HP IT Executive Scorecard

For the Windows ® operating system

Software Version: 9.31

Upgrade Guide

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Documentation Updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.

- Document Release Date, which changes each time the document is updated.

- Software Release Date, which indicates the release date of this version of the software.

To check for recent updates or to verify that you are using the most recent edition of a document, go to:

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- Download software patches

- Manage support contracts

- Look up HP support contacts

- Review information about available services

- Enter into discussions with other software customers

- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To register for an HP Passport ID, go to:

http://h20229.www2.hp.com/passport-registration.html

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

Contents

Upgrade to Version 9.31

This section explains how to upgrade to version 9.31.

> **Note:** The upgrade path that is currently supported is:
> **9.30 => 9.31**
>
> If you require other upgrade path, contact HP Software Support Online web site
> (http://www.hp.com/go/hpsoftwaresupport).

To understand what is new in version 9.31, see What's New in Version 9.31 in the *IT Executive Scorecard Release Notes*.
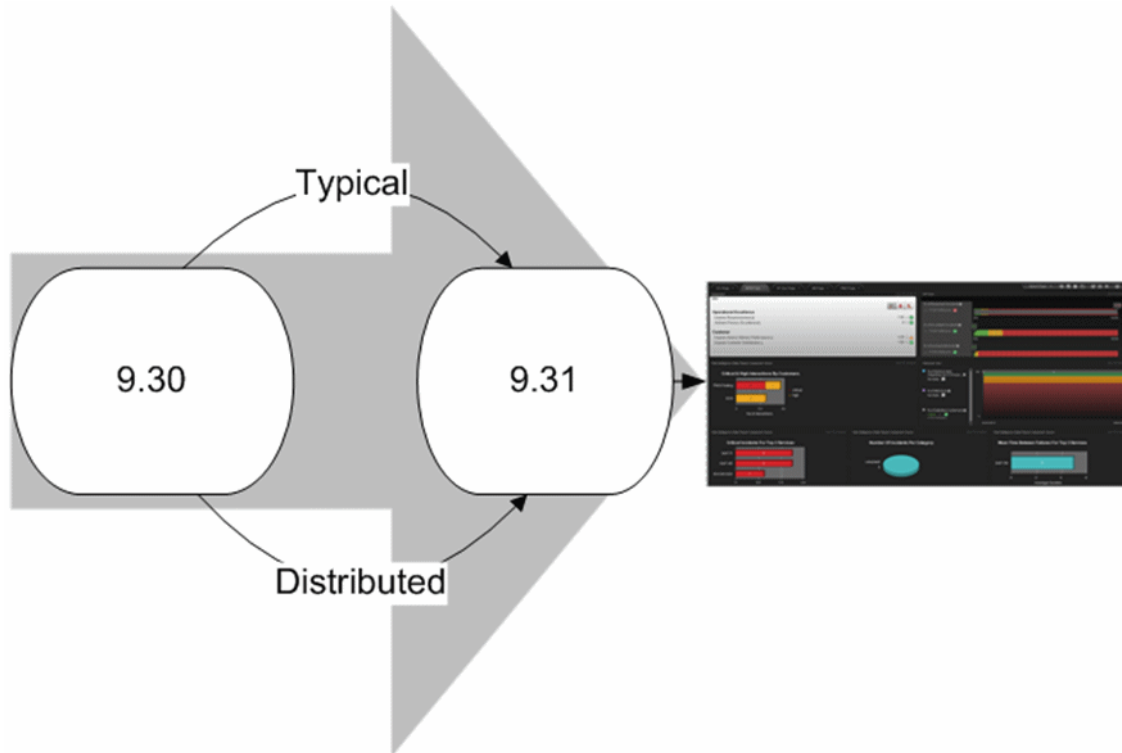
The upgrade procedure is the same for a typical or distributed environment.

The upgrade procedure uses the following steps:

"Prerequisites" on next page

"Upload Version 9.31" on page 8

"Reactivate the Data Sources" on page 15

"Run the ALM ETL" on page 16

"Integrating with HP Service Manager" on page 16

Prerequisites

1. **Backups:**

   a. Make sure you have enough disk space to backup all the Data Warehouse databases.

   b. Backup the Staging and Target databases using SQL Server 2008 Studio.

   c. Backup the SAP® Business Objects database.

   d. Backup the SAP BusinessObjects Data Services database for disaster recovery purposes.

   e. Perform additional backup procedures as indicated in the 9.30 documentation.

   f. Backup the 9.31 **version.txt** file for disaster recovery purposes.

   g. **Moving to unicode:**

      ○ Due to the move to unicode, it is recommended to backup the Management and Result databases (as explained in "Upgrade to Version 9.31" on previous page in the *Administrator Guide*) before performing the upgrade.

      ○ In addition, if you are working with large DB schemas, define the Transaction Log size to be a minimum of 1GB. The migration process automatically migrates the database objects from the VARCHAR data type to NVARCHAR.

   c. Make sure to back up the database Logins and that each user's status is enabled and not locked.

2. **Running ETL streams.** Currently running ETL streams will be aborted during the upgrade procedure. You can cancel the upgrade, wait for the completion of the ETL streams execution, and then start the upgrade.

3. **When using M-iCP:**

   Configure the Data Warehouse server to avoid low virtual memory prompts when using M-iCP as follows:

   a. Make sure that you have a hard disk capacity of at least 60G-80G.

   b. Set the server virtual memory to **system managed size**.

   c. Restart the server.

   d. In Folder Options, clear **Hide protected operating system files**.

   e. Make sure that the **pagefile.sys** size is greater or equal to your physical memory size.

   f. Make sure that you have enough free space on your system drive.

4. **Working with non-English languages:**

If the language of one or more of the language packs that you are going to configure uses a non-Latin character set, the management database must be created with the collation for the relevant language.

5. **Installation Settings:** Ensure that you have the relevant installation settings required for the installation. For details, see the *IT Executive Scorecard Support Matrix*.

6. **Browsers.** It is recommended to close all browsers before starting the upgrade.

7. **Upgrade the Japanese Documentation**

    The 9.31 documentation is only available in English.

    If you want to be able to access the 9.30 documentation in Japanese in addition to the 9.31 documentation in English proceed as follows:

    ▪ **You are installing Executive Scorecard for the first time**. If you are installing Executive Scorecard for the first time and you want the 9.30 documentation in Japanese to be available to you in addition to the 9.31 documentation in English you must proceed as follows:

        i. Make sure you have installed Executive Scorecard 9.30.

        ii. Install the Japanese patch above Executive Scorecard 9.30.

        iii. Then perform the upgrade to version 9.31.

    The result is that the 9.30 documentation in Japanese is available together with the 9.31 documentation in English.

    ▪ **You had installed the Japanese patch above Executive Scorecard 9.30.** During the upgrade to 9.31, the 9.30 documentation in Japanese is not deleted. The 9.31 documentation in English is added in the proper location. So you will have both sets of documentation available.

    ▪ **You have already upgraded to 9.31 and you were not aware of the Japanese patch.** To add the 9.30 documentation in Japanese to the 9.31 documentation in English, copy to the relevant directory, the documentation in Japanese provided in a .ZIP file with the 9.31 files at the SSO site (**http://www.hp.com/go/hpsoftwaresupport** - for additional details, see the Support section at the beginning of this document).

    > **Note:** If you installed the Japanese documentation patch of 9.30, and your browser locale is Japanese, then the online help you see is the 9.30 Japanese documentation on your 9.31 system. To view the 9.31 documentation in English, click the **Help.htm** file in the following location:
    > **<Installation_folder>\agora\docs\en_US\Help.htm**.

8. **Email functionality inside the application.** For the "send email" functionality to work, make sure that the operating system and/or browser of the end user are configured to handle **mailto:** links.

Upload Version 9.31

> **Note:** No data will be lost during the upgrade process. All data that is created during the

upgrade process will be retrieved upon completion directly from the data sources.

Installation

Important note:

- If your 9.30 installation was typical (one server), perform the installation below on the server.
- If your 9.30 installation was distributed (more than one server), run the installation below on each server starting with the server where the Data Warehouse is installed and then on the server where the Executive Scorecard module is installed.

1. Download the .ZIP file (Available with the download of the version from the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport** site). The installation wizard opens.

   Note:

   If you copy the installation directory from the Support Site, make sure that the path to the target directory does not include blank spaces.

2. Unpack the .ZIP file and click **HPXS_9.31_setup.exe**.

   The Installation wizard opens.

3. In the **Initialization** page, click **Next**. The Introduction page opens.
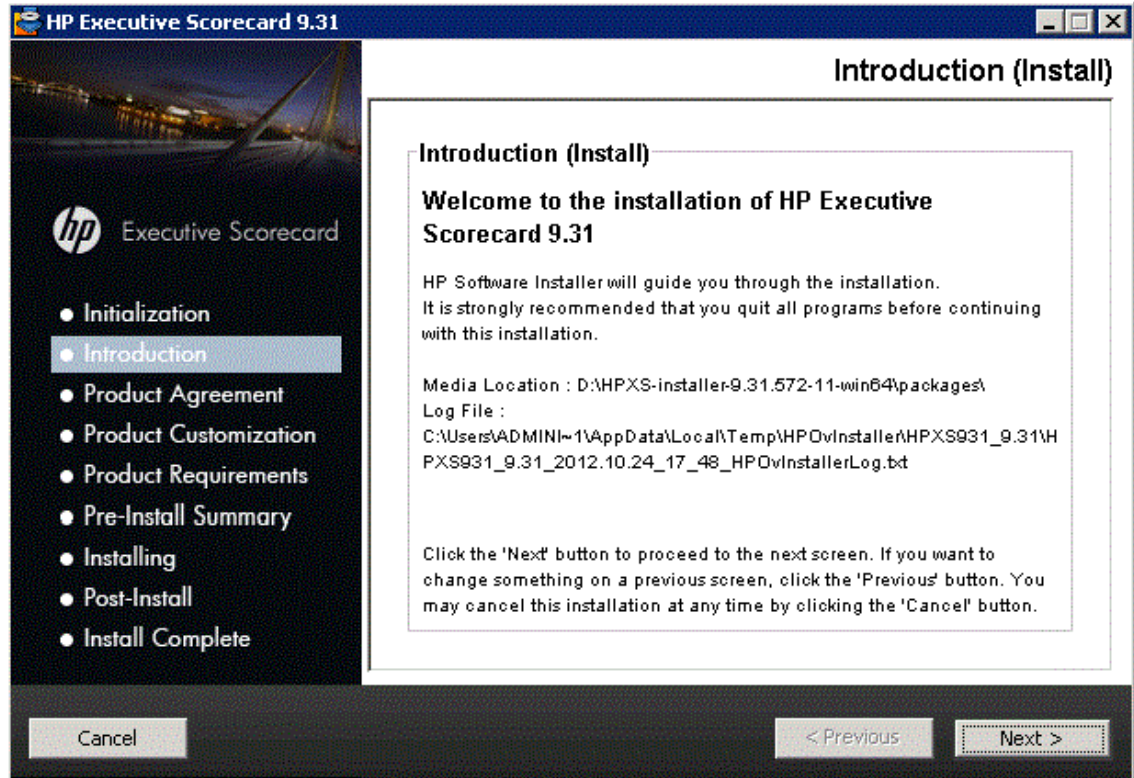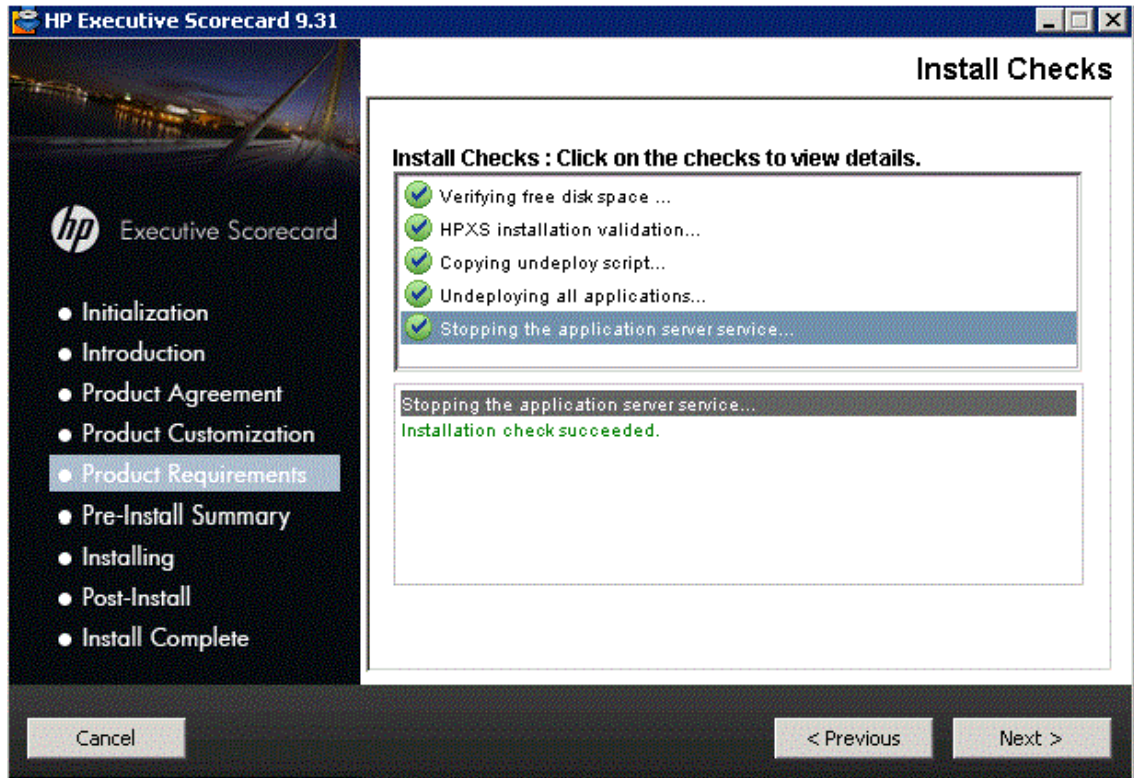
4. In the **Introduction** page, click **Next**. The Product Agreement page opens:
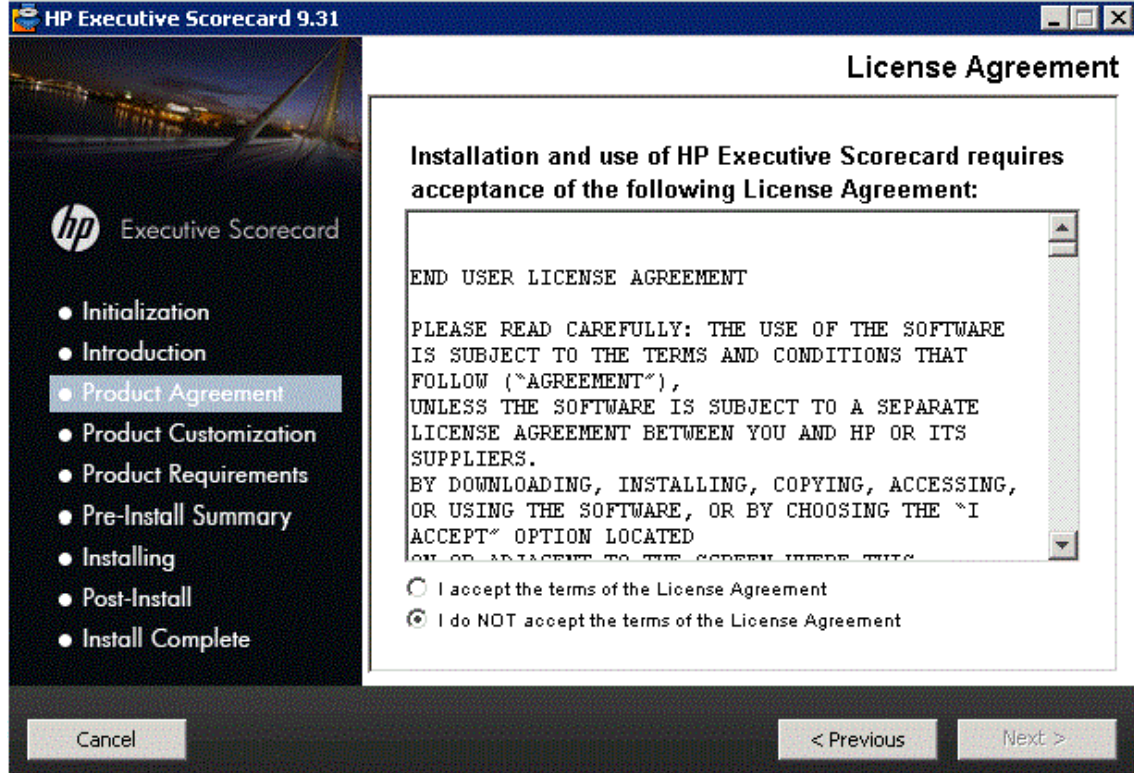
5. In the **Product Agreement** page, click **Next**. The Product Customization page opens, and

then when you click **Next** the Product Requirements page (with the same contents) opens.

6. In the **Product Requirements** page, click **Next**. The Pre-Install Summary page opens.
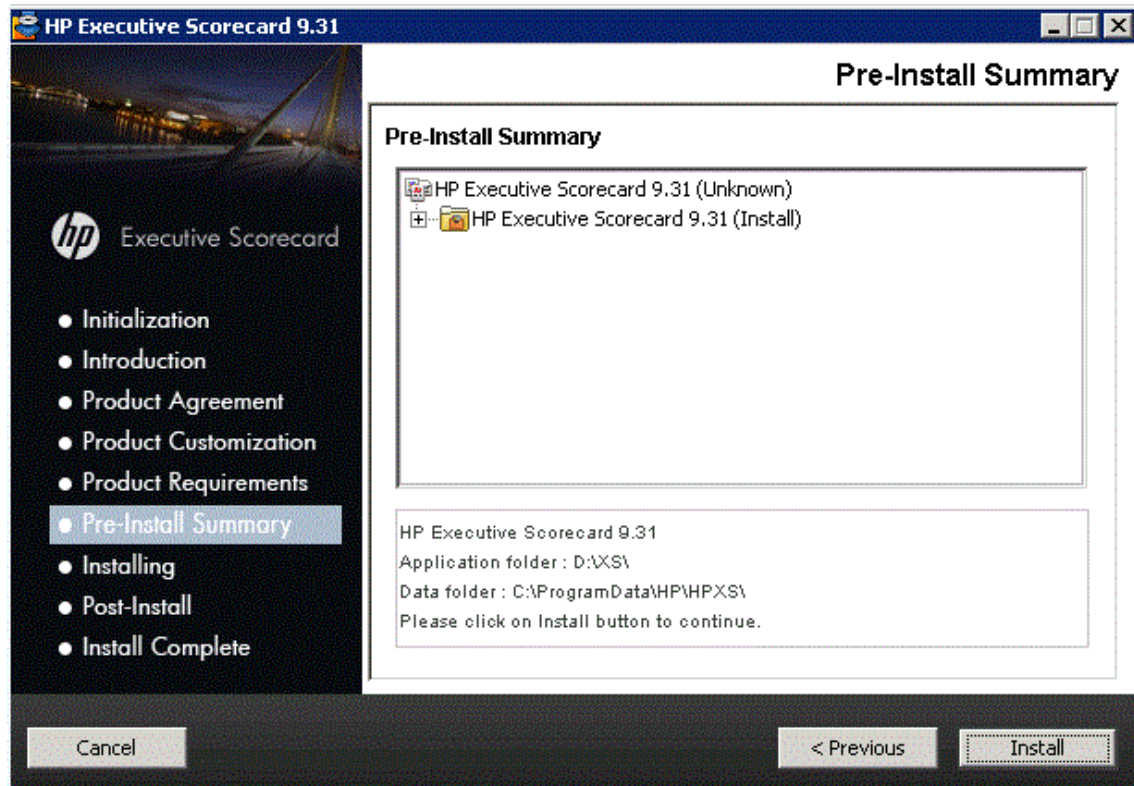
7. In the **Pre-Install Summary** page, click **Next**. The Installing page opens.
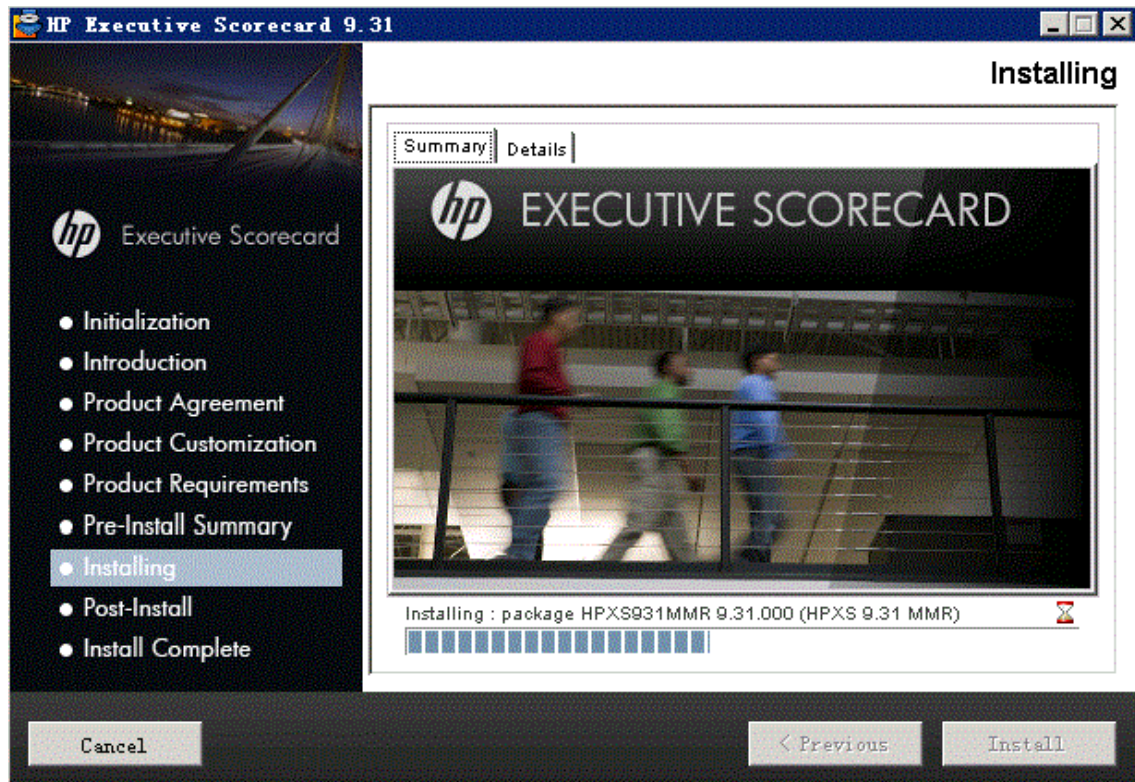
8. In the **Installing** page, click **Install**.

9. The **Post-Install** Configuration wizard starts:

a. The **Introduction** page of the Post-Install Configuration wizard opens. Click **Next**.
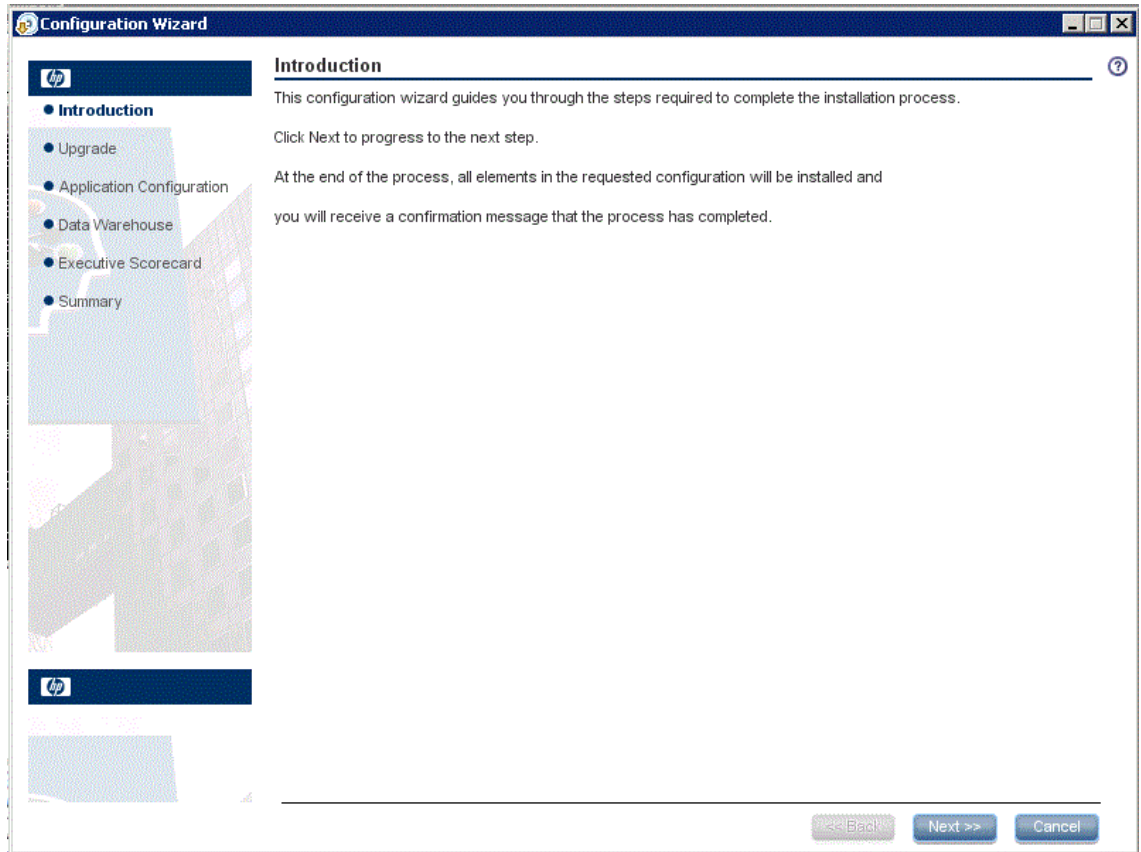
b. In the **Upgrade - Upgrade Required** page, click **Next**.

c. In the **Summary** page, verify that you get the message **Operation completed successfully** and click **Finish**.

10. If after the upgrade the following message is displayed when you try to open the application: **The application is out-of-date. Click the Refresh button on your browser**, clean the temporary Internet files and reopen the application.

Note:

- The upgrade changed the name and configuration of some of the KPIs, in addition to adding new KPIs. Each out-of-the-box KPIs ha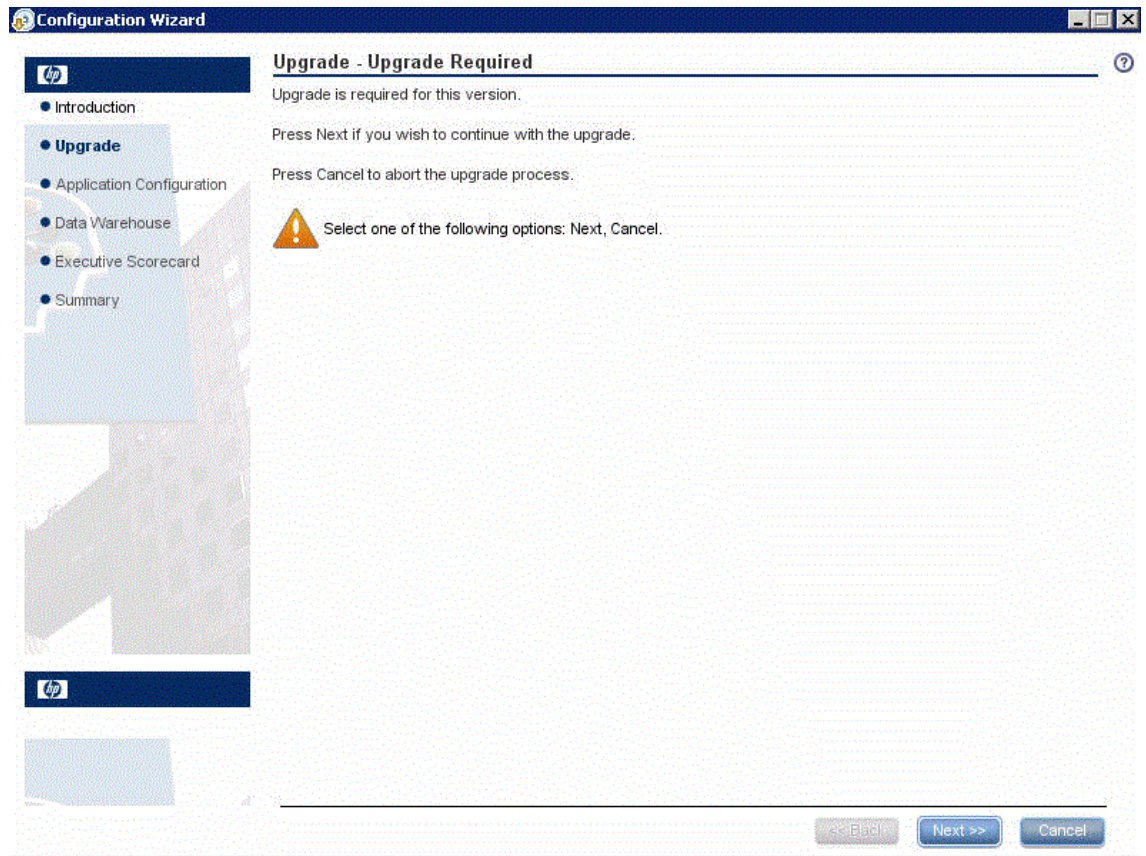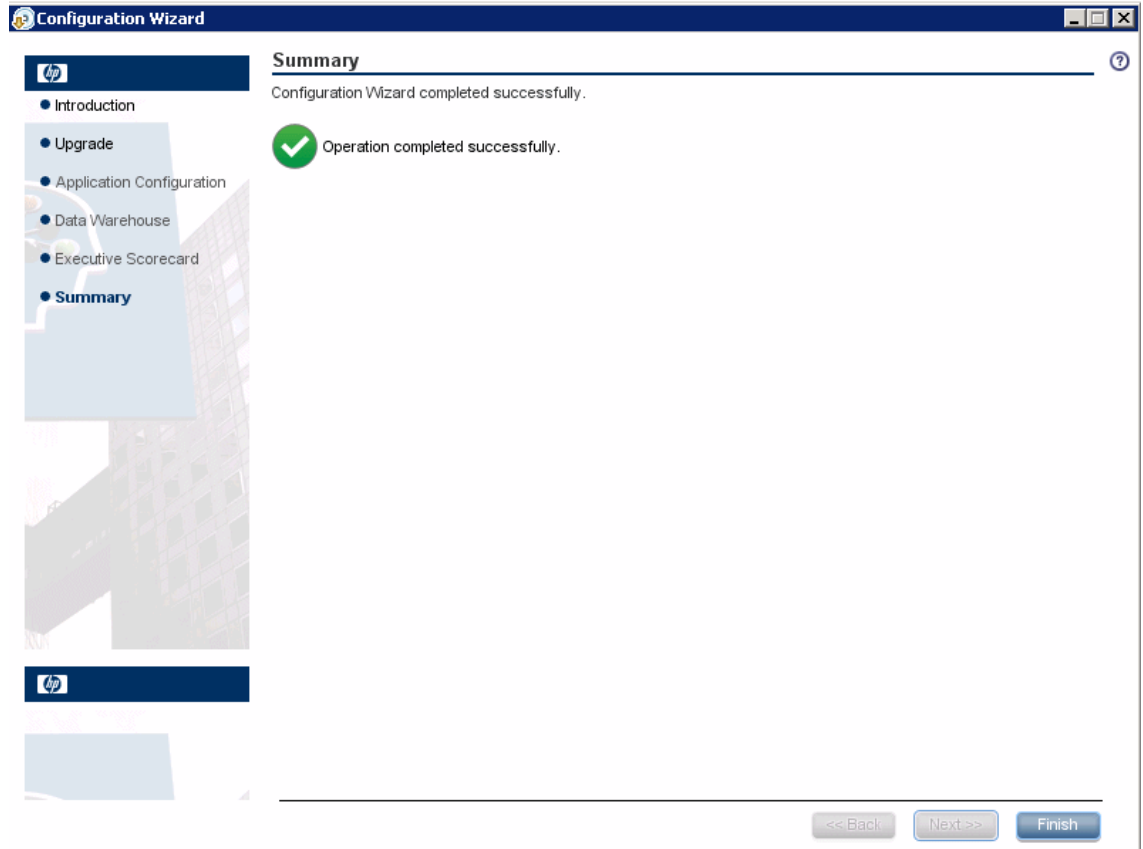s its own and unique UUID, so after the upgrade, the renamed or modified KPIs appear In the KPI Library (KPIs templates area) overriding the previous KPIs (according to the UUID). A KPI that was already activated in the previous version (dragged to the Active KPIs area) is not overridden during the upgrade. If you drag one of the upgraded KPIs from the KPI Library to the Active KPIs area, the new setting is displayed. The active KPI from the previous version and the active KPI from 9.31 have different UUIDs but have the same template UUID.

- At the end of the upgrade, verify the log files. If errors are found in the log files, investigate, correct, and consider re-running the upgrade process. For details on the log files, see Logs in the *Administrator Guide*.

Reactivate the Data Sources

1. **Reactivate the data sources.** After completing the upgrade, all connected data sources will be in the **Deactivated** state. You must reactivate the desired data sources using the Executive

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Scorecard user interface. For more information, see Perform Tasks for Data Source Management in the *Administrator Guide*. CR140373 140574

> **Note:** When reactivating BSM and UCMDB after upgrade procedure, you may have to re-enter the UCMDB username and password. For details, see Perform Tasks for Data Source Management in the *Administrator Guide*.

2. **If the NNM Content Pack was activated in 9.30.** If the NNM Content Pack was activated in 9.30, and if HP Network Node Manager does not need a password to connect to the shared folder (for example when the shared folder resides on the local machine), you must edit the setting of the connection and delete the password value, before you activate the NNM Content Pack. To do that proceed as follows:

    a. In the application, click **Admin > Data Source Management**.

    b. Click the **Edit Settings** link for HP Network Node Manager.

    c. Delete the values in the **Password** field, and perform any additional changes.

    d. Click **Next** twice.

    e. After the data source is successfully configured, click **Close**.

Run the ALM ETL

Due to modifications of the ALM tables introduced for version 9.31, the data from the HP Application Lifecycle Management data source is not restored after the upgrade. To restore the data, run the ALM ETL. For details, see Perform Tasks for ETL Management in *Administrator Guide*.

Integrating with HP Service Manager

If you are integrating with HP Service Manager, note that the source column used to populate CFGITEM_DIM was modified in 9.31 to obtain better results. As a consequence, after upgrading to 9.31, after reactivating the SM Content Pack, and before running the ETL, run the XS batch command **dw_abc_cleandata.bat -batch 1 -entity CFGITEM** and go to the ETL management UI to start the clean data stream in order to delete the existing CFGITEM_DIM data. This will update the data for the next run of the ETL.

Disaster Recovery

In case of disaster, find the latest disaster recovery procedure in the Documentation Errata section in the latest 9.31 Release Notes available from the Manuals site at HP Software Product Manual Site (**http://h20230.www2.hp.com/selfsolve/manuals**).

Optional, When Working With a Non-English Language

If you are working with a non-English language proceed as follows:

1. **Localize the KPI Library**

   The localized installation adds the language libraries of XML files in specific folders. You copy and then import these files to display the out-of-the-box template Scorecards, Perspectives, Objectives, Folders, and KPIs in the KPI Library in the selected language.

   To localize the out-of-the box content of the KPI Library: Scorecards, Perspectives, Objectives, and KPIs, proceed as follows:

   a. In the Executive Scorecard server, locate the **<XS_installation_directory>\agora\glassfish\glassfish\domains\BTOA\config\ kpitemplates\import\languages\<language_code>_<country_code>** folder relevant for the language you want to use in the application. The .xml files in the folder represent both KPIs and KPI directories.

      The language code and country codes are as follows:

Language	Language Code	Country Code
Brazilian Portuguese	pt	BR
French	fr	FR
Spanish	es	ES
German	de	DE
Japanese	ja	JP
English	en	US
Dutch	nl	NL
Italian	it	IT
Simplified Chinese	zh	CN
Korean	ko	KR
Russian	ru	RU

   b. Copy these .xml files to the **<XS_ server>\agora\glassfish\glassfish\domains\BTOA\config\kpitemplates\import\load** folder.

      > **Tip:**
      >
      > If the folder contains other sets of files (for different languages), it is recommended to keep in the folder only the required set of language files and to move the other files outside the folder to prevent the loading of both set of language files and an unknown result.

   c. Import the out-of-the-box language files using the **KPILoader** > **importKPIs()** procedure described in "Import or Export Trees and KPIs" in the *Administrator Guide*.

2. **Localize the Dashboard Pages and Components**

The localized installation adds the language libraries of XML files in specific folders. You copy and then import these files to display the out-of-the-box template pages and components in the selected language, in the Dashboard.

To localize the out-of-the box pages and components, proceed as follows:

a. In the Executive Scorecard server, locate the
**<XS_installation_
directory>\agora\glassfish\glassfish\domains\BTOA\config\uimashup\
import\languages\Components\<lang>_<country_code>\<name>.uim.xml** or **<XS
server>\agora\glassfish\glassfish\domains\BTOA\config\uimashup\
import\languages\Pages\<lang>_<country_code>\<name>.uim.xml** files relevant to
the language you want to install. These .uim.xml files represent the components and the
pages used in the Dashboard. **lang** is the language code and **country_code** is the code of
the country:

Language	Language Code	Country Code
Brazilian Portuguese	pt	BR
French	fr	FR
Spanish	es	ES
German	de	DE
Japanese	ja	JP
English	en	US
Dutch	nl	NL
Italian	it	IT
Simplified Chinese	zh	CN
Korean	ko	KR
Russian	ru	RU

b. Copy these .xml files to the
**<XS_installation_
direc-
tory>\agora\glassfish\glassfish\domains\BTOA\config\uimashup\import\toload**
folder.

> **Tip:**
>
> If the folder contains other sets of files (for different languages), it is recommended to
> keep in the folder only the required set of language files and to move the other files
> outside the folder to prevent the loading of both set of language files and an unknown
> result.

    c. Import the out-of-the-box language files (**only for the pages and components - events are not localized**) using the relevant procedure described in "Import or Export Out-of-the-box Pages, Components, and Events" in the *Administrator Guide*.

3. **Test the installation**

Check the universes in the Executive Scorecard Studio:

    a. If you do not see them, run the Load meta data JMX.

    b. If you still cannot see the universes, restart SAP BusinessObjects Enterprise and rerun the "Load meta data" JMX. For details, see the *IT Executive Scorecard Troubleshooting Guide*.

4. **Set up the User Interface Display Language**

All translated files are provided with the product and the language of the user interface depends on the language settings of your browser. English is the default language.

    a. If you want to display the user interface in a non-English language, go to your browser **Tools > Internet Options**.

    b. In the **General** tab, click **Languages**.

    c. Add the language you want to view in the user interface and use **Move up** to move it to be the first in the list.

    d. Open a new browser and login to Executive Scorecard. The application is presented in the chosen local language.

5. **Set up the Input and Content Language**

The inputs and content language (i18N) depends on the definitions of your database. For details on the supported languages, see *IT Executive Scorecard Support Matrix*.

6. **Import localized CAPs.**

To upload localized CAPs:

    a. Delete the pre-imported out-of-the-box CAPs in the English language.

    b. Upload the localized CAPS:

        ○ **Localized out-of-the-box CAP**. To upload a localized out-of-the-box CAP, proceed as described in and specify the location of the out-of-the-box CAP.

> **Note:** Localized out-of-the-box CAPs .ZIP files are placed in the relevant language folder during installation:
> **..\HPXS\agora\-glassfish\glassfish\domains\BTOA\config\cap\import\languages**
>
> For example, the VPOPS CAP in German is located at:
> **..\HPXS\agora\-glassfish\glassfish\domains\btoa\config\cap\import\languages\de_DE\VPOPS_de_DE.zip**

        ○ **Localized user-defined CAP.** To upload a localized user-defined CAP proceed as

described in "Upgrade to Version 9.31" on page 6 and specify the location of the
localized CAP you have created.

Display the Webi and the Xcelsius Reports

When Executive Scorecard is installed on an SQL Server named instance, and in order for the
Xcelsius and Webi reports to display properly in the relevant Dashboard components, the relevant
universe (Context) connection must be updated to point to the <sql server name>\<named
instance>.

To point to the named instance use the following steps:

1. Open the SAP BusinessObjects Enterprise Designer application on the SAP BusinessObjects
   Enterprise server.

2. Click **Tools > Connections** to display the connection list.

3. Select **XS_DWH_JDBC** and click **Edit**.

4. In the **Server** field enter **<sql server name>\<named instance>:1433**.

5. Click **Next** and then **Finish**.

6. Click **File > Export**, and then click **OK**.

7. Run a report to see if it works

Upgrade the 9.30 Content Acceleration Packs (CAPs)

If you worked with Content Acceleration Packs (CAPs) in version 9.30, you must upgrade the
CAPs so they work in 9.31.

You can upgrade a CAP using one of two ways:

- **Recommended:**

  Use this procedure when you have uploaded the 9.30 CAP. If you never uploaded the 9.30 CAP,
  use the manual procedure below.

  a. Select **Admin > Content Acceleration Packs > CAP Management**.

  b. Delete the 9.30 CAP.ZIP file from the relevant folder.

  c. Create a new CAP in 9.31 using the CAP wizard. In the CAP wizard, select the components
     of the 9.30 CAP (Scorecards, KPIs or Metrics, Dashboard pages that display the
     Scorecards and KPI components, Contexts (universes), and .CSV files).

     The wizard creates the corresponding .ZIP file and uploads it to Executive Scorecard .

     For details, see Create Content Acceleration Packs in the *Administrator Guide*.

  d. You can now activate the new CAP.

- **Manually:**

  a. For each CAP, locate the **<CAP_name>.zip** file.

b. In the **manifest.properties** file, proceed as follows:

Item in the 9.30 manifest.properties file	Item in the 9.31 manifest.properties file	Do the following:
ID= <The Content Acceleration Pack ID number>	**UUID=**< A unique ID for the Content Acceleration Pack>	Remove the **ID** line and enter instead a **UUID** for the CAP. You can use a UUID generator to help you select a UUID. **ID** is obsolete in version 9.31. It is replaced by the **UUID**.
universe= <The names of the universes to be calculated (comma separated). For example, Period_Universe.>	**BCs=** <The names of the universes to be calculated (comma separated). For example, Period_Universe.>	Change **universe=** to **BCs=**. **universe** is obsolete in version 9.31.
recalculate.date=< The start date of the recalculation.> You perform a recalculation after you have imported the Content Acceleration Pack. The recalculation builds a history of the data. The historical data is used in the Content Acceleration Pack Dashboard page to display over time information. The date format is: DD/MM/YYYY.	**recalculate.date=**< The start date of the recalculation.> You perform a recalculation after you have imported the Content Acceleration Pack. The recalculation builds a history of the data. The historical data is used in the Content Acceleration Pack Dashboard page to display over time information. The date format is: DD/MM/YYYY.	This information stays the same.
bo.in.use= ○ **false** <The Content Acceleration Pack contents do not include SAP BusinessObjects Enterprise reports> ○ **true** <The Content Acceleration Pack contents include SAP BusinessObjects Enterprise reports>	**bo.in.use=** ○ **false** <The Content Acceleration Pack contents do not include SAP BusinessObjects Enterprise reports> ○ **true** <The Content Acceleration Pack contents include SAP BusinessObjects Enterprise reports>	This information stays the same.

Item in the 9.30 manifest.properties file	Item in the 9.31 manifest.properties file	Do the following:
version= <The version of the Content Acceleration Pack>	**version=** <The version of the Content Acceleration Pack>	This information stays the same.
	xs.version= <The version of Executive Scorecard>	Add the version of Executive Scorecard that was used when you created the CAP. The version number is available in the **About** dialog in the top right corner of the application.
	name= <The name of the Content Acceleration Pack. Mandatory>	Enter a name for the CAP.
	description= <The description of the Content Acceleration Pack.>	You can add a description for the CAP.
	publisher= <The name of the user, partner, or company that created the CAP.>	You can optionally add the name of the publisher.
type=<For internal use>		Remove this line. **Type** is obsolete in version 9.31.
	documentation= <The path to the file that documents the CAP. The document can be in Microsoft WORD, or PDF format.>	Enter the path and the name of the file that documents the CAP. Optional.

c. Save.

d. Upload and activate the CAP.