

Peregrine

Reporting/Business Intelligence Installation Guide

Business Intelligence Version 2.2

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This edition applies to version 2.2 of the licensed program.

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About This Guide

Welcome to Peregrine Reporting/Business Intelligence, a query, reporting, and analysis solution for Peregrine applications.

Built on Peregrine OAA Platform, and integrated with the third party Business Objects applications, Peregrine Reporting/Business Intelligence allows users to view, create, share, analyze reports and other documents through the Peregrine Portal.

The company's business intelligence information is collected, categorized, and stored, then presented over the Web or intranet in a secure and personalized view to users inside and outside the organization.

The *Peregrine Reporting/Business Intelligence Installation Guide* describes how to install and configure the individual components of Peregrine Reporting/Business Intelligence.

Book Audience

The *Peregrine Reporting/Business Intelligence Installation Guide* was written for Peregrine application administrators. To use this guide most effectively, you need to have knowledge of the following:

- Your organization's process for performing software installations and your responsibilities within that process
- Peregrine products that have been previously installed

- Your system architecture
- Your operating system user interface
- Configuring and maintaining local area networks (LANs)
- System administration tasks in your environment
- System administration tasks for associated back-end products

Related Documentation

As you use Peregrine Reporting/Business Intelligence, you can refer to this related documentation:

- *Peregrine Business Intelligence Documentation Roadmap*, which is an Adobe Acrobat .pdf file that provides links to third party Business Objects documents for the features available in Peregrine Reporting/Business Intelligence. This file is available in the documentation folder.
- *Peregrine Open Architecture Application Platform Administrator's Guide*, which provides information about the OAA Platform architecture and describes how to configure your application servers.
- The installation documentation for your Peregrine application, which provides instructions for installing and administering your Peregrine application.
- The documentation available for the Peregrine application with which you plan to use Peregrine Reporting/Business Intelligence.
- The Peregrine Customer Support Web site, for updated versions of .pdf files and for knowledgebase articles related to Peregrine Reporting/Business Intelligence or your Peregrine application.

Typographical Conventions

This guide uses typeface conventions to indicate special terms and actions. These conventions and their meanings are:

Convention	Meaning
Bold	Information that you must type exactly as shown appears in bold .
<i>Italics</i>	Variables and values that you must provide appear in <i>italics</i> . New terms also appear in <i>italics</i> .
Monospace	Code examples, output, and system messages appear in a monospace font.

Special Elements

This book uses special elements to help you locate information. These special elements and their uses are shown in the following table:

Element	Usage
Important:	Information that is required to complete a task
Note:	Information that is of general interest
Tip:	Information that can make a task easier or faster
Warning:	Information that is needed when there is a risk of losing data

Organization of the Guide

The *Peregrine Reporting/Business Intelligence Installation Guide* contains the following chapters:

- *Chapter 1, Installation Overview*, provides an overview of the installation process, describes the Peregrine Reporting/Business Intelligence components, provides hardware and software requirements, and installation check lists for use prior to and during installation.
- *Chapter 2, Installing Peregrine OAA Platform*, provides resources for installing Peregrine OAA Platform and the Peregrine application with which you plan to use Peregrine Reporting/Business Intelligence.
- *Chapter 3, Configuring the Report Server*, provides detailed instructions about the steps you must perform to configure your Business Intelligence Report Server prior to Business Intelligence installation.
- *Chapter 4, Configuring the Data Repository*, provides information about setting up the Oracle database you will use as your data repository with Peregrine Reporting/Business Intelligence.
- *Chapter 5, Installing Business Objects Enterprise Server Products*, provides the steps for installing the main server components of the Business Objects software.
- *Chapter 6, Installing the Business Objects Desktop Products*, provides the steps for installing the remaining Business Objects software components on the server.
- *Chapter 7, Configuring Business Objects*, describes the configuration steps you need to complete after you install the Business Objects products.
- *Chapter 8, Installing Peregrine Reporting/BI On A Single Machine*, describes the installation you can use to install the Peregrine Reporting/Business Intelligence files on one machine. Use this chapter if you plan to install all the Business Objects components on a single server.
- *Chapter 9, Installing Peregrine Reporting/BI On Multiple Machines*, describes the installation you can use to install the Peregrine Reporting/Business Intelligence files on multiple machines. Use this chapter if you plan to install the Business Objects server components over multiple servers.
- *Chapter 10, Configuring the Application Server/Web Server*, describes various steps for configuring your application and Web servers. The steps you perform are based on your application server/Web server combination.

- *Chapter 11, Configuring Peregrine OAA*, describes the steps you need to perform to configure Peregrine OAA for use with Peregrine Reporting/Business Intelligence.
- *Appendix A, Troubleshooting*, describes possible Peregrine Reporting/Business Intelligence installation problems, explanations, and solutions.
- *Appendix B, Setting Up Broadcast Agent*, describes the steps you need to perform to setup this optional utility.

Contents of the Product CDs

The Peregrine Reporting/Business Intelligence product ships with the following CDs:

- Peregrine application installation
- Peregrine Reporting/Business Intelligence Disk 1
- Peregrine Reporting/Business Intelligence Disk 2
- Peregrine Reporting/Business Intelligence Setup for your Peregrine Application

Contacting Customer Support

For further information and assistance with this release, contact Peregrine Systems' Customer Support.

Peregrine CenterPoint Web Site

Current details of local support offices are available through the following main contacts or through the Peregrine CenterPoint Web site at:

<http://support.peregrine.com>

You need your current login user name and password to access this Web page.

To contact Peregrine customer support

- 1 Log in to the Web site with your login user name and password.
- 2 Click Go beside the CenterPoint support area.

- 3 From **Contents** on the left, select **Whom Do I Call?** to display the **Peregrine Worldwide Contact Information**.

Documentation Web Site

A complete listing of the available documentation is on Peregrine's CenterPoint Web site at:

<http://support.peregrine.com>

Important: Release Notes for this product are continually updated after the release of the product. Visit the Peregrine Customer Support Web site to ensure that you have the most current version of the Release Notes.

1 Installation Overview

CHAPTER

Peregrine Reporting/Business Intelligence requires the following components:

- Peregrine OAA Platform, supported Web server, and OAA Persistence repository
- the Peregrine application with which you plan to use Peregrine Reporting/Business Intelligence, a supported application server, and application database
- Oracle data repository for your Peregrine Reporting/Business Intelligence data
- Business Objects Enterprise Server and Desktop Products
- Peregrine Reporting/Business Intelligence installation files

This chapter describes the components, provides an overview of the installation process, and provides hardware and software requirements.

Single-Machine Versus Multi-Machine Setup

You can install the Peregrine Reporting/Business Intelligence solution on a single server or distributed among a group, or *cluster*, of servers over a CORBA network.

Single-Machine Setup

In a single-machine setup, all the server operations are installed on one server. These server components include:

- **Business Intelligence Report Server**
The Business Objects Enterprise Server products are installed on this server.
- **Business Intelligence Report Publisher**
The Business Objects Desktop products are installed on this server. The `exportunivrptdoc.exe` program is also executed on the Business Intelligence Report Publisher Server.
- **Business Intelligence Portal**
The Business Intelligence Portal server, also known as the *application server*, is where Peregrine OAA is installed. Installation of Business Objects products is not required on this server, though Business Objects Desktop products can be installed on this server as an option. The `rundp.bat` script is installed on the Business Intelligence Portal server.
- **The Peregrine application with which you will use Peregrine Reporting/Business Intelligence.** Note that the Business Objects repository and the OAA Persistence repository (Rome) may or may not be on the same server.

Important: Business Objects warns that installing both the Business Objects Enterprise Server Products and the Desktop Products on the same machine can cause unreliable operations. For more information, see the *Business Objects Deployment Guide*.

Multi-Machine Setup

In a multi-machine setup, one server operates as the Report Server, with only the Business Objects Enterprise Server Products installed on that server. The other server or servers operate as the Report Publisher and the Application Server.

Important: If you plan to have more than ten users access the system at the same time, Peregrine recommends the multi-machine setup for performance reasons.

The Business Objects Components

The Peregrine Reporting/Business Intelligence integration with Business Objects uses the Business Objects Enterprise Server and Desktop products that allow users to access, analyze, and share data over the Web or a corporate intranet.

Understanding the Difference Between Enterprise Server Products and Desktop Products

Each of the two product categories, Enterprise Server and Desktop, has a different scope of use, reflected in its name: Enterprise Server Products are Web-enabled network server applications and Desktop Products are desktop applications.

Note: Because Peregrine Reporting/Business Intelligence users actually access data over an intranet or Web, they will not need to have Desktop Products installed on desktop machines. You might want to install the Desktop Products on an administrator's machine so the administrator can use the Business Objects utilities to make changes to the universe and administer security.

Enterprise Server Products

Below is the list of Business Objects Enterprise Server Products that Peregrine Reporting/Business Intelligence uses in its integration.

Product	Description
WebIntelligence	<p>A decision support system for database query, reporting, and data analysis over the World Wide Web.</p> <p>Its core functionality is provided by the InfoView product, which reads and refreshes BusinessObjects, WebIntelligence, and BusinessQuery documents using a Web browser. Installation of the InfoView module automatically installs the Business Objects Services Administrator, used to monitor and control the processes required in the operation of WebIntelligence and Broadcast Agent.</p>

Product	Description
Zero Admin BusinessObjects	<p>A version of BusinessObjects, the fully integrated query, reporting, and data analysis tool, that is deployable over the Internet, intranets or extranets. Zero Admin BusinessObjects is installed to clients from the server via a Web browser connected to WebIntelligence. Users of client installations of Zero Admin BusinessObjects log in through a Web portal and require no local middleware. Client installations of Zero Admin BusinessObjects are described in the <i>InfoView User's Guide</i>.</p> <p>Its core functionality is provided by READER (required), which is used to read and refresh reports. Full functionality comes with the two optional modules:</p> <p>REPORTER: to query the database and build reports</p> <p>EXPLORER: to drill down to finer levels of analysis in reports.</p> <p>The functionality of Zero Admin BusinessObjects is a subset of that of full-client BusinessObjects. See the <i>Business Objects Deployment Guide</i> for details.</p> <p>To install Zero Admin BusinessObjects, you must have a local administrator's account on the NT or 2000 Server machine on which you are running the installation.</p>
Broadcast Agent	<p>Enables BusinessObjects and WebIntelligence users to automatically process and publish their documents via the repository, an intranet, the server file system and the Web. Its two components, which can be installed separately for distributed use over a network, are:</p> <p>Scheduler: monitors task scheduling and launches tasks as scheduled. Installing the Scheduler automatically installs the Business Objects Services Administrator, used to monitor and control the processes required in operation of WebIntelligence and Broadcast Agent.</p> <p>Console: used by the administrator to monitor the status of processed and pending tasks and to execute actions such as running a task immediately or killing it.</p>

For a description of other Enterprise Server Products not used in the Peregrine Reporting/Business Intelligence integration, see the *Business Objects Deployment Guide*.

Note: Business Objects refers to the company and set of products they produce, while BusinessObjects, with no space, refers to one of the Desktop Products.

Desktop Products

Business Objects Desktop Products are not necessary on the client machines because users will access data through the Web or intranet. You will need to install the Desktop Products, however, on either the cluster manager machine or the cluster node machine, depending on your setup profile.

For this type of setup	Install Desktop Product on...
single-machine installation	the Report Server (<i>cluster manager</i>) machine
multi-machine installation	the Report Publisher (<i>cluster node</i>) machine Note: This may be the same machine as the application server.

Below is a list of the Business Objects Desktop Products that Peregrine Reporting/Business Intelligence uses.

Product	Description
Designer	Used to design universes, the efficient and user-friendly semantic layer that masks the complexities of querying relational databases.
Supervisor	The user administration tool for Business Objects products: defines users and user groups and their profiles, controls access to Business Objects resources, and manages exchange and distribution of universes and documents via the repository.

For a description of other Desktop Products, see the Business Objects documentation.

Overview of the Installation Steps

The following is an overview of the steps required to install and configure a Peregrine Reporting/Business Intelligence server.

Phase	Description	For more information on these steps, see...
1	Install Peregrine OAA Platform and the Peregrine application with which you plan to use Peregrine Reporting/Business Intelligence.	<i>Installing Peregrine OAA Platform</i> on page 31
2	Set up the report server.	<i>Configuring the Report Server</i> on page 33
3	Set up the Business Objects data repository.	<i>Configuring the Data Repository</i> on page 39
4	Install the Business Objects Enterprise Server Products.	<i>Installing Business Objects Enterprise Server Products</i> on page 45
5	Install the Business Objects Desktop Products.	<i>Installing the Business Objects Desktop Products</i> on page 57
6	Configure Business Objects.	<i>Configuring Business Objects</i> on page 67
7	Install Peregrine Reporting/Business Intelligence on a single machine or on multiple machines	<ul style="list-style-type: none"> ■ <i>Installing Peregrine Reporting/BI On A Single Machine</i> on page 73 ■ <i>Installing Peregrine Reporting/BI On Multiple Machines</i> on page 87
8	Configure your application and Web servers.	<i>Configuring the Application Server/Web Server</i> on page 119
9	Configure Peregrine OAA Platform for Peregrine Reporting/Business Intelligence.	<i>Configuring Peregrine OAA</i> on page 131

Hardware and Software Requirements

The hardware and software requirements for Peregrine Reporting/Business Intelligence are based on the requirements for Peregrine OAA Platform and the Business Objects products.

For more information, see these guides:

- The installation documentation of your Peregrine application
- *Peregrine Open Architecture Application Platform Administrator's Guide*
- *Business Objects Deployment Guide*

Server Requirements

Enterprise Server Products use CORBA for distributed processing. You will need to install them on a machine running Windows 2000 Server or Windows NT Server version 4.

For more specific requirements, see the documents recommended in the previous section.

Client Requirements

The Peregrine Reporting/Business Intelligence client is simply a Web browser. Supported browsers are:

- Internet Explorer versions 5.5 and higher
- Netscape versions 4.76 and 6.2 (not compatible with 6.1)

Further information about browsers and supported Java Virtual Machines is available in the Business Objects Readme file on Peregrine Reporting/Business Intelligence Disk 1 at `X:/vol1/core/readme`.

Database Requirements

Peregrine Reporting/Business Intelligence requires a license for Oracle 8.1.6 or higher server and client. The use of the Oracle RDBMS allows Peregrine Reporting/Business Intelligence to connect to your Business Objects repository and corporate databases.

Network Requirements

If you plan to use a multi-machine installation, Peregrine WebIntelligence strongly recommends that the cluster node machines communicate over a dedicated network to cope with the extra network traffic load generated by reporting activity.

Planning Your Installation

The following sections contain important background information that help you accomplish a successful installation of Peregrine Reporting/Business Intelligence.

Pre-installation Considerations

Deploying Business Objects products over an intranet, extranet, and/or the Web is a task that requires careful planning. Your company identified its e-Business Intelligence (e-BI) needs before making the decision to purchase these products. You will need to work with those decision-makers to define concretely how the needs of your company can best be met.

Before putting the software in place for an extended user community, you must identify a number of factors:

- The users: Who are they? Which networks are they connected to? Who will use which products, and which functions in particular?
- The corporate data: Where is it located, and in what type of database?
- Deployment architecture: Client/server or distributed architecture?
- System configuration and server sizing: How, and how heavily, will your Business Objects solution be used? What can you do to optimize performance? What specific server machines and subnets will be dedicated to your Business Objects solution?

The *Business Objects Deployment Guide* discusses these and others factors in detail.

Only when you have planned your solution carefully should you actually install the software.

This guide provides all the information you will need to install, uninstall, and modify or update existing installations of the full range of Business Objects products.

Understanding the OSAgent

The OSAgent is the Object Request Broker for the CORBA system used by the Enterprise Server Products, and the port you specify is the one through which all their processes communicate.

When you install a cluster, all servers in the cluster must have the same OSAgent port. This means that when installing to cluster node machines, you must enter the same OSAgent port value you entered for the cluster manager machine.

What Port Number Should I Enter?

You can enter any number between 1024 and 65535 except for 15000, and as long as the number you enter is not already in use by another CORBA system on the same sub-network. If another computer on your sub-network is already using the port number you enter, installation will not be successful.

By default, the installer displays 14999 for the OSAgent TCP/IP port number, but if an environment variable for this port has already been set on your machine, the Setup Wizard displays that value instead.

Note: Peregrine recommends using port number 14885.

The installer also asks you to decide whether or not to have automatic Business Objects start automatically when the server starts. The automatic start-up option must be configured during the installation of each server.

Selecting an Available Port Value

You can use the services file and the visispy utility as described below to ensure that you have chosen an available port value for your machine or cluster.

Using the Services File to Help Choose an Available Port Value

The services file lists the known services running on your machine, together with the port number for each. You can view this file to check that the port value you choose does not conflict with that used by any existing services.

On an NT system, use a text editor such as Notepad to view the text file `%Systemroot%/system32/drivers/etc/services`, where `%systemroot%` is the folder in which NT was installed (which, by default, is `C:\WINNT4`).

Using the VISISPY Utility to Confirm a Port Value is Available

You can also use the `visispy.exe` utility provided on your Business Objects installation CD. This utility “listens” to network traffic on a given port and lists the sources of any traffic it detects. It can be used to check that no other systems on your local machine are using that port value. `visispy.exe` is automatically installed by default to the folder `X:\Program Files\Business Objects\Server\System 2.5\bin`, where `X` is the drive where Business Objects is installed. To run this utility, open an MS-DOS window and type the following:

```
visispy -p <value> -t <time>
```

where *<value>* is the port you are considering using (for example, 11234) and *<time>* specifies the length of time in milliseconds that the port is to be monitored. 30000, for 30 seconds, should be adequate.

The utility waits for the time specified before returning to the prompt. If successful, it returns silently (without displaying any text). If instead it lists one or more services on your local machine or on other machines in your sub-network, then these services are generating traffic on this port and you must choose another port number. Repeat this process until you find a port value on which there is no traffic.

Understanding the Transaction Database

The transaction database is your OAA application database. Information about your transaction database is available from the Rome tab in the Peregrine OAA Portal. For more information about the Portal, see the *Peregrine Open Application Architecture Platform Administrator's Guide*.

Choosing a Connection Name

During Peregrine/Business Intelligence, you are prompted for a connection name. A connection name is used by the BI Report Server. You can specify any name, but the name should be meaningful for the connection. For example, you might want to use an acronym for your Peregrine application.

Installation Checklists

This section provides the following checklists to guide you as you install different parts of Peregrine Reporting/BI:

- For single machine installation
 - Single Machine Checklist
- For multiple machine installation
 - BI Report Server Checklist
 - BI Publisher Checklist
 - BI Portal Checklist

Use the checklist or checklists that are appropriate for your installation type. Consider creating a copy of the checklist and completing it prior to starting the installation process.

Single Machine Installation Checklists

Use the following checklists prior to installing Peregrine Reporting/Business Intelligence on one machine.

Questions to ask before installing Peregrine Reporting/BI: Completed?

Have you installed Peregrine OAA?

Have you installed your Peregrine application?

Have you completed the DCOM configuration?

Have you created a new database for the Peregrine Reporting/BI repository?

Have you created a new database user to be used to deploy Peregrine Reporting/BI?

Have you assigned the appropriate roles and privileges to the new database user?

Have you installed the Oracle client and set up the transaction, application, and repository connections on the machine?

Have you installed Business Objects Enterprise products?

Have you installed Business Objects Desktop products?

Information needed prior to or during installation of Peregrine Reporting/BI:	Default/Recommended Values	Actual Value Entered
BI database deployment user	BI_DEPLOY	BI_DEPLOY
BI database deployment password	password	password
BI database repository user	BI_REPO	BI_REPO
BI database repository password	password	password
Database table space	users	users
Database temp table space	temp	temp
BI OSAgent TCP/IP port number For more information, see <i>Understanding the OSAgent</i> on page 21.		
BI Application Server host name (BI Portal)		

Information needed prior to or during installation of Peregrine Reporting/BI:	Default/ Recommended Values	Actual Value Entered
BI Web Server port number	8080	
Transaction database Login ID For more information, see <i>Understanding the Transaction Database</i> on page 23.		
Transaction database Password		
Transaction database connection string ^a		
Company name ^b Enter your company name with no spaces.	COMPANY	
Connection name Examples: GR, PAM, GA For more information, see <i>Choosing a Connection Name</i> on page 23.		

a The transaction database connection string is equivalent to the service name for the Oracle server as it is set in the tnsnames.ora file on the client machine where the BO repository resides.

b The Company name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

Multiple Machine Installation Checklists

Use the following checklists prior to installing Peregrine Reporting/Business Intelligence on multiple machine

Business Intelligence Report Server Checklists

Questions to ask before installing Business Intelligence Report Server:	Completed?
---	------------

Have you completed the DCOM configuration?	
--	--

Have you created a new database for the Peregrine Reporting/BI repository?	
--	--

Have you created a new database user to be used to deploy Peregrine Reporting/BI?	
---	--

Have you assigned the appropriate roles and privileges to the new database user?	
--	--

Have you installed the Oracle client and set up the transaction, application, and repository connections on the Business Intelligence Report Server?	
--	--

Have you installed Business Objects Enterprise products?	
--	--

Information needed prior to or during installation of Business Intelligence Report Server:	Default/Recommended Values	Actual Value Entered
--	----------------------------	----------------------

BI database repository user	BI_REPO	BI_REPO
-----------------------------	---------	---------

BI database repository password	password	password
---------------------------------	----------	----------

Database table space	users	users
----------------------	-------	-------

Database temp table space	temp	temp
---------------------------	------	------

BI OSAgent TCP/IP port number For more information, see <i>Understanding the OSAgent</i> on page 21.		
---	--	--

Company name ^a Enter your company name with no spaces.	COMPANY	
--	---------	--

a The Company name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

Business Intelligence Report Publisher Checklists

Questions to ask before installing Business Intelligence Report Publisher: Completed?

Have you installed the Oracle client and set up the transaction, application, and repository connections?

Have you installed Business Objects Desktop products?

Information needed prior to or during installation of Business Intelligence Report Publisher:	Default/Recommended Values	Actual Value Entered
BI repository user ID	BI_REPO	BI_REPO
BI repository password	password	password
Transaction database logon ID For more information, see <i>Understanding the Transaction Database</i> on page 23.		
Transaction database password		
Transaction database connection string ^a		
Company name ^b Enter your company name with no spaces.	COMPANY	
Connection name Examples: GR, PAM, GA For more information, see <i>Choosing a Connection Name</i> on page 23.		
Web server port number	8080	

a The transaction database connection string is equivalent to the service name for the Oracle server as it is set in the tnsnames.ora file on the client machine where the BO repository resides.

b The Company name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

Business Intelligence Portal Server Checklists

Questions to ask before installing Business Intelligence Portal Server: Completed?

Have you installed Peregrine OAA?

Have you installed your Peregrine application?

Have you installed the Oracle client and set up the transaction, application and repository connections?

Have you successfully installed and configured BI Report Server?

Have you started WebIntelligence services on the BI Report Server?

Have you successfully installed and configured BI Report Publisher?

Information needed prior to or during installation of Business Intelligence Portal Server:	Default/Recommended Values	Actual Value Entered
BI repository user	BI_REPO	BI_REPO
BI repository password	password	password
BI Report Server IP address		
BI OSAgent TCP/IP port number For more information, see <i>Understanding the OSAgent</i> on page 21.		
BI Application Server host name		
Company name ^a Enter your company name with no spaces.	COMPANY	

a The Company name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

What's Next

Now that you understand the installation steps for installing Reporting/Business Intelligence, you are ready to proceed to the next step, installing the Peregrine OAA Platform and your Peregrine application. See *Installing Peregrine OAA Platform* on page 31, for an overview of the process.

2

CHAPTER

Installing Peregrine OAA Platform

Peregrine Reporting/Business Intelligence runs on top of Peregrine OAA Platform. Peregrine OAA Platform provides the Peregrine Portal, through which users will access, share, and analyze data.

Peregrine OAA Platform includes the Peregrine Portal, through which your users can access and share business intelligence data.

After you install Peregrine OAA Platform, you should install the Peregrine application with which you plan to use Peregrine Reporting/Business Intelligence.

For a single-machine setup, you will install Peregrine OAA Platform and your Peregrine application machine on the same machine. For a multi-machine setup, you will install both Peregrine OAA Platform and your Peregrine application on the Business Intelligence Portal machine.

This chapter provides an overview about installing OAA Platform and your Peregrine application

Installing Peregrine OAA Platform

For instructions on installing Peregrine OAA Platform, refer to the installation instructions of your application. For more information about Peregrine OAA Platform, refer to the *Peregrine Open Architecture Platform Administrator's Guide*.

Installing Your Peregrine Application

For instructions on installing the Peregrine application of which you plan to use Peregrine Reporting/Business Intelligence, refer to the installation instructions of the application.

What's Next

After you install your Peregrine application, you should setup the Report Server. See *Configuring the Report Server* on page 33, for the order of steps to perform.

3

Configuring the Report Server

CHAPTER

Configuring the Report Server

After you install Peregrine OAA Platform and your Peregrine application, perform the following steps to prepare your report server for Peregrine Reporting/Business Intelligence.

Step	Description	For more information, see...
1	Log onto the server as a local domain administrator.	
2	Set up a Windows administrator account or select an existing one to use for the Broadcast Agent scheduling application to schedule processes on the local domain. Make sure the new user is part of the Local Administrators group. To create a new account for Windows 2000 Server: 1 Click Start , point to Programs , point to Administrative Tools , then click Computer Management . 2 In the left panel, expand Local Users and Groups, then right-click Users . 3 Select New User . 4 Enter the account information, then click Create . 5 Click Close . or To create a new account for Windows NT Server: 1 Click Start , point to Programs , point to Administrative Tools , then click User Manager for Domains . 2 From the User menu, choose New User . 3 Enter the information for the account, then click Add . 4 Click Close .	Windows Server online help

Step	Description	For more information, see...
3	<p data-bbox="237 178 929 239">Ensure the user account you added or chose is part of the Administrators group on the local domain.</p> <p data-bbox="237 248 929 317">To add the user to the Administrators group for Windows 2000 Server:</p> <ol data-bbox="237 326 929 560" style="list-style-type: none"><li data-bbox="237 326 929 387">1 In the Computer Management window, right-click the name of the user account you created.<li data-bbox="237 395 439 421">2 Click Properties.<li data-bbox="237 430 929 491">3 On the Member Of tab, select Administrators group, click Add, then add the new user to the Administrators group.<li data-bbox="237 499 368 526">4 Click OK.<li data-bbox="237 534 368 560">5 Click OK. <p data-bbox="237 569 261 595">or</p> <p data-bbox="237 604 929 673">To add the user to the Administrators group for Windows NT Server:</p> <ol data-bbox="237 682 929 914" style="list-style-type: none"><li data-bbox="237 682 746 708">1 In User Manager, double-click the user name.<li data-bbox="237 716 411 743">2 Click Groups.<li data-bbox="237 751 782 777">3 In the Not Member of list, select Administrators.<li data-bbox="237 786 929 847">4 Click the <-Add button to move the Administrators group to the Member of list.<li data-bbox="237 855 839 881">5 Click OK to close the Group Memberships dialog box.<li data-bbox="237 890 782 914">6 Click OK to close the User Properties dialog box.	Windows Server online help

Step	Description	For more information, see...
4	<p>Assign the following permissions, or <i>security policies</i>, to the user account. The following policies are required for WebIntelligence/Broadcast Agent to function properly:</p> <ul style="list-style-type: none"> ■ Access this computer from network ■ Back up files and directories ■ Log on locally ■ Restore files and directories ■ Act as part of the operating system (Windows 2000 only) ■ Log on as a batch job (Windows 2000 only) ■ Log on as a service (Windows 2000 only) <p>To assign policies to the account for Windows 2000 Server:</p> <ol style="list-style-type: none"> 1 Click Start, click Programs, click Administrative Tools, then click Local Security Policy. 2 Expand Local Policies, then select Users Rights Assignments. 3 In the right pane, right-click the name of the policy to assign, then click Security. 4 Click Add. 5 Under Name, select the name of the user account, then click Add. 6 Click OK. 7 Click OK again. <p>or</p> <p>To assign policies to the account for Windows NT Server:</p> <ol style="list-style-type: none"> 1 Click Start, point to Programs, point to Administrative Tools, then click System Policy Editor. <p>Have your network administrator perform the following:</p> <ol style="list-style-type: none"> 1 Create a network domain user account with the same user ID and password as the one you created on the local domain. 2 Assign the same security policies to the account on the network domain. 	Windows Server online help
5	<p>Have your network administrator perform the following:</p> <ol style="list-style-type: none"> 1 Create a network domain user account with the same user ID and password as the one you created on the local domain. 2 Assign the same security policies to the account on the network domain. 	Windows Server online help

Step	Description	For more information, see...
6	<p>Set up the Peregrine Reporting/Business Intelligence Documentation Roadmap files.</p> <p>To view the files on the local machine:</p> <p>Copy the .pdf files from the BI setup CD <code>exe\documentation</code> directory to <code>X:\Program Files\Business Objects\Online Guides\EN</code>.</p> <p>To set up the documentation files for viewing from a browser:</p> <p>Copy the .pdf files from the BI setup CD <code>\documentation</code> directory to and from <code>X:\Program Files\Business Objects\Online Guides \EN</code> to your Web server root directory. Then, browser machines can view the .pdf files from <code>http://<YourServerName>/BI_doc_roadmap.pdf</code>.</p>	
7	Reboot the Report Server machine.	

What's Next

After you configure your Report Server, you should setup your data repository. See *Configuring the Data Repository* on page 39 for the procedures to perform.

4 Configuring the Data Repository

CHAPTER

Peregrine Reporting/Business Intelligence requires a valid server and client license for Oracle version 8.1.6 or higher.

You must perform the following tasks to use Peregrine Reporting/Business Intelligence with Oracle:

- Install the server and client software using the Oracle default options
- Add a new database instance for the Business Intelligence repository
- Create a database user account for the Business Intelligence deployment
- Map the Oracle server instance to the Business Intelligence repository

Peregrine recommends using a dedicated database server. Placing the database server on the same machine as the application database may impact performance.

Installing the Default Oracle Server and Client

Install the Oracle server and client software. For more information, refer to your Oracle documentation or see your database administrator. For a single-machine configuration, you need to install the Oracle client on the Report Server machine. For a multi-machine configuration, install the client on the Report Server, Report Publisher, and Business Intelligence Portal machines.

Installing Oracle normally installs a default database so that you can import additional databases.

Description	Default
username	system
password	manager

If the default database is not created, you cannot create additional databases or import data properly.

Adding a New Database Instance

After you have installed the Oracle server and client software, you add a new database named `bi_repo`. You use the Oracle DBA Studio to add a database instance. For more information about the Oracle DBA Studio, see your Oracle documentation or your database administrator.

To add a new database instance:

- 1 Start the Oracle DBA Studio.
- 2 On the File menu, click **Add Database to Tree**.
- 3 Select **Add a database manually**.
- 4 In the Hostname box, type the name of the host server.
- 5 In the Port Number box, type the number of the port of the host server.
- 6 In the SID box, type the SID.
- 7 In the Net Service Name box, type `bi_repo`.
- 8 Click OK.

Creating a Database User Account

You must first create the user account, then assign the appropriate roles and privileges to the account. If you need assistance, contact your database administrator.

To create a database user account:

- 1 Start the Oracle Database Studio DBA application.
- 2 Connect to the database using a login with DBA privileges.

- 3 Navigate to *Servername*, then Security, then Users.
- 4 In the left frame, right-click Users, then click **Create**.
- 5 In the CreateUser dialog box, specify the following:

In this field...	Type
Name	BI_DEPLOY
Password	<i>password</i>
Confirm Password	<i>password</i>

- 6 Continue to the next section to assign the appropriate roles to the user account.

Assigning Roles to the Database User Account

The database user account must have certain assigned roles. If you have existing reporting repository database user ID these roles must also be set.

Important: This step is critical. If you do not assign the roles properly, your installation will fail.

To assign roles to the user account you created in the previous section:

- 1 In the CreateUser dialog box, click the **Roles** tab.
- 2 Assign the following required roles to the account:
 - AQ_ADMINISTRATOR_ROLE
 - CONNECT
 - RESOURCE
- 3 Continue to the following section to assign the appropriate privileges.

Assigning Privileges to the Database Account

The database user must also have certain database privileges assigned. If you have existing reporting repository database user ID these privileges must also be set.

To assign privileges to the user account you created:

- 1 In the CreateUser dialog box, click the **System Privileges** tab.
- 2 Assign the following database privileges:
 - ALTER_USER
 - ALTER_ANY_TABLE
 - COMMENT_ANY_TABLE
 - CREATE_ANY_INDEX
 - CREATE_ANY_PROCEDURE
 - CREATE_ANY_TABLE
 - CREATE_USER
 - EXECUTE_ANY_PROCEDURE
 - GRANT_ANY_PRIVILEGE
 - GRANT_ANY_ROLE
 - INSERT_ANY_TABLE
 - SELECT_ANY_TABLE
 - UNLIMITED_TABLESPACE
- 3 Click **Create**.

Mapping the Server Instance

You must map the connection between the database client and database server in the `tnsnames.ora` file. The `tnsnames.ora` file is a configuration file that contains net service names mapped to network connections. For this task, you use the service name `bi_repo`.

You can map the server instance using the Oracle Net8 Configuration Assistant.

To map the server instance using Net8 Configuration Assistant file:

- 1 Start the Oracle Net8 Configuration Assistant. The icon should appear under the grouping of Oracle Network Administration tools.
- 2 In the Welcome dialog box, choose the **Local Net Service Name configuration** option button, then click **Next**.

- 3 In the Net Service Name Configuration dialog box, click **Add**, then click **Next**.
- 4 In the Net Service Name Configuration, Database Version dialog box, choose the **Oracle8i database or service** option button, then click **Next**.
- 5 In the Service Name box in the Net Service Name Configuration, Service Name dialog box, type the service name provided by your DBA, then click **Next**.
- 6 From the list of protocols in the Net Service Name Configuration, Select Protocols dialog box, select **TCP**, then click **Next**.
- 7 In the Host box in the TCP/IP Protocol dialog box, type the host name for the computer where your business intelligence data repository resides, then click **Next**.
- 8 In the Test dialog box, choose the **Yes, perform a test** option button to test the connection, then click **Next**.
You should see a message similar to the following:
Connecting...Test successful
If you do not see this message, your configuration is not correct. Consult your database administrator for assistance.
- 9 Do one of the following:
 - Click **Change Login** to specify the login account and password you use to connect to the database.
 - Click **Next** to continue.
- 10 Enter the Net Service Name `bi_repo`, then click **Next**.
The Would You Like to Configure Another Net Service Name message appears.
- 11 If your transaction and application database connections have already been configured, go to step 12. Otherwise, establish these connections before continuing.
- 12 Click **No**.
- 13 Click **Next**.
- 14 Click **Next**.
- 15 Click **Finish**.

Testing the Database Connection

Test your connection to the repository table space before continuing. The procedure is different depending on your operating system.

If you have problems connecting, verify that the DNS suffix for your domain is set properly.

To verify your DNS suffix setting in Windows 2000 Server:

- 1 Right-click the My Network Places icon on your desktop.
- 2 Click **Properties**.
- 3 Right-click **Local Area Connection**, then click **Properties**.
- 4 Select **Internet Protocol (TCP/IP)**, then click **Properties**.
- 5 Click **Advanced**.
- 6 Select the **DNS** tab.
- 7 Verify the DNS suffix is filled in. If not, contact your network administrator to determine the suffix to add.

To verify your DNS suffix setting in Windows NT Server:

- 1 Right-click Network Neighborhood, then click **Properties**.
- 2 Click the **Protocols** tab.
- 3 Select **TCP/IP Protocol**, then click **Properties**.
- 4 Click the **DNS** tab.
- 5 Verify the DNS suffix is filled in. If not, contact your network administrator to determine the suffix to add.

What's Next

After you setup your data repository, you should install the Business Objects Enterprise Server Products. See *Installing Business Objects Enterprise Server Products* on page 45 for the procedures to perform.

5 Installing Business Objects Enterprise Server Products

CHAPTER

To successfully install Business Objects products, you must have the following skills:

- Standard Windows system administration skills
- Standard database connectivity administration skills
- Standard Web server administration skills

Regardless of the installation type you choose, the installer program guides you through the entire process with a setup wizard. This wizard provides detailed information on all the installation options available.

For more in-depth discussion of deployment strategies, see the *Business Objects Deployment Guide*.

Installing the Enterprise Products

Before installing the Enterprise products, you must have administrator rights for the machine on which the products are to be installed and have the appropriate security policies as set up in *Configuring the Report Server* on page 33.

To run the setup wizard for the Enterprise Server Products:

- 1 Insert the Peregrine Reporting/Business Intelligence Disk 1 into your CD-ROM drive.

The setup wizard should launch automatically. If not, click Start, click Run, then type `<drive>:\VOL1\setup\setup.exe`, where `<drive>` is the drive letter for your CD-ROM drive.

The setup wizard first displays a welcome window.



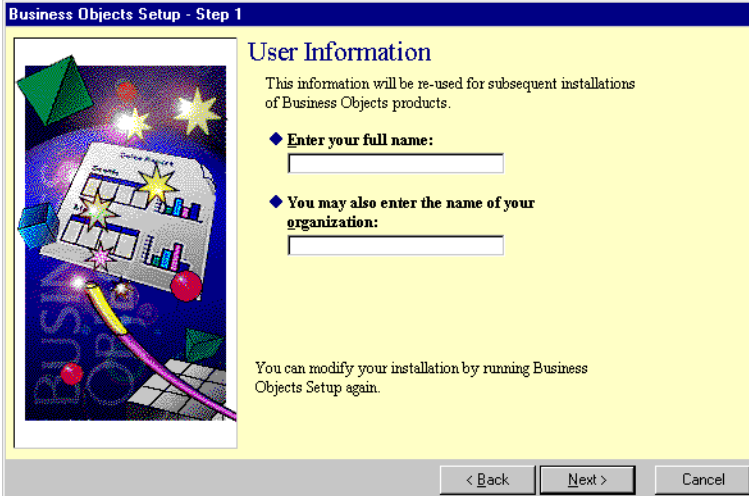
- 2 Choose the **Enterprise Server Products** option button, then click **Begin**.

The Business Objects Setup - Overview window displays the phases on the installation procedure.



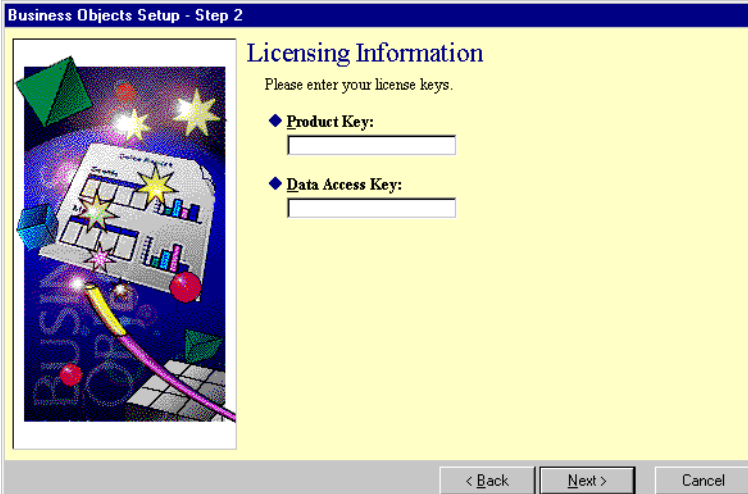
3 Click Next.

The Business Objects Setup - Step 1 dialog box is displayed.



The dialog box is titled "Business Objects Setup - Step 1". It features a decorative graphic on the left showing a document with charts and stars. The main area is titled "User Information" and contains the following text: "This information will be re-used for subsequent installations of Business Objects products." Below this are two bullet points: "◆ Enter your full name:" followed by a text input field, and "◆ You may also enter the name of your organization:" followed by another text input field. At the bottom, there is a note: "You can modify your installation by running Business Objects Setup again." and three buttons: "< Back", "Next >", and "Cancel".

- 4 Type your full name. This is required. You can also type the name of your organization. Business Objects will use this information in any subsequent Business Objects installations to this machine.
- 5 Click Next to continue.
- 6 The Business Objects Setup - Step 2 dialog box is displayed.



The dialog box is titled "Business Objects Setup - Step 2". It features the same decorative graphic as Step 1. The main area is titled "Licensing Information" and contains the text: "Please enter your license keys." Below this are two bullet points: "◆ Product Key:" followed by a text input field, and "◆ Data Access Key:" followed by another text input field. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

7 Contact your Customer Support representative (see *Contacting Customer Support* on page 11) for the following information, then click **Next**:

- Your product license key.

This key determines which products are available for installation. You cannot proceed with installation until you have entered this key.

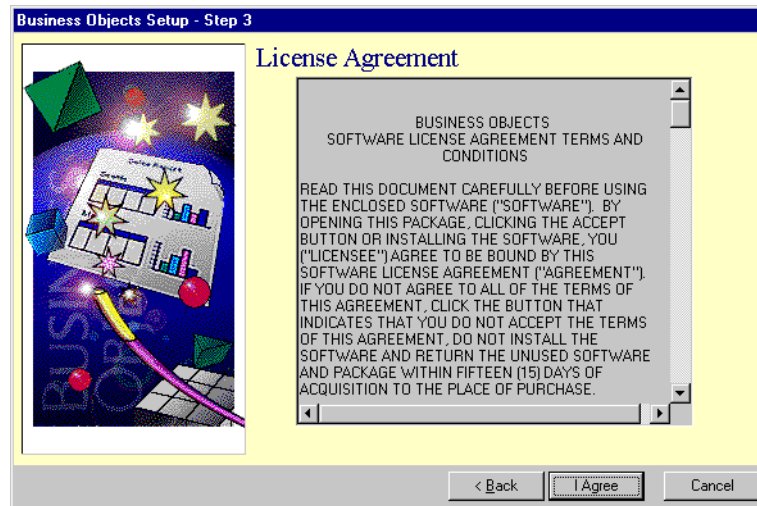
- Your data access key.

This key determines which database access packs will be available for installation.

Your product license and data access keys are included in the shipment of your Business Objects products.

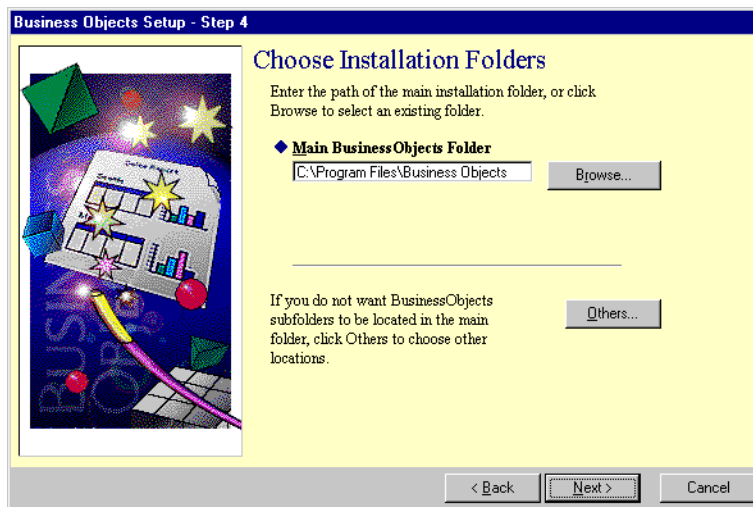
Note: Business Objects provides a multiple-product license key that allows you to install every product you purchased. However, if you acquired the products in more than one purchase, you will have one key for each purchase. To install them together, without having to run the setup wizard for each key, you can enter all the keys together, separated by a semi-colon.

The Business Objects Setup - Step 3 dialog box is displayed. This dialog box displays the Business Objects license agreement.



- 8 Read the license agreement carefully, then click **I Agree** to continue. If you do not agree with the license agreement, the installer cannot continue with the installation.

After you click **I Agree**, the Business Objects Setup - Step 4 dialog box is displayed.

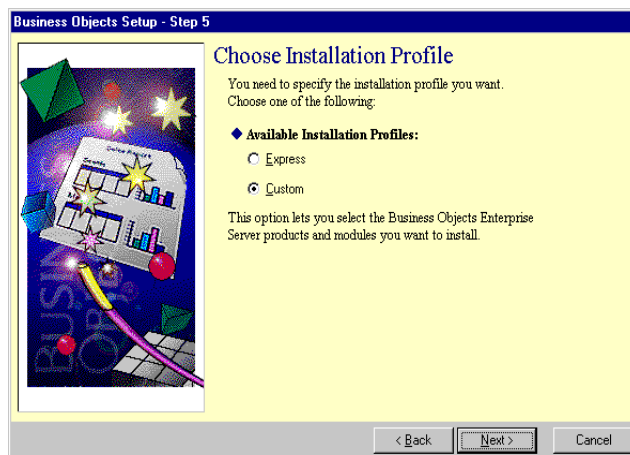


The installer displays the default main Business Objects folder (C:\Program Files\Business Objects). This is the folder on your hard disk where the installer will install all the products and create all the other Business Objects installation folders.

- 9 Do one of the following:
 - If you want to install your products and the installation folders to the default main Business Objects folder, click **Next**.
 - To install the products to a different, existing folder, type the path of the folder or click **Browse** to select it. Then, click **Next**.

If you specify a folder that does not exist, the program asks you if you want to create it.

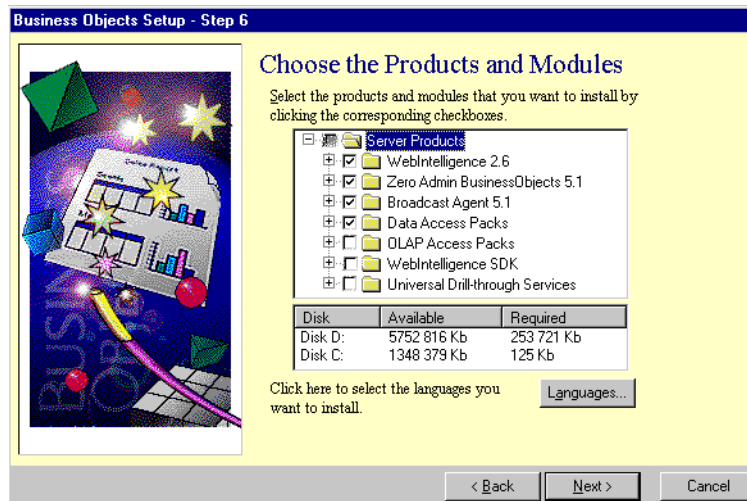
The Business Objects Setup - Step 5 dialog box is displayed.



10 Under Available Installation Profiles, click the Custom option button. This enables you to select the products to install.

11 Click Next.

The Business Objects Setup - Step 6 dialog box is displayed.



The products are arranged in a tree structure, with each product a main branch under Server Products. Expanding each branch shows the product's component modules, if any, plus its online help and online documentation files.

12 Select the check boxes for the following products:

- WebIntelligence 2.6
- Zero Admin BusinessObjects 5.1
- Broadcast Agent 5.1
- Data Access Packs
 - Expand Data Access Packs and select Oracle only

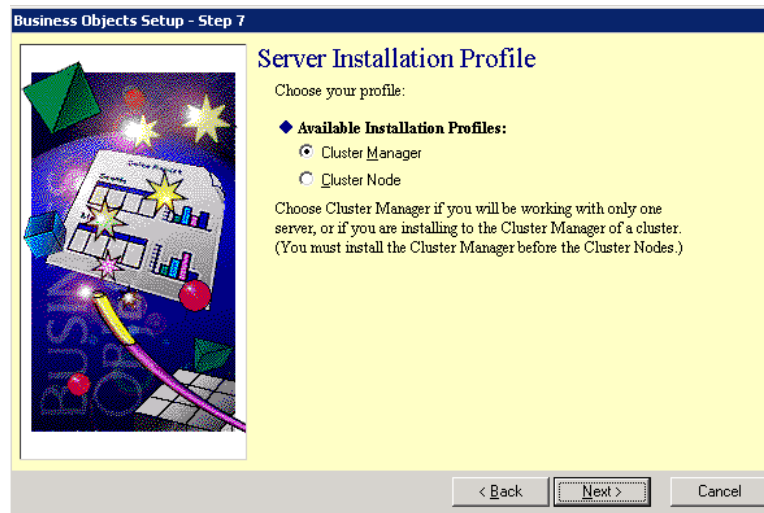
As you choose products, the box below the tree window shows you:

- the disk you are installing to
- how much space is available on that disk
- how much space is required to install the products you have chosen.

If you do not have enough space on your disk to install the software, the installer will not let you continue the installation.

- 13 After choosing the products and modules to install and the interface language to use, click Next.

The Business Objects Setup - Step 7 dialog box is displayed.



- 14 Click the Cluster Manager option button, then click Next.

Note: You can use Business Objects Enterprise Server Products either in a single-machine solution or with operation distributed among a group of servers over the CORBA network. This group of servers is called a cluster.

Distribution over the CORBA network requires an Object Request Broker to coordinate distributed operation. This is called the OS Agent and is installed on one server in the cluster, called the cluster manager machine. The cluster manager profile must be installed on a machine also running a Web server. The other servers in the cluster are called the cluster node machines.

For a more in-depth look at distributed deployment of Enterprise Server Products, see the *Deployment Guide*.

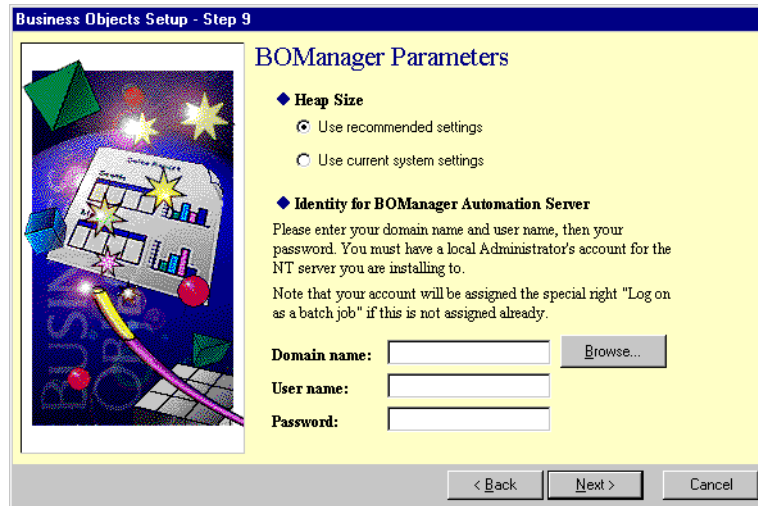
The Business Objects Setup - Step 8 dialog box is displayed.



- 15 Specify the OS Agent TCP/IP port number from your installation checklist.

- 16 Leave the default setting for the Enable Automatic Start box, then click Next.

The Business Objects Setup - Step 9 dialog box is displayed.



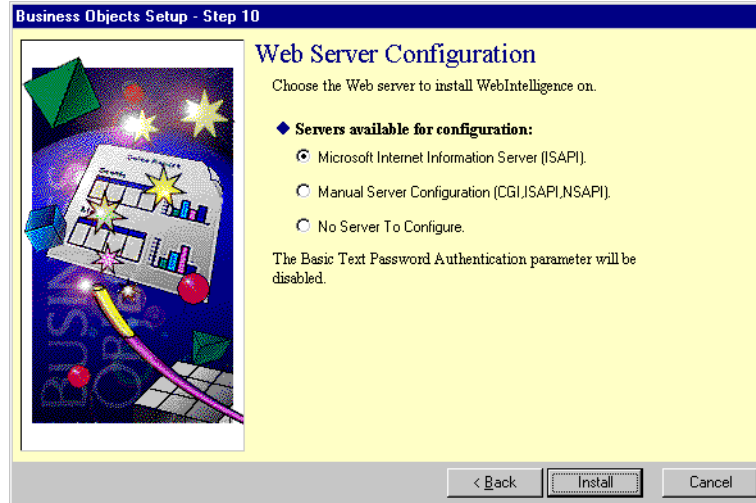
- 17 Specify the following information for BOManager to ensure optimal performance of the system, then click Next:

Field	Description
Heap Size	The heap size parameters control how Windows allocates system memory. You can use the recommended settings or the current system settings. For more information, see the <i>Business Objects Deployment Guide</i> .
Identity for BOManager Automation Server	Type your domain name, user name, and password. This information controls the security context. You must have a local administrator's account on the server on which you are running the installation.

BOManager is the Business Objects component that is used to process BusinessObjects documents. Peregrine recommends the Use recommended settings option.

Note: After the installation, you can use the servconf.exe tool located in `\Business Objects\Server\BusinessObjects Manager 5.0` to view or modify these parameters. The tool provides detailed information on optimal settings in its online help.

After you click **Next**, the Business Objects Setup - Step 10 dialog box is displayed.



The installer asks you how you want to configure your Web server software. The installer detects any Web server programs available on your system and offers them as options. Typically, you want to select one of these servers. For example, if you have the Netscape Enterprise Server installed, the first option will be for that server to be configured using NSAPI. You could also, however, choose to use the CGI protocol, or ISAPI in anticipation of installing a Microsoft Web server.

The installer automatically configures the Web server software during installation. This adds a set of mapping aliases to your Web server directory entries.

Important: Microsoft and Netscape Web servers work with a default Web site and any number of additional Web sites. If other Web sites in addition to the default Web site are running, the installer detects and automatically configures only the default Web site.

18 Do one of the following:

- If you want to use one of the detected Web servers, choose the option button next to the name of that Web server.
Choose Microsoft Internet Information Server (ISAPI) if TomCat is your Web server.

- If you want to configure your Web server manually, choose the **Manual Server Configuration** option button. This is required if your web server supports only the CGI server interface.

You must configure the Web server after the Enterprise Server Products installation is complete. If your Web server uses Secure Socket Layers (SSL) to encrypt data transmissions between the Web server and clients, you can enable SSL options in your Web server after the Business Objects installation.

- If there is no Web server on the machine on which you are installing, choose the **No Server to Configure** option button. This may be the case if you are installing on a cluster node machine because a Web server is required only on the cluster manager machine. Do not choose this option if you are installing on a cluster manager machine.

19 Click **Install** to install your Enterprise Server Products.

During the installation process, you will be asked to insert the second installation CD to complete installation. Throughout, a message box displays the file being installed. To interrupt the process at any time, click the **Stop** button.

20 Insert the Reporting/Business Intelligence Disk 2 CD when prompted.

Before the end of the installation, a Business Objects Setup message box is displayed. It asks if you want to check the *middleware*, which is your Oracle database, for the Business Objects drivers that you have installed.

21 If you want to check the middleware, click **Yes**, otherwise, click **No**.

If you click **Yes**, the `chkmidw.log` file is displayed. It contains a section for each middleware supported by the Business Objects drivers you have installed. The `chkmidw.log` is stored by default at: `C:\Program Files\Business Objects\Data Access 5.0\chkmidw.log`.

If the last line of the section contains the text *The middleware checking has not detected any errors*, the middleware is correctly installed.

If you encounter an error message in the section corresponding to the middleware you plan to use, check your middleware installation.

Note: If you want to check your middleware after you have installed Business Objects products, you can run the `chkmidw.exe` file located at: `C:\Program Files\Business Objects\Data Access 5.0\Chkmidw.exe`.

To run `chkmidw.exe`, click **Start** and then click **Run**, then type the following and click **OK**:

```
"C:\Program Files\Business Objects\Data Access 5.0\Chkmidw.exe"  
mode:verbose chkmidw.ini chkmidw.log
```

- 22 Reboot your system after installing Business Objects Enterprise Server Products.

What's Next

Now that you have installed the Business Objects Enterprise Server Products, the next step is to install the Business Objects Desktop Products. See *Installing the Business Objects Desktop Products* on page 57 for the procedures to perform.

6

CHAPTER

Installing the Business Objects Desktop Products

Your users use a browser to access your business intelligence data through the Web or an intranet. Therefore, you do not need to install the Desktop Products on each client machine.

For a single-machine installation, you will install the Desktop Products on the Report Server machine. For a multi-machine installation, you will install them on a Report Publisher machine.

The Desktop Products used in Peregrine Reporting/Business Intelligence include:

- Designer
- Supervisor

The Setup Wizard

Regardless of the installation type you choose, the installer program guides you through the entire process with a setup wizard. This wizard provides detailed information on all the installation options available.

For more in-depth discussion of deployment strategies, see the *Business Objects Deployment Guide*.

Installing the Desktop Products

Before you install the Desktop Products, you must install the Enterprise Server Products as described in *Installing Business Objects Enterprise Server Products* on page 45.

To install the Desktop Products:

- 1 Insert the Peregrine Reporting/Business Intelligence Disk 1 into the CD-ROM drive on the cluster manager machine if you are using a single-machine setup or on a cluster node machine if you are using a multi-machine setup.

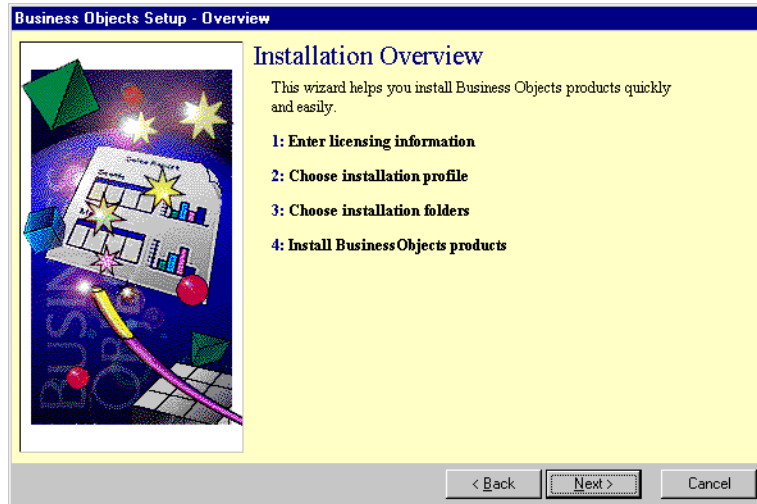
The setup wizard should launch automatically. If not, click Start, click Run, then type `<drive>:\VOL1\setup\setup.exe`, where `<drive>` is the drive letter for your CD-ROM drive.

The Business Objects Setup - Welcome dialog box is displayed.



- 2 Choose the Desktop Products option button, then click **Begin**.

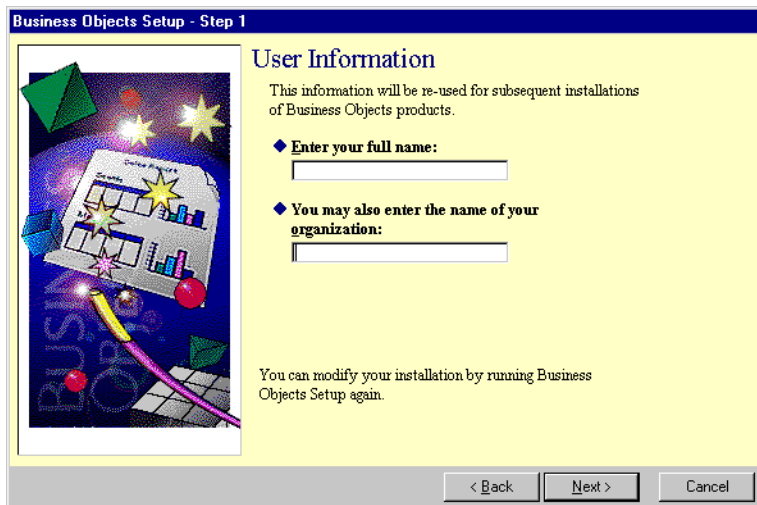
The Business Objects Setup - Overview dialog box is displayed.



This window displays an overview of the installation process for Desktop Products.

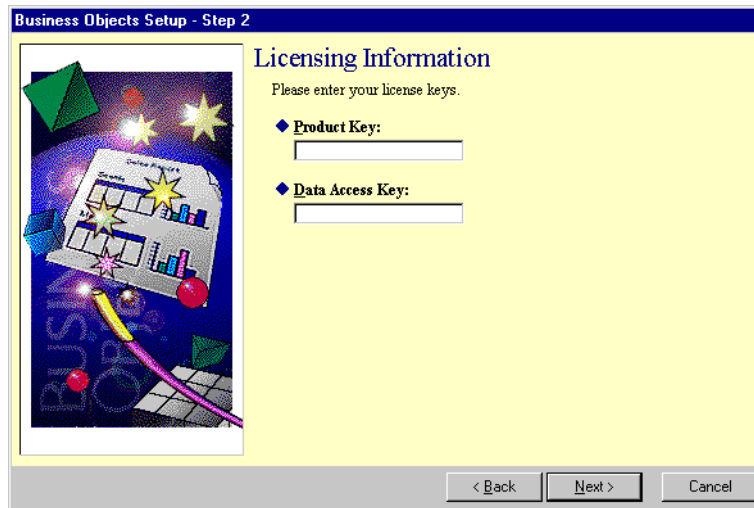
- 3 Review the list of steps in the Desktop Products installation, then click **Next** to continue.

The Business Objects Setup - Step 1 dialog box is displayed.



- 4 Type your full name. This is required. You can also type the name of your organization. Business Objects will use this data in any subsequent Business Objects installations to this machine.
- 5 Click **Next** to continue.

The Business Objects Setup - Step 2 dialog box is displayed.



- 6 Contact your Customer Support representative (see *Contacting Customer Support* on page 11) for the following information, then click **Next**:

- Your product license key.

This key determines which products are available for installation. You cannot proceed with installation until you have entered this key.

If you already installed the Enterprise Server Products, the Enterprise Server Products key is displayed in the Product Key box. The Desktop Products key is different from the Enterprise Server Products key.

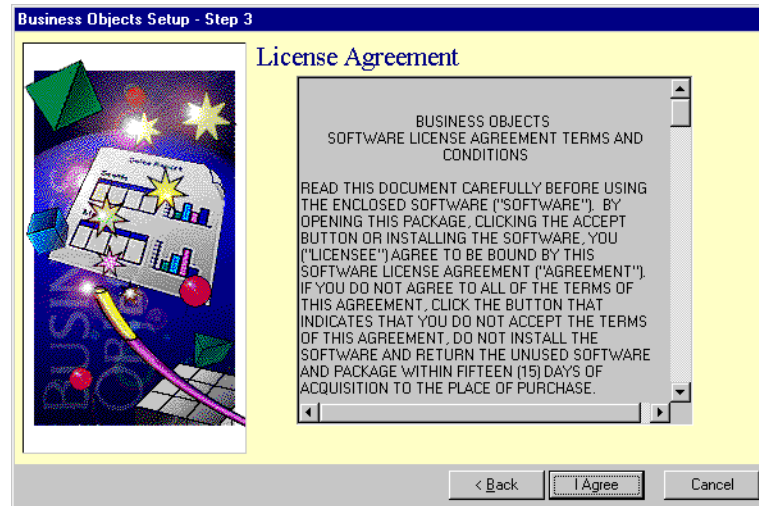
- Your Oracle data access key.

This key determines which database access drivers will be available for installation. You need to enter a data access key for each database you plan to use with your Business Objects products. This key is the same for both the Enterprise Server and Desktop Products.

Your product license and data access keys are included in the shipment of your Business Objects products.

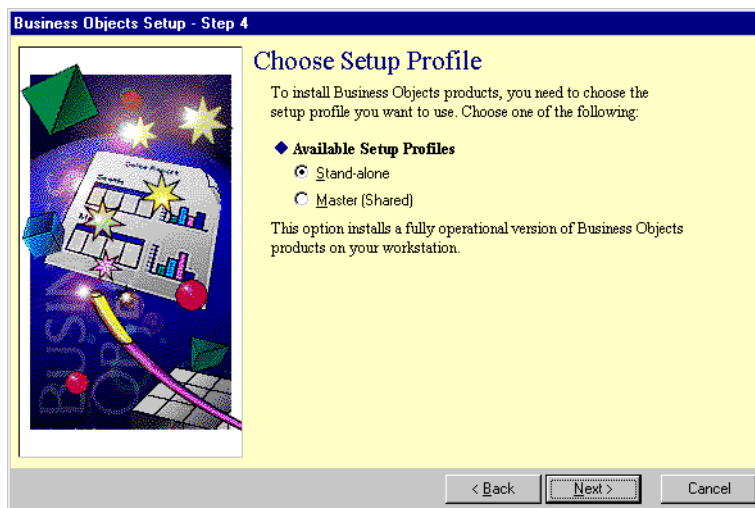
Tip: Business Objects provides a multiple-product license key that allows you to install every product you purchased. However, if you acquired the products in more than one purchase, you will have one key for each purchase. To install them together, without having to run the setup wizard for each key, enter all the keys together, separated by semi-colons.

The Business Objects Setup - Step 3 dialog box is displayed. This dialog box displays the Business Objects license agreement.



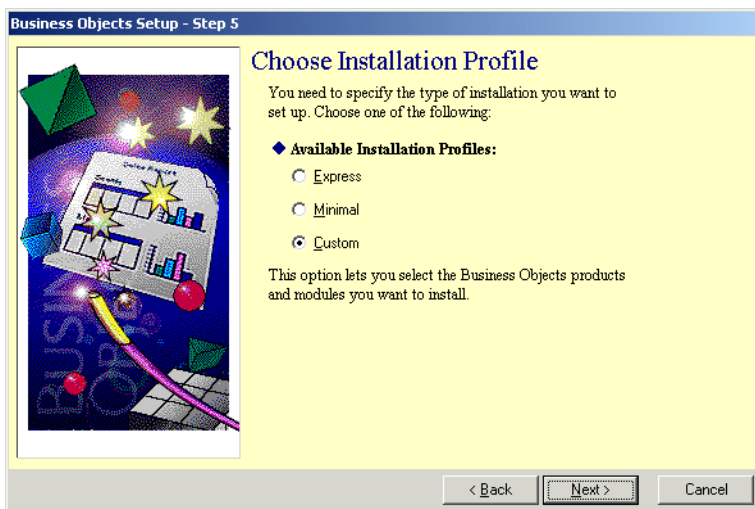
- 7 Read the license agreement carefully, then click **I Agree** to continue. If you do not agree with the license agreement, you cannot continue with the installation.

After you click **I Agree**, the Business Objects Setup - Step 4 dialog box is displayed.



- 8 Click **Standalone**, then click **Next**.

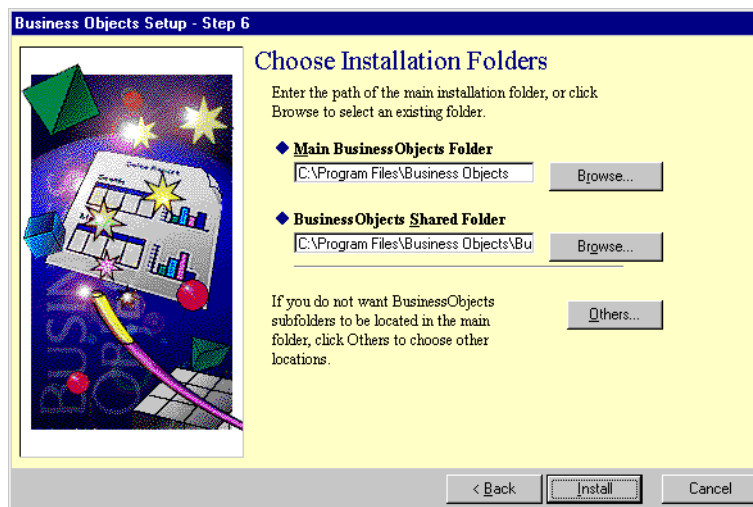
On one machine installations, the one machine is the master machine. The Business Objects Setup - Step 5 dialog box is displayed.



- 9 Choose the **Custom** option button so you can select which products and modules to install, along with the languages to use for the interface.

Note: You must choose the custom installation to be able to install the Business Objects Services Administrator or the Broadcast Agent Console.

The Business Objects Setup - Step 6 dialog box is displayed.



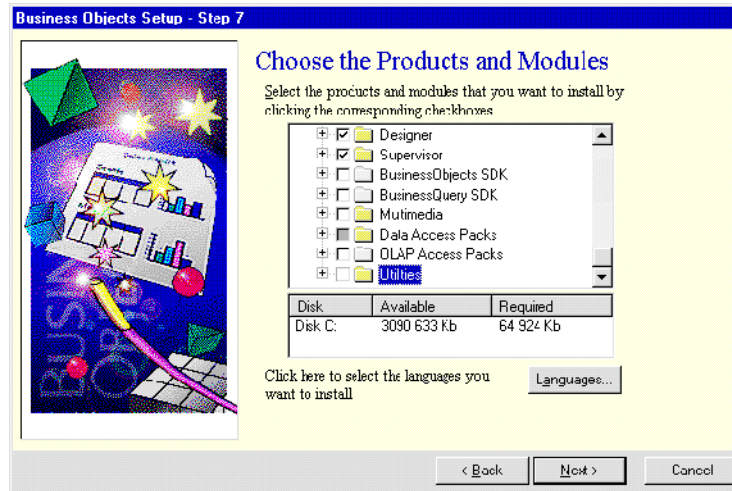
This dialog box displays the default main Business Objects folder (C:\Program Files\Business Objects) and the default Business Objects shared folder (C:\Program Files\Business Objects\BusinessObjects 5.0\ShData).

The Main Business Objects Folder (C:\Program Files\Business Objects) is the folder on your hard disk where the installer will install the products and create all the other Business Objects installation folders.

The BusinessObjects Shared Folder (C:\Program Files\Business Objects\BusinessObjects\ShData) is where shared security and administration files will be located. By default, the shared folder is located in the main Business Objects folder.

- 10 Review the options then click **Install**.

The Business Objects Setup - Step 7 dialog box is displayed.



- 11 Select the boxes for the following products:

- Designer
- Supervisor

As you choose products, the box below the tree window shows you:

- the disk you are installing to
- how much space is available on the disk
- how much space is required to install the products you have chosen

- 12 After choosing the products, click **Finish**.

- 13 Click **Install** to finish installing the products.

Throughout the installation, a message box displays the names of the files being installed. To interrupt the process at any time, click **Stop**.

- 14 Insert the Peregrine Reporting/Business Intelligence Disk 2 when you are prompted.

Before the end of the installation, a Business Objects Setup message box may appear to ask if you want to check the middleware for the BusinessObjects drivers that you have installed.

- 15 To check the middleware, click **Yes**.

The `chkmidw.log` file is displayed. It contains a section for each middleware supported by the BusinessObjects drivers you have installed. The `chkmidw.log` is stored by default at: `C:\Program Files\Business Objects\Data Access 5.0\chkmidw.log`.

If the last line of the section contains the text *The middleware checking has not detected any errors*, the middleware is correctly installed.

If you encounter an error message in the section corresponding to the middleware you plan to use, check your middleware installation.

Note: If you want to check your middleware after you have installed BusinessObjects, you can run the `chkmidw.exe` file located at:

`C:\Program Files\Business Objects\Data Access 5.0\Chkmidw.exe`.

To run `chkmidw.exe`, click **Start**, click **Run**, then type the following and click OK:

```
"C:\Program Files\Business Objects\Data Access 5.0\Chkmidw.exe"  
-mode:verbose chkmidw.ini chkmidw.log
```

- 16 Reboot the machine following the installation.

What's Next

Now that you have installed the Business Objects Desktop products, the next step is to configure Business Objects. See [Configuring Business Objects](#) on page 67 for the procedures to perform.

7 Configuring Business Objects

CHAPTER

After you install Business Objects, you must perform a number of steps to configure the products. This chapter describes the following configuration steps:

- Verify that WebIntelligence Manager and WebIntelligence Orb (object request broker) services start properly
- Configure the services to start automatically when you reboot the machine
- Configure the BOManager server

Starting the WebIntelligence Manager and WebIntelligence Orb Services

Verify that both WebIntelligence Manager and WebIntelligence Orb (object request broker) services start properly on the Report Server machine.

To start the services:

- 1 Do one of the following to access the list of services:
 - For Windows NT Server, click **Start**, point to **Settings**, click **Control Panel**, then click **Services**. From the list of Services, select **WebIntelligence Manager**, then click **Start**.
 - For Windows 2000 Server, click **Start**, point to **Programs**, point to **Administrative Tools**, then click **Computer Management**. Click **Services** under **Services and Applications** in the left pane.

- 2 From the list of Services, right-click **WebIntelligence Manager**, then click **Start**.

The WebIntelligence Orb service starts when you start the WebIntelligence Manager service.

Configuring the Services for Automatic Start-up

Configure the services to start automatically whenever you reboot. The configuration steps differ depending on your server operating system.

Windows 2000 Server

Follow this procedure if you're using Windows 2000 Server as your operating system.

To configure the automatic start-up for Windows 2000 Server:

- 1 In the list of services, right-click WebIntelligence Manager.
- 2 From the shortcut menu, click **Properties**.
- 3 In the Startup type box, select Automatic.
- 4 Click **OK**.
- 5 Repeat the steps for the WebIntelligence Orb service.
- 6 Close the Computer Management window.

The services should now start whenever you reboot the server.

Windows NT Server

Follow this procedure if you're using Windows NT Server as your operating system.

To configure the automatic start-up for Windows NT Server:

- 1 From the list of services, right-click WebIntelligence Manager.
- 2 Click **Startup**.
- 3 Under Startup Type on the Service dialog box, click **Automatic**.
- 4 Click **OK**.
- 5 Repeat the steps for the WebIntelligence Orb service.
- 6 Click **Close**.

The services should now start whenever you reboot the server.

Configuring the BusinessObjects Manager Server

BOManager is a server-based form of the BusinessObjects product that allows users to view and refresh BusinessObjects documents using the WebIntelligence system. By default, BOManager starts whenever you start WebIntelligence.

You can configure the BOManager server software using the server configuration utility.

In this procedure, you set the following:

- **Non-interactive heap size**
The heap size settings control how Windows allocates system memory. The interactive heap size is associated with the interactive, logged-on user, while the non-interactive heap size controls service processes and Component Object Model (COM) processes.

For more information, refer to the BusinessObjects Server Configuration online help.

- **Default Distributed Component Object Model (DCOM) security settings**
The default security settings apply to all DCOM applications
- **DCOM security settings for the BusinessObjects server.**
- **Configure the user account for BusinessObjects server.**

To configure the heap size, DCOM security settings, DCOM security settings for the BusinessObjects server, and the user account for the BusinessObjects server:

- 1 Start the `servconf.exe` utility, located in `X:\Program Files\Business Objects\Server\BusinessObjects Manager 5.0`.
- 2 Under **System Heap Size Non-interactive**, specify 1536.
For information about heap size settings, refer to your Windows server online help.
- 3 Click **Apply**, click **Yes** to modify your configuration, then click **No to Restart**.
- 4 Start `servconf.exe`.
- 5 Click **Run DCOM Config**.
- 6 Click **Yes**, then click **Yes** a second time.

- 7 Click the **Default Security** tab.
- 8 Under **Default Access Permissions**, click **Edit Default**.
- 9 Click **Add**.
- 10 In the **Add Users and Groups** dialog box, select the user account you created for the **WebIntelligence/Broadcast Agent** processes.
- 11 Click **Add**. You might want to use the **Search** button to locate the user account.
- 12 Add the **INTERACTIVE** and **SYSTEM** users.
- 13 Choose **OK**.
- 14 In the **Type of Access** box in the **Registry Value Permissions** dialog box, select **Allow Access**.
- 15 Click **OK**.
- 16 Under **Default Launch Permissions** on the **Default Security** tab, click **Edit Default** and repeat steps 5 through 9. Make sure the user, **INTERACTIVE**, and **SYSTEM** users have **Allow Launch** access.
- 17 Under **Default Configuration Permissions**, click **Edit Default** and repeat steps 5 through 9. Make sure the user have **INTERACTIVE**, and **SYSTEM** users have **Full Control** access.
- 18 Choose **OK**, then in the **BusinessObjects Server Configuration** dialog box, choose **Apply**, choose **OK**, choose **Apply**, choose **Yes** to modify your configuration, then click **No to Restart**.
- 19 Start **servconf.exe**.
- 20 Click **Run DCOM Config**.
If a warning message appears, click **No**. Otherwise, go to step 21.
- 21 Click the **Applications** tab.
- 22 In the **Applications** list, double-click **BusinessObjects.Server**.
- 23 Click the **Security** tab.
- 24 Select the **Use custom configuration permissions** option button.
- 25 Click **Edit** to modify the list of users who can change the configuration information for the application.
- 26 Click **Add**.
- 27 In the **Add Users and Groups** dialog box, select the user account you created for the **WebIntelligence/Broadcast Agent** processes.

- 28 Click **Add**. You might want to use the **Search** button to locate the user account.
- 29 Choose **OK**.
- 30 In the **Type of Access** box in the Registry Key Permissions dialog box, select **Full Control**.
- 31 Click **OK**, then **OK** a second time.
- 32 Click **Apply**, then **OK**, then **OK** a second time.
- 33 Click **Run DCOM**.
- 34 On the DCOM Configuration Properties dialog box **Applications** tab, double-click **BusinessObjects.Server**.
- 35 Click the **Identity** tab.
- 36 Select the **This user** option button.
- 37 In the **User** box, specify the user account in the format *domain\userid*.
- 38 In the **Password** box, specify the same password used for the WebIntelligence Manager and WebIntelligence Orb services.
- 39 Click **OK**, then click **OK** again on the next dialog box.
- 40 Click **Test User Account** to verify the account details, then click **OK**.
- 41 Click **Yes** to apply the setting.
- 42 Reboot the server for the changes to take effect.

What's Next

Now that you have configured Business Objects, the next step is to install Peregrine Reporting/Business Intelligence. Refer to the following table to determine the appropriate chapter for the procedures to perform.

Number of Machines for Peregrine Reporting/BI Installation	Chapter
1	<i>Installing Peregrine Reporting/BI On A Single Machine</i> on page 73.
2 or more	<i>Installing Peregrine Reporting/BI On Multiple Machines</i> on page 87.

8

CHAPTER

Installing Peregrine Reporting/BI On A Single Machine

This chapter provides instructions for the installation of Peregrine Reporting/Business Intelligence on one machine. If you plan to install Peregrine Reporting/Business Intelligence on multiple machines, see chapter 9, *Installing Peregrine Reporting/BI On Multiple Machines* on page 87.

Prerequisites

You use the procedures in this chapter if all of the following are true:

- You are using a single-machine installation of Peregrine Reporting/Business Intelligence
- You have Business Objects Enterprise and Desktop products installed
- You will have ten or fewer users accessing the system at the same time

Copying Files from the Setup CD

Before you run the setup program, you need to copy certain files from the setup CD to the Report Server machine.

To copy the files:

- 1 Stop the WebIntelligence services.

- 2 Copy files as specified in the table.

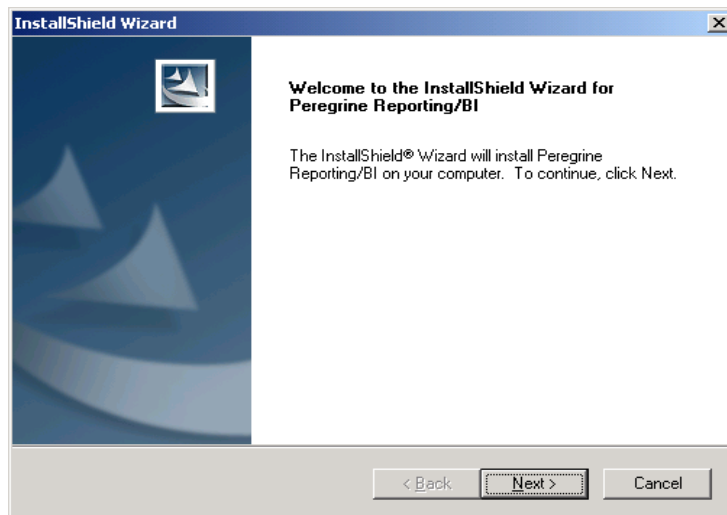
Copy these file from the setup CD...	To this folder on the Report Server machine...
The file located in the folder \Exe\BOPatch_SP3	X:\Program Files\Business Objects\Business Objects 5.0
All files located in the folder \Exe\BOJDK	X:\Program Files\Business Objects\Server\WebIntelligence 2.5\wiapi\lib

- 3 Restart the WebIntelligence services.

Installing Peregrine Reporting/BI on a Single Machine

To install Peregrine Reporting/Business Intelligence on a single machine:

- 1 Insert the Peregrine Reporting/BI Setup Disk 1 into your CD-ROM drive. The setup wizard should launch automatically. If not, click Start, click Run, then type `<drive>:\setup.exe`, where `<drive>` is the drive letter for your CD-ROM drive. The installation program starts and the Welcome dialog box is displayed.



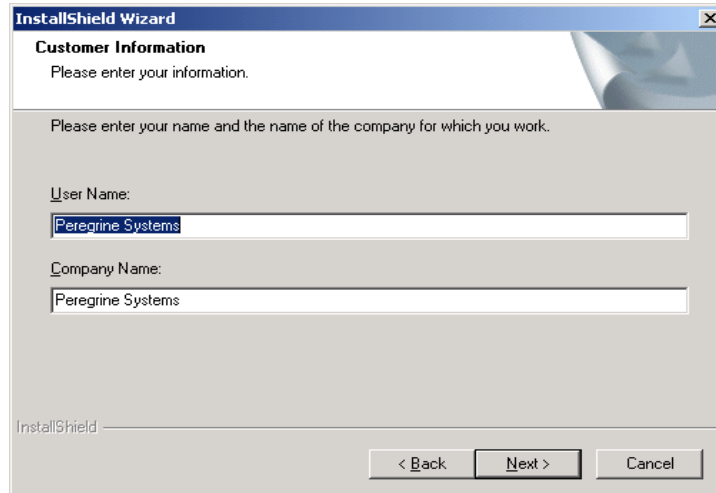
2 Click Next.

The License Agreement information is displayed.



3 Read the license agreement carefully, then click Yes to accept the terms of the agreement.

The Customer Information dialog box is displayed.



4 Type your user and company names, then click Next.

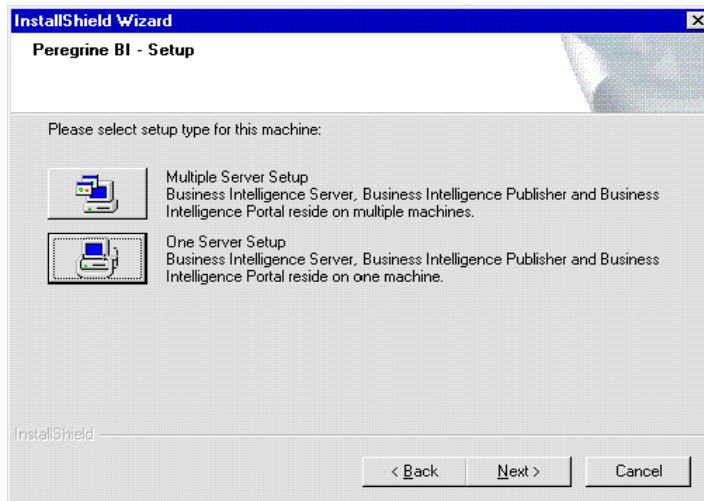
The Peregrine BI Setup - Business Objects dialog box is displayed.



- 5 Click No then click Next.

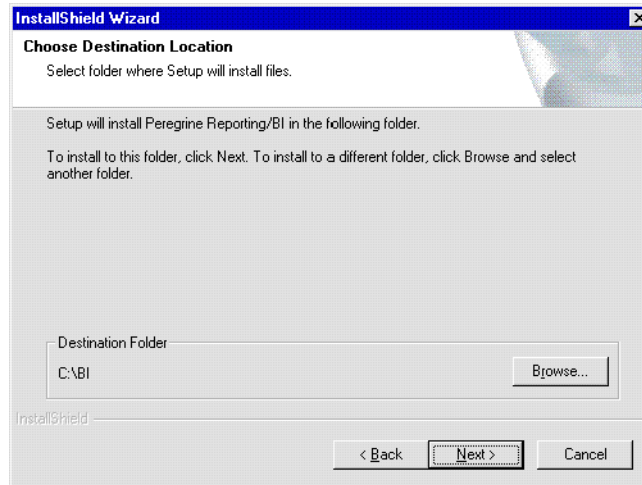
Warning: Clicking Yes can irrevocably corrupt any existing Business Objects data repository. Refer to your Peregrine application Release Notes for additional information regarding migration, multiple application deployment, and existing non-Peregrine Business Objects installation.

The select setup type information is displayed.



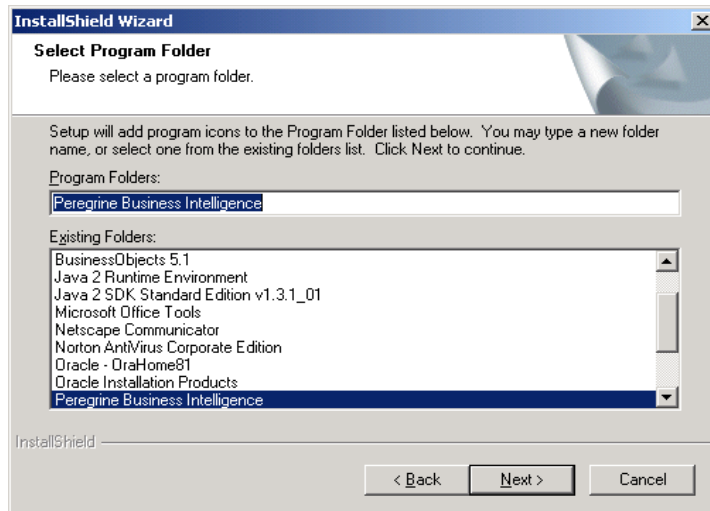
6 Click One Server Setup.

The Choose Destination Location dialog box is displayed.



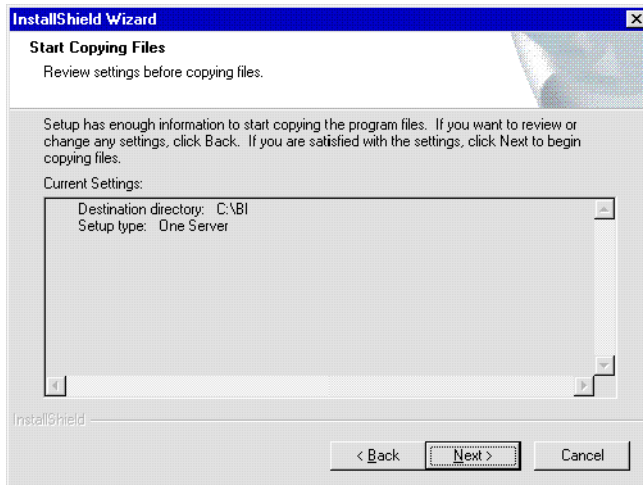
7 Specify the folder where you want to install the Peregrine Reporting/Business Intelligence files, then click Next.

The Select Program Folder dialog box is displayed.



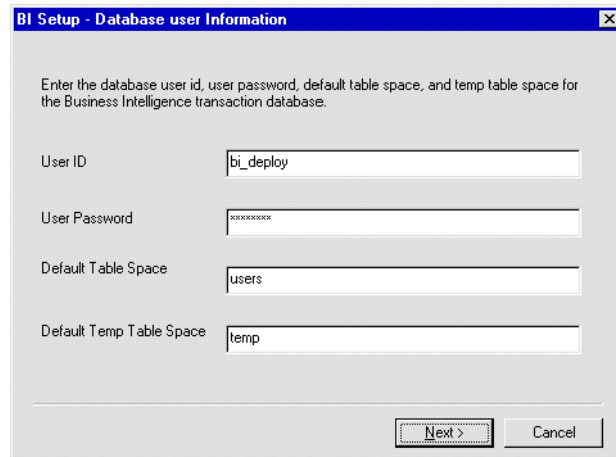
8 Specify the program folder where you want to install the program icon, then click Next.

The Start Copying Files dialog box displays the settings you have selected.



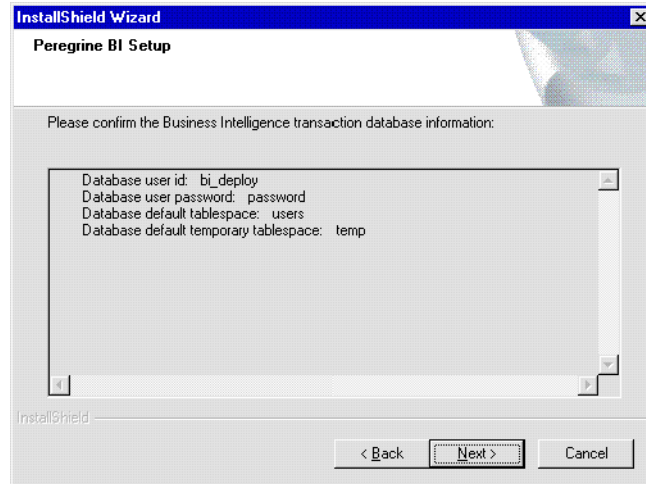
- 9 Verify the settings you selected, then click Next to begin copying the files.

The BI Setup - Database user Information dialog box is displayed.



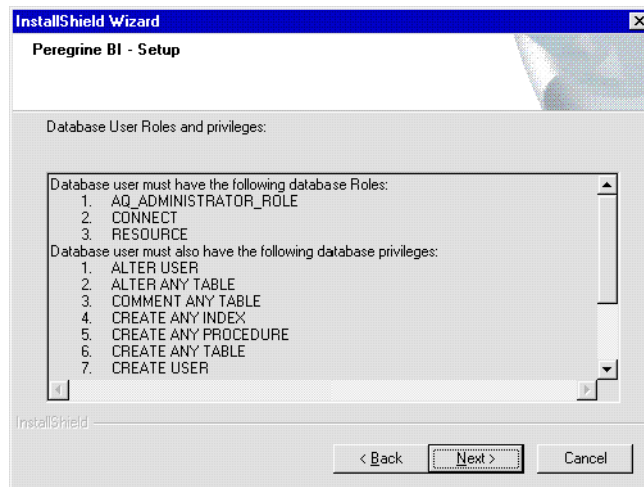
- 10 Specify the BI deployment user, BI deployment password, default table space, and default temp table space from your installation checklist, then click Next.

The Peregrine BI Setup dialog box displays the database user information you entered.



- 11 Verify the database user information, then click Next.

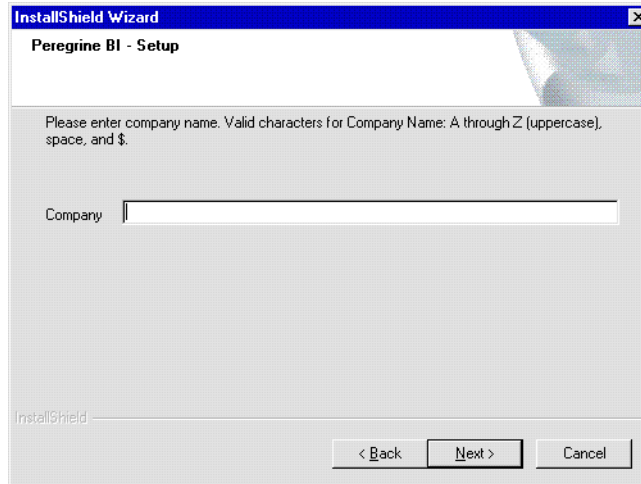
The next dialog box displays the database user roles and privileges that are required for the default user ID you specified. For more information, see *Configuring the Data Repository* on page 39.



Note: The Business Intelligence install program verifies whether the required roles and privileges are assigned to the specified user and does not continue until you have assigned all required roles and privileges.

Important: If the required roles are not assigned, your installation will fail.

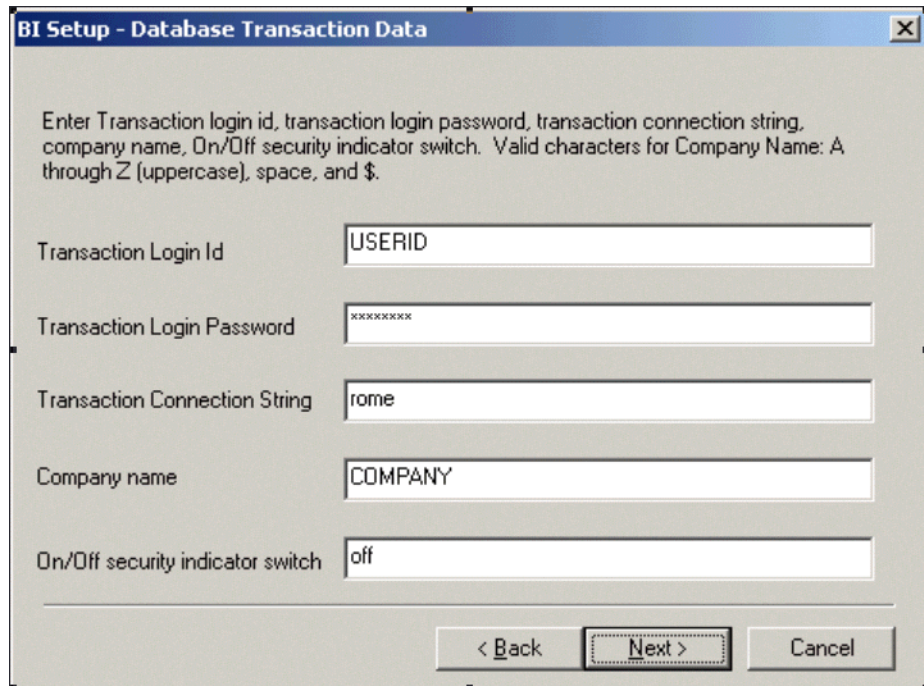
The company name for the Business Intelligence server information dialog box is displayed.



- 12 Type the company name from your installation checklist, then click Next.

Warning: The Company Name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

The BI Setup - Database Transaction Data dialog box is displayed.



The dialog box titled "BI Setup - Database Transaction Data" contains the following fields and controls:

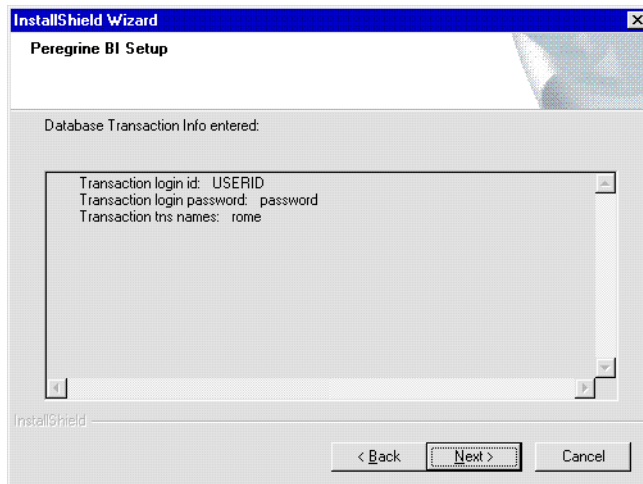
- Transaction Login Id: USERID
- Transaction Login Password: xxxxxxxx
- Transaction Connection String: rome
- Company name: COMPANY
- On/Off security indicator switch: off

At the bottom, there are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

- 13 Type the transaction login ID, password, and connection string from your installation checklist, then click Next.

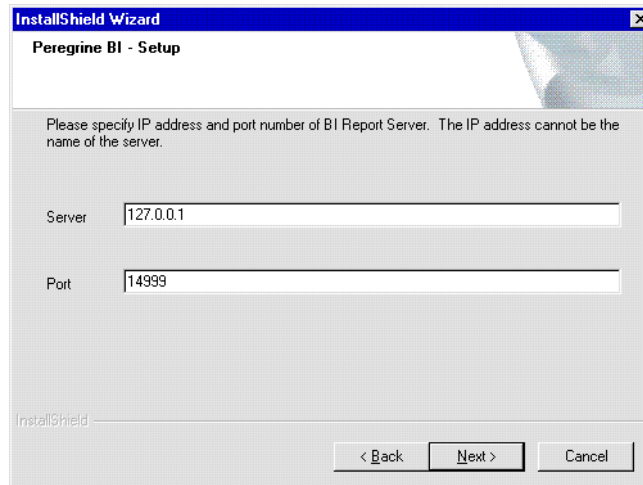
Important: The transaction database connection string is equivalent to the service name for the Oracle server as it is set in the `tnsnames.ora` file on the client machine where the BO repository resides.

The next dialog box displays the database transaction information you entered.



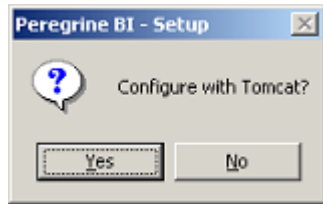
- 14 Verify the database transaction information, then click Next.

The next dialog box requests information about the BI Intelligence server.



- 15 Type BI Report Server IP address and OSAgent TCP/IP port number from your installation checklist, then click **Next**.

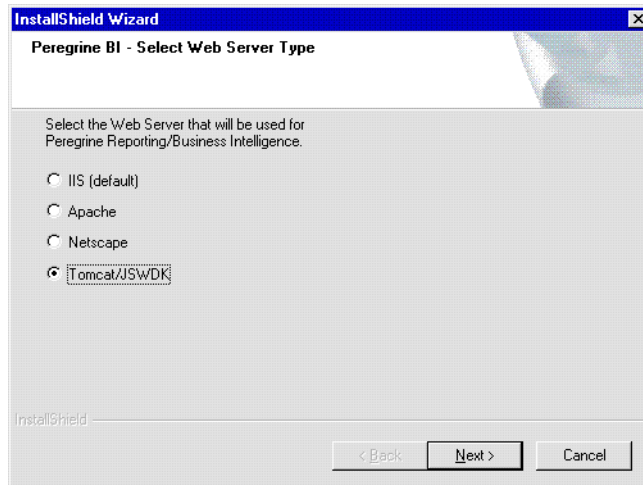
The Configure with Tomcat message box is displayed.



- 16 Click **Yes**.

If you click **Yes**, the Business Intelligence install program modifies your Tomcat files and publish documents. If you click **No**, you will need to manually configure your application server and publish documents.

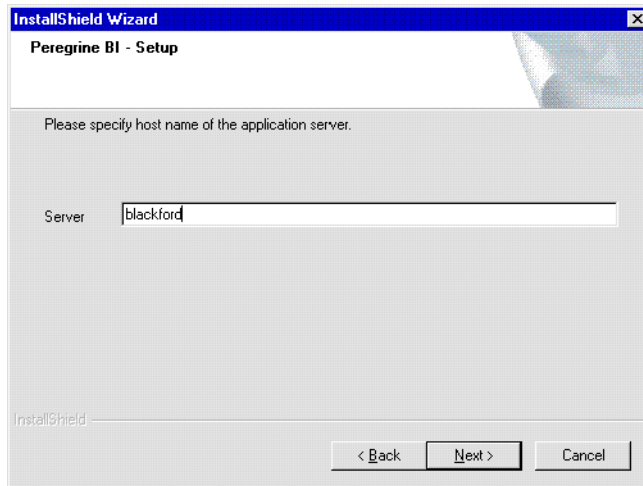
The Setup Status dialog box is displayed during file installation. When the process is complete, the Select Web Server Type dialog box is displayed.



- 17 Click the name of your server, then click **Next**.

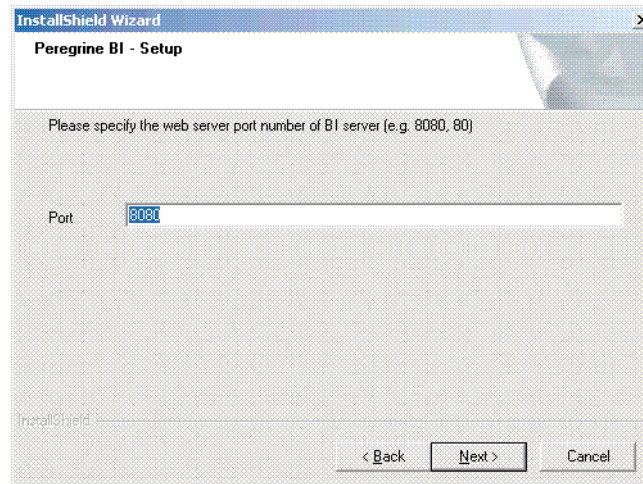
Note: Select the same Web server you specified when installing your OAA application. If you are using Tomcat as the stand-alone application server and Web server, choose **Tomcat/JSWDK**.

The host name of the application server dialog box is displayed.



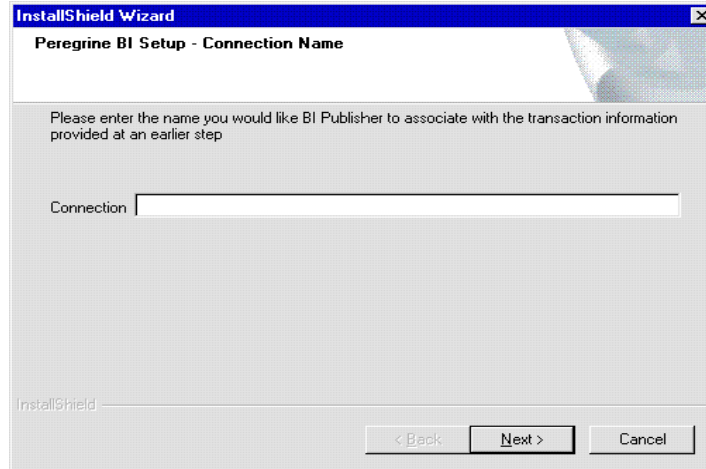
- 18 Type the host name of the BI application server host name from your installation checklist, then click **Next**.

The installation program continues to configure additional files, then the Business Intelligence Report Server port number dialog box is displayed.



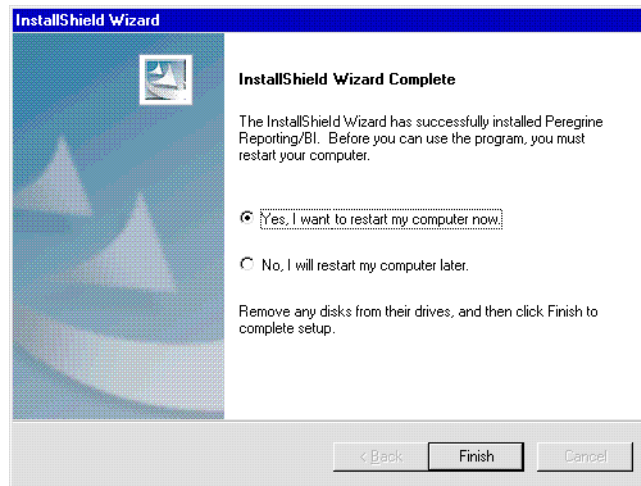
- 19 In the Port box, type the BI Web server port number from your installation checklist, then click Next.

The installation program continues to configure additional files, then the Connection Name dialog box is displayed.



- 20 In the Connection box, type the connection name from your installation checklist, then click Next.

When the installation and configuration is complete, the InstallShield Wizard Complete dialog box is displayed.



This dialog box indicates that the installation is complete.

21 Click Finish.

What's Next

Now that you have installed Peregrine Reporting/Business Intelligence on a single machine, you should configure your application server/web server. See *Configuring the Application Server/Web Server* on page 119, for the procedures to perform.

9 Installing Peregrine Reporting/BI On Multiple Machines

CHAPTER

This chapter provides instructions for the installation of Peregrine Reporting/Business Intelligence on multiple machines. If you plan to install Peregrine Reporting/Business Intelligence on a single machine, see chapter 8, *Installing Peregrine Reporting/BI On A Single Machine* on page 73.

For a multiple installation, you install the following three components of Peregrine Reporting/Business Intelligence:

- Business Intelligence Report Server (BI Report Server)
- Business Intelligence Report Publisher (BI Publisher)
- Business Intelligence Portal (BI Portal)

You can install and configure the components on two or three machines according to the following table:

Number of Server Computers	Server Installation and Configuration
Two	<ul style="list-style-type: none">■ BI Report Server■ BI Report Publisher and BI Portal
Three	<ul style="list-style-type: none">■ BI Report Server■ BI Report Publisher■ BI Portal

Important: Windows is required for the Report Publisher server computer.

Prerequisites

You use the procedures in this chapter if the following is true:

- You are using a multiple-machine installation of Peregrine Reporting/Business Intelligence

Copying Files from the Setup CD

Before you run the setup program, you need to copy certain files from the setup CD to the BI Report Server machine.

To copy the files:

- 1 Stop the WebIntelligence services.
- 2 Copy files as specified in the table.

Copy these file from the setup CD...	To this folder on the BI Report Server machine...
The file located in the folder \Exe\BOPatch_SP3	X:\Program Files\Business Objects\Business Objects 5.0
All files located in the folder \Exe\BOJDK	X:\Program Files\Business Objects\Server\WebIntelligence 2.5\wiapi\lib

- 3 Restart the WebIntelligence services.

Installing Peregrine Reporting/BI on Multiple Machines

Installing Peregrine Reporting/Business Intelligence on multiple machines is a three-step process. You use the Install Wizard to install the Peregrine Reporting/Business Intelligence components in the following order:

- Business Intelligence Report Server

- Business Intelligence Report Publisher
- Business Intelligence Portal

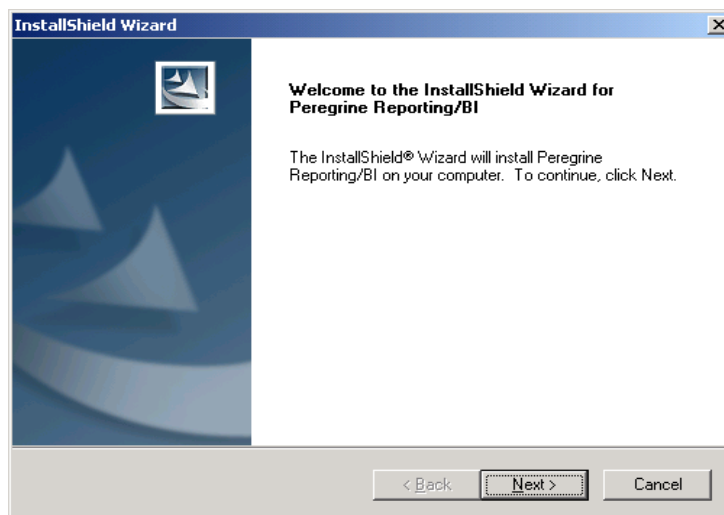
Installing the Business Intelligence Report Server

Installation of the Business Intelligence Report Server is the first step in installing Peregrine Reporting/Business Intelligence on multiple machines.

To install the Business Intelligence Report Server:

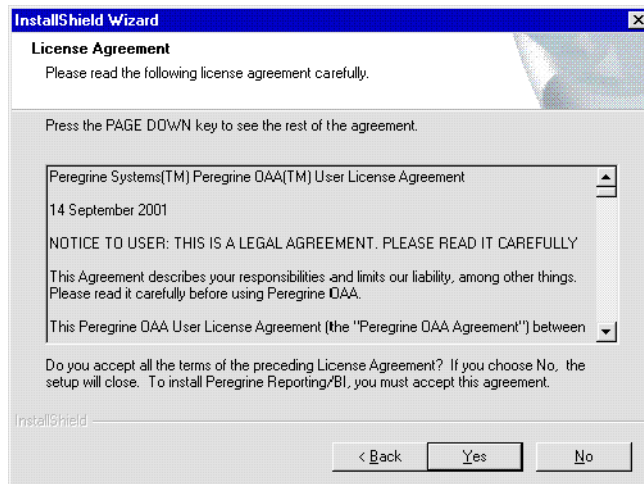
- 1 Insert the Peregrine Reporting/BI Setup CD into your CD-ROM drive. The setup wizard should launch automatically. If not, click Start, click Run, then type `<drive>:\setup.exe`, where `<drive>` is the drive letter for your CD-ROM drive.

The installation program starts, and the Welcome dialog box is displayed.



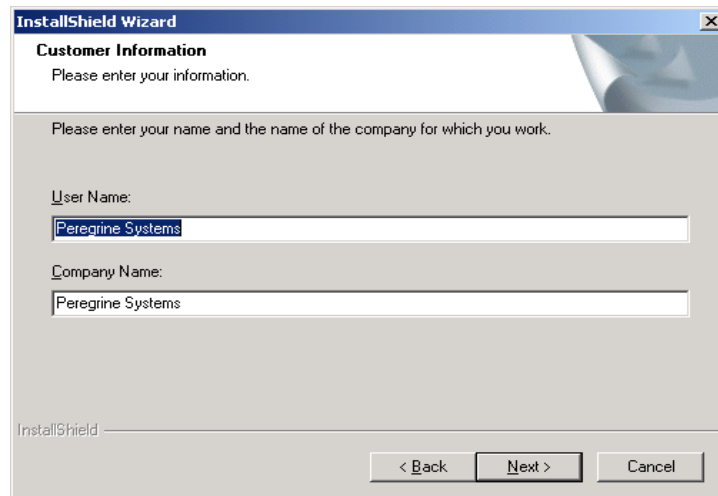
- 2 Click Next.

The License Agreement information is displayed.



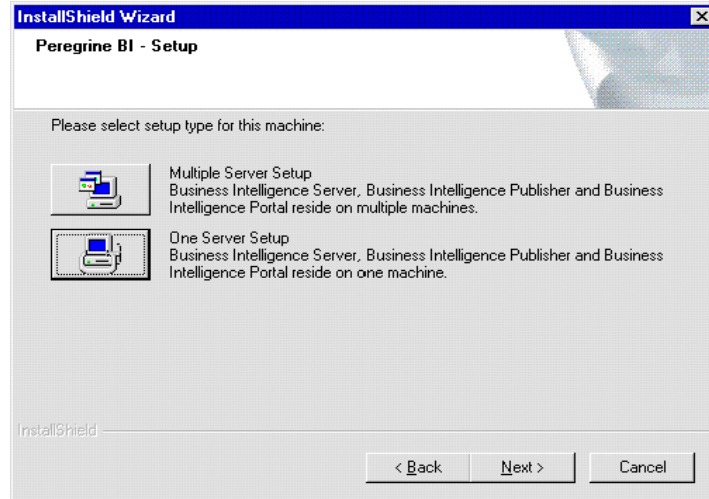
- 3 Read the license agreement carefully, then click Yes to accept the terms of the agreement.

The Customer Information dialog box is displayed.



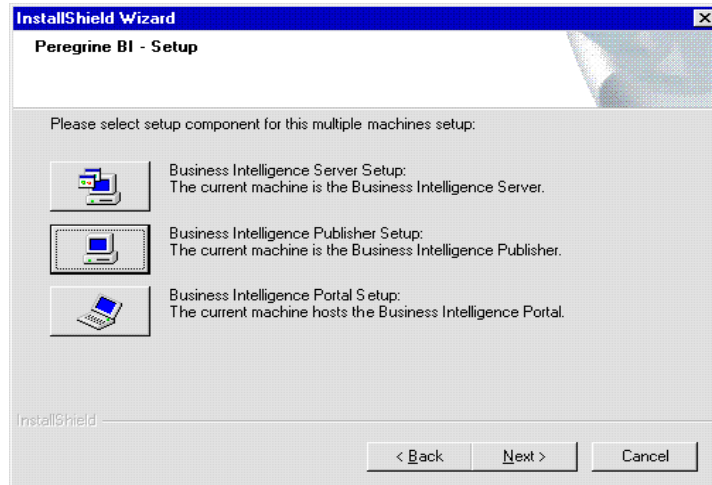
- 4 Type your user and company names, then click Next.

The setup type information is displayed.



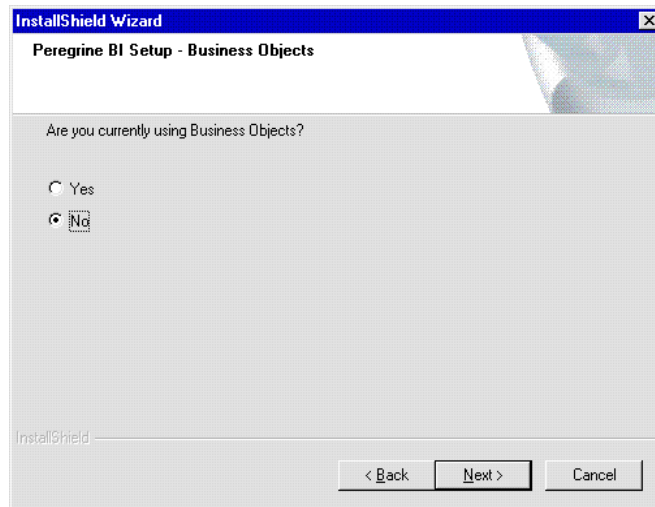
5 Click Multiple Server Setup.

The select setup component information is displayed.



6 Click Business Intelligence Server Setup, then click Next.

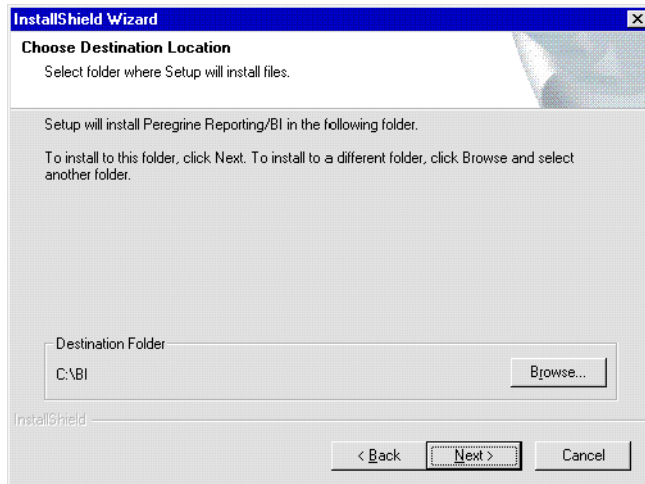
The Peregrine BI Setup - Business Objects dialog box is displayed.



7 Click No, then click Next.

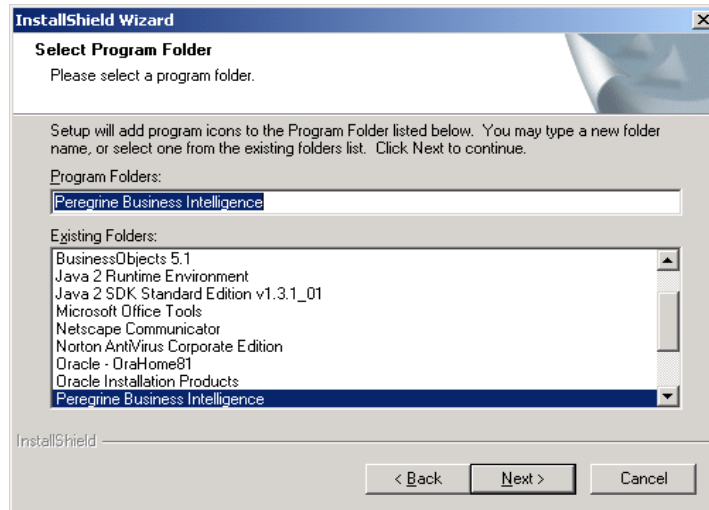
Warning: Clicking Yes can irrevocably corrupt any existing Business Objects data repository. Refer to your Peregrine application Release Notes for additional information regarding migration, multiple application deployment, and existing non-Peregrine Business Objects installation.

The Choose Destination Location dialog box is displayed.



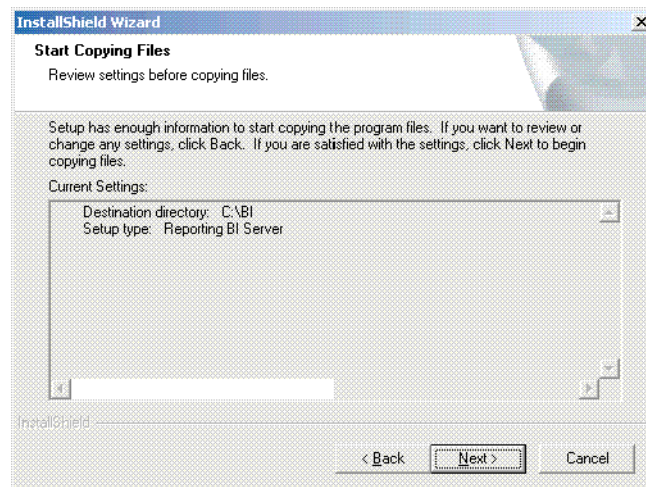
- 8 Specify the folder where you want to install the Peregrine Reporting/Business Intelligence files, then click **Next**.

The Select Program Folder dialog box is displayed.



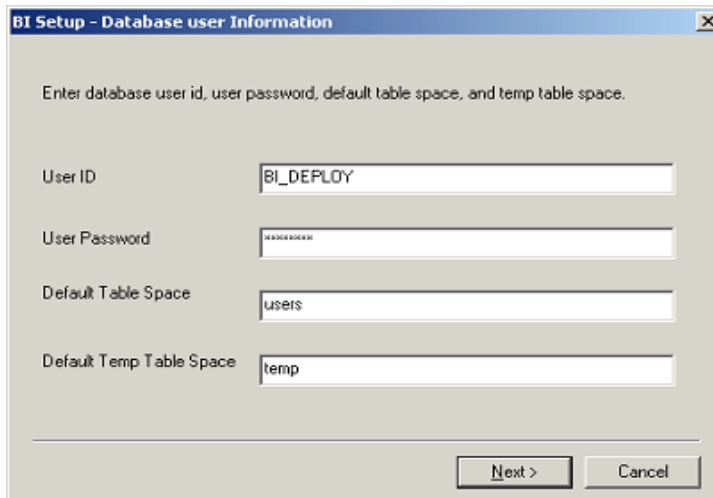
- 9 Specify the program folder where you want to install the program icon, then click **Next**.

The Start Copying Files dialog box displays the settings you have selected.



- 10 Verify the settings you selected, then click **Next** to begin copying the files.

The BI Setup - Database user Information dialog box is displayed.



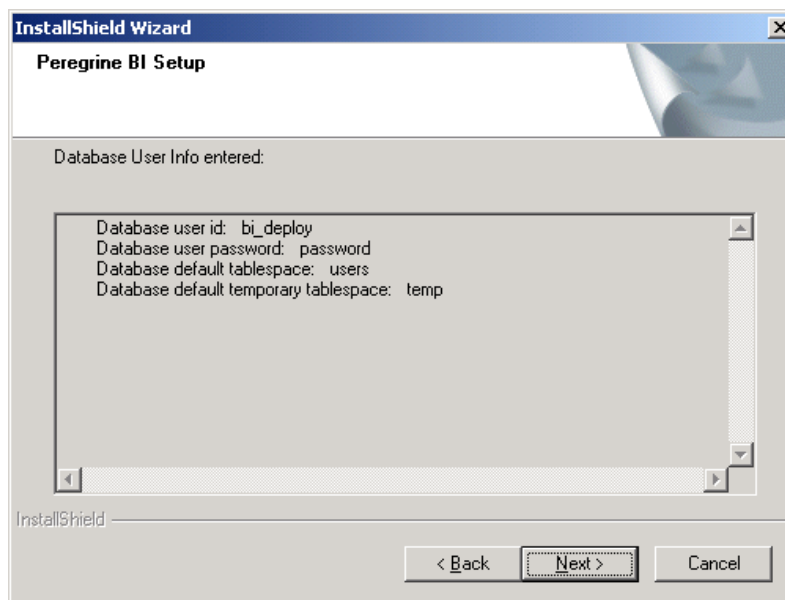
The dialog box titled "BI Setup - Database user Information" contains the following fields and values:

Field	Value
User ID	BI_DEPLOY
User Password	password
Default Table Space	users
Default Temp Table Space	temp

Buttons: Next >, Cancel

- 11 Type the BI deployment user ID, and BI deployment password, default table space, and default temp table space from your installation checklist, then click Next.

The Peregrine BI Setup dialog box displays the database user information you entered.



The "InstallShield Wizard" dialog box, titled "Peregrine BI Setup", displays the entered database user information in a list box:

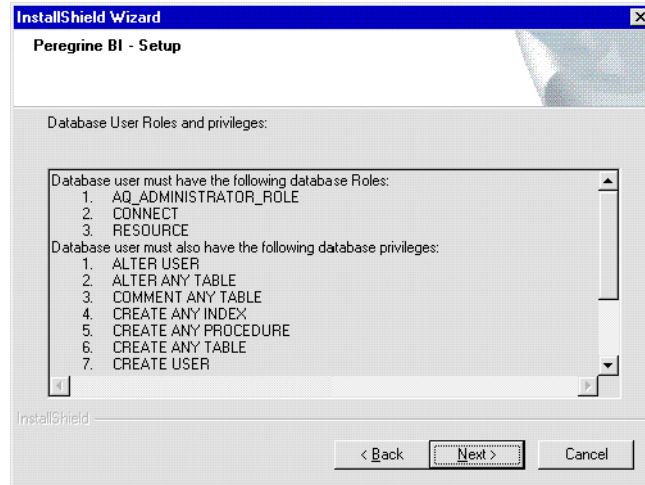
```

Database User Info entered:
Database user id: bi_deploy
Database user password: password
Database default tablespace: users
Database default temporary tablespace: temp
  
```

Buttons: < Back, Next >, Cancel

- 12 Verify the database user information, then click Next.

The next dialog box displays the database user roles and privileges that are required for the default user ID you specified. For more information, see *Configuring the Data Repository* on page 39.



Note: The Business Intelligence install program verifies whether the required roles and privileges are assigned to the specified user and does not continue until you have assigned all required roles and privileges.

Important: If the required roles are not assigned, your installation will fail.

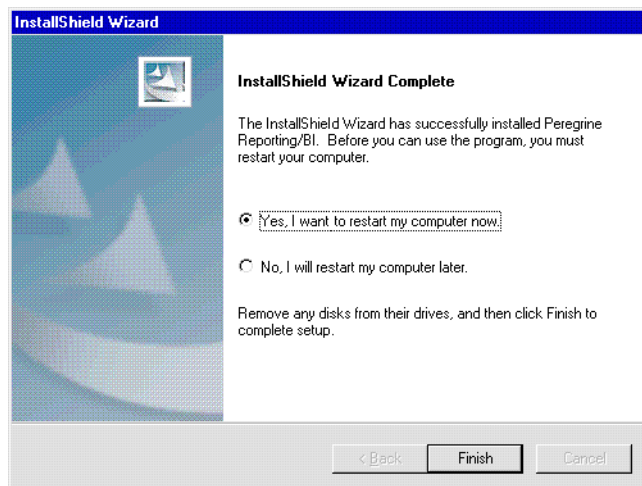
13 Click Next.

The company name for the Business Intelligence server information dialog box is displayed.

**14** Type the company name from your installation checklist, then click Next.

Warning: The Company Name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

When the installation and configuration is complete, the InstallShield Wizard Complete dialog box is displayed.



This dialog box indicates that the Business Intelligence Report Server installation is complete.

- 15 Click Finish.

Installing the Business Intelligence Report Publisher

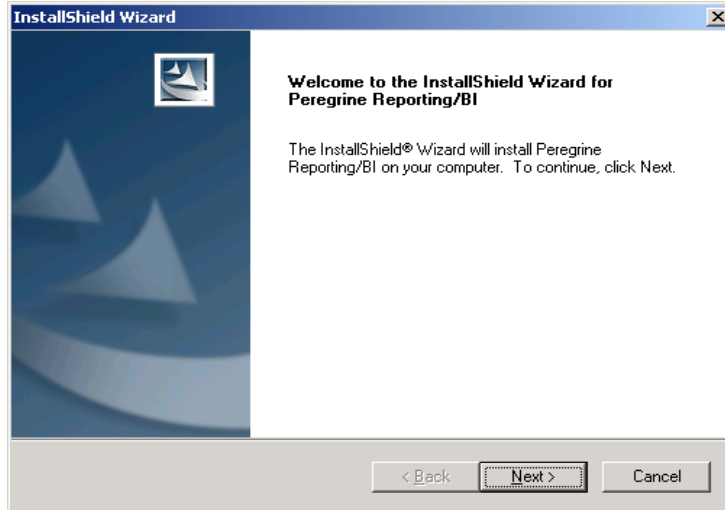
Installation of the Business Intelligence Report Publisher is the second step in installing Peregrine Reporting/Business Intelligence on multiple machines. Installing the Report Server is a prerequisite for Report Publisher installation.

Note: Installation of the Report Publisher requires a machine running the Windows operating system.

To install the Business Intelligence Publisher:

- 1 Insert the Peregrine Reporting/BI Setup CD into your CD-ROM drive. The setup wizard should launch automatically. If not, click Start, click Run, then type `<drive>:\setup.exe`, where `<drive>` is the drive letter for your CD-ROM drive.

The installation program starts and the Welcome dialog box is displayed.



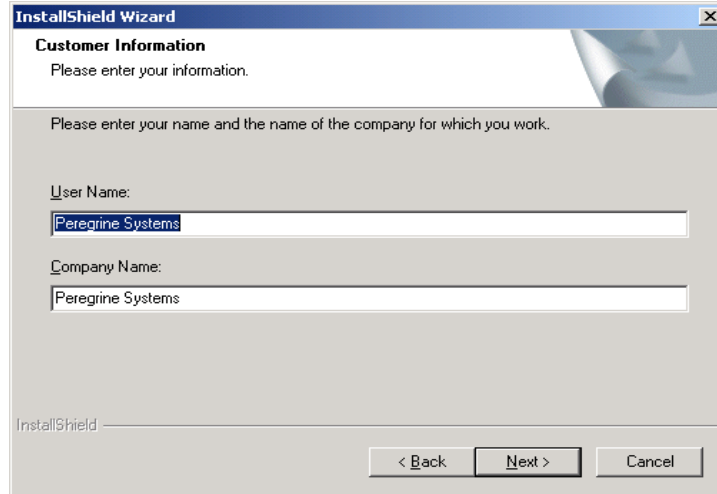
2 Click Next.

The License Agreement information is displayed.



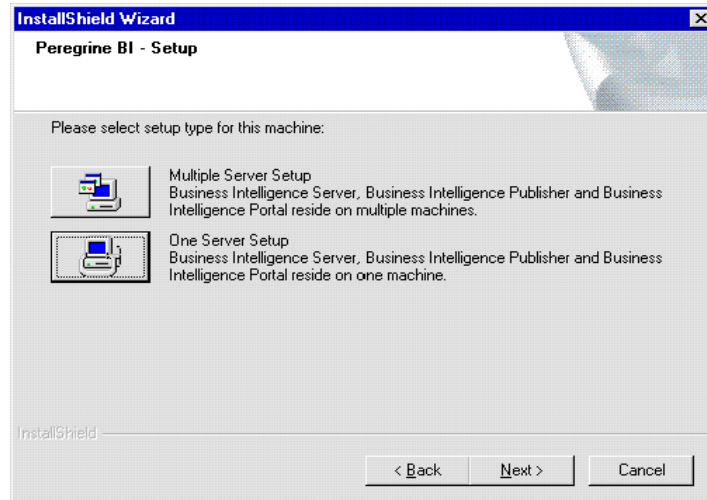
3 Read the license agreement carefully, then click Yes to accept the terms of the agreement.

The Customer Information dialog box is displayed.



The screenshot shows the 'InstallShield Wizard' dialog box with the title 'Customer Information'. The text inside reads: 'Please enter your information.' and 'Please enter your name and the name of the company for which you work.' There are two text input fields: 'User Name:' with the value 'Peregrine Systems' and 'Company Name:' with the value 'Peregrine Systems'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

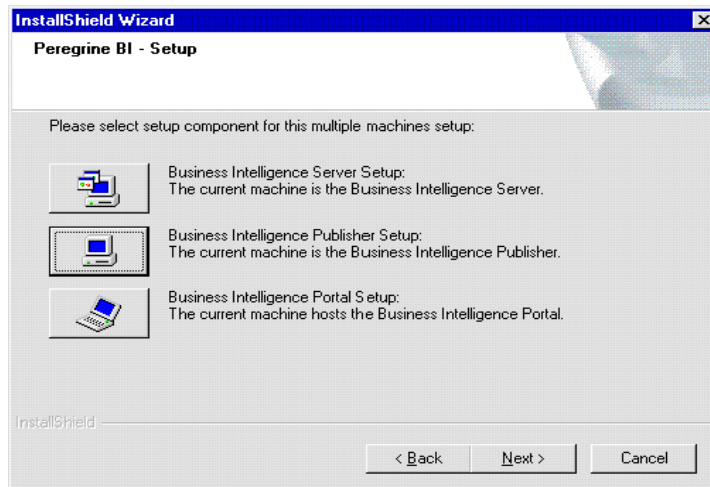
- 4 Type your user and company names, then click Next.
The setup type information is displayed.



The screenshot shows the 'InstallShield Wizard' dialog box with the title 'Peregrine BI - Setup'. The text inside reads: 'Please select setup type for this machine:'. There are two radio button options: 'Multiple Server Setup' (with a server rack icon) and 'One Server Setup' (with a single server icon). The descriptions for each option are: 'Business Intelligence Server, Business Intelligence Publisher and Business Intelligence Portal reside on multiple machines.' and 'Business Intelligence Server, Business Intelligence Publisher and Business Intelligence Portal reside on one machine.' At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

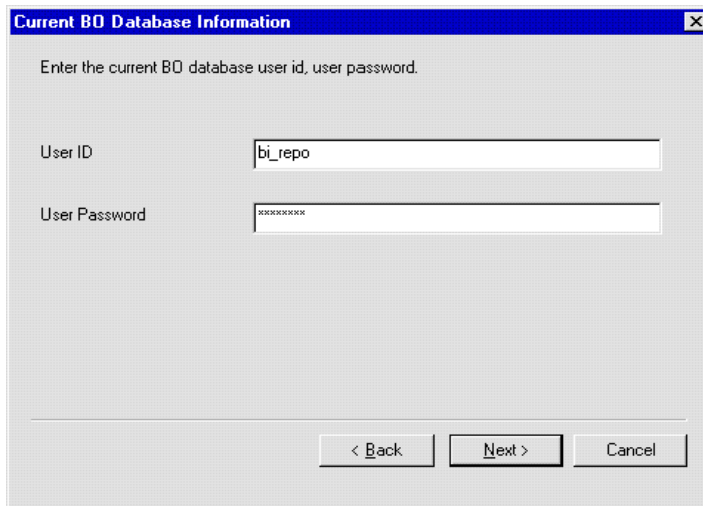
5 Click Multiple Server Setup.

The select setup component information is displayed.



6 Click Business Intelligence Publisher Setup.

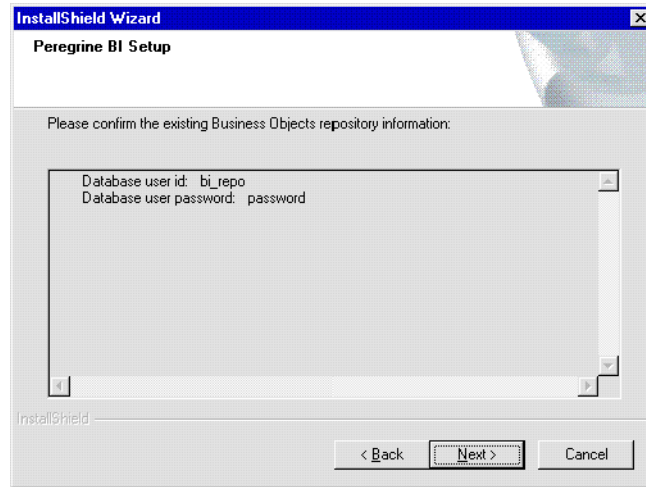
The Existing Business Objects Database Information dialog box is displayed.



7 Type the BI repository user ID and password from your installation checklist, then click Next.

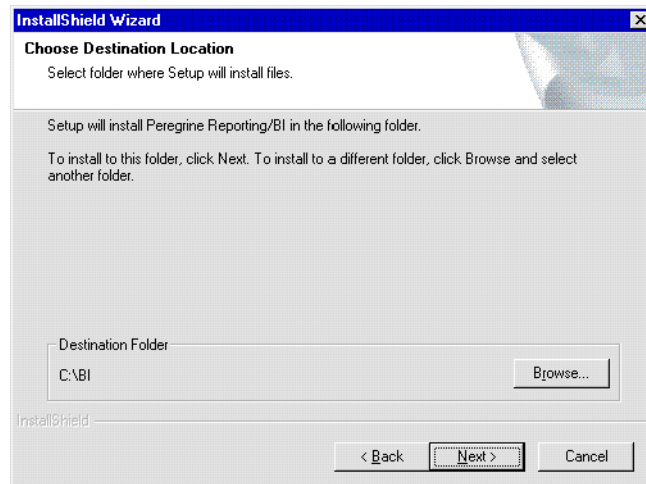
The Business Intelligence install program verifies whether the required roles and privileges are assigned to the specified user and does not continue until you have assigned all required roles and privileges.

The Peregrine BI Setup dialog box is displayed with your Business Objects user information.



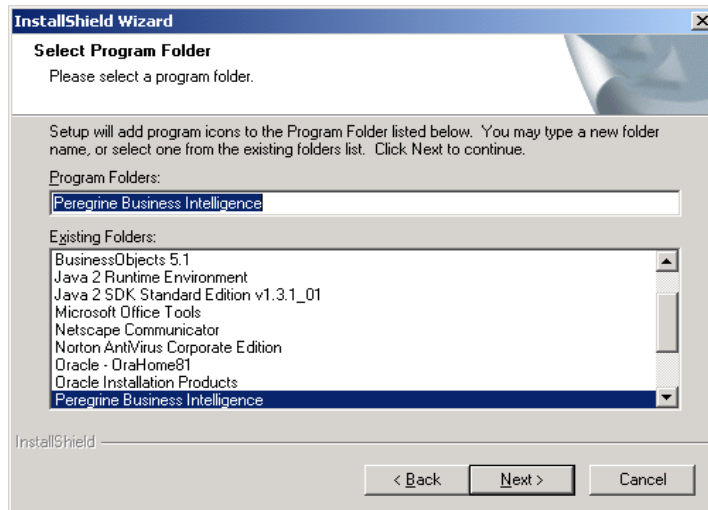
8 Click Next.

The Choose Destination Location dialog box is displayed.



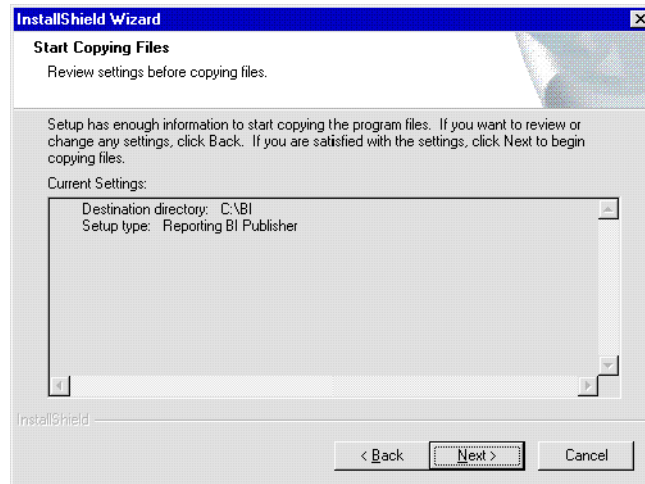
9 Specify the folder where you want to install the Peregrine Reporting/Business Intelligence files, then click Next.

The Select Program Folder dialog box is displayed.



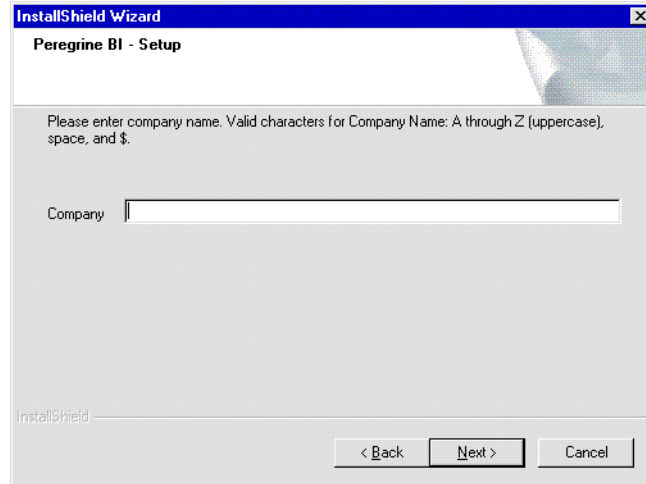
- 10 Specify the program folder where you want to install the program icon, then click Next.

The Start Copying Files dialog box displays the settings you have selected.



- 11 Verify the settings you selected, then click Next to begin copying the files.

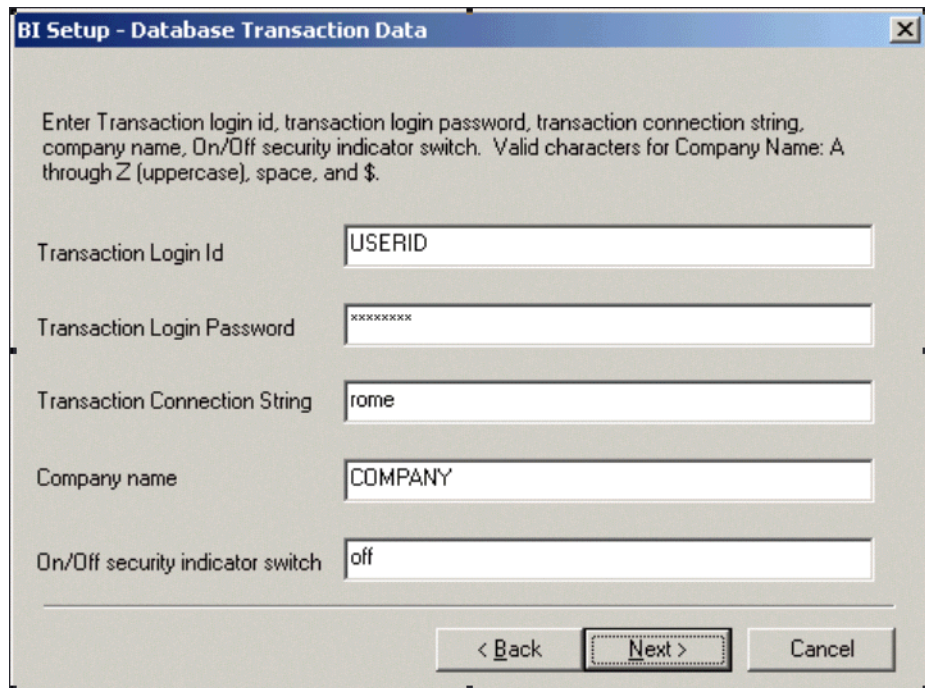
The company name for the Business Intelligence server information dialog box is displayed.



- 12 Type the company name from your installation checklist, then click Next.

Warning: The Company name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

The BI Setup - Database Transaction Data dialog box is displayed.

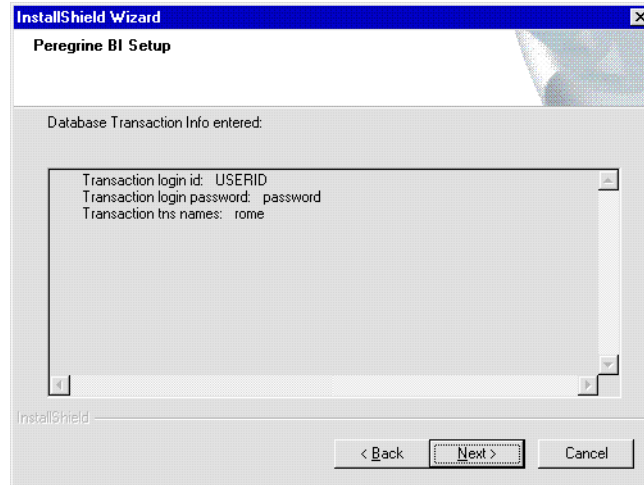


The image shows a Windows-style dialog box titled "BI Setup - Database Transaction Data". The dialog box has a blue title bar with a close button (X) in the top right corner. Below the title bar, there is a text area with the following instructions: "Enter Transaction login id, transaction login password, transaction connection string, company name, On/Off security indicator switch. Valid characters for Company Name: A through Z (uppercase), space, and \$." Below this text are five input fields, each with a label to its left: "Transaction Login Id" (containing "USERID"), "Transaction Login Password" (containing "xxxxxxx"), "Transaction Connection String" (containing "rome"), "Company name" (containing "COMPANY"), and "On/Off security indicator switch" (containing "off"). At the bottom of the dialog box, there are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

- 13 Type the Transaction Login ID, Transaction Login Password, and Transaction Connection String from your checklist, then click Next.

Important: The Transaction Connection String is equivalent to the service name for the Oracle server as it is set in the `tnsnames.ora` file on the client machine where the BO repository resides.

The next dialog box displays the database transaction data you entered.



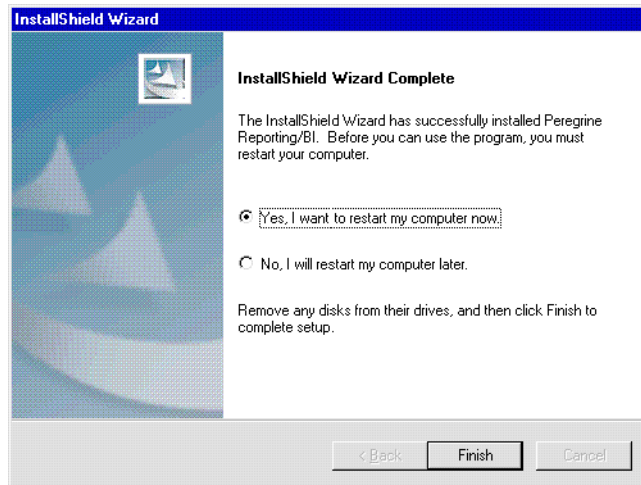
- 14 Verify the database transaction data, then click **Next**.

The BI server Connection Name dialog box is displayed.



- 15 In the Connection box, type the name of the connection from your installation checklist, then click **Next**.

When the installation and configuration is complete, the InstallShield Wizard Complete dialog box is displayed.



This dialog box indicates that the Business Intelligence Publisher Server installation is complete.

- 16 Click Finish.

Installing the Business Intelligence Portal

Installation of the Business Intelligence Portal is the third and final step in installing Peregrine Reporting/BI on multiple machines. Installing the Report Server and the Publisher Server are prerequisites for Business Intelligence Portal installation.

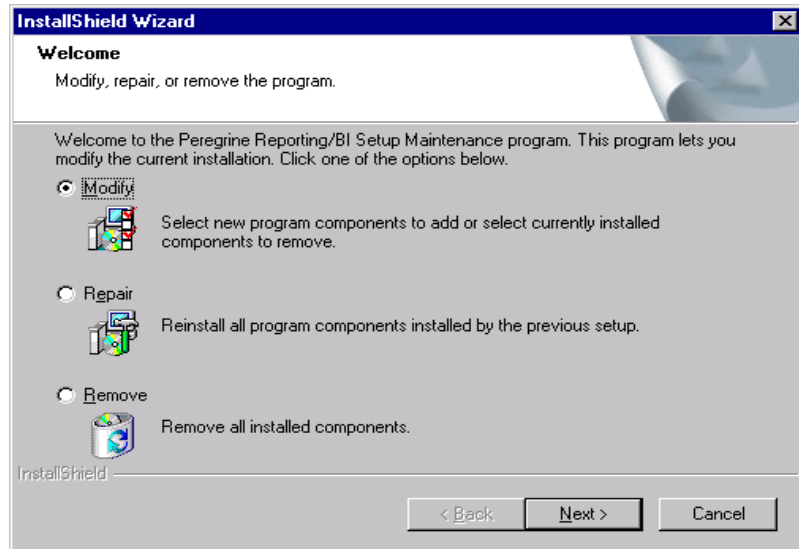
To install the Business Intelligence Portal:

- 1 Insert or reinsert as appropriate the Peregrine Reporting/Business Intelligence Setup Disk 1 into your CD-ROM drive.

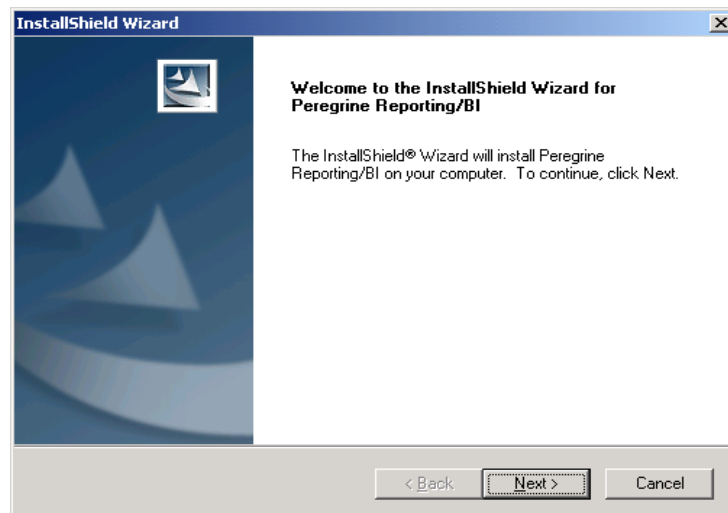
The setup wizard should launch automatically. If not, click Start, click Run, then type `<drive>:\setup.exe`, where `<drive>` is the drive letter for your CD-ROM drive.

The installation program starts, and one of the following occurs:

- a If you are installing Reporting/Business Intelligence on two machines, the Welcome Modify, repair, or remove the program dialog box is displayed. Click **Modify**, then go to step 6.

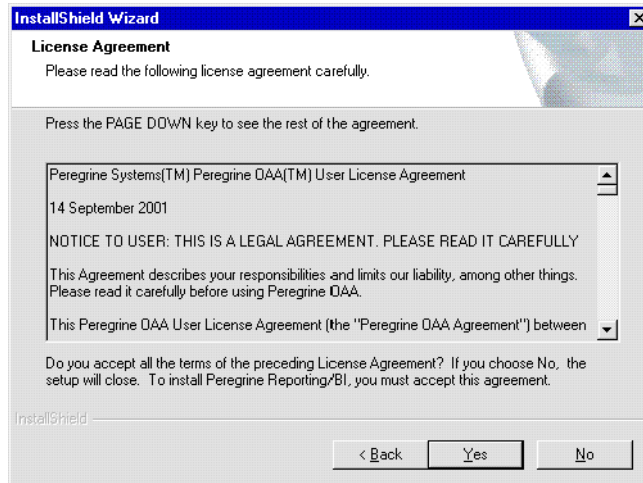


- b If you are installing Reporting/Business Intelligence on more than two machines, the Welcome dialog box is displayed. Go to step 3.



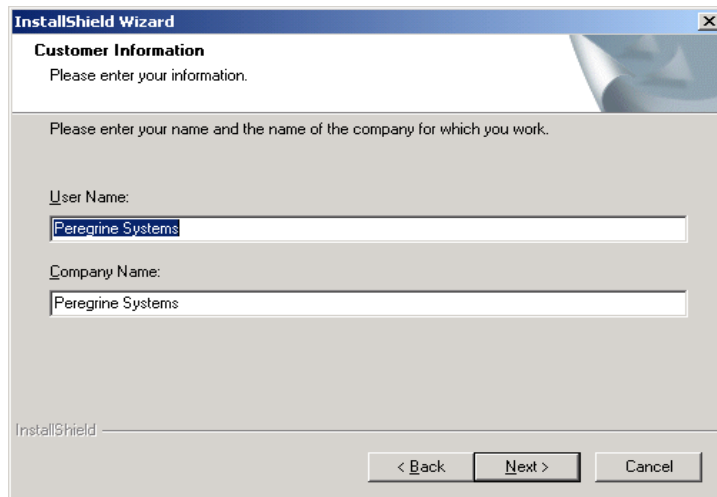
2 Click Next.

The License Agreement information is displayed.



3 Read the license agreement carefully, then click Yes to accept the terms of the agreement.

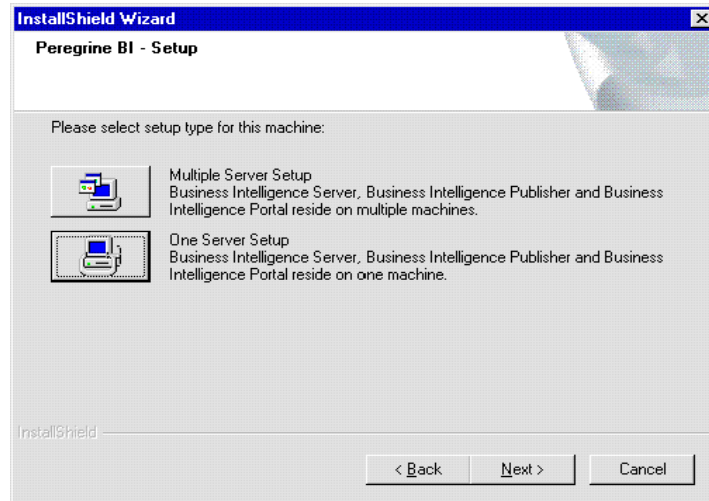
The Customer Information dialog box is displayed.



4 Type your user and company names.

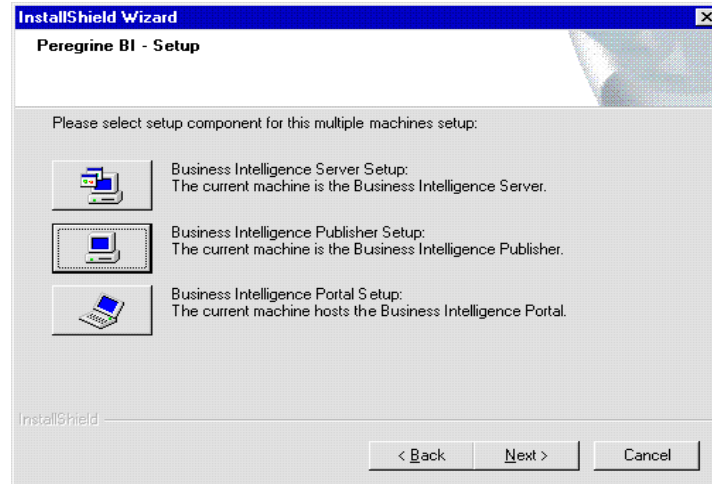
5 Click Next.

The setup type information is displayed.



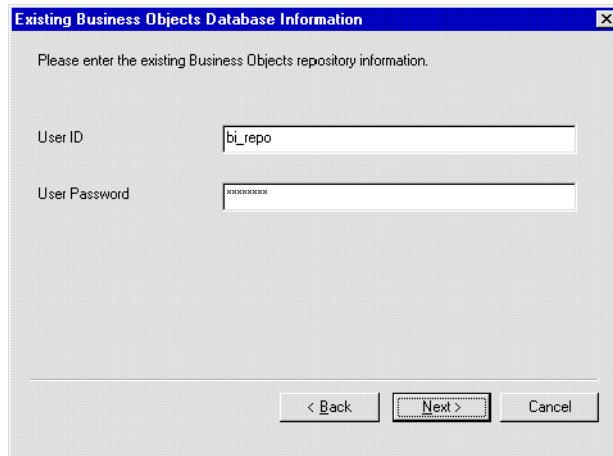
6 Click Multiple Server Setup.

The select setup component information is displayed.



7 Click Business Intelligence Portal Setup.

The Existing Business Objects Database Information dialog box is displayed.



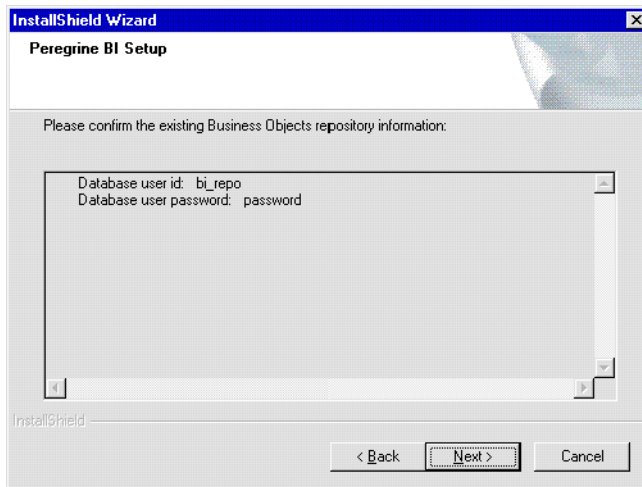
The dialog box titled "Existing Business Objects Database Information" contains the following elements:

- Title bar: Existing Business Objects Database Information
- Text: Please enter the existing Business Objects repository information.
- User ID: A text input field containing "bi_repo".
- User Password: A password input field containing "password".
- Buttons: < Back, Next >, and Cancel.

- 8 In the User ID box, type the BI repository user ID and password from your installation checklist, then click Next.

Note: The Business Intelligence install program verifies whether the required roles and privileges are assigned to the specified user and does not continue until you have assigned all required roles and privileges.

The Peregrine BI Setup dialog box is displayed with your Business Objects user information.

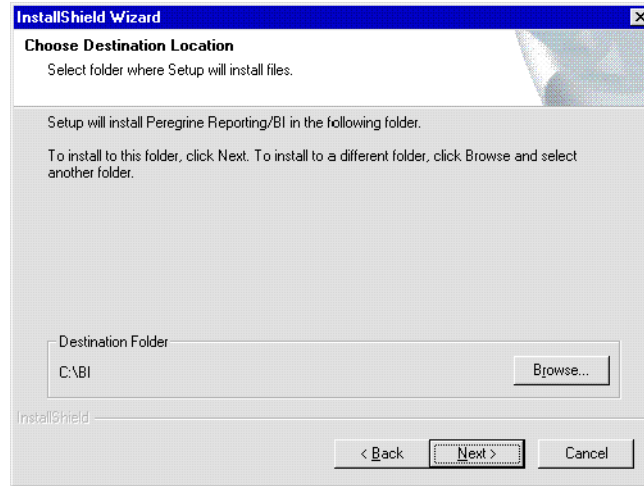


The dialog box titled "Peregrine BI Setup" contains the following elements:

- Title bar: InstallShield Wizard
- Section: Peregrine BI Setup
- Text: Please confirm the existing Business Objects repository information:
- Text area: Database user id: bi_repo, Database user password: password
- Buttons: < Back, Next >, and Cancel.

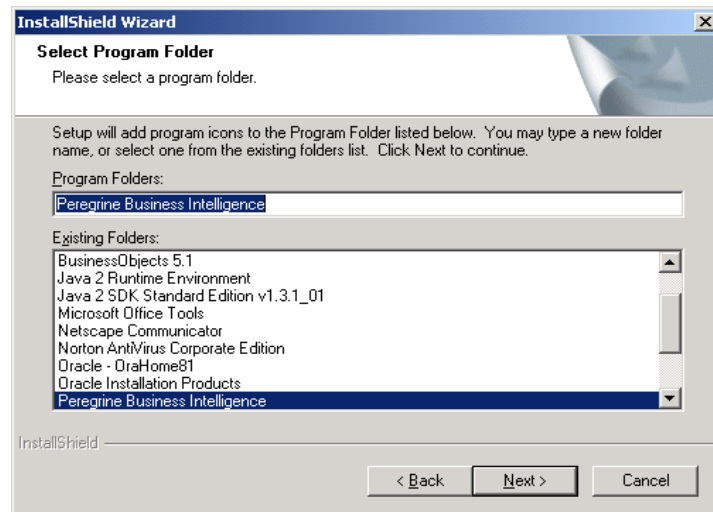
- 9 Click Next.

The Choose Destination Location dialog box is displayed.



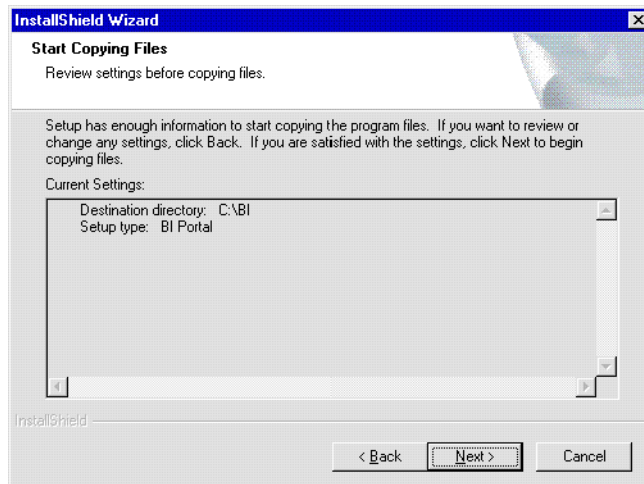
- 10 Specify the folder where you want to install the Peregrine Reporting/Business Intelligence files, then click **Next**.

The Select Program Folder dialog box is displayed.



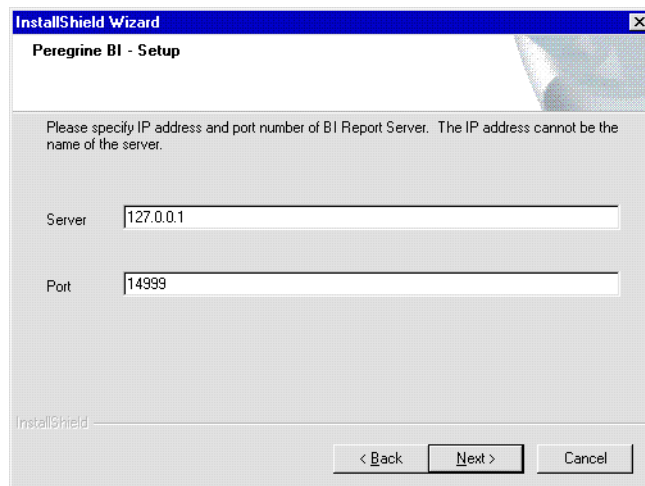
- 11 Specify the program folder where you want to install the program icon, then click **Next**.

The Start Copying Files dialog box displays the settings you have selected.



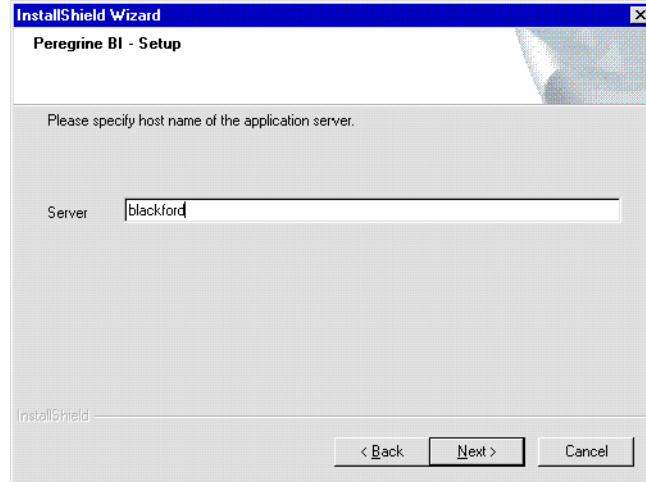
- 12 Verify the settings you selected, then click Next to begin copying the files.

The IP address and port number of the BI Report Server information is displayed.



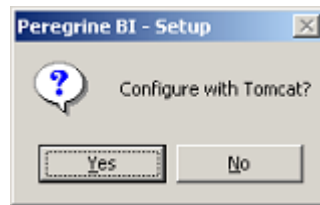
- 13 Type the BI Report Server IP address and OSAgent TCP/IP port number from your installation checklist, then click Next.

The application host name information is displayed.



Type the name of the BI application server host name from your installation checklist, then click Next.

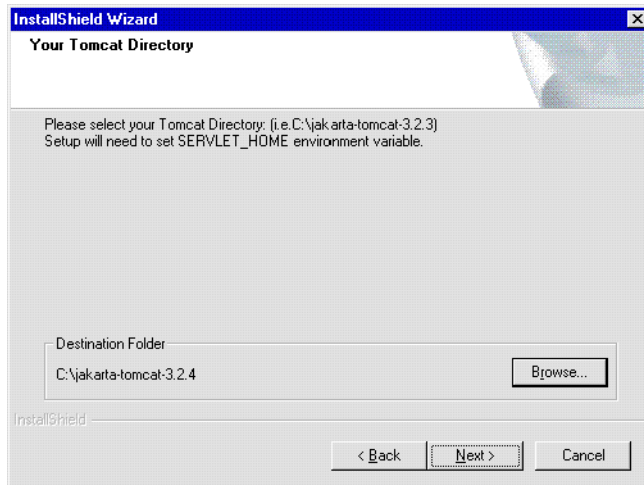
The Configure with Tomcat message box is displayed.



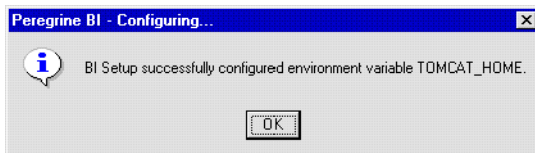
14 Click Yes.

If you click Yes, the Business Intelligence install program attempts to modify your Tomcat files and publish documents. If you click No, you will need to manually configure your application server and publish documents.

The Tomcat Directory information is displayed.



- 15 Specify the folder that contains the Tomcat files, then click Next. A message is displayed.



- 16 Click OK.

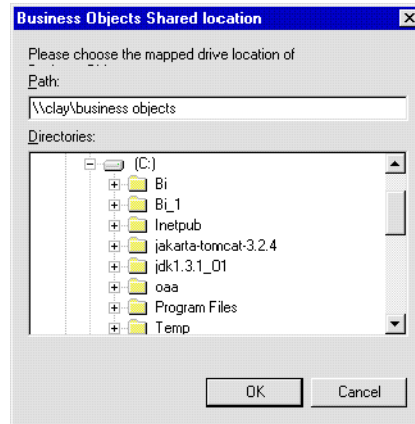
The company name dialog box is displayed.



- 17 Type the name of your company from your installation checklist, then click Next.

Warning: The Company name must match the company name that is in the boDB tab of the Admin module in the Property Asset Management application. This is case sensitive. If the company name does not match exactly, including case, then reporting will not work for that company.

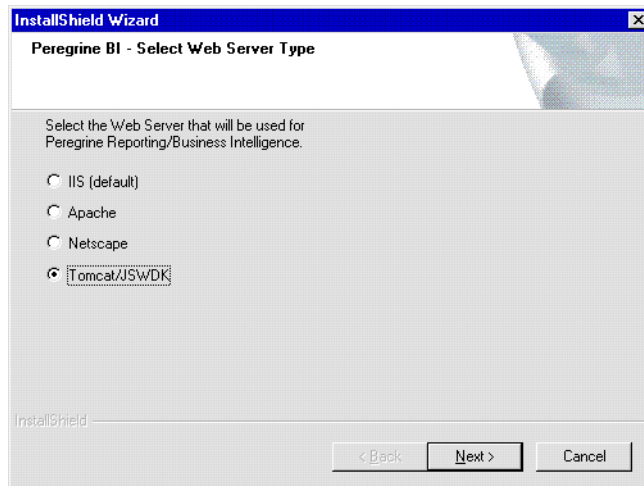
The Business Objects Shared location dialog box is displayed.



Specify the location of the Business Objects folder on the Report Server, then click OK.

Specify the shared location by specifying its UNC pathname in the format \\<BIReportServer>\Business Objects

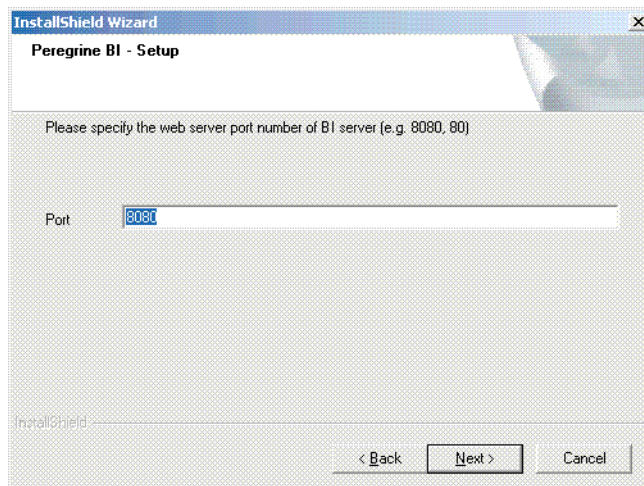
The process is complete, the Select Web Server Type dialog box is displayed.



- 18 Click **Tomcat/JSWDK**, then click **Next**.

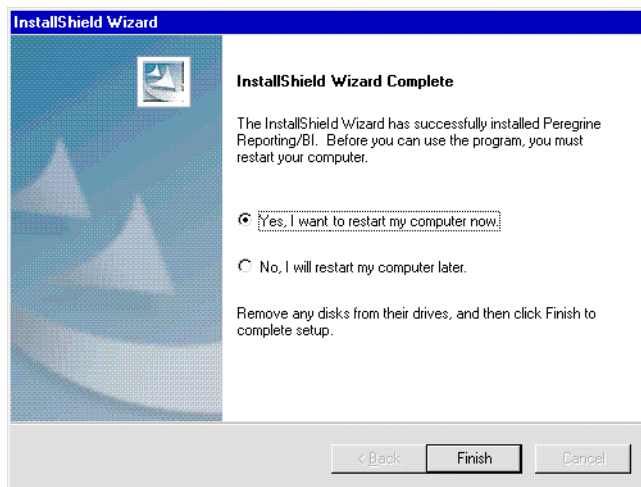
Note: Select the same Web server you specified when you installed your Peregrine OAA application. If you are using Tomcat as the stand-alone application server and Web server, choose **Tomcat**.

The installation program continues to configure additional files, then the application server port number dialog box is displayed.



- 19 In the Port box, type the BI Web server number from your installation checklist, then click **Next**.

When the installation and configuration is complete, the InstallShield Wizard Complete dialog box is displayed.



This dialog box indicates that the Business Intelligence Portal installation is complete.

- 20 Click Finish.

What's Next

After you install Peregrine Reporting/Business Intelligence on multiple machines, you are ready to start the remaining application server/Web server configuration steps. See *Configuring the Application Server/Web Server* on page 119 for the procedures to perform.

10

CHAPTER

Configuring the Application Server/Web Server

The configuration steps you need to perform for your application server and Web server depend on your application server/Web server combination and whether you are performing a single-machine or multi-machine installation.

If you are using the default application server, Tomcat, and the default Web server, Tomcat, the configuration steps you need to complete are minimal. If you are using any of the optional application or Web servers, the configuration is more involved.

Configuring the Application Server and Web Server

The following subsections provide tables that list the configuration steps you need to perform for different combinations of application servers and Web servers.

The first table provides the configuration steps for combinations that include Tomcat as the application server. The second table lists combinations that include application servers other than Tomcat.

Configuration for Tomcat Application Server Combinations

This table lists the configuration tasks for application server/Web server combinations that use Tomcat as the application server. Carefully read the second column in the table to determine which steps you need to complete for your installation type and combination of application and Web server.

Important: Only perform the steps that are relevant for your application server/Web server combination and installation type.

Step	Installation Type Application server Web server	Description	For more information, see...
1	Single-machine or multi-machine Tomcat Tomcat	Modify the wrapper.properties file if you want to start Tomcat as an NT service.	<i>Starting Tomcat as an NT Service</i> on page 124
2	Single-machine or multi-machine Tomcat Apache	Configure the Apache Web server.	<i>Configuring the Apache Web Server</i> on page 126
3	Multi-machine Tomcat IIS	Configure IIS as a Web server.	<i>Configuring IIS as a Web Server</i> on page 124

Configuration for Other Application Server Combinations

This table lists the configuration tasks for application server/Web server combinations that do not use Tomcat as the application server. Carefully read the second column in the table to determine which steps you need to complete for your installation type and combination of application and Web server.

Important: Only perform the steps that are relevant to your application server/Web server combination and installation type.

Modifying the wibeau.orb.properties File

You must modify the `wibeau.orb.properties` file based on your application server. This file specifies how and where the application server can access and communicate with the report server.

To modify the `wibeau.orb.properties` file:

- 1 Copy the `wibeau.orb.properties` file from the folder `X:\BI\EXE\BOSetUpExecutables\WebiApp` to the folder where your application server properties, configuration, or batch file resides.
For example, the Tomcat batch file resides in the `X:\Tomcat folder\bin`. The `JRUN` properties file, `local.properties`, resides in `X:\VRUN folder\JRUN\Servers\bin`.

Note: This file may already exist in the proper directory.

- 2 Use a text editor to open the `wibeau.orb.properties` file in its new location.
- 3 Set the case-sensitive values specified in the following table.

Note: If you are using Tomcat as both your application server and Web server, you only need to set the `default_HTTPServerURL` variable. If you are using Microsoft IIS, there is no need to add the port number. Thus the URL should be similar to `http://appserver`. If you are using an alternate Web server, such as Apache, configure the variables as shown in the following table.

For this variable...	Assign this value...
<code>ORBagentPort</code>	<i>your OS Agent port number</i>
<code>ORBagentAddr</code>	<i>the report server IP address</i>

For this variable...	Assign this value...
default_HsalPath	<p>one of the following values:</p> <ul style="list-style-type: none"> ■ Apache (DSO): <code>/wi/bin/apachewi</code> ■ IIS: <code>/wi/bin/iswi.dll</code> ■ WebLogic (standalone): <code>HSALServlet</code> ■ Tomcat or JSWDK: <code>/servlet/com.bo.hsal.HSALServlet</code> <p>For example, <code>default_HsalPath=/wi/bin/apachewi</code></p> <p>Note: HSAL stands for HTTP Server Abstraction Layer. HSAL is a component of the Web server that receives user requests for WebIntelligence services and converts them from the gateway protocol into a form that WebIntelligence understands.</p>
default_HTTPServerURL	<p><code>http://your host name:port</code></p> <p>For example: <code>default_HTTPServerURL=http://localhost:8080</code></p> <p>Note: Specify the port on which your Web server is listening. With Apache, for example, the port is set in the Apache <code>httpd.conf</code> file during setup.</p> <p>IIS uses port 80 by default. Peregrine recommends using a port other than 80 or 8080. Port 82 is normally an available port number. Check with your system administrator for more information.</p>

- 4 Save the `wibean.orb.properties` file.
- 5 Copy the `wibean.orb.properties` file to the folder `X:\BI\exe\BOSetupExecutables\WebiApp`
- 6 Verify the information in the `wibean.orb.properties` file in its new location.

Setting the Environment Variables

If you are not using Tomcat as your application server, the Business Intelligence install program creates only one of the three environment variables, WIAPI_HOME. JAVA_HOME should have been created by the Peregrine OAA install program. Determine whether you have all three environment variables. If not, you will need to create them manually.

System-Level Environment variable	Value
SERVLET_HOME	<i>the location of the application server's servlet.jar file or weblogic.jar file</i>
WIAPI_HOME	X:\Webilib or the location of your \Webilib folder after the Business Intelligence installation
JAVA_HOME	<i>location of the JDK</i> For example, X:\jdk1.3.1

To create or set system-level environment variables, see your Windows documentation or online help.

Configuring the Application Server File for Tomcat

If you are using Tomcat as your application server, with either Tomcat or IIS as your Web server, you need to modify certain files before you can start Tomcat as a NT service.

Starting Tomcat as an NT Service

Before you can start Tomcat as an NT service, you must modify the `wrapper.properties` file.

To modify the `wrapper.properties` file:

- 1 Use a text editor to open the `wrapper.properties` file, located in the `\conf` folder of the Tomcat directory.
- 2 Verify that the file contains the following information, where `<Drive>` is the drive where Business Intelligence is installed:

```
wrapper.tomcat_home=<path of Tomcat installation>
wrapper.java_home=<path of JDK installation>
wrapper.webilib=<Drive>:\Webilib
```

#Define the classpath to the BI jar files

```
wrapper.class_path=$(wrapper.webilib)\jhsal.jar
wrapper.class_path=$(wrapper.webilib)\vbjapp.jar
wrapper.class_path=$(wrapper.webilib)\vbjorb.jar
wrapper.class_path=$(wrapper.webilib)\wibean.jar
```

- 3 Save the `wrapper.properties` file.
- 4 Copy the file `wibean.orb.properties` from the `\bin` folder of the Tomcat directory to the Tomcat directory.
- 5 Restart Tomcat.

Configuring IIS as a Web Server

If you are using Tomcat as your application server and IIS as your Web server, you must do the following to configure IIS:

- Add virtual directories using the IIS Management Console
- Copy files from the cluster manager machine

Creating Virtual Directories for IIS

The following procedure is only necessary if the installation is a multi-machine. Create virtual directories on the server where the web server is setup for the Peregrine application and Peregrine Reporting/Business Intelligence.

To create virtual directories for the IIS Web server:

- 1 Launch the IIS Management Console.
- 2 Create a new virtual directory called `wi` with the physical path `X:/Webilib/http-server`.
- 3 Under the new `wi` virtual directory, create a virtual directory named `bin` with the physical path `X:/Webilib/http-server/bin`. Make sure the directory has Execute permissions.
- 4 Under the `wi` virtual directory, create another virtual directory named `wiadmin` with the physical path `X:/Webilib/http-server/classes/bo/wi/adm`.

Copying Files from the Cluster Manager Server

To copy files from the cluster manager server:

- 1 Locate the Business Objects folder that is shared by the cluster manager machine.
- 2 Locate the folder `\\clustermanager\Business Objects\Server\System 2.5\bin`.
- 3 Copy the following files from that folder to the folder `X:\Webilib\http-server\bin`:
 - `SERVCONFDLL.DLL`
 - `servconfEN.dll`
 - `std-2.1-vc5.0-mt.dll`
 - `streaming-2.1-vc5.0-mt.dll`
 - `thread-2.1-vc5.0-mt.dll`
 - `time-2.1-vc5.0-mt.dll`
 - `file-2.1-vc5.0-mt.dll`
 - `helper-2.1-vc5.0-mt.dll`
 - `network-2.1-vc5.0-mt.dll`
 - `io-2.1-vc5.0-mt.dll`
 - `kagtrepo.dll`
 - `kagtunv.dll`
 - `kbus.dll`
 - `kwividrv.dll`
 - `orb.dll`

- orb_r.dll
- wii18ncore.dll
- wii18nSort.dll

Configuring the Apache Web Server

If you are using Apache as your Web server, you must perform the following configurations:

- Download Apache Module
- Modify the Apache Configuration File

Note: You must run Apache in Dynamic Shared Object (DSO) mode. Also, Apache is case-sensitive. The folder and file names you specify must appear exactly as they appear in Windows Explorer.

Downloading the Apache Module

To download the Apache module:

- 1 Download the precompiled Apache 1.3.20 module, `Mod-dav-1.0.3-dev-win32.zip`, from the following Web site:
http://www.webdav.org/mod_dav/win32/mod_dav-1.0.3-dev-win32.zip
- 2 Use the WinZip application to unzip the `mod-dav.dll` file.
- 3 Copy the file `mod_dav.dll` to the root directory of the Apache server.

Example: `C:/Program Files/Apache Group/Apache Group/Apache/`

If you are using Tomcat for your application server, perform the following:

To download the Apache module for Tomcat:

- 1 From the following site, download `Mod_jk.dll`:
<http://jakarta.apache.org/builds/jakarta-tomcat/release/v3.2.4/bin/win32/i386>
- 2 Copy the file `Mod_djk.dll` to the modules directory of the Apache server.
Example: `C:/Program Files/Apache Group/Apache Group/Apache/modules`

Modifying the Apache Server Configuration Files

If you performed the automated installation, this configuration was already performed. You should only need to verify the modifications.

To modify the Apache server configuration files:

- 1 Use a text editor to open the file `httpd.conf`, located by default in the `X:\Program Files\Apache Group\Apache\conf` directory.

Important: Apache is both case-sensitive and space-sensitive. When editing this file, be sure to type the text exactly as shown.

- 2 Search for DSO to find the DSO Support section.
- 3 Add this line following the last line beginning with `LoadModule`:

```
LoadModule dav_module mod_dav.dll
```

Note: This line is case-sensitive. Also, do not place a pound sign (#) on this line, as Apache will ignore it.

- 4 Search for `ServerName`.
- 5 At the end of the `ServerName` section in the file, append the host name that is sent back to clients for your server.

For example: `ServerName 111.11.11.111`

Note: You can specify `www` in place of the host's real name, or specify the IP address of the server. This setting determines what you set for the `default_HTTPServerURL` in the file `wibean.orb.properties`. For more information, see [Modifying the wibean.orb.properties File](#) on page 121.

- 6 Search for the `DirectoryIndex` section in the file
- 7 Add the following lines at the beginning of the section, where `<Drive>` is the drive where the Business Intelligence setup files are installed:

```
<Directory"<Drive>:/Webilib/http-server">
  DirectoryIndex apache.html
  Options-Indexes
</Directory>
```

- 8 Search for the `Aliases` section in the file.

- 9 At the end of the Aliases section and before the ScriptAlias section, add the following lines, where *<Drive>* is the drive where the Business Intelligence setup files are installed:

```
Alias /wi "<Drive>:/Webilib/http-server"
Alias /wi/wiadmin "<Drive>:/Webilib/http-server/classes/bo/wi/adm"
Alias /wi/OnlineGuides "<Drive>:/Program Files/Business Objects/Online Guides"
```

- 10 Search for the Script Alias section in the file.
- 11 Add the following lines at the end of the section, where *<Drive>* is the drive where the `\webilib` folder resides:

```
ScriptAlias /wi/bin "<Drive>:/Webilib/http-server/Bin"

<Directory "<Drive>:/Webilib/http-server/Bin">
  AllowOverride None
  Options None ExecCGI
  Order allow,deny
  Allow from all
</Directory>
```

At the end of the file, add the following lines, where *X*: is the drive where Tomcat is installed, *<OSAGENT_PORT value>* is the value used during the Business Objects installation, and *Y*: is the drive where the Business Intelligence setup files are installed. Refer to the `OSAGENT_PORT` environment variable to find the `OSAGENT` port number.

```
Include X:/jakarta-tomcat-3.2.4/conf/mod_jk.conf-auto
<location /wi/bin/apachewi>
  SetHandler hsal_handler
</location>
```

```
PassEnv OSAGENT_PORT <OSAGENT_PORT value>
```

```
LoadModule hsal_module "<Drive>:/webilib/http-server/Bin/aphwi.dll"
```

- 12 Save your changes.
- 13 Copy all Business Objects `.dll` files from the Report Server at: `<share>:\Program Files\Business Objects\Server\System\2.5\bin` to the Report Publisher at `<drive>:\Webilib\http-server\bin`
- 14 After changing the `httpd.conf` file, restart the Apache Web server and your application server for your changes to take effect.

Note: By default, Apache runs as a service.

Configuring WebLogic as the Application Server

To configure WebLogic as the application server, you must do one of the following:

- For WebLogic version 5.1, you must modify the `weblogic.properties` file.
- For WebLogic version 6.0, you must modify the `startWebLogic.cmd` file.

Modifying the `weblogic.properties` File

For WebLogic version 5.1, you configure WebLogic as the application server by modifying the `weblogic.properties` file.

To modify the file:

- 1 Use a text editor to open the `weblogic.properties` file.
- 2 Locate the WebLogic JSP Properties section of the file.
- 3 Remove comments and modify the lines as shown in bold below:

```
#####
#WEBLOGIC JSP PROPERTIES
#-----
#Sets up automatic page compilation for JSP.Adjust init args for
#directory locations and uncomment to use.
weblogic.httpd.register.*.jsp=\
weblogic.servlet.JSPServlet
weblogic.httpd.initArgs.*.jsp=\
pageCheckSeconds=60,\
#packagePrefix=examples.jsp,\
compileCommand=d:/jdk1.2.2/bin/javac.exe,\
workingDir=d:/weblogic/myserver/classfiles,\
verbose=true
```

Note: In the line that begins with `compileCommand`, make sure you specify the path where you installed the JDK. Also make sure you specify the correct version. The previous example is for an installation of JDK version 1.2.2 at the root of the `d:` drive.

- 4 Locate the variable `weblogic.httpd.servlet.classpath` and change it as shown in bold below:

```
weblogic.httpd.servlet.classpath=<Drive>:/
weblogic:myserver:servletclasses; <Drive>:/weblib/wibean.jar;
```

**<Drive>:/webiblib/jhsal.jar; <Drive>:/webiblib/vbjorb.jar;
<Drive>:/webiblib/vbapp.jar**

- 5 Specify the drive where the folder webiblib was installed during the Business Intelligence installation. It should be in the root drive where the Business Intelligence contents are located.
- 6 Save the file and exit the text editor.
- 7 Stop and restart the WebLogic server.

Modifying the startWebLogic.cmd File

For WebLogic version 6.0, you configure WebLogic as the application server by modifying the startWebLogic.cmd file.

To modify the file:

- 1 Use a text editor to open the startWebLogic.cmd file, located by default in `X:\bea\wlserver6.0\config\mydomain`.
- 2 Locate the CLASSPATH section of the file, then add the paths shown in bold below:

```
set
CLASSPATH=.;\lib\weblogic_sp.jar;.\lib\weblogic.jar;<Drive>:/webiblib/wibean.jar;
<Drive>:/webiblib/jhsal.jar;<Drive>:/webiblib/vbjorb.jar;<Drive>:/webiblib/vbjapp.jar
```

- 3 Save the file and exit the text editor.
- 4 Restart WebLogic and IIS.

What's Next

Now that you have configured your application server/Web server, you are ready to start the Peregrine OAA configuration steps. See *Configuring Peregrine OAA* on page 131 for the procedures to perform.

11

CHAPTER

Configuring Peregrine OAA

After deploying the Peregrine Reporting/Business Intelligence files, you must perform the following OAA Platform configuration steps:

- Set up your company name
- Add user accounts
- Assign capabilities to user accounts
- Set the data security filter (on or off), if applicable for your application

Important: In addition to assigning capabilities to user accounts, you must also assign Peregrine application-specific roles to user accounts. Roles are essential for accessing Business Intelligence reports. For more information, see the documentation that is included with your Peregrine application.

The following sections provide instructions for completing these configuration steps.

Setting Up Your Company Name

Peregrine Reporting/Business Intelligence uses the company name you specify to manage data in the data repository.

To set up your company name in the Peregrine OAA Portal:

- 1 Log in to the Peregrine OAA Portal as an administrator.
Example: `http://localhost:8080/oaadmin/admin.jsp`
Login: Admin
Password: <None>
- 2 In the Navigation Menu, click **Admin**.
- 3 In the Target column list, click **boDB**.
- 4 In the Company Name box, type the company name from your installation checklist that was specified during installation.
- 5 Click **Save**, **Reset Server**, and exit the Portal.

Adding User Accounts

Before a user can log into the Peregrine Portal and access business intelligence data, he or she must have an active user account with the appropriate security assigned.

To add a user account

- 1 Log on to the Peregrine Portal as an administrator.
For more information, see the documentation for your Peregrine application.
- 2 In the Navigation Menu, click **People**.
- 3 Click **New**.
- 4 Specify the user's ID, name, and status (active or inactive), then specify any associated image files using the Main Image buttons.
- 5 Specify a logon name and password for the user.
- 6 Click **Submit Changes**.

Assigning Capabilities to User Accounts

Capabilities are similar to security rights. They determine which functions a user can perform.

The following is a list of the business intelligence security capabilities you can assign to a user account:

Capability	Description
BI_View	<p>A user with this capability can:</p> <ul style="list-style-type: none"> ■ Manage personal documents and categories ■ Read corporate and inbox documents ■ Run and refresh documents ■ Use and refresh list of values ■ Work in drill mode ■ Schedule documents ■ Send documents to users within and outside of own group
BI_Exec	<p>A user with this capability can perform the same functions as BI_View. The difference is that the BI_Exec capability does not have any data security control.</p>
BI_Create	<p>A user with this capability can perform the BI_View functions, plus:</p> <ul style="list-style-type: none"> ■ Download Zero Administration BusinessObjects ■ Create and edit documents ■ Format the toolbar ■ Perform a transparent drill outside the cube ■ View SQL
BI_All	<p>A user with this capability can perform the BI_Create functions, plus:</p> <ul style="list-style-type: none"> ■ Publish corporate documents
BI_Admin	<p>Can perform all functions. In addition to the BI_All functions, this includes:</p> <ul style="list-style-type: none"> ■ Change passwords ■ Change list display and default Web site ■ Change, view, and edit technology options

Note: In addition, the BI_ACCESS capability is required for each user. If this capability is not assigned, the Reporting link does not appear in the Navigation Menu when the user logs in.

Note: If two or more capability rights are assigned, the one with the least functionality takes precedence. For example, if a user has both view and create rights, the view right takes precedence.

To assign capabilities to a user account:

- 1 Log in to the Peregrine Portal as an administrator.

For more information, see your Peregrine application documentation and the *Peregrine Open Application Architecture Platform Administrator's Guide*.

- 2 In the Navigation Menu, click **People**.
- 3 Search for the user account to which you want to assign capabilities, then click on the user name.

Note: You must have already added the user account. For more information, see *Adding User Accounts* on page 132.

- 4 Under Actions, click **Set Security Capabilities**.
- 5 Select the check box next to each capability you want to assign to the user.
- 6 Click **OK**, then click **Submit Changes**.

After you assign roles, the account is ready to use. See your Peregrine application documentation for more information.

To Turn On/Off the Data Security Filters

The data security filters is used for some Peregrine applications as a security measure.

You can configure two security filter options:

- **Enable Data Security:** Controls whether or not data is filtered by pre-defined security roles. When on, all data is filtered according to the role assigned to the user who is logged in.
- **Enable BI Report Filtering:** Controls whether or not Business Intelligence reports are filtered. When on, the reports are filtered.

Note: BI report filtering works only if the Enable Data Security option is turned on.

To turn on/off the filters:

- 1 Log on to the Peregrine Portal as an administrator.
For more information, see your Peregrine application documentation and the *Peregrine OAA Platform Reference Guide*.
- 2 In the Navigation Menu, click **Admin**.
- 3 Click the **rome** tab.
- 4 To enable either the Enable Data Security option or the Enable BI Report Filtering option, type **on** in the appropriate box. To disable either option, type **off**.
- 5 Click **Save**, **Reset Server**, and exit the Portal.

What's Next

Now that you have configured Peregrine OAA, you can setup the Broadcast Agent Scheduler if you choose to use this utility. See *Setting Up Broadcast Agent* on page 141 for the procedures to perform.

A Troubleshooting

APPENDIX

This appendix describes possible installation problems and solutions.

Report Server Unavailable Message

Problem	The error message <i>Report Server is unavailable</i> is displayed on the Report Module screen.
Explanation	One of the following is the cause of the problem: Report server Webi process is not running on the report server, or a network connection to the report server is not available, or the <code>wibean.orb.properties</code> file is misconfigured.
Solution	Ensure that your report server is connected to the network, and that the Webi service is running. An icon appears on the status area of the Windows taskbar when the Webi service is running.

Invalid UserID Please contact your Business Objects Administrator Message

Problem	The error message <i>Invalid UserID Please contact your Business Objects Administrator</i> is displayed on the Report Module screen.
Explanation	The user has BI_ACCESS capability but does not have any other BI capability, or a misconfigured application setting exists. For example, the company name specified in Peregrine OAA Administration is different from the name that was specified during Business Objects installation.
Solution	Use the application People module to add BI_ACCESS capability to the user account for each user you wish to have access to reporting. Next, select an access level for each user in addition to BI_ACCESS. Each user should have BI_ACCESS and one of the following: BI_ADMIN, BI_ALL, BI_CREATE, BI_EXEC, or BI_VIEW. In addition, ensure the user has assigned roles. For more information, see your Peregrine application documentation.

To correct the company name, perform the following procedure:

- 1 Log on to your Get.It application with the user name Admin.
- 2 Click the Administration tab.
- 3 On the Admin Settings list, click Settings.
- 4 Click the BoDb tab.
- 5 In CompanyName box, type the name of the company from your installation checklist and that you specified during installation.
- 6 Click **Save** then click **Reset Server**.
The company name is saved.

Unable to Stop the Business Objects Installer

Problem	Unable to stop the Business Objects installer from performing the final configuration during installation.
Explanation	Clicking Cancel on the Business installer has no effect on the Business Objects installation.
Solution	If you must stop the installation, use Windows Task Manager. Stopping the installation is not recommended.

Business Objects Reports Do Not Appear

Problem	WebIntelligence reports appear in the Corporate Documents list of the Report module but Business Objects reports do not.
Explanation	Business Object reports did not completely deploy.
Solution	Ensure that the DCOM configuration was performed correctly, then manually deploy the Business Objects reports.

Existing Data Does Not Appear in Summary Reports

Problem	Migrated or existing data that has been loaded into the application does not appear in reports. Synchronizing the data does not solve the problem.
Explanation	The database tables need to exist for the data to appear in reports. A batch file and SQL script is provided to create the database tables for data that is new or migrated. After the batch file is run, the Business Objects report server can use the data and display the data in reports.
Solution	Modify then run the batch file included with Peregrine OAA and your application. You can locate the batch file after performing a successful installation. The batch file and associated SQL script will be in the <application deployment directory> \oaa\web-inf\etc directory.

BI Publisher was not able to setup successfully Message

Problem	The Business Intelligence Report Publisher does not install successfully.
Explanation	The Business Intelligence Publisher install program calls <code>exportunivrptdoc</code> then checks for <code>exporterrorlog.csv</code> in <code><BI Destination Folder>\exe\exportuniverses</code> . <code>Exporterrorlog.csv</code> is created only if the Business Intelligence installation program encounters an error when calling the <code>exportunivrptdoc</code> . If <code>exporterrorlog.csv</code> exists, the installation process stops and the message appears.
Solution	Check the following: <code><BI Destination Folder>\exe\exportuniverses\Exporterrorlog.csv</code> and determine whether the parameters passed are correct. If not, reinstall Business Intelligence. As a last resort, manually export the universes.

B Setting Up Broadcast Agent

APPENDIX

Broadcast Agent is a Business Objects product that provides scheduled or batch processing and distribution of documents. The two components of Broadcast Agent, Scheduler and Console, can be installed separately. You can install the Scheduler, the process which starts the tasks at the designated time, on more than one machine in your cluster. You'll want to do this to provide greater reliability in the following two cases:

- When more than one server cluster will handle the tasks of Broadcast Agent. In this case, a second Scheduler on the cluster serves as a backup if the machine housing the first Scheduler fails or is disconnected.
- The Console allows the administrator to monitor the progress of scheduled tasks and edit task parameters. You can install it on any machine in the cluster where this will be useful, without having to install the Scheduler.

For more information, see the *Business Objects Broadcast Agent Administrator's Guide*.

Setting Up the Broadcast Agent Scheduler.

The following procedure describes the steps for setting up the Broadcast Agent Scheduler.

To set up the Broadcast Agent scheduler:

- 1 Decide which machine will run the Broadcast Agent scheduler.
Tip: You might also want to choose a second machine to be the backup so that if one machine breaks down, the second one will continue to process tasks.
- 2 Click **Start**, point to **Programs**, point to **Broadcast Agent 5.1**, then click **Broadcast Agent Administrator Tool** to start the Business Objects Services Administrator.
Tip: To access from a browser, point to the URL `http://<server name>/wi/wiadmin/AdministratorEN.htm`, where `<server name>` is the host name of the cluster manager machine.
- 3 When the Business Objects Services Administrator window appears, type an administrator user name and password, then click **Login**.
- 4 In the left-hand panel, under your server name, select **Broadcast Agent Manager**.
Note: The right-hand panel lists the schedulers that are currently running on the selected machine. If there are none, the panel appears empty. Schedulers are listed by the Broadcast Agent to which they refer (by company name). You can turn on or off each scheduler using the buttons on the dialog box. The parameter buttons allow you to modify parameters to optimize each scheduler.
- 5 In the right-hand panel, click **Monitor One More Broadcast Agent**.
- 6 Select a repository key file. By default, the key file is **BOMain.key**.
- 7 Click **Refresh BCA List** to generate a list of all Broadcast Agents on the cluster.
- 8 Type a Supervisor log on name and password for the repository, then click **OK**.

Example: Peregrine_Supervisor as the log on name.

A list of the named Broadcast Agents in the cluster appears.

- 9 Select a Broadcast Agent from the list, then click OK.
- 10 Enter the Supervisor's password for Broadcast Agent, then click OK.
Broadcast Agent is now up and running.
When the server is rebooted, the Broadcast Agent scheduler restarts automatically.

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