



Futrix Administration Training Course

Audience

This course is designed for administrators who configure the Futrix Enterprise Business Intelligence suite for end users.

Course Description

This one-day course focuses on using the Futrix administration console to configure Futrix.

Prerequisites

You should be competent in using the Futrix end user environment to the level presented in the Futrix End User Training course. No knowledge of SAS is required though it would be useful to have attended the SAS Programming 1 course to understand some Futrix administration concepts.

Objectives

When you have completed this course you should be able to:

Initial Set Up

- install and invoke Futrix
- update licensing details
- understand “libraries” and “library references”

Library & Installation Management

- understand the purpose of each core Futrix library
- add and remove library references
- link to third party DBMS's via SAS/Access products
- set up integration with SAS Metadata Server and SAS OLAP Server
- set up scripts to run on Futrix initialization

Migration Management

- describe the Futrix system areas which can be split into development, test or production environments
- set up migration control
- control the migration from development to test and from test to production

Format Management

- define search paths for formats (local & remote servers)
- add, remove and modify measure formats
- understand the different types of dimension formats that can be created and maintained in Futrix
- add, remove and modify dimension formats

Metabase Management

- read and understand the contents of the metadata matrix
- add new subjects and register new data
- edit existing meta-items, dimensions, measures
- import and export meta-items
- select the metadata matrix attributes for display

Menu Management

- customize the titles and logo
- add, remove and restructure items within the menu
- add, edit or delete menu groups
- understand the relationship between the metabase and menu items

- understand the different ways of saving reports to the Main Menu
- set up the holding location for global report requests
- manage submitted global report requests

General Security

- understand security uses and Futrix security roles
- create and edit security roles
- modify general Futrix security settings and password requirements

User Registration and Restricted Access

- add, edit and delete users and user groups
- create reports about security group membership and user attribute settings
- restrict access to Futrix elements such as dimensions, measures, menu items
- restrict access to dimension values (row level security)
- restrict access to Futrix functionality
- restrict access and set Futrix options & preferences

End User Interface Management

- understand and edit Futrix user types
- restore the original settings for user types
- set default options & preferences for all Futrix users
- customize or create a web skin

Tracking & Performance Management

- create a pre-calculated stored cache
- set up tracking
- update the tracking reporting data
- use pre-defined tracking reports to analyse users actions and queries

General Futrix Administration

- understand and remove administration locking
- create & restore a backup of all the Futrix metadata

Static Publishing (Optional)

- understand static reporting groups
- understand “By Group” dimensions and how to use them
- publish static reports

Client/Server Manager (Optional)

- register a remote server within Futrix
- understand remote library references & remote formats