Qlik Essbase Connector Installation and User Guide and Release Notes

Contents

1 Qlik Essbase Connector

The Qlik Essbase Connector provides a means for the QlikView business discovery platform to efficiently load data into a QlikView application from Essbase cubes. The Essbase Connector uses an XMLA service to retrieve data from Essbase cubes. An XMLA service is a SOAP service that uses the XML for Analysis format for communication.

2 Release Notes

QVXEB-122
The Create Select Statement – Essbase dialog freezes temporarily when selecting multiple dimensions with large amount of data and large number of members.

3 Install the Qlik Essbase Connector

1. Download the `QvEssbaseConnector_setup.exe` file from the Qlik download site.

2. Run the `QvEssbaseConnector_setup.exe`.

   The Qlik Essbase Connector InstallShield Wizard sets up the installation environment and completes the installation.

   The Connector is then available from the QlikView Desktop with the name "QvEssbaseConnector.exe."

3. Open the QlikView11 Desktop application.
   If QlikView is open when you install the Essbase Connector, you must close and reopen it in order for QlikView to recognize the Connector.

4 Create an Essbase connection

Access to the Qlik Essbase Connector is provided by the QlikView business discovery platform. QlikView applications connect to data sources through the Script Editor.

1. Open a new or existing QlikView application.

2. Click **Edit Script...** on the **File** menu in the main QlikView window.

3. Select QvEssbaseConnector.exe from the drop-down list next to **Connect...** on the **Data** tab in the lower part of the **Edit Script** dialog.
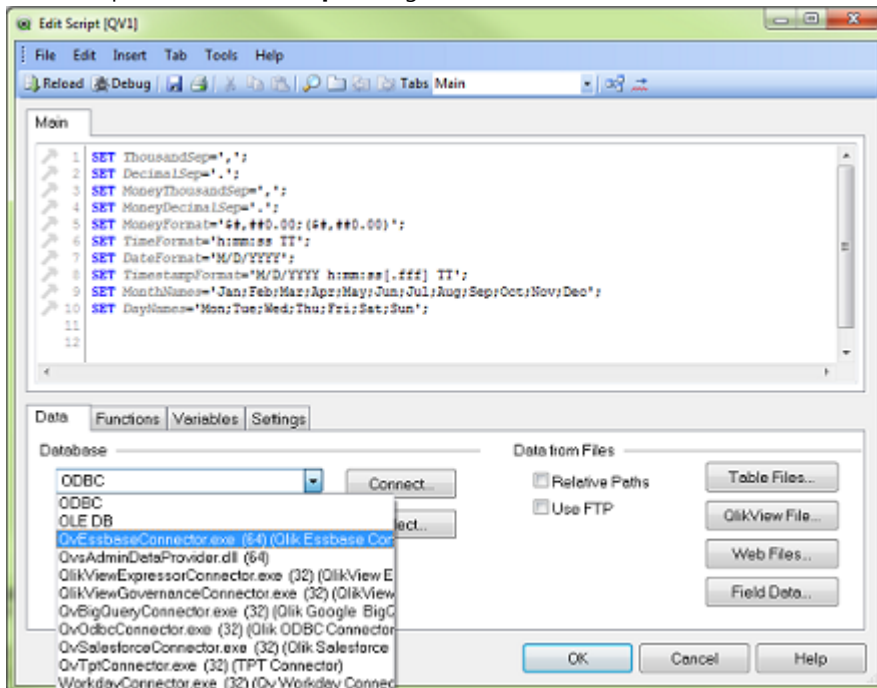
4. Click **Connect...** to open the **Essbase Connection** dialog.
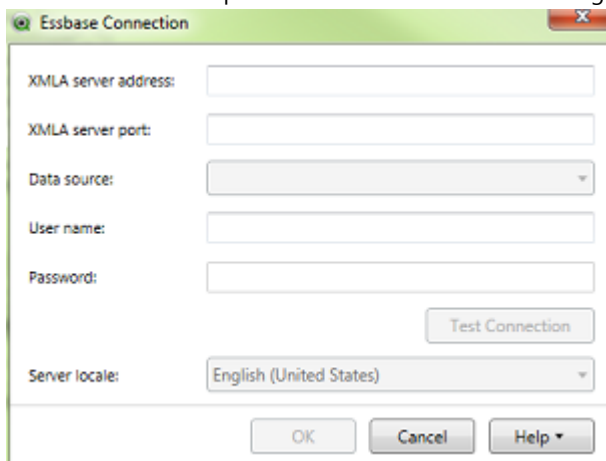

5. Enter the name or IP address of a server with an XMLA service.

6. Enter the number of the server port used by the XMLA service.

7. Select a data source from the drop-down **Data Source** list.
   The data source is an instance of the Essbase server. Multiple Essbase instances can be registered in an XMLA service. The Connector works with one data source at a time.

Note: The Connector contacts the XMLA service when the Data Source drop-down list is selected. If there are no Essbase servers registered in the XMLA service, the Data Source drop-down list is empty. The list is also empty if the address or port number provided for the XMLA server is incorrect.

8. Enter the user name and password for the Essbase instance.

9. Click **Test Connection** to verify the Connector can retrieve applications from the selected data source.

10. Select the locale for the XMLA server.
    The Connector needs to know the locale setting on the XMLA server to translate the data correctly for the client.

11. Click **OK** to create the connection string used when sending the load statement to the Essbase data source.

5 Create a load statement

1. Click the enabled **Select...** on the **Data** tab in the lower part of the **Edit Script** dialog.
    The **Edit Script** dialog has two **Select...** buttons when the Essbase Connector has been connected but only the bottom button is enabled.

2. Select an application from the Applications list in the **Create Select Statement Essbase Connector** dialog.
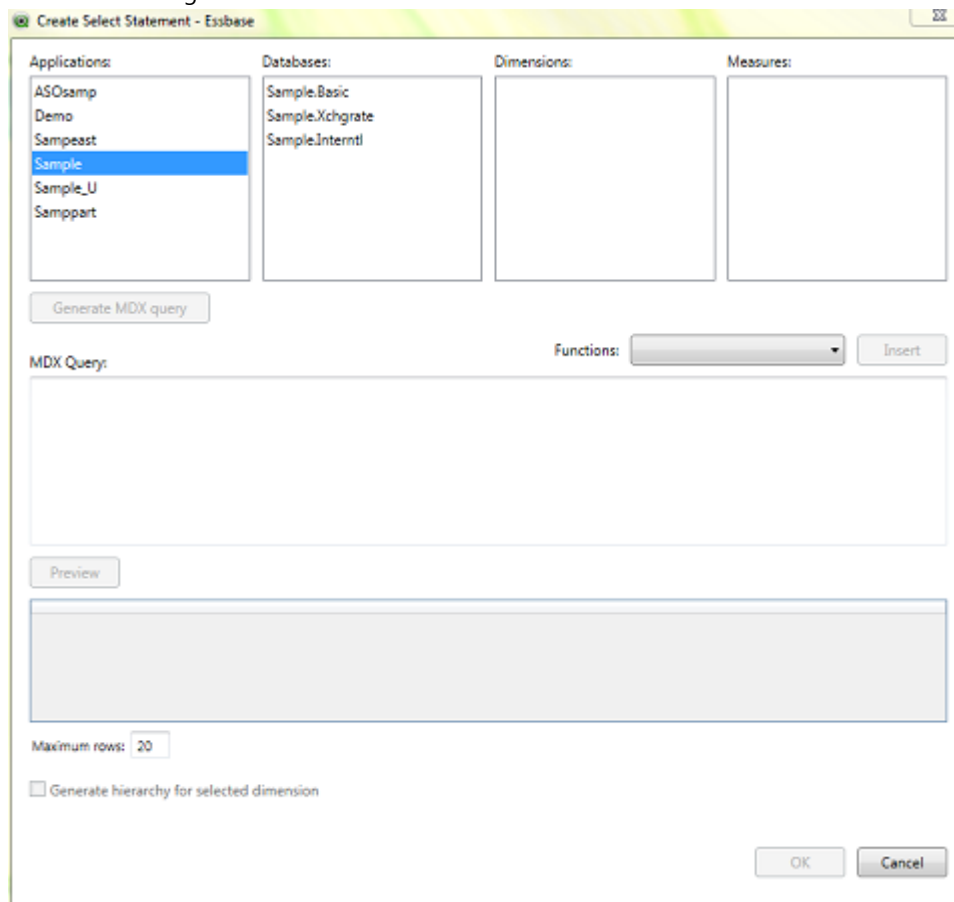
3. Select a database table from the Databases list.

4. Select fields from the **Dimensions** list that can be used as dimensions in QlikView objects.
    Multiple fields can be selected. The dimensions can be a hierarchy, as in this illustration:
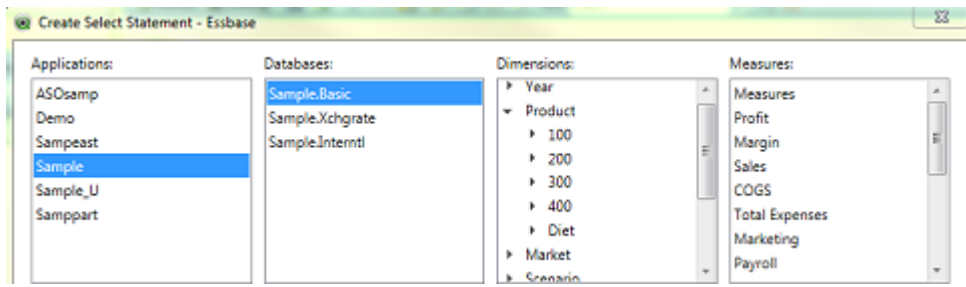
When multiple dimensions are selected, the generated MDX query will contain one or both of the following functions:

> CROSSJOIN( ) to join multiple dimensions or members
> UNION( ) to unite multiple members from one dimension

Note: Dimensions are loaded in QlikView as QVX_TEXT strings regardless which data type the dimension has in Essbase.

5. Select fields from the **Measures** list that can be used as measures in QlikView objects.
   Multiple fields can be selected.

6. Click **Generate MDX query** to create the query that selects data from the Essbase database.
   MDX (Multidimensional Expression) is the query language used for OLAP (Online Analytical Processing) databases like Essbase. The query generated is a simple MDX query that uses the selected database, dimensions, and measures. The query can be entered manually in the **MDX Query** text box, and the generated query can be edited.

   The generated MDX query contains:

   o Descendants ([Dimension Name], [Level depth]) if a dimension is selected at the highest level. All members of the dimension are included in the results.

   o [Dimension Name].[Member Name].Children if a member of a dimension is selected. That is, a node below the highest level but not the last level. All levels beneath the level selected are included in the results.

   o [Dimension Name].[Member Name] if the member at the lowest level of a dimension is selected. Only that member is included in the results.

   The query does not include a WHERE clause, but one can be added to the MDX query. The WHERE clause must conform to the MDX requirements. In MDX, the WHERE clause filters with a member name, not a value. For example, the syntax "WHERE [Profit]" is correct, but the syntax "WHERE [Profit]=1" is incorrect. Also, the WHERE clause must be the last component of the query.

   Note: The Connector sends the MDX query directly to the XMLA service. The Connector does not validate the query. The XMLA service handles the query and returns data or an error if the query is not valid.

7. Enter MDX functions by placing the cursor at the desired location in the generated MDX query, selecting a function from the **Functions** drop-down list, and and clicking **Insert Function**. Adding functions is optional.

8. Click **Preview** to see the results of the query in a grid.
   The number of rows displayed in the preview is controlled by the **Maximum rows** setting beneath the **Preview** box.

9. Select **Generate hierarchy for selected dimension** if you want to create a hierarchical structure for the dimension or dimensions in the query.
   A hierarchical structure can be created only when the selected dimension is hierarchical and is the root or highest level of the hierarchy. If the selected dimension is a branch or a leaf (the

bottom node) in a hierarchy, the **Generate hierarchy for selected dimension** is not enabled. If one of the selected dimensions is the root of a hierarchy and another selected dimension is a branch, the **Generate hierarchy for selected dimension** is enabled, but only the dimension that is the root of a hierarchy is loaded as a hierarchy. If a root dimension is selected and one of its branches is also selected, the root dimension is loaded as a hierarchy.

When **Generate hierarchy for selected dimension** is not selected, the resulting list-box tables are flat. When **Generate hierarchy for selected dimension** is selected, an additional list-box table is produced with the hierarchical structure. For example:
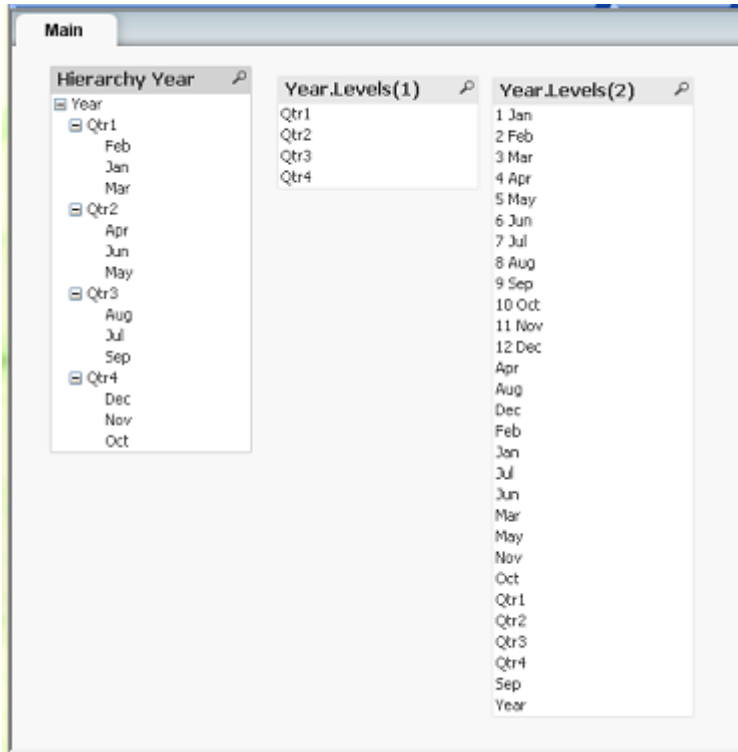
To get the collapsible view in the Hierarchy Year list box, select **Show as TreeView** in the **List Box Properties** dialog.

Note: If a dimension has an alias, both the alias and dimension name are displayed in a hierarchy. If there is no alias, only the name is displayed.

10. Click **OK** when you are finished making your selections.

6 Log information

The Essbase Connector's log file is located at:

```
{ProgramData}\QlikTech\Custom Data\QvEssbaseConnector\Log
```

Where `{ProgramData}` is `%ALLUSERSPROFILE%`.