



# Altosoft Insight

## 30-Day Evaluation Version

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### Quick Start Guide

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## ALTOSOFT INSIGHT EVALUATION EDITION QUICK START GUIDE

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# 1 Introduction

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## 1.1 Purpose

The purpose of this document is to provide step by step instructions on how to quickly and easily install and begin using Altosoft Insight Evaluation Edition.

## 1.2 Background

Altosoft Insight 30-Day Evaluation Edition provides users with full access to key components of Altosoft Insight, including InsightBI, MetricsMart, Data Source Adapters and ProcessMart, for a period of thirty days. For this limited period of time, users will be allowed to test the functionality of Insight for evaluation purposes.

For further information on Altosoft's Insight offerings, updates on Insight features, upcoming releases etc., please visit us at <http://www.altosoft.com> or contact [info@altosoft.com](mailto:info@altosoft.com).

## 1.3 Architecture

There are three primary elements in the Altosoft architecture, which you will have access to once you install Insight Studio:

- The InsightBI layer, which is the front end of the Insight platform providing dashboarding, reporting, and other interfaces into Insight's monitoring and analysis capability.
- MetricsMart, which handles data acquisition, aggregation, calculation, and optimization, fundamentally simplifying and redefining data integration.
- Insight Studio, which is the single configuration environment for all Altosoft components.

For more information regarding these and other offerings by Altosoft, please visit <http://www.altosoft.com/products/>

## 2 Insight Installation

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### 2.1 Accessing Altosoft Insight 30-Day Evaluation Edition

You can download Altosoft Insight 30-Day Evaluation Edition from the Altosoft website at <http://demo2.altosoft.com/Altosoft.Web/login.aspx>. You will be required to register in order to complete the download.

### 2.2 Pre-requisites

#### 2.2.1 Software Requirements

The following software must be installed prior to installing Insight.

- **Hardware:** 2G RAM
- **Operating System:** Windows XP Pro SP2, Windows Server 2003, Windows Server 2008, or Vista
- **Framework:** .NET 3.5
- **Applications:** Dashboard designer supports IE 6.0, 7.0, or 8.0 with Flash Player version 9,0,124,0 Dashboard Viewer supports IE, Firefox, and Opera.
- **Databases:** MS SQL 2005 or 2008 or SQL Express or Oracle 9.x and higher or Oracle XE
- **Optional Applications:** Microsoft Excel 2007 (for Excel plug-in)

#### 2.1.2 .NET 3.5 Configuration

.Net Framework 3.5 is required for Insight. This can be downloaded and installed from the following link:

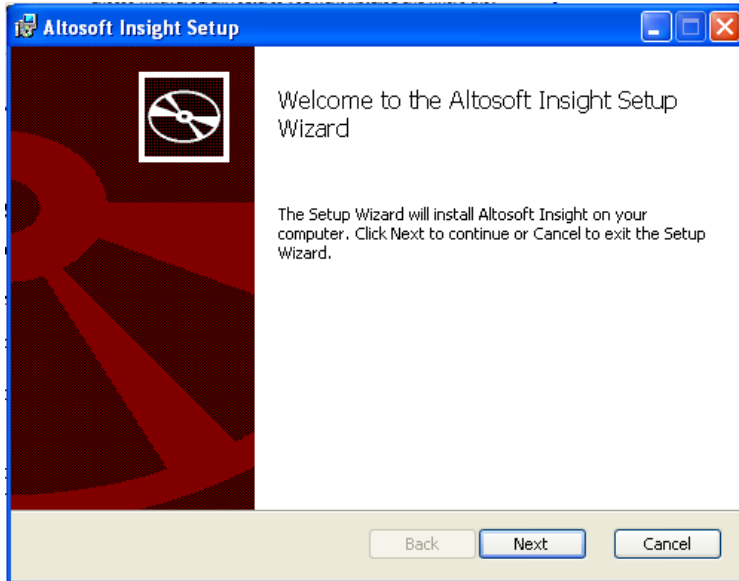
- <http://www.microsoft.com/downloads/details.aspx?FamilyID=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>

### 2.3 Installation Process

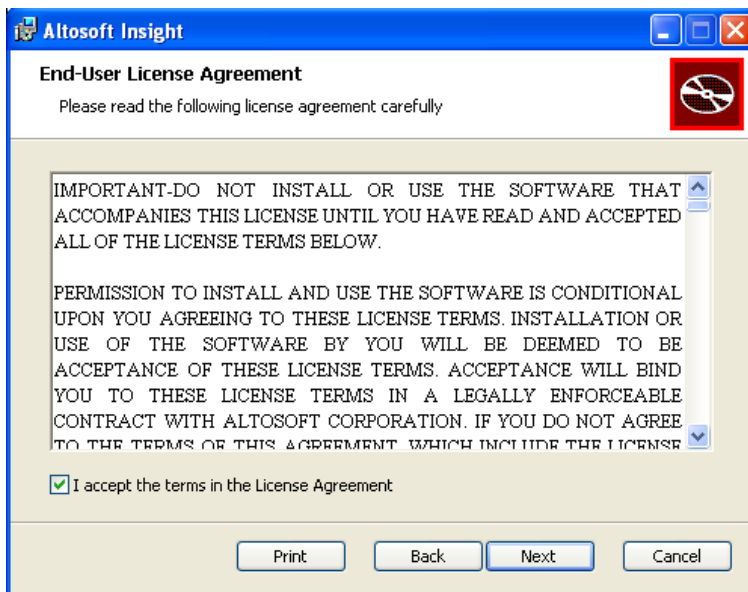
This section will cover the actual Insight installation wizard.

To install Altosoft Insight:

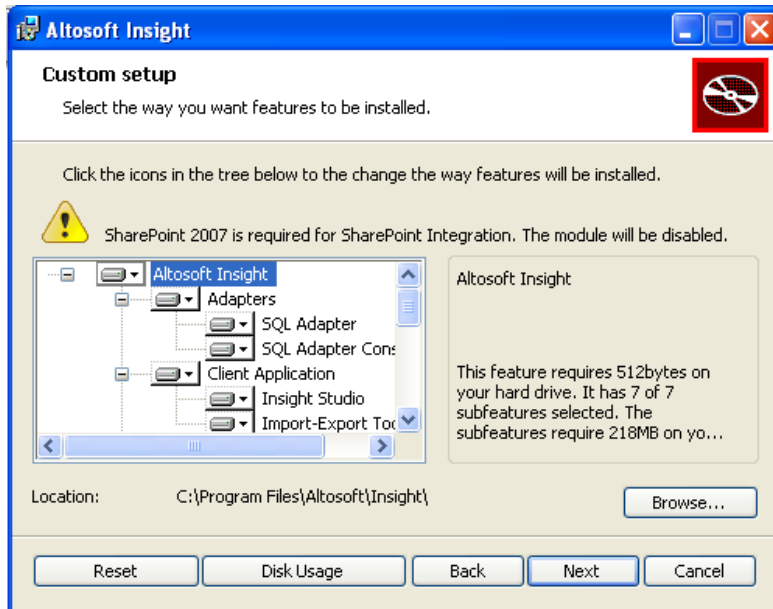
1. **Welcome** - Double click on setup.exe and click **Next** at the initial screen:



2. **End-User License Agreement** - Agree to the license terms by clicking the checkbox "I accept the terms in the License Agreement" and then click **Next**:

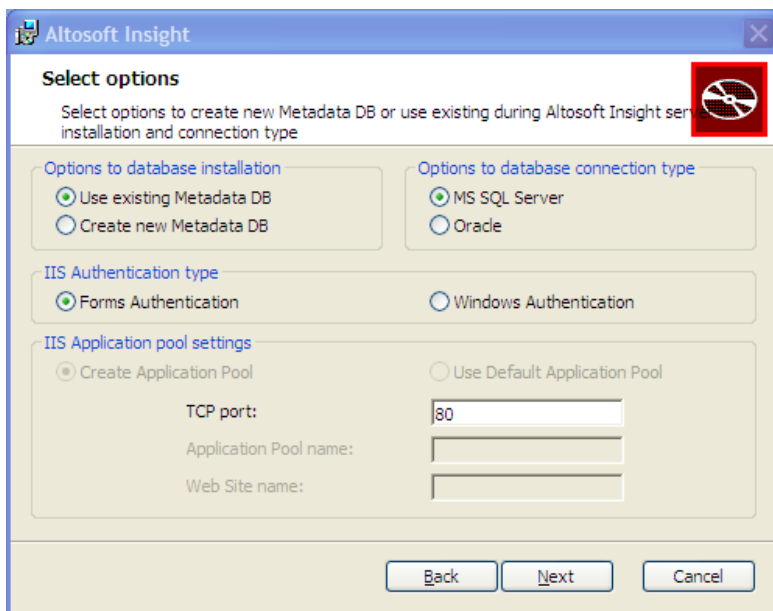


3. **Custom Setup** – This step allows you to select the features that you want installed. It is recommended that you accept default options by clicking **Next**:



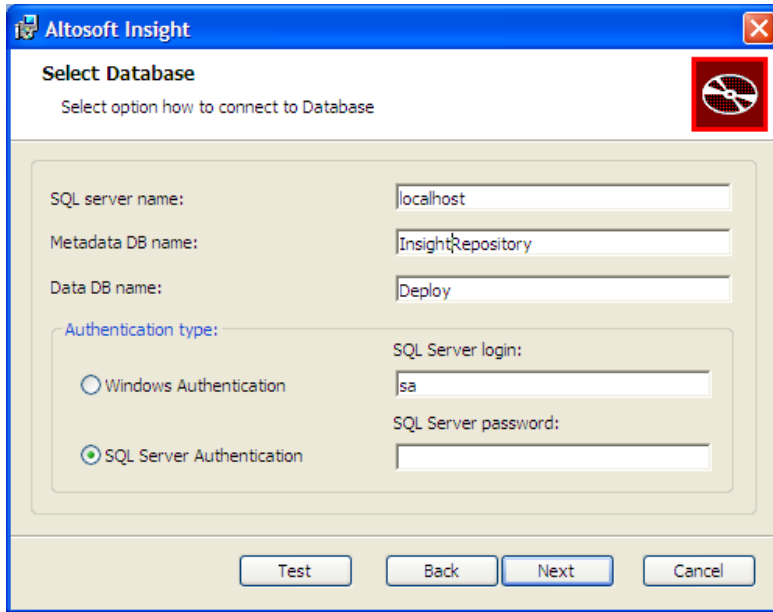
4. **Select Options** - On this screen, one can specify a number of options relating to the type of database to be used for storing configuration as well as IIS information.

- **Metadata DB:** All configurations that are entered via Insight Studio are stored here. Since you have not already created a metadata database, select the **Create new Metadata DB** option.
- **IIS Authentication:** Forms authentication requires dashboard users to enter a username and password before accessing Insight's web dashboard, while Windows Authentication relies on the user's windows authentication for access.



5. **Select Database** – This screen allows you to set the connection information for the databases that will store the configuration data. If you are running the installer for the first time, please note that the installer will create these databases for you during the installation process. The databases should not already exist.

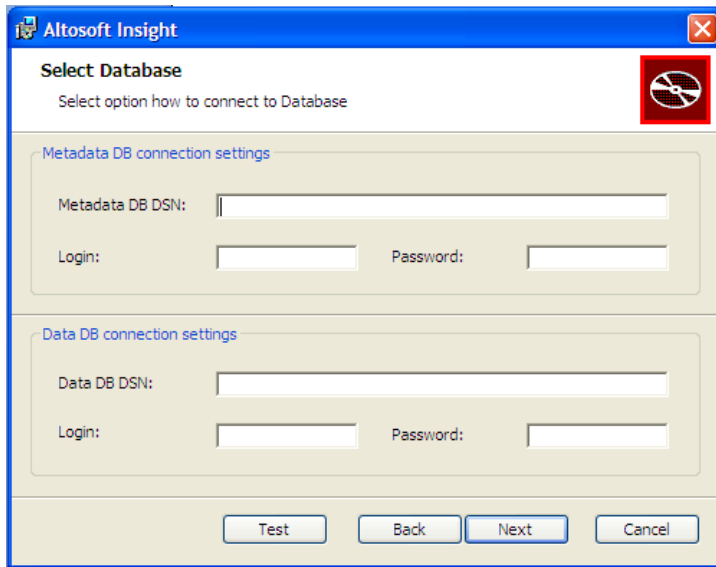
For MS SQL Server,



The screenshot shows the 'Select Database' dialog box in Altosoft Insight. The dialog box has a blue title bar with the Altosoft Insight logo and a close button. Below the title bar, it says 'Select Database' and 'Select option how to connect to Database'. There are four input fields: 'SQL server name:' with 'localhost', 'Metadata DB name:' with 'InsightRepository', 'Data DB name:' with 'Deploy', and 'Authentication type:' with 'SQL Server Authentication' selected. There are also fields for 'SQL Server login:' with 'sa' and 'SQL Server password:'. At the bottom, there are four buttons: 'Test', 'Back', 'Next', and 'Cancel'.

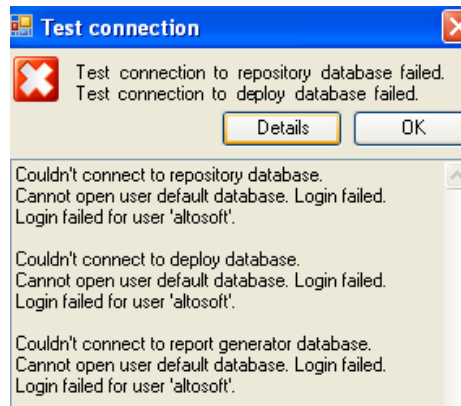
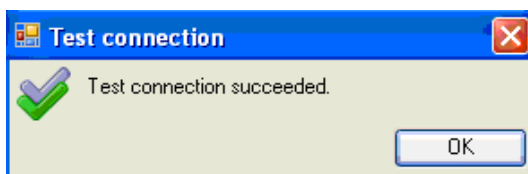
- i. SQL server name – Enter the name of the server on which the SQL Server database should be installed. If you are using SQL Express, the server name is <COMPUTER NAME>\<SERVICE NAME>, for example MY\_PC\SQLEXPRESS.
- ii. Metadata database name – Name of the database that will store the main metrics mart configuration information (i.e. InsightRepository).
- iii. Data database name – Name of the database that will store the dashboard definitions as well as the data and metrics that will appear on Insight Dashboards and the Metrics Mart itself (i.e. Deploy)
- iv. Authentication type – The type of authentication (Windows or SQL Server) to be used. It is suggested that SQL Authentication be used. If you use Windows authentication instead, please note that the user that runs the Altosoft services must be an account that also has access to the repository databases. This user is specified in the Logon tab in the definition of the Insight Windows services.

For Oracle,



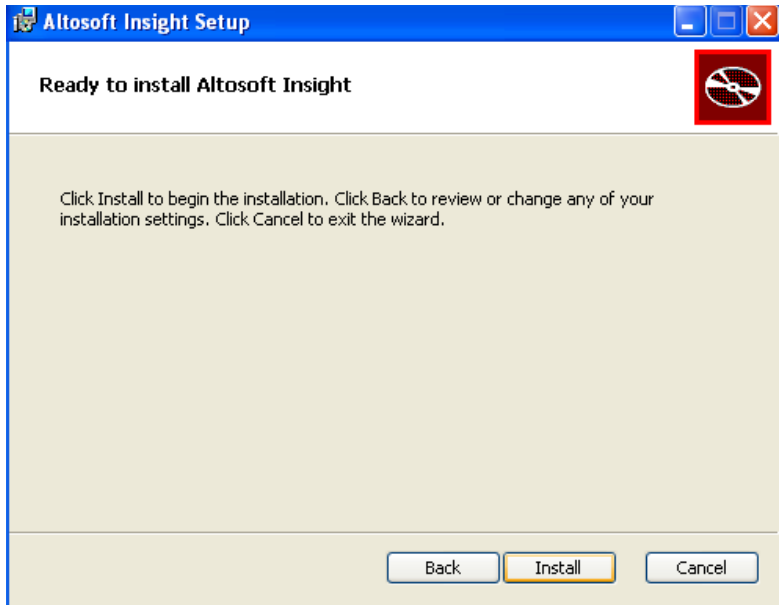
- i. Metadata database connection information – Information for the database that will store the main metrics mart configuration information. The user will need to enter in the DSN, Login and Password.
- ii. Data database connection information – Information for the database that will store the dashboard definitions as well as the data and metrics that will appear on Insight Dashboards. The user will need to enter in the DSN, Login and Password.

**6. Test Configuration** – After entering in the relevant database connection information, the user should click the Test button to ensure the installer is able to connect. If connections are accurate, you will be notified accordingly. If the test fails, Insight will assist you with **Details** about the error.

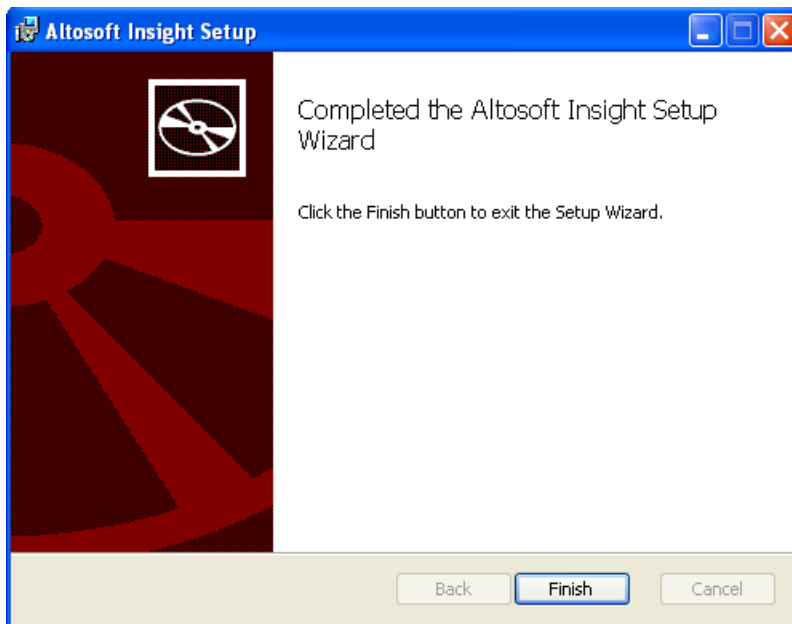


Once you have finished entering the data source connection information, click **Next** to continue with the installation.

**7. Execute Installation** – At this point, all user entry for the installation is complete. Click **Install** to continue the installation. Click **Back** to review or change any of the installation settings. Click **Cancel** to cancel the installation.



If installation has been performed successfully, you will see the message below. Click **Finish** to complete installation.



## 3 Working with Insight Studio

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### 3.1 Overview

You will now be able to run Insight Studio from the location where you have installed the software. Login using the default credentials:

- **Username:** Administrator
- **Password:** password

You now have access to Insight Studio. You can use either the Basic Guide or the Advanced Guide to build out your configurations.

### 3.2 Next Steps

For a quick basic demonstration of how Insight Studio can be used to build dashboards, watch our 15-minute build from scratch video on

[http://demo2.altosoft.com/Altosoft.Web.Videos/downloads/Build%20from%20scratch%20video%20\(09-23-09\).html](http://demo2.altosoft.com/Altosoft.Web.Videos/downloads/Build%20from%20scratch%20video%20(09-23-09).html)

If you wish to explore a pre-configured instance of Insight Studio, follow the steps detailed in section 4.

## 4 Working with Pre-Configured Sample Databases

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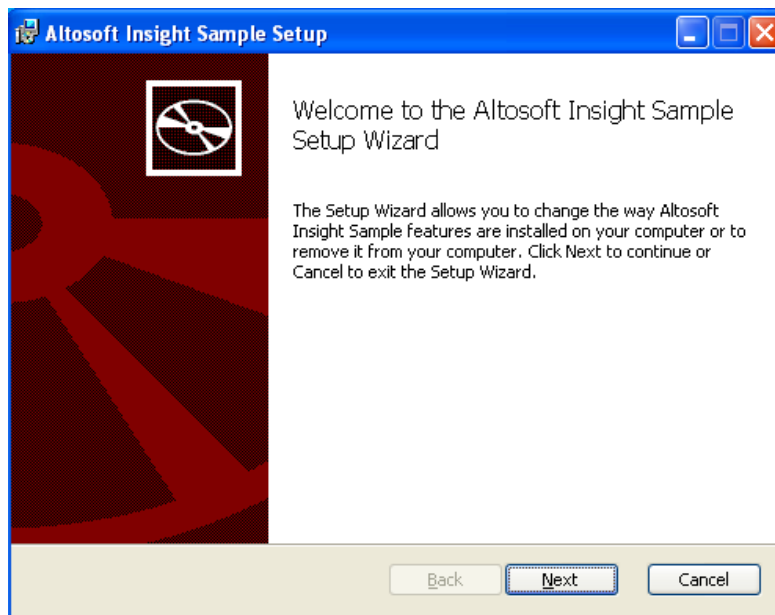
### 4.1 Installation

This installer will place five databases in a location of your choice. These databases include:

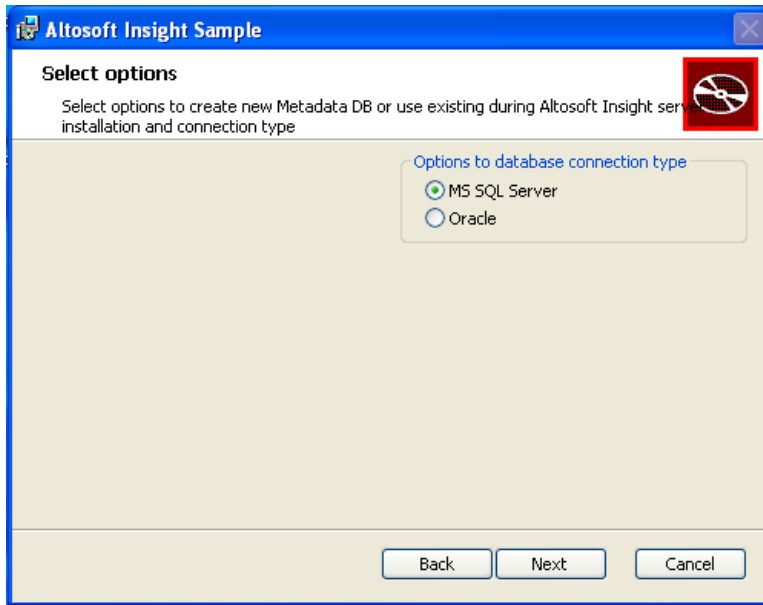
- sample\_HR: This database contains sample human resources data.
- sample\_ORDERS: This database contains sample order processing data.
- sample\_PROD: This database contains information about products on which orders are placed.
- sample\_META: Stores configuration data that was entered in via Insight Studio to build sample dashboards.
- sample\_TARGET: Contains the published configurations defined in Insight Studio and the MetricsMart that holds the data derived from records and metrics created in Insight Studio.

The following steps describe how you can install and examine our pre-configured KPIs and dashboard pages:

1. **Download Installation Files** – Download the sample data setup files from <http://demo2.altosoft.com/Altosoft.Web/product/InsightSampleSetup.zip>
2. **Welcome** – Click on 'Next' in the welcome screen.



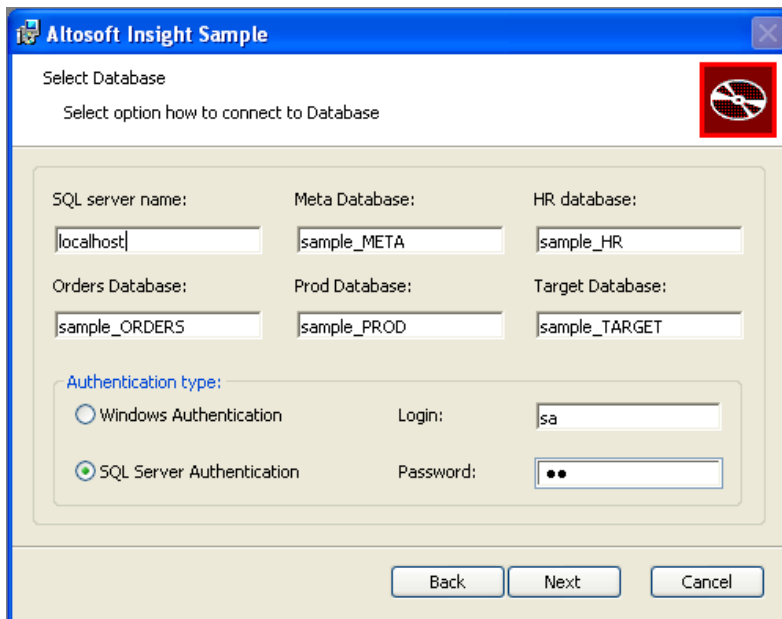
3. **Select Database** – The sample databases can either be installed in MS SQL Server or Oracle.



4. **Establishing Database Connections** – You will encounter the following window if, in the previous step, you choose,

MS SQL Server:

- SQL server name – Enter the name of the server on which the SQL Server database should be installed. If you are using SQL Express, the server name is <COMPUTER NAME>\<SERVICE NAME>, for example MY\_PC\SQLEXPRESS.
- Database names – It is advised that you do not change the names of the sample databases.
- Authentication type – The type of authentication (Windows or SQL Server) to be used. It is suggested that SQL Authentication be used. If you use Windows authentication instead, please note that the user that runs the Altosoft services must be an account that also has access to the repository databases.



Oracle:

- Database DSN – It is advised that you do not change the sample DSNs.
- Login and Password – Enter your authentication details as required.

**Select Database**  
Select option how to connect to Database

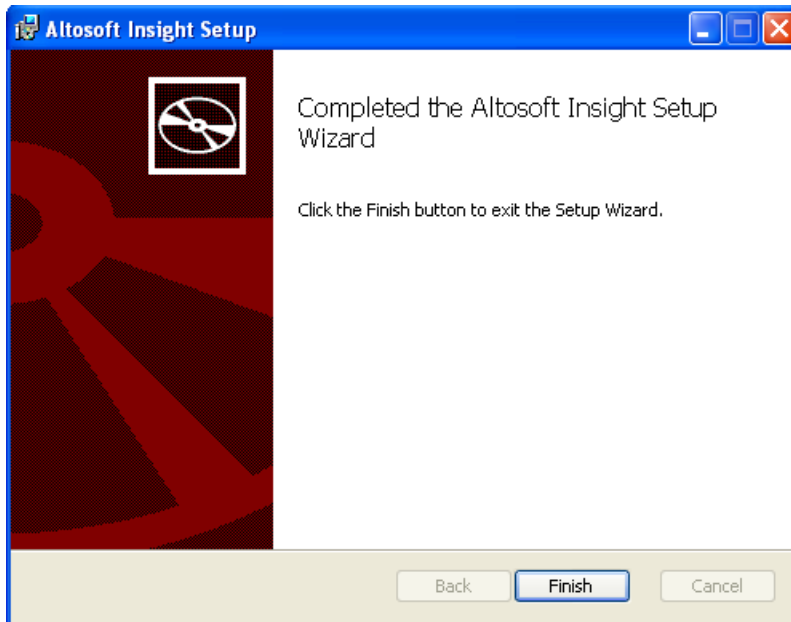
META database DSN:	Login:	Password:
<input type="text" value="SAMPLE_META"/>	<input type="text"/>	<input type="text"/>
HR database DSN:	Login:	Password:
<input type="text" value="SAMPLE_HR"/>	<input type="text"/>	<input type="text"/>
ORDERS database DSN:	Login:	Password:
<input type="text" value="SAMPLE_ORDERS"/>	<input type="text"/>	<input type="text"/>
PROD database DSN:	Login:	Password:
<input type="text" value="SAMPLE_PROD"/>	<input type="text"/>	<input type="text"/>
TARGET database DSN:	Login:	Password:
<input type="text" value="SAMPLE_TARGET"/>	<input type="text"/>	<input type="text"/>

5. **Execute Installation** – At this point, all user entry for the installation is complete. Click **Install** to continue the installation. Click **Back** to review or change any of the installation settings. Click **Cancel** to cancel the installation.

**Ready to install Altosoft Insight Sample**

Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.

If installation has been performed successfully, you will see the message below. Click **Finish** to complete installation.



## 4.2 Viewing Sample Configurations

- When you next run Insight, Studio will automatically have adopted the sample configurations. Login with default credentials:  
**Username:** Administrator  
**Password:** password
- Examine pre-configured Data Source connections (view via Advanced Guide), Metrics, Records (Advanced Guide) and other settings to gain an understanding of how the product functions. Use the Basic and Advanced guides as a basis to understand and explore Insight Studio.
- To view the prebuilt dashboard, click on **Open Dashboard Viewer**. In the web browser, login with credentials:  
**Username:** Administrator  
**Password:** password
- To return to any previous instance of Insight Studio that you had been working on, or to create a new instance, select **Change Metadata DB** from the **File** drop-down menu. Since each Insight Studio instance is based on one metadata DB, enter the connection string of the metadata DB that you wish to either **Create** or **Change** to and proceed accordingly. Note that "creating" a Metadata DB with the same name as an existing database will overwrite that database.