parameters can either be visible/amendable by the users when "refresh" is clicked, or hidden.

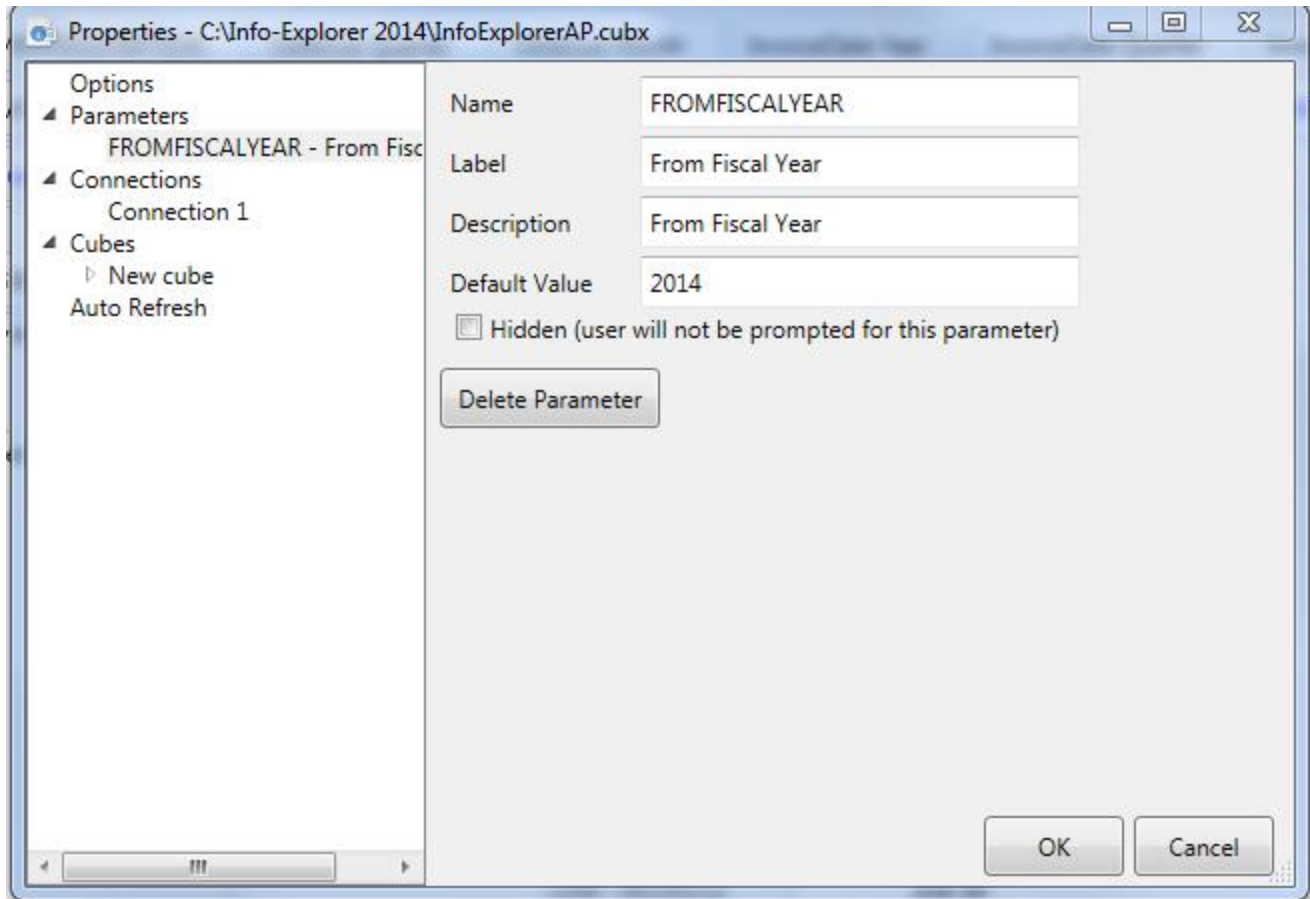
To add a new parameter, click on the  Properties icon

Click "Add Parameter" to add a new parameter, or click the existing parameter to amend an existing parameter :



Per parameter you can define:

- The parameter Name
- The parameter Label
- The parameter tool tip description
- an optional default value
- set if it is a hidden parameter



After defining the parameters, these must be edited into the query as is required - between % symbols. For example "FROMFISCALYEAR" and :TOFISCALYEAR" as shown in red below :

```
SELECT rtrim(A.ACCTSEGVAL)+' - '+rtrim(A.ACCTDESC) AS Account, rtrim(A.ACSEGVAl02)+' - '+rtrim
(S1.SEGVALDESC) AS SEGMENT1, rtrim(A.ACSEGVAl03)+' - '+rtrim(S2.SEGVALDESC) AS SEGMENT2, rtrim
(A.ACSEGVAl04)+' - '+rtrim(S3.SEGVALDESC) AS SEGMENT3, rtrim(A.ACCTGRPSCD)+' - '+rtrim(GRP.ACCTGRPDES)
AS AccountGroup, CASE rtrim(A.ACCTTYPE) WHEN 'B' THEN 'Balance Sheet' ELSE 'Income Statement' END AS
AccountType, F.FSCSYR, '01' AS Period, (case when F.FSCSDSG = 'A' then (F.OPENBAL + F.NETPERD1) else 0 end) AS
Actual,
(case when F.FSCSDSG = '1' then (F.OPENBAL + F.NETPERD1) else 0 end) AS Budget1
FROM GLAMF AS A LEFT OUTER JOIN GLASV AS S1 ON A.ACSEGVAl02 = S1.SEGVAL AND S1.IDSEG =
'000002'
LEFT OUTER JOIN GLASV AS S2 ON A.ACSEGVAl03 = S2.SEGVAL AND S2.IDSEG = '000003'
LEFT OUTER JOIN GLASV AS S3 ON A.ACSEGVAl04 = S3.SEGVAL AND S3.IDSEG = '000004'
LEFT OUTER JOIN GLACGRP AS GRP ON A.ACCTGRPSCD = GRP.ACCTGRPCOD
```

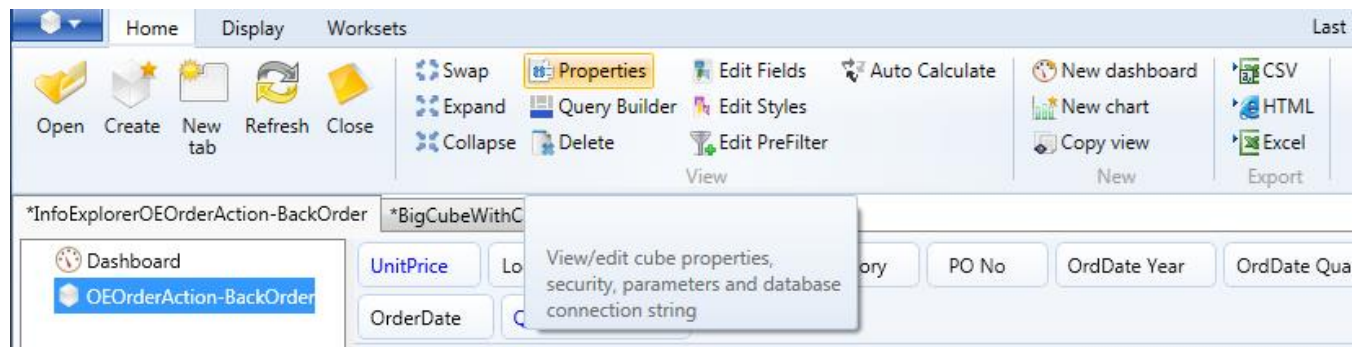
LEFT OUTER JOIN GLAFS AS F ON A.ACCTID = F.ACCTID AND F.CURNTYPE = 'F' and FSCSYR >= %FROMFISCALYEAR% and FSCSYR <= %TOFISCALYEAR%

See also [Creating a cube](#)

See also [Working with Info-Explorer - Home Tab](#)

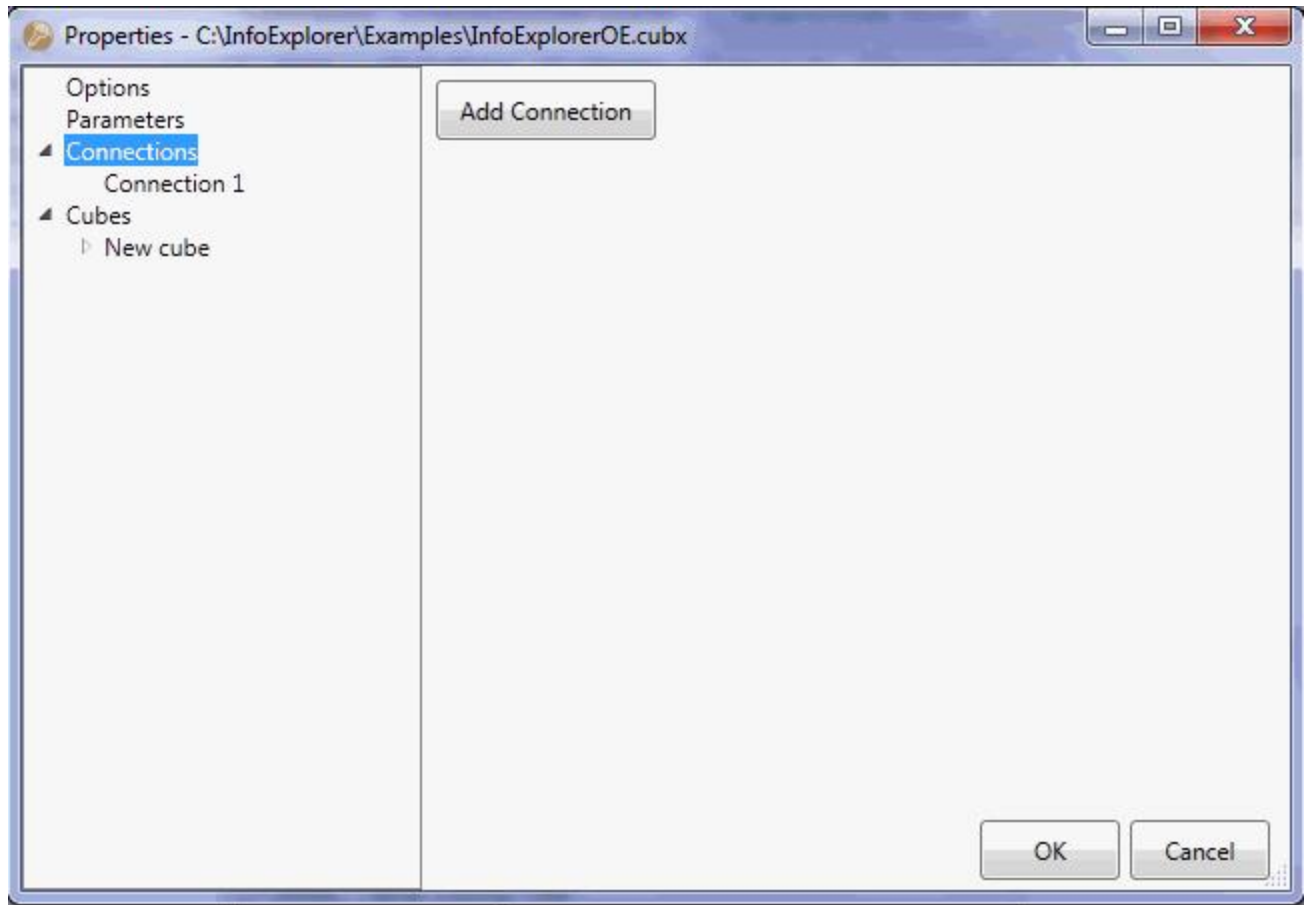
CREATE A NEW CONNECTION

To create a new database connection, select Properties on the Home Tab.



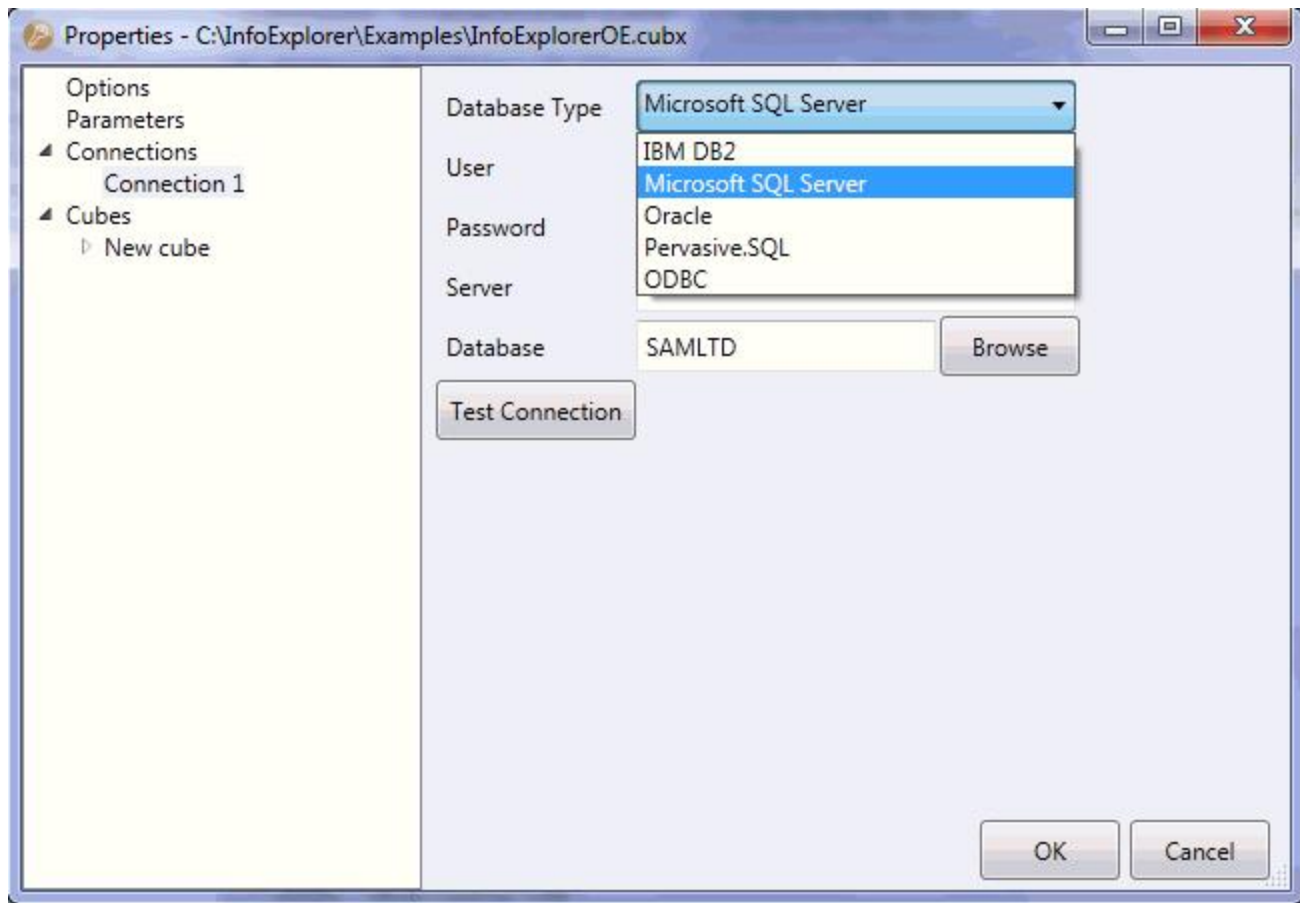
Then select the "Connections" option. Then Click "Add Connection" and specify the connection details.

Tip: You can use this if you need to switch the cube between different databases (a test and live databases). It is also useful if you include data from different databases in the same cube file (cubx extension).



The different database driver details that can be selected are :

- IBM DB2
- Microsoft SQL Server
- Oracle
- Pervasive.SQL
- ODBC



AUTO REFRESH

Configure Auto-Refresh while using the cube:

On the Home Ribbon, select Properties > Auto Refresh and select how often you want to refresh the data (in minutes).

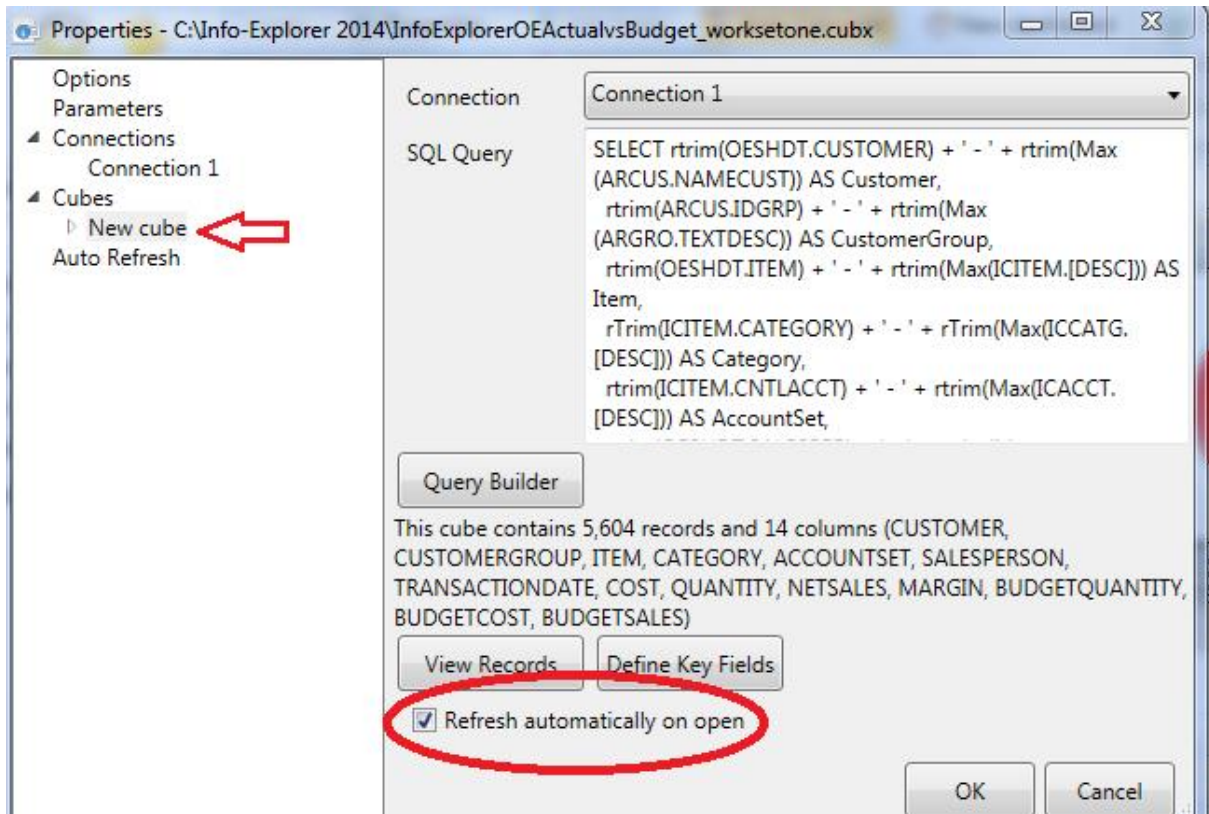
Configure Refresh on Opening the cube -

On the Home > Properties > Cubes > Select a cube.

Select the cube name, for example \New Cube

Tick "Refresh Automatically on open"

This will refresh the data in the cube when you open it.



For other Options, refer to Refresh Info-Explorer Cubes on page 40

Info-Explorer Writeback

Info-Explorer Writeback allows you to budget beyond the G/L Level and use various spread methods to populate the budget top-down or bottom up.

- Multiple Spread Methods
- Update budget data through Analysis Interface
- Writeback to Sage 300 or other databases
- Maintain multiple budget versions

Using Info-Explorer Writeback with Optional Tables	116
Budgeting using the Workset Tab	117
Writeback to Sage 300	119

Refer to Info-Explorer Writeback training video



USING INFO-EXPLORER WRITEBACK WITH OPTIONAL TABLES

The first example describes Sage 300 budgeting at the GL level using Info-Explorer (with Budget Write-back) and Optional Tables (with Excel Add-in).



The second example describes Sage 300 budgeting at the GL & Transactional Optional Field level (e.g. Project Budgeting) using Info-Explorer and Optional Tables.

A graphic titled "Spotlight On..." with the subtitle "Budgeting (2 of 3)". It features a 3D bar chart with a yellow line graph overlaid, showing an upward trend. Below the chart are two circular icons: a magnifying glass over a document labeled "Info-Explorer" and a document with a bar chart labeled "Optional Tables".

The third example describes Sage 300 budgeting at the Sub-ledger level (e.g. Customer & Item budgeting) using Info-Explorer and Optional Tables.






A graphic titled "Spotlight On..." with the subtitle "Budgeting (3 of 3)". It features a 3D bar chart with a yellow line graph overlaid, showing an upward trend. Below the chart are two circular icons: a magnifying glass over a document labeled "Info-Explorer" and a document with a bar chart labeled "Optional Tables".

BUDGETING USING THE WORKSET TAB

Requirement! You need a "Budget and Writeback" licence to view the Workset tab.

The screenshot shows the Info-Explorer 2014 interface. At the top, there are tabs for 'Home', 'Display', and 'Worksets'. Below these are various filters and options like 'Re-Estimate', 'Copy', 'New', 'Delete', 'Write Back', 'Method: Proportionally', 'Based On: Current Value', 'Fiscal set year: Match', 'Unformatted Account: Match', 'Account: Match', 'Version: Match', 'Included Segment 1: Match', 'Period: Match', 'Included Segment 2: Match', and 'Account Group: Match'. The main area displays a table titled '*InfoExplorerBudgetEntry' with columns for 'Included Segment 1', 'Included Segment 2', 'Included Segment 3', 'Account Type', and 'Version'. Below this is a grid of budget entries with columns for 'Account Gro', 'Unformat', 'Account', and fiscal years '02' through '12'. The data shows various sales and revenue figures, such as '40001 4000 - Sales' with values ranging from 304.62 to -300,000.00.

From the Workset tab, "Workset" links you can

- 
Create a new Workset
- 
Delete an existing Workset
- 
Copy an existing Workset
- 
Rename a Worksheet
- 
Write back a workset to underlying ERP



To amend a budget, forecast or scenario figure, double click on the cell and change the value.

Note:

If this cell is made up of a single record, then the single value will be updated.

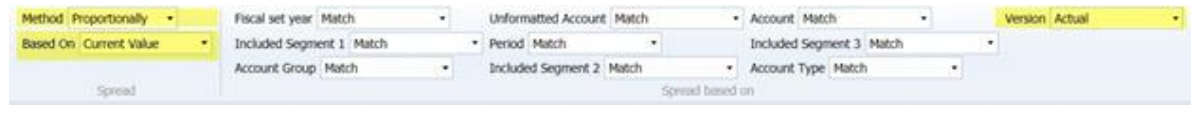
If the cell you have changed is a total of a number of records, then the total will be amended by updating the underlying records. The underlying records will be updated according to the selected "Spread" method.

Spread methods

- 
Evenly : The total value entered is divided by the number of records making up the total, and this equal value is spread to all the underlying records
- 
Proportionally : When this method is selected, you need to specify which values are to form the basis of the spread – the current value in the Workset, or the original value of the workset before any changes were made. Additionally you can spread proportionally based on a different dimension value.

Example:

In the example below, any changes to the budget figure will be spread based on the existing current values in the "Actual" version.



- **Minimum only** : The total value entered is assigned to the single record which has the minimum value of the underlying records
- **Maximum only**: The total value entered is assigned to the single record which has the maximum value of the underlying records
- **Average** : The value entered is the average value, and will be assigned to all records making up the total.
- **Percentage increase/decrease**: The total percentage value entered is applied to all the records making up the total.

Example: To increase all records by 10%, enter "10". To decrease all records by 10%, enter "-10".

- **Absolute increase/decrease**: The absolute value entered is applied to all the records making up the total.

Example: To increase all records by \$100, enter "100". To decrease all records by \$100, enter "-100".

WRITEBACK TO SAGE 300

Warning! With a "Budget and Writeback" licence, you are able to view the Workset tab and use the Writeback functionality.

Once the required fact has been selected, the SQL query to be executed for each amended fact will be displayed.

The SQL query will be executed for all amended facts. You can include dimension values from your cube by including them in the SQL statement, surrounded by percent signs (%).

The amended budget, forecast or scenario figures must be included from your cube by including the fact as %VALUE%

There are 3 supported write back queries for Sage 300

1. GL Budgets
2. Information Manager Infosets
3. IC Item Projected Sales

Note:

No new records will be created in the Sage 300 database with the default queries.

- to update a GL budget for an account/fiscal year/fiscal period combination – the budget record must already exist in Sage 300. So you might need to import zero for all accounts/fiscal year/fiscal periods required.
- to update an information manager infoset, the initial record must be inserted for the key combination and date required. So you might need to use an import/export into Infosets, or the Information Manager Excel add-in to create new records
- to update IC Item projected sales, the initial record(s) must be imported into the IC reorder table

Example SQL queries:

1. Example SQL query to update GL Budgets:

For a specific site, the sample cube would need adapting.

Included dimensions included in percentage signs %xxx%, and are highlighted in yellow

The budget, forecast or scenario data entered is always called %VALUE% shown in green below

The SQL query is shown in blue text below

Hard coded fields in red (currency, budget set and currency type) would need amending per customer site

```

DECLARE @SQL VARCHAR(MAX);
DECLARE @columnname VARCHAR(10);
DECLARE @period VARCHAR(2);
DECLARE @currency VARCHAR(3);
DECLARE @fscdsg VARCHAR(1);
DECLARE @curntype VARCHAR(1);
SET @currency = N'CAD';
SET @fscdsg = N'1';
SET @curntype = N'F';
SET @period = N'%PERIOD%';
SET @columnname = N'NETPERD' +

```



```

case left(@period,1) when '0' then RIGHT(rtrim(@period),1) else RIGHT(rtrim(@period),2) end;
SET @SQL = 'UPDATE GLAFS set ' + @columnname + ' = %VALUE% WHERE RTRIM(ACCTID) =
"%UNFORMATTEDACCOUNT%" AND FSCSYR = "%FISCALYEAR%" AND FSCSCURN = "' + @cur-
rency +
"' AND FSCSDSG = "' + @fscdsg + "' AND CURNTYPE = "' + @curntype + "'";
EXEC (@SQL);

```

2. Example SQL query to update Customer/Item Budgets:

This query is designed to update a Customer/Item budget stored in an Information Manager infoset. There are facts which can be entered, Budget Quantity, Budget Sales and Budget Cost

Included dimensions included in percentage signs %xxx%, and are highlighted in yellow

The budget, forecast or scenario data entered is always called %VALUE% shown in green below

The SQL query is shown in blue text below

Hard coded variables which might require changing per customer site are shown in red text below

a. SQL Query for fact BUDQTY

SQL Query for BUDQTY

```

DECLARE @SQL VARCHAR(MAX);
DECLARE @infokey as VARCHAR(10) = CONVERT(VARCHAR(10), '%INFOKEY%');
DECLARE @optfield as VARCHAR(10) = N'BUDQTY';
SET @SQL = 'UPDATE EBINFOO set VALUE = %VALUE% WHERE INFOKEY = ' + @infokey + ' AND RTRIM
(OPTFIELD) = ''' + @optfield + ''';';
EXEC (@SQL);

```

b. SQL Query for fact BUDCOST

```

DECLARE @SQL VARCHAR(MAX);
DECLARE @infokey as VARCHAR(10) = CONVERT(VARCHAR(10), '%INFOKEY%');
DECLARE @optfield as VARCHAR(10) = N'BUDCOST';
SET @SQL = 'UPDATE EBINFOO set VALUE = %VALUE% WHERE INFOKEY = ' + @infokey +
' AND RTRIM(OPTFIELD) = ''' + @optfield + ''';';
EXEC (@SQL);

```

c. SQL Query for fact BUDVALUE

```

DECLARE @SQL VARCHAR(MAX);
DECLARE @infokey as VARCHAR(10) = CONVERT(VARCHAR(10), '%INFOKEY%');
DECLARE @optfield as VARCHAR(10) = N'BUDCOST';
SET @SQL = 'UPDATE EBINFOO set VALUE = %VALUE% WHERE INFOKEY = ' + @infokey +

```

```
' AND RTRIM(OPTFIELD) = '' + @optfield + ''';  
EXEC (@SQL);
```

3. Example SQL query to update IC Item Projected Sales Budgets:

This query is designed to update a Customer/Item budget stored in an Information Manager infoaset. There are facts which can be entered, Budget Quantity, Budget Sales and Budget Cost

Included dimensions included in percentage signs **%xxx%**, and are highlighted in yellow
The budget, forecast or scenario data entered is always called **%VALUE%** shown in green below
The SQL query is shown in blue text below

```
DECLARE @SQL VARCHAR(MAX);  
DECLARE @periodstart as VARCHAR(8) = CONVERT(VARCHAR(9), '%PERIODSTART%', 112);  
DECLARE @itemno as VARCHAR(24) = N'%ITEMNO%';  
DECLARE @location as VARCHAR(10) = N'%LOCATION%';  
SET @SQL = 'UPDATE ICREORD set SALES PROJ = %VALUE% WHERE RTRIM(ITEMNO) = '' +  
@itemno +  
'' AND LOCATION = '' + @location + '' and PERIODSTRT = ' + @periodstart + '';  
EXEC (@SQL);
```




Office: 2/273 Alfred Street, North Sydney
New South Wales 2060 Australia

Phone: +61 +61 2 9099 1077

Fax: +61 2 9955 0606

Email: info@orchid.systems

www.orchid.systems

sage | Development
Partner Gold

Work *Smarter* with Orchid

© 2019 Orchid Systems