

# HP IT Executive Scorecard

For the Windows® operating system

Software Version: 9.40

## Upgrade Guide

Document Release Date: June 2013

Software Release Date: June 2013



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

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To find more information about access levels, go to:

**[http://h20230.www2.hp.com/new\\_access\\_levels.jsp](http://h20230.www2.hp.com/new_access_levels.jsp)**

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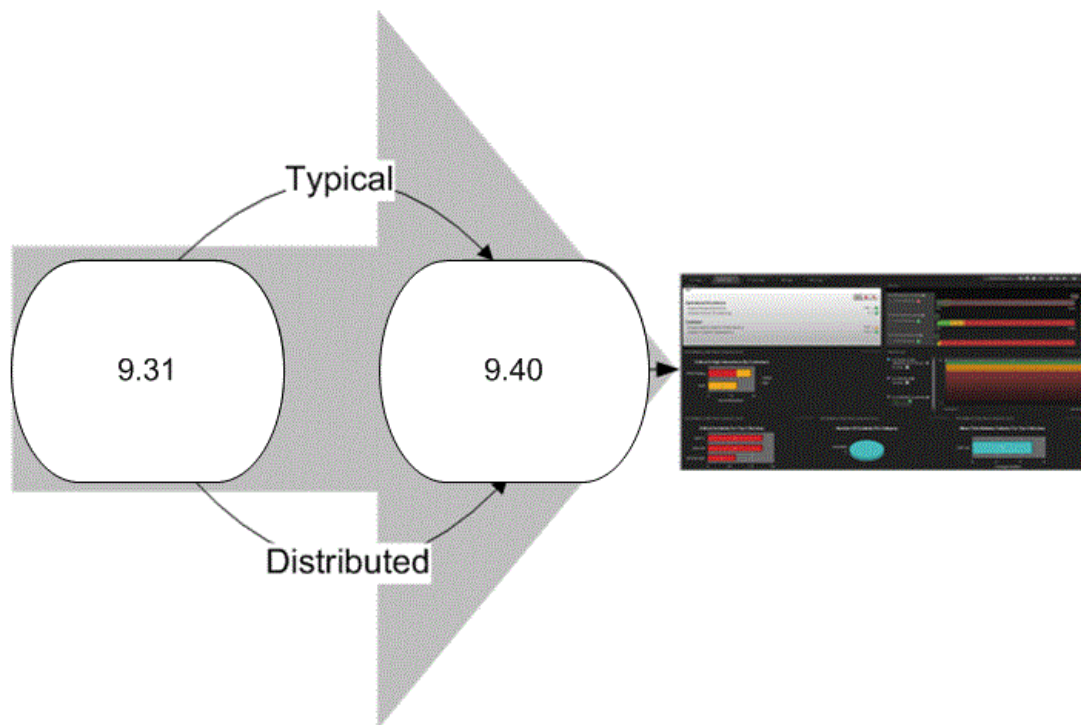
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# Upgrade

The following explains the upgrade to Executive Scorecard version 9.4.

**Note:** The upgrade path that is currently supported is:  
**9.31 => 9.40**

If you require other upgrade path, contact [HP Software Support Online web site](http://www.hp.com/go/hpssoftwaresupport) (<http://www.hp.com/go/hpssoftwaresupport>).



**Important:** Connecting the new 9.4 instance to the 9.31 instance will disable the existing 9.31 instance.

This section includes the following topics:

- ["Upgrade to 9.4 in a Typical Environment" on the facing page](#)
- ["Upgrade to 9.4 in a Distributed Environment" on page 43](#)
- ["Additional Steps" on page 91](#)

# Upgrade to 9.4 in a Typical Environment

To upgrade to version 9.4 when you had a typical (one server) configuration in 9.03, use the following procedure:

1. "Prerequisites" below
2. "Backup and Restore All Databases" on page 10
3. "Install Version 9.4 on a New Server" on page 10
4. "Steps for use with Extended Content " on page 13
5. "Run the Post-Install Wizard" on page 15
6. "Upgrade Configuration" on page 29

## Prerequisites

1. It is recommended to duplicate all the 9.31 schemas before starting the upgrade procedure in order to have both 9.31 and 9.4 up and running after the upgrade. To duplicate a schema in MSSQL, right-click the schema, select **Tasks > Back Up**. In the Back Up Database <file\_name> dialog box, enter the name of the back up file in the **Name** field in the **Backup Set** area, select where you want to save the duplicate in the **Destination** area, and click OK. Make sure that the back up is successful.
2. **Backups:**
  - a. Make sure you have enough disk space to backup all the Data Warehouse databases.
  - b. Back up the Staging and Target databases using SQL Server 2008 Studio.
  - c. Back up the SAP® Business Objects database.
  - d. Back up the SAP BusinessObjects Data Services database for disaster recovery purposes.
  - e. Back up the 9.31 **version.txt** file for disaster recovery purposes.
  - f. Back up the database Logins and that each user's status is enabled and not locked.
  - g. Back up the 9.31 <HPXS folder>\agora\DataWarehouse\ExternalSources folder before starting the upgrade.
3. Make sure that the Management and Result databases are located on the same server.
4. **Moving to unicode:**

- Due to the move to unicode, it is recommended to backup the Management and Result databases (as explained in "[Backup and Restore All Databases](#)" on page 10 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.
5. **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.
  6. **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.
  7. **Installation Settings:** Ensure that you have the relevant installation settings required for the installation. For details, see the *IT Executive Scorecard Support Matrix*.
  8. It is recommended to install the 9.4 version on a new server in order to have both 9.31 and 9.4 up and running after the upgrade.
  9. To restore the Management, Result, Target, and Staging databases, right-click **Database** in the relevant SQL server and select **Restore Database**. In the Restore Database dialog box, select **From device**, and click the button. In the Specify Backup dialog box, click **Add**. Select the duplicate file, and click **OK**.
  10. Install the following on the typical server, before you start the component installation:
    - a. SQLCMD utility as follows:
      - i. On the Microsoft SQL Server 2008 Enterprise Edition with SP 2 CD, run Setup.

**Note:**

- If you did not previously install Microsoft .NET Framework 3.5.1 on your server, you may be prompted to install it. When installing Microsoft .NET Framework 3.5.1, make sure that WCF Activation is unchecked.
- When installing the SQLCMD utility, make sure that the path to the utility is not enclosed in quotes (") and does not include quotes as this might cause the installation of Data Warehouse to fail.

- ii. Select **New SQL Server Standalone Installation**.
- iii. On the Feature Select screen, select **Management Tools - Basic**, unselect



**Management Tools - Complete**, and finish the Wizard.

**Note:** If you want to use the default HTTP port in the Executive Scorecard installation, ensure that port 80 is available after the installation of the SQLCMD tool. For more information about the ports, see the Support Matrix document available from the [Support Site](http://h20230.www2.hp.com/selfsolve/manuals) (<http://h20230.www2.hp.com/selfsolve/manuals> or from the Installation DVD).

11. 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.

12. **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.

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

14. If you are using CAPs and an upgrade from one server to another server (upgrade side-by-side):

- a. Copy the <CAP\_name>.ZIP files from: **<installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\load** and **<installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\loaded** folders located on the source server to the same folders on the target server.
- b. If you work with localized CAP files, they should be copied at the same time.

15. If your upgrade to XS 9.31 was configured with LDAP, copy the external-ldap.properties file from: **<Installation Directory>\agora\glassfish\glassfish\domains\BTOA\config\conf** in the 9.31 environment to the same location in the just upgraded 9.4.

Note: For ITFM users: While all pages and KPIs are automatically transferred in the upgrade, the upgrade does not include a transfer of ITFM allocations created in 9.31. In these cases, contact HP support for instructions.

## Backup and Restore All Databases

The database upgrade process requires you to clone the current production database (on the same machine) and to implement the upgrade process on the cloned restored database. Make sure the databases you restore are up to date.

### Before performing backup and restore make sure:

- The database server has enough disk space to contain both the backup files and the cloned database.
- The directory structure and drives for the cloned database exist on the server.
- The source database names do not exist in the destination database. If the names do exist, they will be overwritten.

### To backup and restore the databases:

**Note:** Data Warehouse only supports Microsoft SQL Server 2008 R2, therefore the backup and restore process is only supported for this version.

1. Backup the source Staging, Target, Management, and Results databases using SQL Server 2008 Studio. Make sure that the backup file names are unique and that they do not exist on the destination database server.
2. Restore the backup of the source databases on the destination server using new names. make a note of the restored names to be used during the upgrade.

**Note:** You must also backup the SAP BusinessObjects Data Services database for disaster recovery purposes.

## Install Version 9.4 on a New Server

**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.

1. Ensure that you have the relevant installation settings required for the installation as described in the "[Installation Checklists](#)".
2. Close all Windows before you start the installation process.
3. Insert the XS media into the CD/DVD drive. The installation wizard opens.

**Caution:** The CD/DVD must remain in the drive until you complete the Executive Scorecard Configuration Wizard.

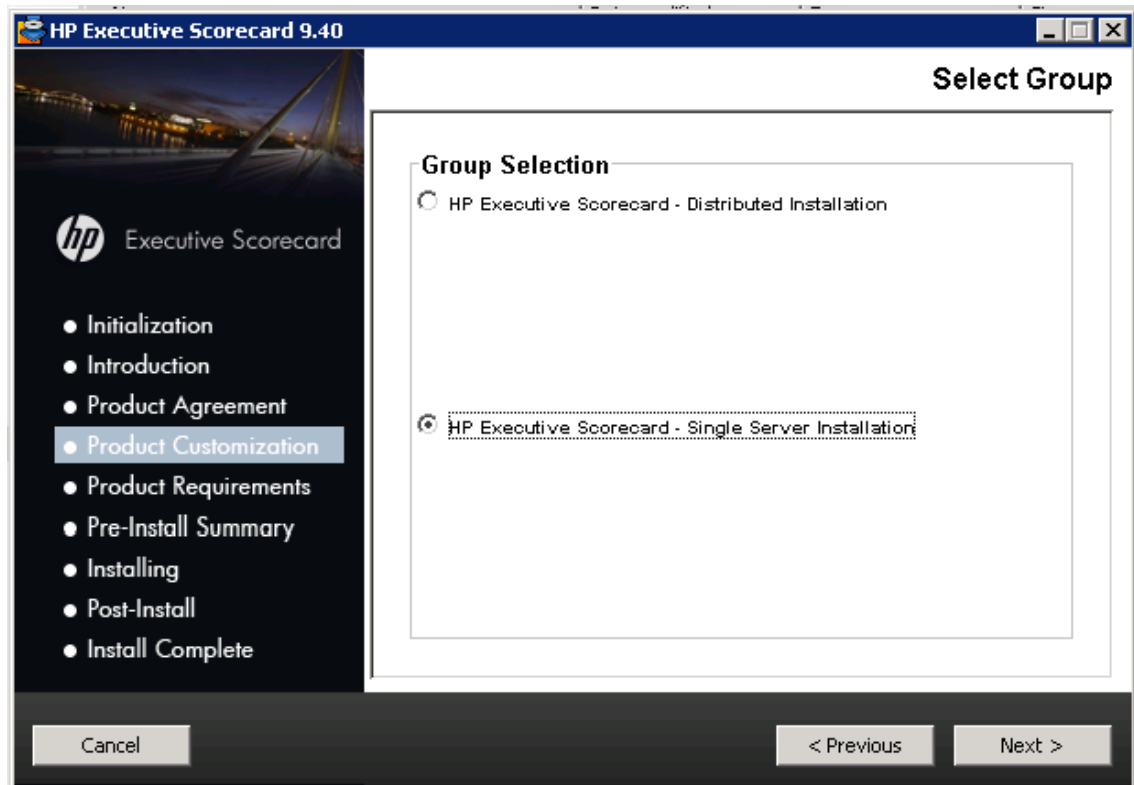
**Note:** If the installation wizard does not start automatically, run the file: <DVD\_ROOT>\Windows\_Setup\HPXS\_9.4\_setup.exe

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

#### 4. Installation Section of Wizard

Follow the prompts until you get to the **Select Group** page.

5. On the **Select Group** page, select the type of installation you are performing: **Single Server installation**, and then click **Next**.



6. On the **Select Features** page, **Common Components** are automatically selected and installed with each component.
7. On the **Choose the folders** page, click **Next** to accept the default application folder, or

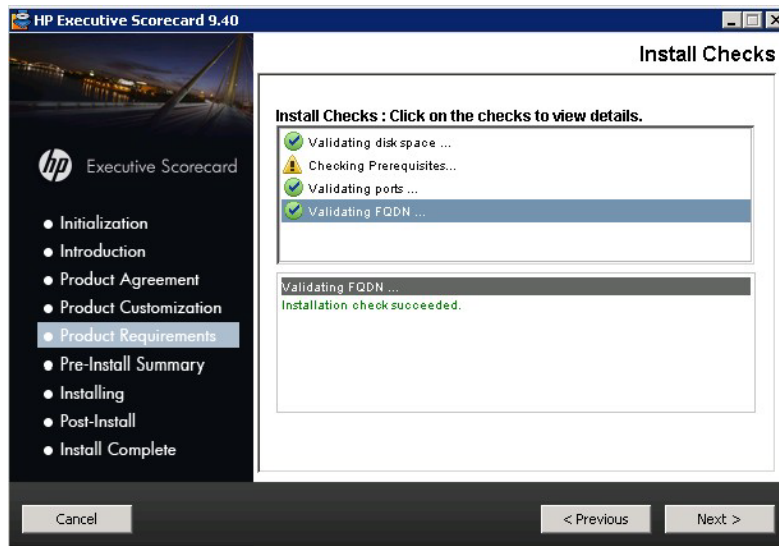
**Browse** to navigate to and then select a new application folder location.

**Note:** If you enter a new application folder name, it cannot contain embedded spaces. For example a folder with a name **HP XS** is invalid.

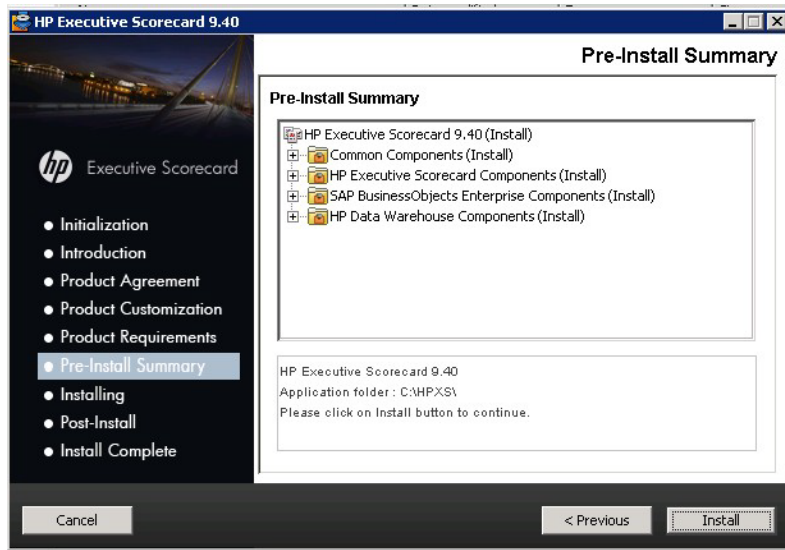
The wizard then runs a series of checks to validate system requirements.

If an installation check failed, you might be required to perform corrective action before you can run the installer. Certain checks can be corrected after a component has been installed.

8. On the **Install Checks** page, ensure that all the installation checks are successful, and then click **Next**.



9. On the **Pre-Install Summary** page, verify that the components you wish to install are listed, and then click **Install**. The Post-Install wizard window opens.



10. Copy the external sources folder : **<install drive>\<Installation directory>\agora\DataWarehouse\ExternalSources** to the new installation machine under: **<install drive>\<Installation directory>\agora\ DataWarehouse\**.

The file copying process starts. On completion, the Post-Install Wizard opens.

**Note:** If the server is not compliant with certain minimum system requirements such as free disk space, the install process does not begin.

## Steps for use with Extended Content

If you have extensions to out-of-the-box content packs:

**Note:** Make sure that every change that was done in the BODS workflows is synchronized with the content packs xml files. For information see the [HP Software Support](#) web site, or contact your HP Support representative.

Copy the following folders:

- **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction\\_CUSTOMIZATION**

to the new installation machine under:

**<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction\\_**

- **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source\\_CUSTOMIZATION**

to the new installation machine under:

**<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source\**

- **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities\\_CUSTOMIZATION**

to the new installation machine under:

**<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities\**

#### **If you created new content packs:**

**Note:** Make sure that every change that was done in the BODS workflows is synchronized with the content packs xml files. For information see the [HP Software Support](#) web site, or contact your HP Support representative.

Copy the content pack folder from:

**<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\**

to the new installation machine under:

**<install drive>\<Installation directory>\agora\ContentPacks\**

#### **If you have extensions to the FBI extractor:**

1. Back up the 9.4 fbi-web.war from the folder: **<install drive>\<Installation directory>\agora\apps.**
2. Open the file using Win RAR.
3. Copy the extension JAR to the WEB-INF\lib\ directory in the war file.
4. Overwrite the fbi-web.war file to **<install drive>\<Installation directory>\agora\apps** with the updated war file.
5. Open the fbi-web.war file to make sure that the new JAR is placed under the right path.
6. Resume the post install.

## Run the Post-Install Wizard

1. On the **Introduction** page of the Configuration Wizard, click **Next**.

**Note:** Make sure that in the following steps, you enter the details about the restored databases.

2. **Configure the Management Database:**

- a. In the **Management Database - Configure Management Settings** page, select **Connect to an existing database** and click **Next**.

**Management Database - Configure Management Database Settings** ?

Select how you want to configure the management database.

Create a new database

Connect to an existing database

<< Back   Next >>   Cancel

UI Element	Description
<b>Create a new database</b>	Select this option to create a new Management database.
<b>Connect to an existing database</b>	This option connects to an existing Management database.  Select this option when the Management database has already been created while installing a previous component or when performing an upgrade.

- b. On the **Management Database - Configure Management Database Connectivity Settings** page, enter the following, and then click **Next**.

**Management Database - Configure Management Database Connectivity Settings** ?

Enter connectivity and authentication parameters for the MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back    Next >>    Cancel



UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Management database.</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</p>
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Management database.</p> <p>It is recommended that you use the following database naming convention: <i>datasename_mng_</i></p> <p><b>Tip:</b> The database name must be the name of the restored database.</p>

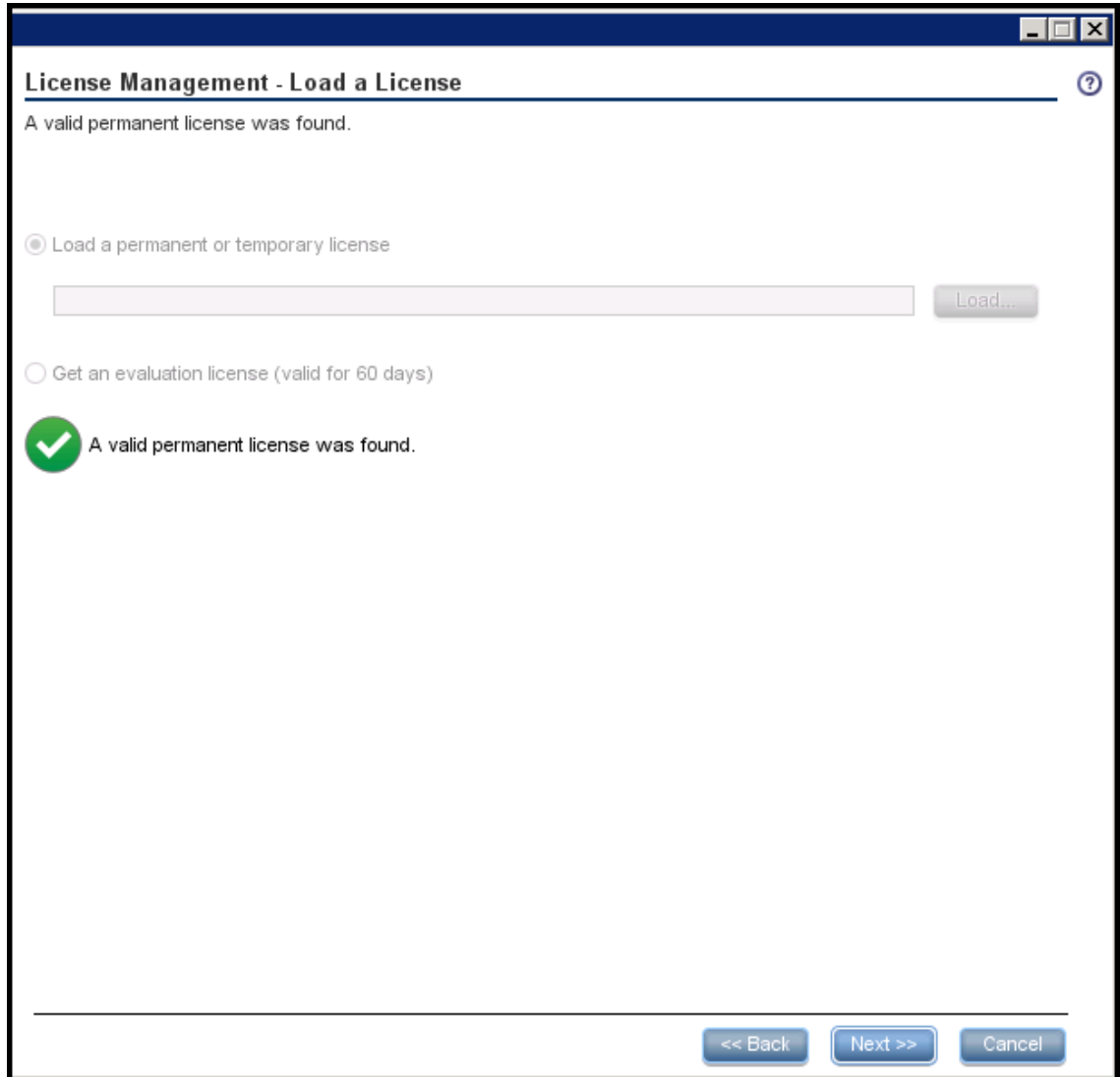
**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>○ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>○ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>○ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

- c. On the **Management Database Configuration Status** page, verify that the Management

database configuration was completed successfully, and then click **Next**.

- d. In the **Management Database - Load a License** page, check that a valid permanent license was found, and click **Next**.

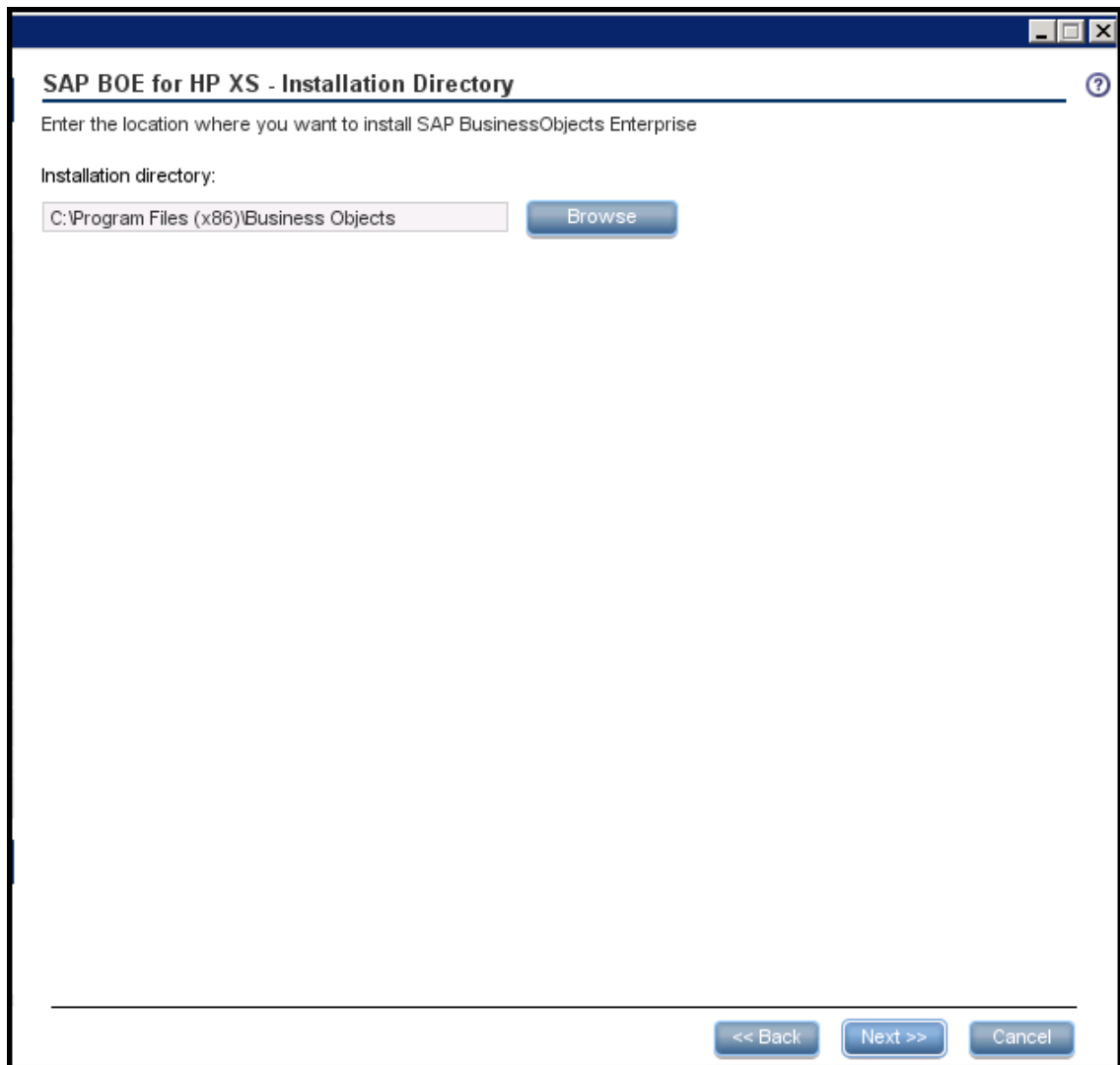


The wizard recognizes the license entered in the previous version.

## Configure SAP BusinessObjects Enterprise

1. In the **SAP BusinessObjects Enterprise for HP XS - Installation Directory** page, enter the path to the installation directory in the **Installation Directory** field, and click **Next**.
2. In the **SAP BusinessObjects Enterprise for HP XS - Configure Server Connectivity**

page, enter the relevant information, and click **Next**.



UI Element (A-Z)	Description
<b>Installation directory</b>	<p>The directory where SAP BusinessObjects Enterprise will be installed.</p> <p>Click <b>Next</b> to install SAP BusinessObjects Enterprise in the default installation directory.</p> <p>To select an alternate installation directory, click <b>Browse</b>, navigate to the required installation directory, select it, and proceed with the installation.</p>

3. On the **SAP BusinessObjects Enterprise for HP XS - Configure Server Connectivity**

page, enter the following, and then click **Next**.

**SAP BOE for HP XS - Configure Server Connectivity** ?

Enter the connection properties for the SAP BusinessObjects Enterprise server:

CMS port:

Administrator password:

Confirm administrator password:

Tomcat port:

<< Back   Next >>   Cancel

UI Element	Description
<b>CMS port</b>	The port number of the CMS listener. The default value is 6400. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> ) or from the Installation DVD).

UI Element	Description
<b>Administrator password</b>	<p>The SAP BusinessObjects Enterprise Administrator password. This password is used only to login to SAP BusinessObjects Enterprise.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>
<b>Confirm administrator password</b>	Confirm the Administrator password.
<b>Tomcat port</b>	<p>The port number of the Tomcat listener. The default value is 8080. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p>

4. In the **SAP BusinessObjects Enterprise for HP XS - Configure Central Management Server (CMS) Database** page, select Create a new CMS database, and click **Next**.
5. On the **SAP BusinessObjects Enterprise for HP XS - Configure Central Management Server (CMS) Database Connectivity Settings** page, if required, enter the following, and then click **Next**.

**SAP BOE for HP XS - Configure CMS Database Connectivity Settings** ?

Enter database configuration parameters:

\* Host name:

\* Port:

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back   Next >>   Cancel

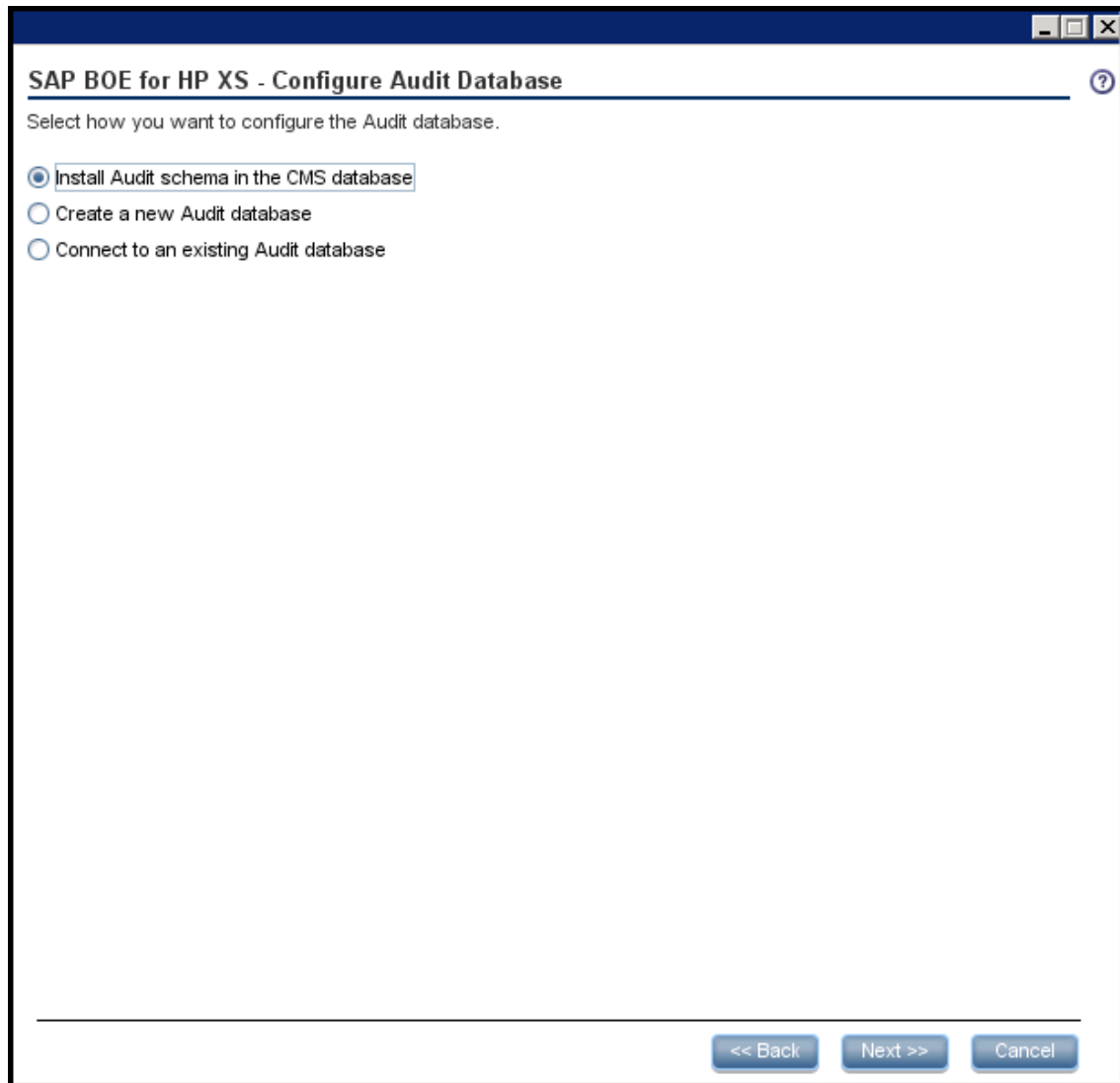
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL 2008 Server hosting the CMS database.  <b>Note:</b>  If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b> .

UI Element	Description
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> (<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the CMS database.</p> <p>It is recommended that you use the following database naming convention:</p> <p><i>databasename_cms</i></p>

**SQL Server authentication area:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

6. In the **SAP BusinessObjects Enterprise for HP XS - CMS Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.
7. On the **SAP BusinessObjects Enterprise for HP XS -Configure Audit Database** page, select **Install Audit schema in the CMS database**, and then click **Next**.



UI Element	Description
<b>Install Audit schema in the CMS database</b>	Installs the Audit database schema as part of the CMS database previously created.
<b>Create a new Audit database</b>	Creates a new Audit database.
<b>Connect to an existing Audit database</b>	Connect to an existing Audit database.

8. In the **SAP BusinessObjects Enterprise for HP XS - Audit Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.
9. In the **SAP BusinessObjects Enterprise for HP XS - Configuration Status** page, make sure that the operation completed successfully, and click **Next**.



- On the **Application Configuration - Configure Web Server Infrastructure Connectivity** page, enter the following, and then click **Next**.

**Application Configuration - Configure Web Server Infrastructure Connectivity** ?

Enter the following infrastructure configuration parameters.

**Data related configuration:**

\* Time zone:

**Web Server configuration:**

\* HTTP port:

\* HTTPS port:

**Business Objects enterprise:**

\* SSO shared secret:

\* Confirm SSO shared secret:

<< Back    Next >>    Cancel

**Data related configuration area:**

UI Element	Description
<b>Time Zone</b>	The Data Warehouse time zone used when consolidating the data extracted from the data sources.

**Web Server Configuration area:**

UI Element	Description
<b>HTTP port</b>	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).  <b>Note:</b> If you want to use the default HTTP port in the Executive Scorecard installation, you must ensure that port 80 is not in use by another process.
<b>HTTPS port</b>	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).

**Business Objects enterprise area:**

UI Element	Description
<b>SSO shared secret</b>	Enter the SSO shared secret.
<b>Confirm SSO shared secret</b>	Confirmation of the SSO shared secret.

11. On the **Application Configuration - Configure Infrastructure Connectivity** page, enter the following, and then click **Next**.

**Application Configuration - Configure Infrastructure Connectivity** ?

Enter connectivity and authentication parameters:

\* Administrator user name:

\* Administrator password:

\* Confirm Administrator password:

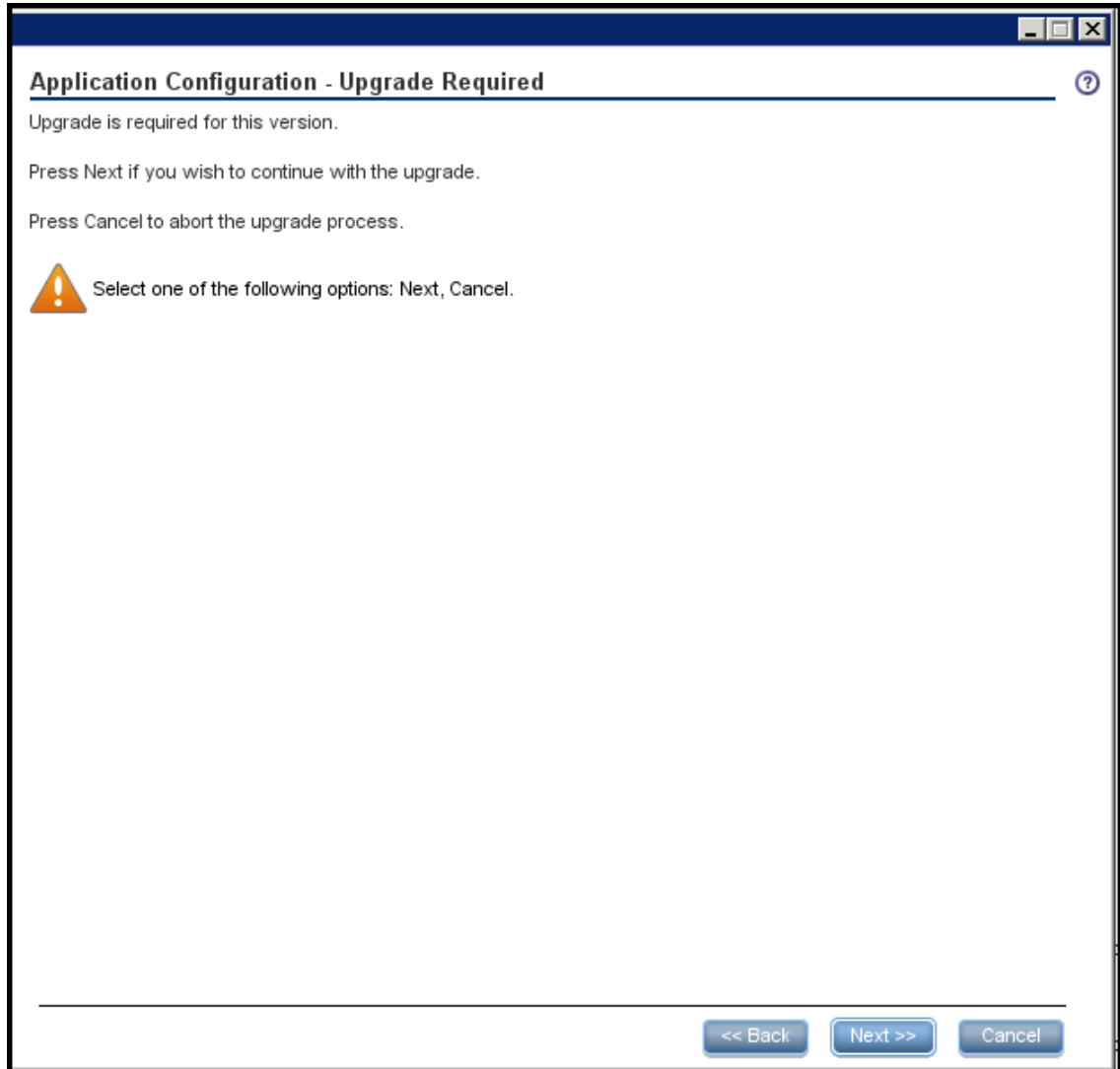
<< Back   Next >>   Cancel

UI Element	Description
<b>Administrator user name</b>	The user name for the administrator. Use this user to log into Executive Scorecard for the first time.

UI Element	Description
<b>Administrator password</b>	The password for the administrator.  <b>Note:</b> <ul style="list-style-type: none"><li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li><li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li><li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li></ul>
<b>Confirm Administrator password</b>	Confirmation of the administrator password.

# Upgrade Configuration

1. In the **Management Database - Upgrade required** page, click **Next** to perform the upgrade.



2. In the **Management Database - Configure Result Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the restored 9.31 Result/DATA Schema, and click **Next**.

**Application Configuration - Configure Result DB Connectivity Settings for Upgrade** ?

Enter connectivity and authentication parameters for the Result MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back    Next >>    Cancel

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Result database.</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</p>

UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Result database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention:  <i>datasenname_res_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

3. In the **Management Database - Configure Target Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the restored 9.31 Target Schema, and click **Next**.

**Application Configuration - Configure Target DB Connectivity Settings for Upgrade** ?

Enter connectivity and authentication parameters for the Target MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

**Enter connectivity and authentication parameters for the Target MS SQL Server database:**

UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Target database.  <b>Note:</b>  If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b> .



UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Target database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention: <i>database_name_trg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

7. In the **Management Database - Configure Staging Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the duplicated 9.03 Staging Schema, and click **Next**.

**Application Configuration - Configure Staging DB Connectivity Settings for Upgrade** ?

Enter connectivity and authentication parameters for the Staging MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back    Next >>    Cancel

**Enter connectivity and authentication parameters for the Staging MS SQL Server database:**

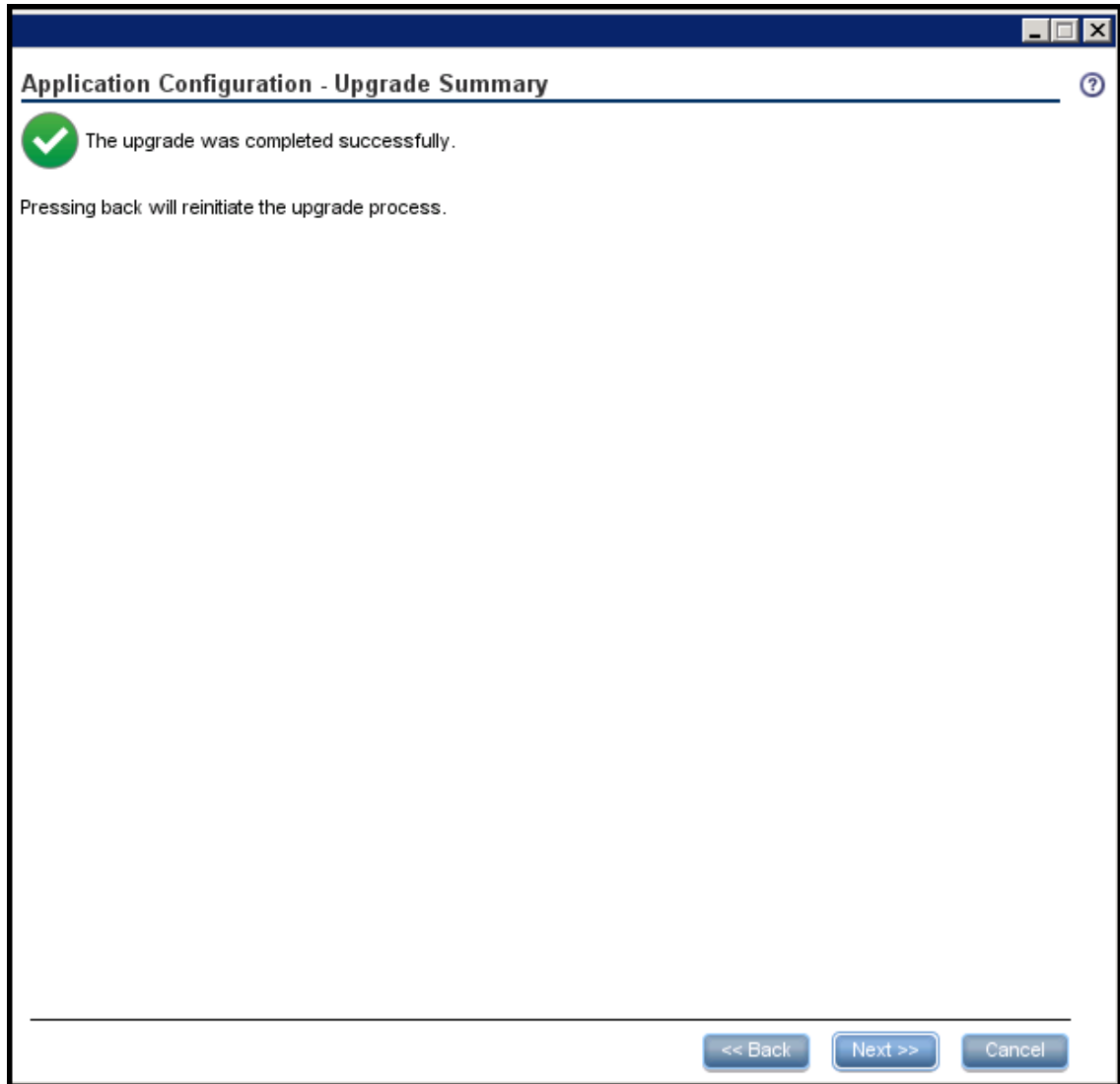
UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Staging database.</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</p>

UI Element	Description
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> (<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Staging database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention:  <i>dbname_stg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

4. In the **Management Database - Upgrade Summary** page, check that the upgrade was completed successfully, and click **Next**.



5. In the **Data Warehouse - SAP BusinessObjects Data Services for HP XS** page, enter the relevant information, and click **Next**.

**Data Warehouse - SAP BusinessObjects Data Services for HP XS** ?

Enter database connectivity and authentication details

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication**

\* Login Name (requires admin permissions):

\* Password:


**Database login authentication**

\* New Login Name:

\* Password:

\* Confirm Password:

Installation directory:

 Installation of SAP BusinessObjects Data Services for HP XS may take 10-20 minutes

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the SAP BusinessObjects Data Services database.</p> <ul style="list-style-type: none"> <li>■ Do not use localhost as the host name.</li> <li>■ The sum of the number of characters of the following names must not exceed 65:               <ul style="list-style-type: none"> <li>○ The Host name FQDN</li> <li>○ The SAP BusinessObjects Data Services database name</li> <li>○ The number of the server port.</li> <li>○ The Login Name.</li> </ul> </li> </ul> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</p>
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the SAP BusinessObjects Data Services database.</p> <p>It is recommended that you use the following database naming convention:</p> <p><i>databasename_bods</i></p>

**SQL Server authentication area:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.</p>

UI Element	Description
<b>Password</b>	<p>The password of the specified login.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

**Database login authentication area:**

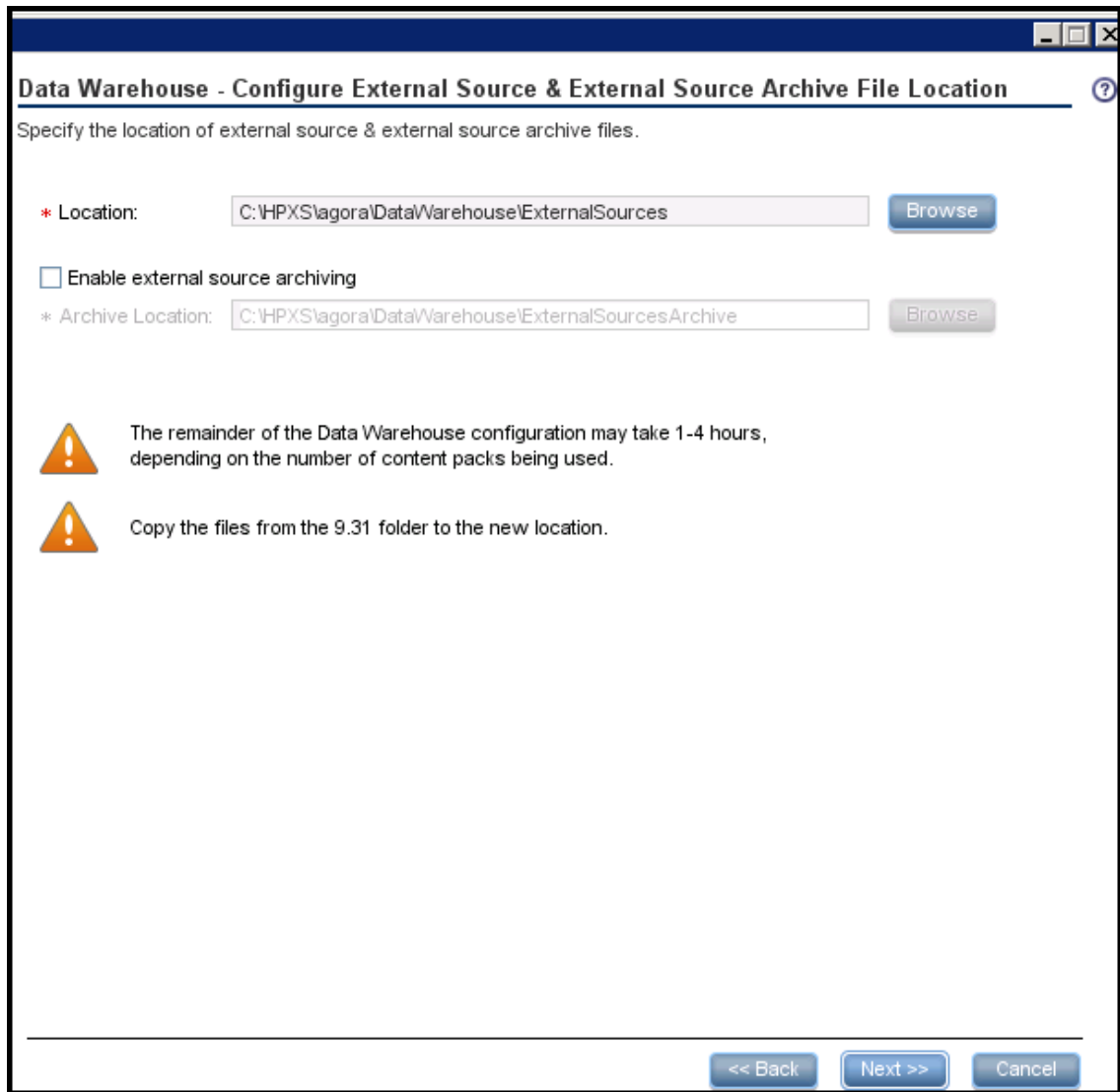
UI Element	Description
<b>New Login name</b>	<p>A new MS SQL login created for the SAP BusinessObjects Data Services database.</p> <p>A SAP BusinessObjects Data Services database user account with the same name is automatically created.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The Login Name can only comprise alphanumeric characters and if required an underscore.</li> <li>■ Do not use XS as a new database login name because the XS user name is already used internally.</li> </ul>
<b>Password</b>	<p>The password for the new login.</p> <p>The same password is also applied to the database user account.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The password can comprise alphanumeric characters and an underscore.</li> <li>■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.</li> </ul>
<b>Confirm Password</b>	Confirmation of the password for the new login.

**Installation directory area:**

UI Element	Description
<b>Installation directory</b>	<p>The location where you want to install SAP BusinessObjects Data Services.</p> <p>The maximum allowable path length is 69 characters. In addition, the Installation directory field does not support multi-byte characters. To install the software on a system with a multi-byte locale, you must specify the installation directory with single-byte characters or use the default location.</p> <p>To run the Designer, a user requires both read and write access to the installation directory.</p>

6. In the **Data Warehouse - Configure External Source & External Source Archive File Location** page, enter the relevant information, and click **Next**.





**Specify the external source archiving folder:**

UI Element	Description
<b>Enable external source archiving folder</b>	Select to start archiving external data source data files.
<b>Location</b>	Specify where you want to archive the external data source data files.  <div style="background-color: #e0e0e0; padding: 5px;"> <p><b>Note:</b> Because archiving data files can be memory intensive, it is recommended to archive to a dedicated separate logical drive.</p> </div>

7. In the **Data Warehouse - Configuration Status** page, make sure that the operation completed successfully, and click **Next**.
8. In the **Executive Scorecard - Executive Scorecard Summary** page, make sure that the operation completed successfully, and click **Next**.
9. In the **Financial Planning and Analysis - Installing FPA** page, click **Next**.
10. In the **Financial Planning and Analysis - Summary** page, make sure that the operation completed successfully, and click **Next**.
11. In the **Summary** page, make sure that the operation completed successfully, and click **Finish**.
12. 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 has 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*.

13. You can now proceed with "[Additional Steps](#)" on page 91.

# Upgrade to 9.4 in a Distributed Environment

To upgrade to version 9.4 when you had a distributed configuration in 9.31, use the following procedure:

1. ["Prerequisites" below](#)
2. ["Upgrade to 9.4 in a Distributed Environment" above](#)
3. ["Install BusinessObjects Enterprise" on page 46](#)
4. ["Install Data Warehouse on a Separate Server" on page 49](#)
5. ["Install Executive Scorecard on a Separate Server" on page 75](#)

## Prerequisites

1. It is recommended to duplicate all the 9.31 schemas before starting the upgrade procedure in order to have both 9.31 and 9.4 up and running after the upgrade. To duplicate a schema in MSSQL, right-click the schema, select **Tasks > Back Up**. In the Back Up Database <file\_name> dialog box, enter the name of the back up file in the **Name** field in the **Backup Set** area, select where you want to save the duplicate in the **Destination** area, and click OK. Make sure that the back up is successful.
2. **Backups:**
  - a. Make sure you have enough disk space to backup all the Data Warehouse databases.
  - b. Back up the Staging and Target databases using SQL Server 2008 Studio.
  - c. Back up the SAP® Business Objects database.
  - d. Back up the SAP BusinessObjects Data Services database for disaster recovery purposes.
  - e. Back up the 9.31 **version.txt** file for disaster recovery purposes.
  - f. Back up the database Logins and that each user's status is enabled and not locked.
  - g. Back up the 9.31 <HPXS folder>\agora\DataWarehouse\ExternalSources folder before starting the upgrade.
3. Make sure that the Management and Result databases are located on the same server.
4. **Moving to unicode:**

- Due to the move to unicode, it is recommended to backup the Management and Result databases (as explained in ["Upgrade to 9.4 in a Distributed Environment" on the 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.
5. **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.
  6. **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.
  7. **Installation Settings:** Ensure that you have the relevant installation settings required for the installation. For details, see the *IT Executive Scorecard Support Matrix*.
  8. It is recommended to install the 9.4 version on a new server in order to have both 9.31 and 9.4 up and running after the upgrade.
  9. Restore the Management, Result, Target, and Staging databases, right-click **Database** in the relevant SQL server and select **Restore Database**. In the Restore Database dialog box, select **From device**, and click the button. In the Specify Backup dialog box, click **Add**. Select the duplicate file, and click **OK**.
  10. Install the following on the Data Warehouse server, before you start the component installation:
    - a. SQLCMD utility as follows:
      - i. On the Microsoft SQL Server 2008 Enterprise Edition with SP 2 CD, run Setup.

**Note:**

- If you did not previously install Microsoft .NET Framework 3.5.1 on your server, you may be prompted to install it. When installing Microsoft .NET Framework 3.5.1, make sure that WCF Activation is unchecked.
- When installing the SQLCMD utility, make sure that the path to the utility is not enclosed in quotes (") and does not include quotes as this might cause the installation of Data Warehouse to fail.

- ii. Select **New SQL Server Standalone Installation**.

- iii. On the Feature Select screen, select **Management Tools - Basic**, unselect **Management Tools - Complete**, and finish the Wizard.

**Note:** If you want to use the default HTTP port in the Executive Scorecard installation, ensure that port 80 is available after the installation of the SQLCMD tool. For more information about the ports, see the Support Matrix document available from the [Support Site](http://h20230.www2.hp.com/selfsolve/manuals) (<http://h20230.www2.hp.com/selfsolve/manuals> or from the Installation DVD).

11. 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.
12. **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.
  13. **Browsers.** It is recommended to close all browsers before starting the upgrade.
  14. If you are using CAPs and an upgrade from one server to another server (upgrade side-by-side):
    - a. Copy the <CAP\_name>.ZIP files from: **<installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\load** and **<installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\loaded** folders located on the source server to the same folders on the target server.
    - b. If you work with localized CAP files, they should be copied at the same time.
  15. If your upgrade to XS 9.31 was configured with LDAP, copy the external-ldap.properties file from: **<Installation Directory>\agora\glassfish\glassfish\domains\BTOA\config\conf** in the 9.31 environment to the same location in the just upgraded 9.4.

## Backup and Restore All Databases

The database upgrade process requires you to clone the current production database (on the same machine) and to implement the upgrade process on the cloned restored database. Make sure the databases you restore are up to date.

### Before performing backup and restore make sure:

- The database server has enough disk space to contain both the backup files and the cloned database.
- The directory structure and drives for the cloned database exist on the server.
- The source database names do not exist in the destination database. If the names do exist, they will be overwritten.

### To backup and restore the databases:

**Note:** Data Warehouse only supports Microsoft SQL Server 2008 R2, therefore the backup and restore process is only supported for this version.

1. Backup the source Staging, Target, Management, and Results databases using SQL Server 2008 Studio. Make sure that the backup file names are unique and that they do not exist on the destination database server.
2. Restore the backup of the source databases on the destination server using new names. make a note of the restored names to be used during the upgrade.

**Note:** You must also backup the SAP BusinessObjects Data Services database for disaster recovery purposes.

## Install BusinessObjects Enterprise

SAP BusinessObjects Enterprise must be the first component you install.

**Note:** Virus scanning software may interfere with the installation of SAP BusinessObjects Enterprise. Turn off all virus scanning software before installing.

1. Create a Schema in the DB server.
2. In the DB server, if you use a 64 bit operating system, run the command:  
**C:\Windows\SysWOW64\odbcad32.exe** and do not use the option: **go to Control Panel > Administrative Tools > Data Sources (ODBC)**. You can use this option on 64 bit OS.

3. In the **ODBC Data Source Administrator**, click the **System DNS** tab, and the **Add** button to add related Data Source:
4. In the **Create New Data Source** page that opens, select the SQL Server driver and click **Finish**.
5. In the **Create a New Data Source to SQL Server** page, enter the information to create the ODBC data source for your BOE database, and click **Next**.
6. In the next **Create a New Data Source to SQL Server** page, select **the With SQL Server authentication using a login ID and password entered by the user**, select the **Connect to SQL Server to obtain default settings for the additional configuration options** and enter the **Login ID** and **Password**, **Use ANSI quoted identifiers** and **Use ANSI nulls**, **paddings** and **warnings**. Click **Next**.
7. In the next **Create a New Data Source to SQL Server** page, select the Schema you created before and select the **Change the default database to** option, and select the schema you created previously. Click **Next**.
8. In the Microsoft SQL Server DSN Configuration page, select **Perform translation for character data**, and click **Finish**.
9. In the **ODBC Microsoft SQL Server Setup** page click **Test Data Source**, and wait for the message **TESTS COMPLETED SUCCESSFULLY!**

#### **Install BusinessObjects Enterprise:**

1. Close all Windows before you start the installation process.
2. Insert the XS media into the CD/DVD drive. The installation wizard opens.

**Caution:** The CD/DVD must remain in the drive until you complete the Executive Scorecard Configuration Wizard.

**Note:** If the installation wizard does not start automatically, run the file: **<DVD\_ROOT>\Windows\_Setup\packages\boe\_installer\setup.exe**

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

3. In the **BusinessObjects Enterprise XI 3.1 Setup - User Information** page, insert the license key in the **Product Keycode** field. Click **Next**.
4. In the **BusinessObjects Enterprise XI 3.1 Setup - Install Type** page, select **New, Use an existing database server**, and **Enable servers upon installation**. Click **Next**.

5. In the **BusinessObjects Enterprise XI 3.1 Setup - Server Components Configuration** page, enter **6400** in the **CMS port** field and select **Configure the BusinessObjects Enterprise Administrator at a later time**. Click **Next**.
6. In the **BusinessObjects Enterprise XI 3.1 Setup - Server Intelligence Agent** page, enter the name of the node in the **Node Name** field, and the port number (**6410**) in the **Port** field. Click **Next**.
7. In the **BusinessObjects Enterprise XI 3.1 Setup - CMS Database Information** page, select **SQL Server (ODBC)** in the **CMS Database** area in the **Select existing CMS database** dropdown.
8. Click **Browse** to select the relevant data source in the **Data Source Name** field and enter the password in the **Password** field, in the SQL Server Logon dialog box. Click **OK**.
9. In the **BusinessObjects Enterprise XI 3.1 Setup page - Select Web Application Server**, select **Java Web Application Server** and **Install Tomcat application server and deploy to it**. Click **Next**.
10. Click **Next** using all the default ports.

**Note:** The **BOWInstall\_0.log** Installation log file is saved in the **temp** folder.

11. To login to BusinessObjects Enterprise after installation, use the following URL:  
**http://<server name>:8080/CmcApp**  
User: administrator, Password: (empty).
12. In the **BusinessObjects Enterprise XI 3.1 Setup - Automatically Re-Deploy Web Applications?** page, select **Yes, automatically re-deploy the web applications**. Click **Next**.
13. As you have already installed Tomcat, in the **BusinessObjects Enterprise XI 3.1 Setup - Configure Web Application Server** page, enter the server instance in the **Server Instance** field, the service name in the **Service Name** field, and the path to the Tomcat in the Application Server Installation Directory field. Click **Next** to install.

#### **Configure the JDBC driver:**

1. Copy the sqljdbc.jar into **<BOE install folder>\common\4.0\java\lib\external** directory.
2. In the **<BOE install folder>\BusinessObjects Enterprise 12.0\win32\_x86\dataAccess\connectionServer\jdbc\jdbc.sbo** file add the following lines to the **<JDBCdriver>** section of MS SQL Server 2005 configuration:

```
<ClassPath>  
  <Path>C:\Program Files (x86)\Business
```



```
Objects\common\4.0\java\lib\external\sqljdbc.jar</Path>  
</ClassPath>
```

3. In the <BOE install folder>\common\4.0\java\CRConfig.xml file, add the following in the <Classpath> section of <DataDriverCommon>:

```
<BOE install folder>\common\4.0\java\lib\external\sqljdbc.jar;
```

## Install Data Warehouse on a Separate Server

**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.

1. Ensure that you have the relevant installation settings required for the installation as described in the "[Installation Checklists](#)".
2. Close all Windows before you start the installation process.
3. Insert the XS media into the CD/DVD drive. The installation wizard opens.

**Caution:** The CD/DVD must remain in the drive until you complete the Executive Scorecard Configuration Wizard.

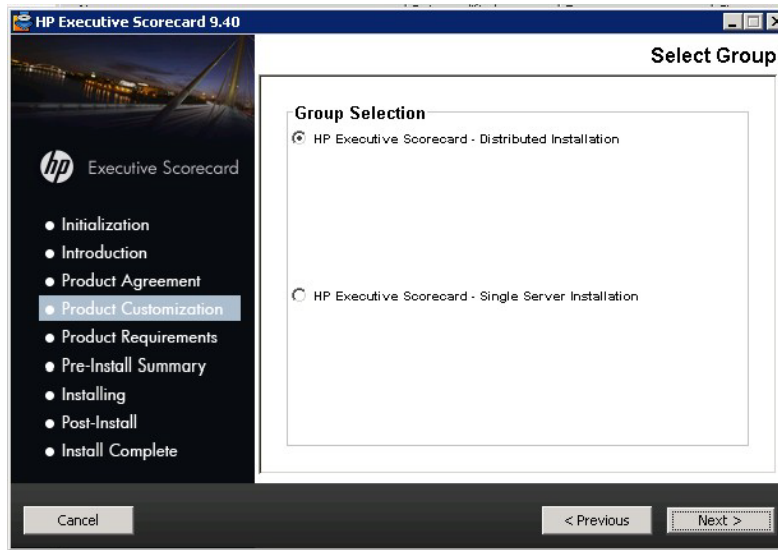
**Note:** If the installation wizard does not start automatically, run the file: <DVD\_ROOT>\Windows\_Setup\HPXS\_9.30\_setup.exe

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

#### 4. Installation Section of Wizard

Follow the prompts until you get to the **Select Group** page.

5. On the **Select Group** page, select the type of installation you are performing: **Distributed Installation**, and then click **Next**.



6. If necessary, on the **Select Features** page, select the component you are installing on this server, and then click **Next**.

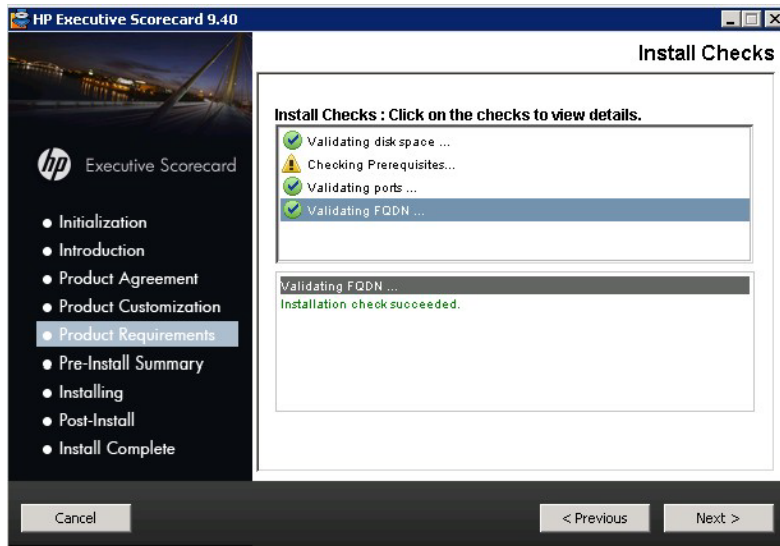
**Common Components** are automatically selected and installed with each component.

7. On the **Choose the folders** page, click **Next** to accept the default application folder, or **Browse** to navigate to and then select a new application folder location.

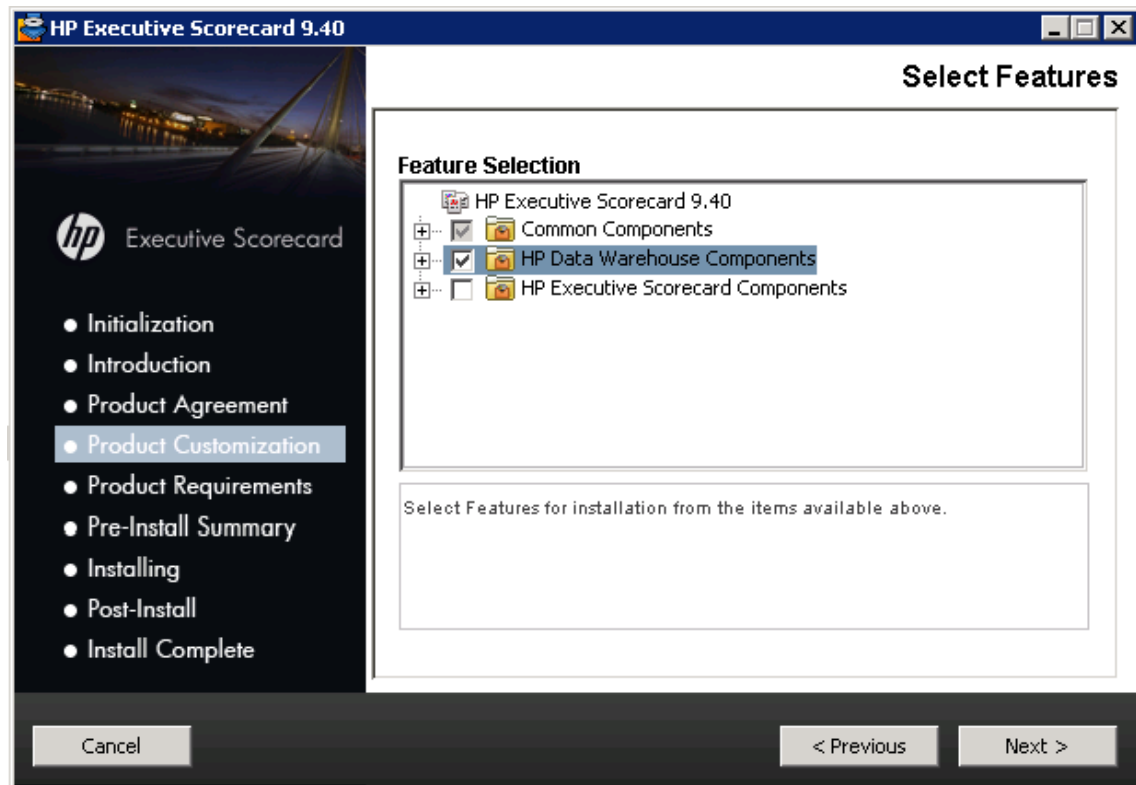
**Note:** If you enter a new application folder name, it cannot contain embedded spaces. For example a folder with a name **HP XS** is invalid.

The wizard then runs a series of checks to validate system requirements. If an installation check failed, you might be required to perform corrective action before you can run the installer. Certain checks can be corrected after a component has been installed.

8. On the **Install Checks** page, ensure that all the installation checks are successful, and then click **Next**.



9. On the **Pre-Install Summary** page, verify that the components you wish to install are listed, and then click **Install**. The Post-Install wizard window opens.



10. Copy the external sources folder : **<install drive>\<Installation directory>\agora\DataWarehouse\ExternalSources** to the new installation machine under: **<install drive>\<Installation directory>\agora\ DataWarehouse\**.

The file copying process starts. On completion, the Post-Install Wizard opens.

**Note:** If the server is not compliant with certain minimum system requirements such as free disk space, the install process does not begin.

## Steps for use with Extended Content

If you have extensions to out-of-the-box content packs:

**Note:** Make sure that every change that was done in the BODS workflows is synchronized with the content packs xml files. For information see the [HP Software Support](#) web site, or contact your HP Support representative.

Copy the following folders:

- `<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction\_CUSTOMIZATION`

to the new installation machine under:

`<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction\_`

- `<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source\_CUSTOMIZATION`

to the new installation machine under:

`<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source\`

- `<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities\_CUSTOMIZATION`

to the new installation machine under:

`<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities\`

If you created new content packs:

**Note:** Make sure that every change that was done in the BODS workflows is synchronized with the content packs xml files. For information see the [HP Software Support](#) web site, or contact your HP Support representative.

Copy the content pack folder from:

`<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\`

To the new installation machine under:

**<install drive>\<Installation directory>\agora\ContentPacks\**

**If you have extensions to the FBI extractor:**

1. Back up the 9.4 fbi-web.war from the folder: **<install drive>\<Installation directory>\agora\apps.**
2. Open the file using Win RAR.
3. Copy the extension JAR to the WEB-INF\lib\ directory in the war file.
4. Overwrite the fbi-web.war file to **<install drive>\<Installation directory>\agora\apps** with the updated war file.
5. Open the fbi-web.war file to make sure that the new JAR is placed under the right path.
6. Resume the post install.

**Post-Install Wizard - Management Database Section**

1. On the **Introduction** page, click **Next**.
2. On the **Management Database - Configure Management Database Settings** page, select Connect to existing, and then click **Next**.
3. On the **Management Database - Configure Management Database Connectivity Settings** page, enter the information and then click **Next**.

**Management Database - Configure Management Database Connectivity Settings** ?

Enter connectivity and authentication parameters for the MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back   Next >>   Cancel

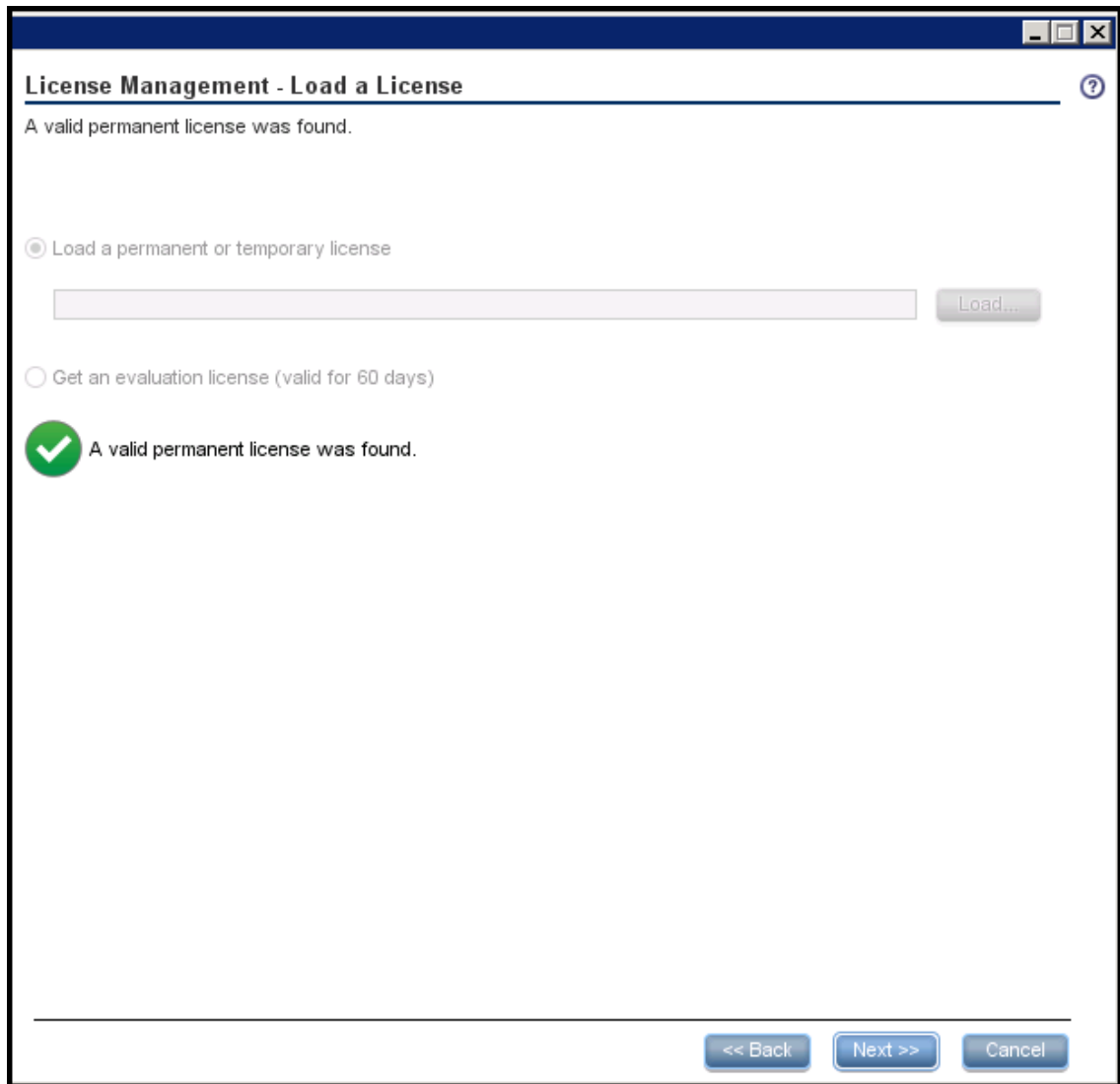
UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Management database.  <b>Note:</b>  If you work with the Named Instance feature, format Host Name as follows: <host_name>\<instance_name>.

UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Management database.</p> <p>It is recommended that you use the following database naming convention: <i>datasenname_mng</i></p> <p><b>Tip:</b> Make note of the database name, as it may be needed when installing other components.</p>

**SQL Server authentication:**

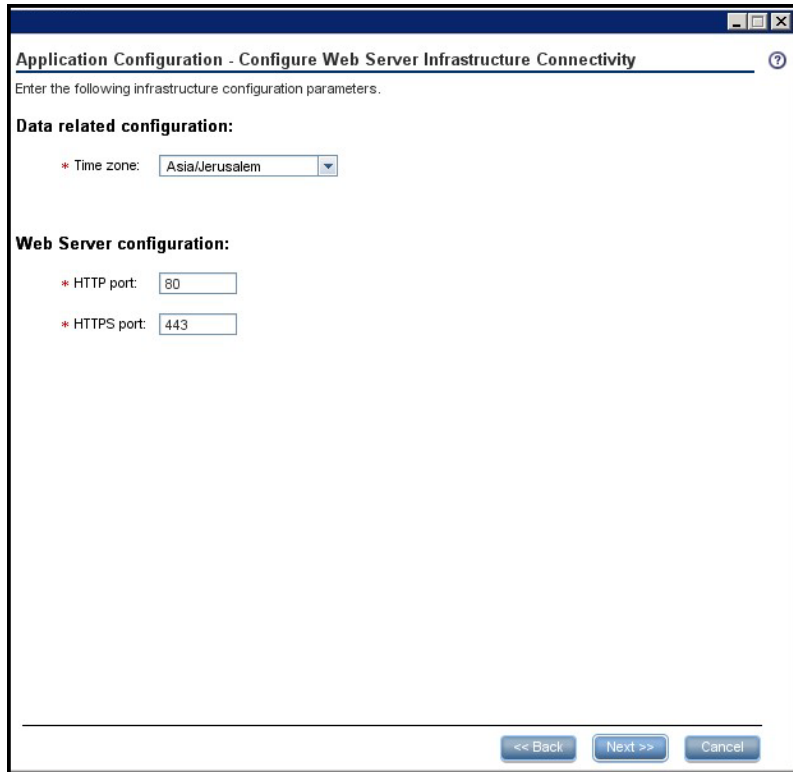
UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

4. On the **Management Database - Management Configuration Status** page, verify that the operation completed successfully. and then click **Next**.
5. In the **Management Database - Load a License** page, check that a valid permanent license was found, and click **Next**.



6. The wizard recognizes the license entered in the previous version.
7. On the **Application Configuration - Configure Web Server Infrastructure Connectivity** page, enter the information and then click **Next**.





**Data related configuration area:**

UI Element	Description
<b>Time Zone</b>	The Data Warehouse time zone used when consolidating the data extracted from the data sources.

**Web Server Configuration area:**

UI Element	Description
<b>HTTP port</b>	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).  <b>Note:</b> If you want to use the default HTTP port in the Executive Scorecard installation, you must ensure that port 80 is not in use by another process.
<b>HTTPS port</b>	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).

- On the **Application Configuration - Configure Infrastructure Connectivity** page, enter the

information and then click **Next**.

**Application Configuration - Configure Infrastructure Connectivity** ?

Enter connectivity and authentication parameters:

\* Administrator user name:

\* Administrator password:

\* Confirm Administrator password:

<< Back   Next >>   Cancel

UI Element	Description
<b>Administrator user name</b>	The user name for the administrator. Use this user to log into Executive Scorecard for the first time.

UI Element	Description
<b>Administrator password</b>	The password for the administrator.  <b>Note:</b> <ul style="list-style-type: none"><li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li><li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li><li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li></ul>
<b>Confirm Administrator password</b>	Confirmation of the administrator password.

9. On the **Application Configuration - Configure Infrastructure Connectivity** page, enter the information and then click **Next**.

**Application Configuration - Configure Infrastructure Connectivity** ?

Enter connectivity and authentication parameters for the SAP BusinessObjects Enterprise CMS server:

\* Host name:

\* CMS port:

\* Administrator user name:

\* Administrator password:

\* Confirm Administrator password:

\* SSO shared secret:

\* Confirm SSO shared secret:

\* Authentication scheme:

\* Tomcat port:

The next step may take a few minutes.

It is recommended that in your SAP BusinessObjects Web Intelligence Processing Server, you set the Maximum Documents per User property to 10, and the Maximum Connections property to at least 200.

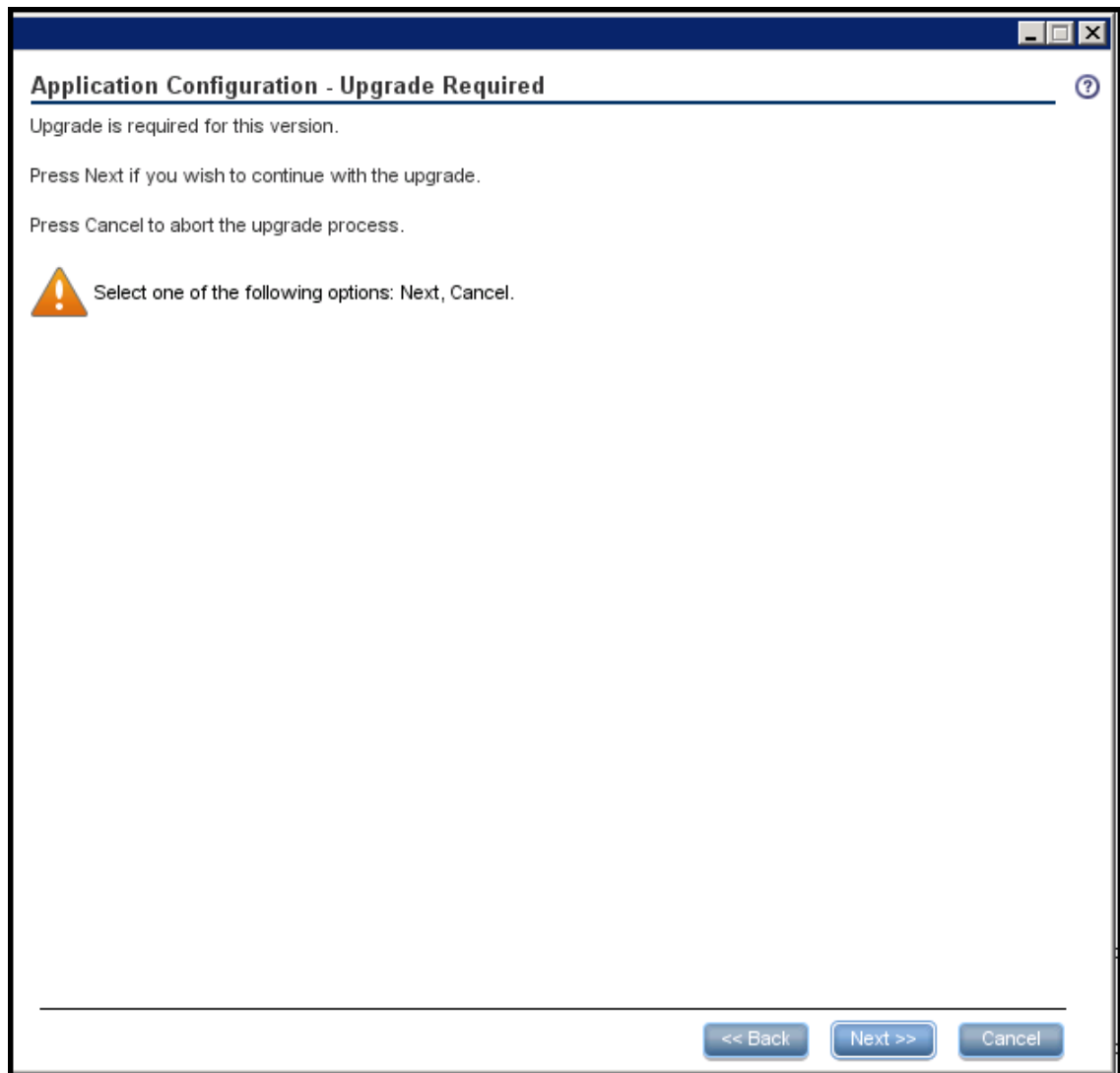
<< Back   Next >>   Cancel

UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the SAP BusinessObjects Enterprise XI 3.1 server.
<b>CMS Port</b>	The port number used by the CMS listener. The default value when SAP BusinessObjects Enterprise is installed as part of the Executive Scorecard installation, is 6400.
<b>Administrator User name</b>	The SAP BusinessObjects Enterprise XI 3.1 administrator user name.  <b>Note:</b> This user name and the following password are used when logging in to the SAP BusinessObjects Enterprise applications.
<b>Administrator password</b>	The SAP BusinessObjects Enterprise XI 3.1 administrator password.

UI Element	Description
<b>Confirm Administrator password</b>	Confirmation of the administrator password.
<b>SSO shared secret</b>	The shared secret that is used to authenticate communications with the SAP BusinessObjects Enterprise XI 3.1 server. If trusted authentication is configured, the shared secret entered is validated against the SAP BusinessObjects Enterprise XI 3.1 server. If trusted authentication is not configured, the entered shared secret is configured on the SAP BusinessObjects Enterprise XI 3.1 server.
<b>Confirm SSO shared secret</b>	Confirmation of the SSO shared secret.
<b>Authentication scheme</b>	Select one of the following SAP BusinessObjects Enterprise XI 3.1 authentication schemes that contains the administrator account: <ul style="list-style-type: none"> <li>■ <b>secEnterprise</b> - When the SAP BusinessObjects administrator account is a native Enterprise account.</li> <li>■ <b>secLDAP</b> - When the SAP BusinessObjects administrator account originates from an LDAP user database.</li> </ul>
<b>Tomcat Port</b>	The port used by the Tomcat listener. The default value is 8080. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).

### Upgrade Configuration for DWH

1. In the **Management Database - Upgrade required** page, click **Next** to perform the upgrade.



2. In the **Management Database - Configure Result Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the restored 9.31 Result/DATA Schema, and click **Next**.

**Application Configuration - Configure Result DB Connectivity Settings for Upgrade** ?

Enter connectivity and authentication parameters for the Result MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back    Next >>    Cancel

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Result database.</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</p>

UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Result database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention:  <i>databasename_res_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

3. In the **Management Database - Configure Target Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the restored 9.31 Target Schema, and click **Next**.



**Application Configuration - Configure Target DB Connectivity Settings for Upgrade** ?

Enter connectivity and authentication parameters for the Target MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back    Next >>    Cancel

**Enter connectivity and authentication parameters for the Target MS SQL Server database:**

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Target database.</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b>.</p>

UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Target database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention:  <i>database_name_trg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

7. In the **Management Database - Configure Staging Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the duplicated 9.03 Staging Schema, and click **Next**.

**Application Configuration - Configure Staging DB Connectivity Settings for Upgrade** ?

Enter connectivity and authentication parameters for the Staging MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back   Next >>   Cancel

**Enter connectivity and authentication parameters for the Staging MS SQL Server database:**

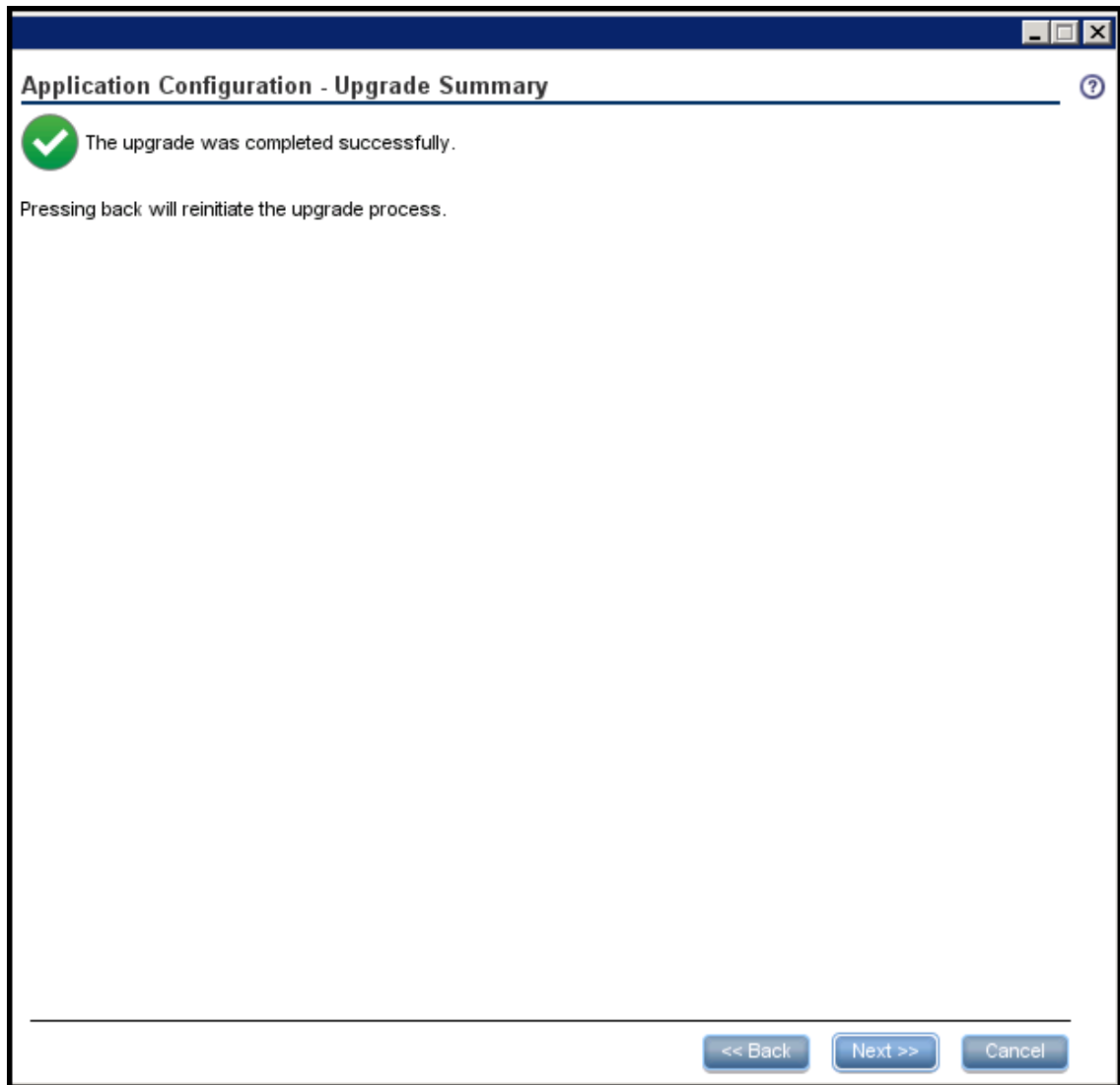
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Staging database.  <b>Note:</b>  If you work with the Named Instance feature, format Host Name as follows: <host_name>\<instance_name>.

UI Element	Description
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> (<a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a>) or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Staging database that was restored earlier.</p> <p>It is recommended that you use the following database naming convention:  <i>dbname_stg_upg</i></p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

4. In the **Management Database - Upgrade Summary** page, check that the upgrade was completed successfully, and click **Next**.



5. In the **Data Warehouse - SAP BusinessObjects Data Services for HP XS** page, enter the relevant information, and click **Next**.

**Data Warehouse - SAP BusinessObjects Data Services for HP XS** ?

Enter database connectivity and authentication details

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication**

\* Login Name (requires admin permissions):

\* Password:


**Database login authentication**

\* New Login Name:

\* Password:

\* Confirm Password:

Installation directory:

 Installation of SAP BusinessObjects Data Services for HP XS may take 10-20 minutes

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the SAP BusinessObjects Data Services database.</p> <ul style="list-style-type: none"> <li>■ Do not use localhost as the host name.</li> <li>■ The sum of the number of characters of the following names must not exceed 65:               <ul style="list-style-type: none"> <li>○ The Host name FQDN</li> <li>○ The SAP BusinessObjects Data Services database name</li> <li>○ The number of the server port.</li> <li>○ The Login Name.</li> </ul> </li> </ul> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: <code>&lt;host_name&gt;\&lt;instance_name&gt;</code>.</p>
<b>Port</b>	<p>The port of the MS SQL server listener. The default port is 1433. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the SAP BusinessObjects Data Services database.</p> <p>It is recommended that you use the following database naming convention:</p> <p><i>databasename_bods</i></p>

**SQL Server authentication area:**

UI Element	Description
<b>Login Name</b>	<p>The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.</p>

UI Element	Description
<b>Password</b>	<p>The password of the specified login.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

**Database login authentication area:**

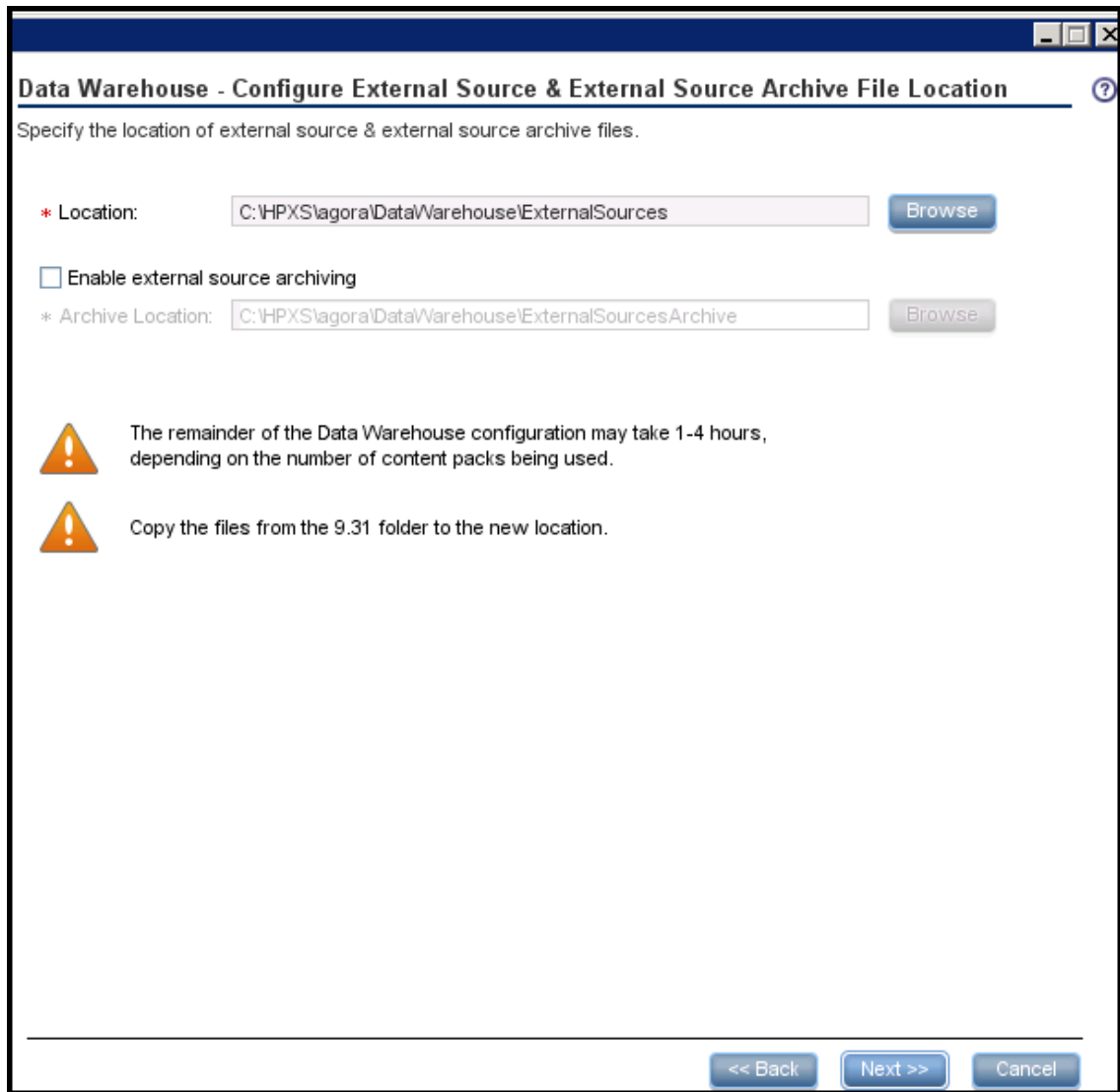
UI Element	Description
<b>New Login name</b>	<p>A new MS SQL login created for the SAP BusinessObjects Data Services database.</p> <p>A SAP BusinessObjects Data Services database user account with the same name is automatically created.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The Login Name can only comprise alphanumeric characters and if required an underscore.</li> <li>■ Do not use XS as a new database login name because the XS user name is already used internally.</li> </ul>
<b>Password</b>	<p>The password for the new login.</p> <p>The same password is also applied to the database user account.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The password can comprise alphanumeric characters and an underscore.</li> <li>■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.</li> </ul>
<b>Confirm Password</b>	<p>Confirmation of the password for the new login.</p>

**Installation directory area:**



UI Element	Description
<b>Installation directory</b>	<p>The location where you want to install SAP BusinessObjects Data Services.</p> <p>The maximum allowable path length is 69 characters. In addition, the Installation directory field does not support multi-byte characters. To install the software on a system with a multi-byte locale, you must specify the installation directory with single-byte characters or use the default location.</p> <p>To run the Designer, a user requires both read and write access to the installation directory.</p>

6. In the **Data Warehouse - Configure External Source & External Source Archive File Location** page, enter the relevant information, and click **Next**.



**Specify the external source archiving folder:**

UI Element	Description
<b>Enable external source archiving folder</b>	Select to start archiving external data source data files.
<b>Location</b>	Specify where you want to archive the external data source data files.  <div style="background-color: #e0e0e0; padding: 5px;"><b>Note:</b> Because archiving data files can be memory intensive, it is recommended to archive to a dedicated separate logical drive.</div>

7. In the **Data Warehouse - Configuration Status** page, make sure that the operation

completed successfully, and click **Next**.

## Install Executive Scorecard on a Separate Server

**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.

1. Ensure that you have the relevant installation settings required for the installation as described in the "[Installation Checklists](#)".
2. Close all Windows before you start the installation process.
3. Insert the XS media into the CD/DVD drive. The installation wizard opens.

**Caution:** The CD/DVD must remain in the drive until you complete the Executive Scorecard Configuration Wizard.

**Note:** If the installation wizard does not start automatically, run the file: <DVD\_ROOT>\Windows\_Setup\HPXS\_9.4\_setup.exe

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

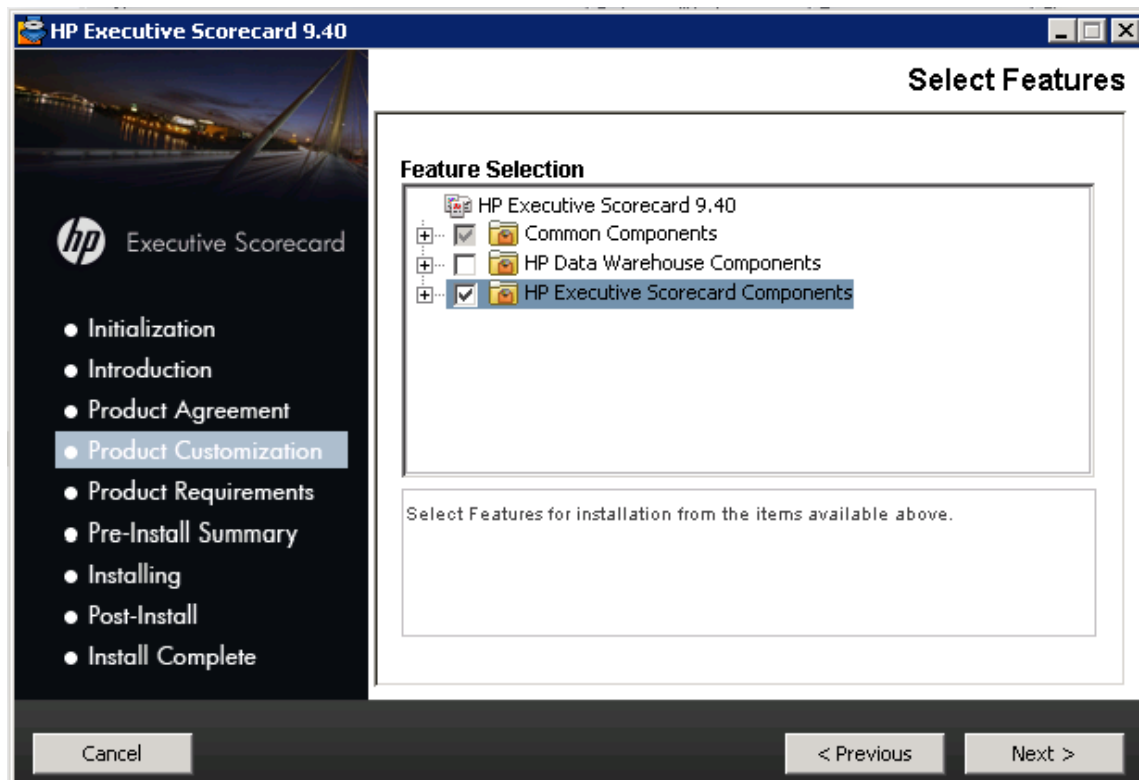
### Installation Section of the Wizard

Follow the prompts until you get to the **Select Group** page.

1. On the **Select Group** page, select **HP Executive Scorecard - Distributed Installation**, and then click **Next**.



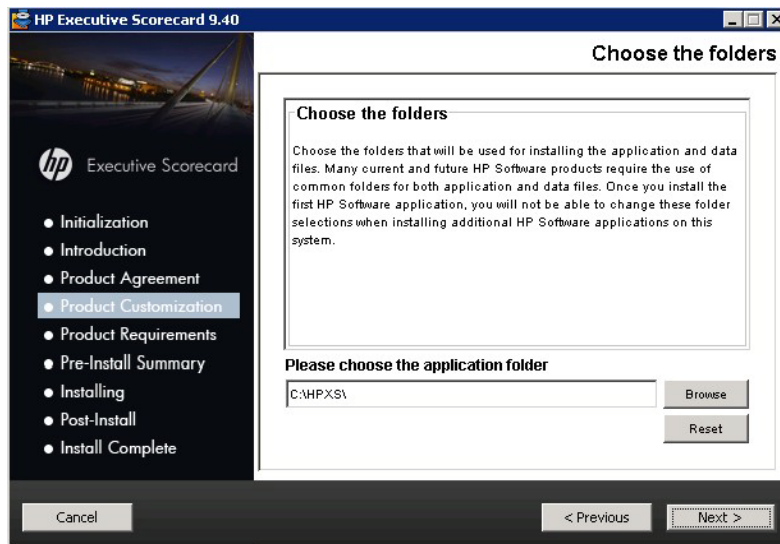
2. On the **Select Features** page, select the component you are installing on this server, and then click **Next**.



**Common Components** are automatically selected and installed with each component.

3. On the **Choose the folders** page, click **Next** to accept the default application folder, or

**Browse** to navigate to and then select a new application folder location.

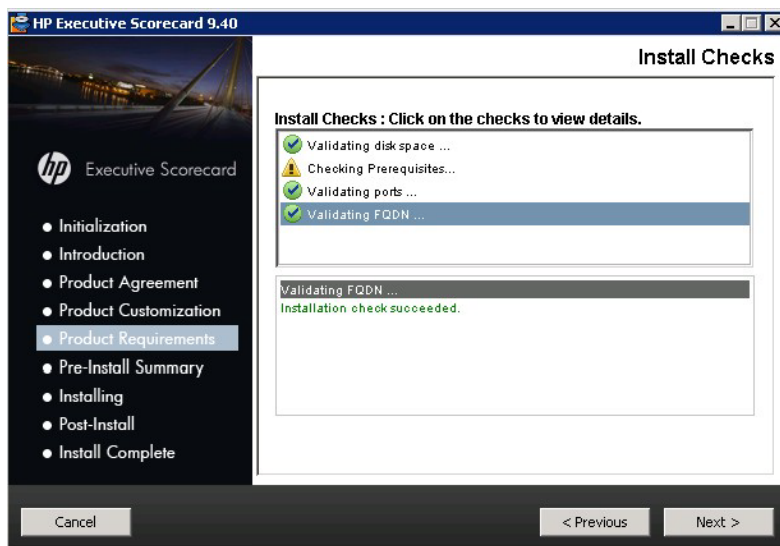


**Note:** If you enter a new application folder name, it cannot contain embedded spaces. For example a folder with a name **HP XS** is invalid.

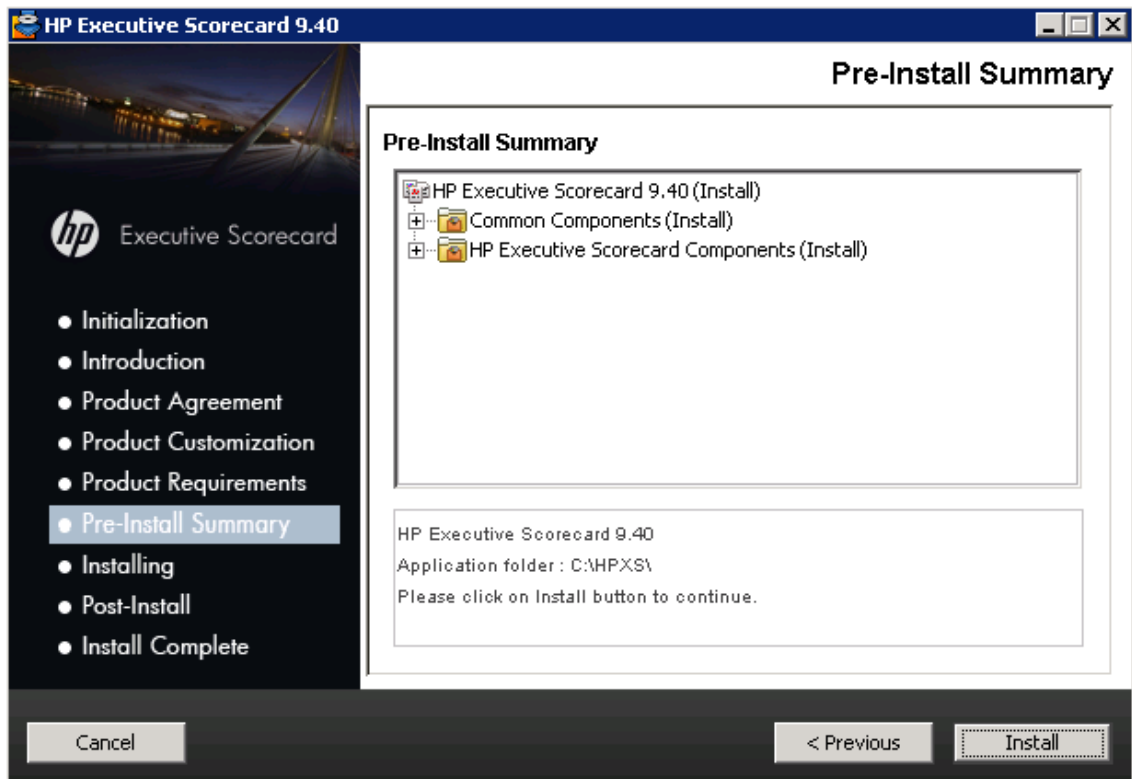
The wizard then runs a series of checks to validate system requirements.

If an installation check failed, you might be required to perform corrective action before you can run the installer. Certain checks can be corrected after a component has been installed.

4. On the **Install Checks** page, ensure that all the installation checks are successful, and click **Next**.



5. On the **Pre-Install Summary** page, verify that the components you wish to install are listed, and then click **Install**.



The file copying process starts. On completion, the Configuration Wizard begins.

### Post-Install Wizard

**Note:** Make sure that you installed DWH and BOE on a another server before you installed XS on this server.

1. On the **Management Database - Configure Management Database Settings** page, **Connect to an existing one**, and then click **Next**.
2. On the **Management Database - Configure Management Database Connectivity Settings** page, enter the following, and then click **Next**.

**Management Database - Configure Management Database Connectivity Settings** ?

Enter connectivity and authentication parameters for the MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back    Next >>    Cancel

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Management database.</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: &lt;host_name&gt;\&lt;instance_name&gt;.</p>

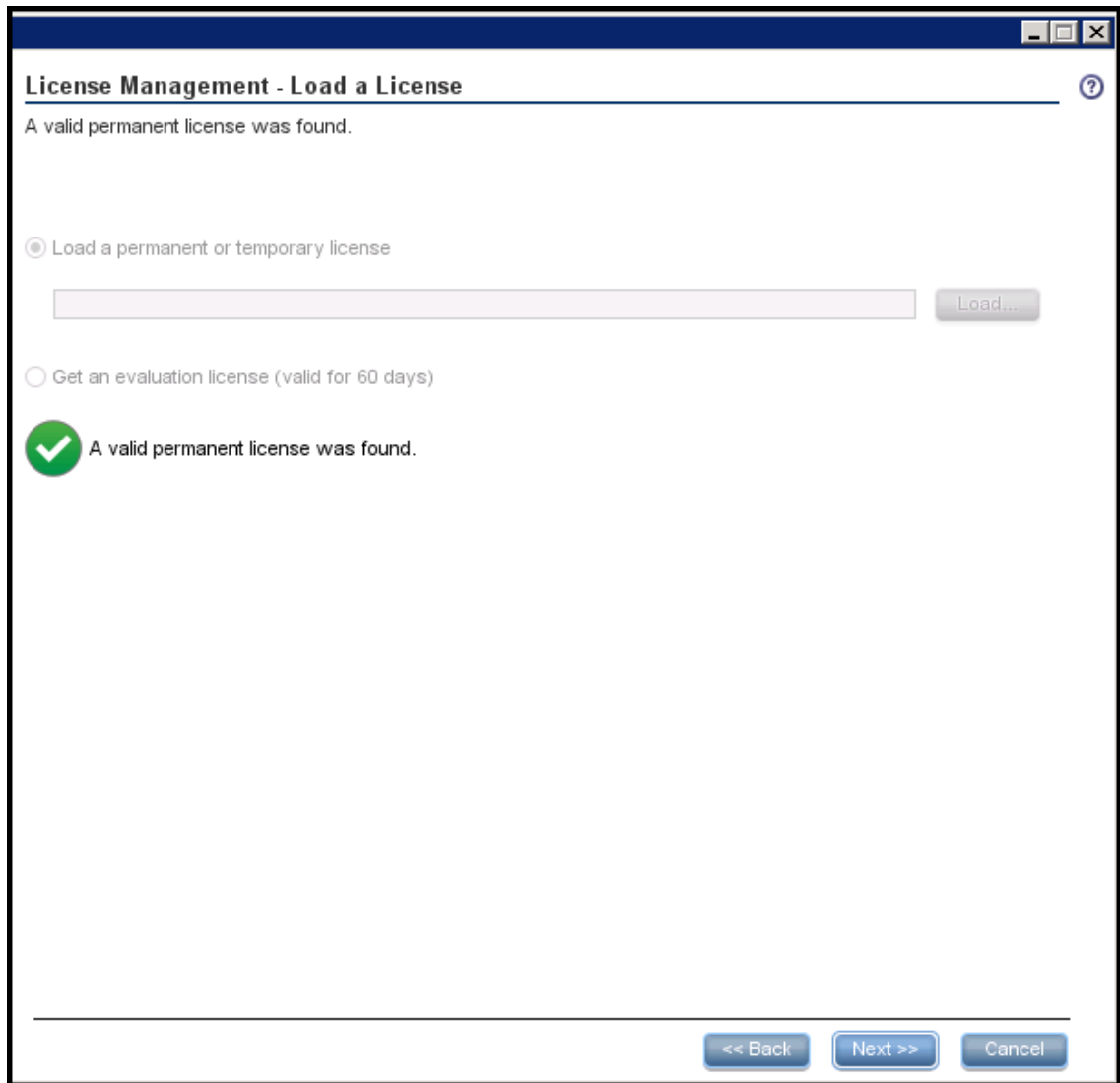
UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Management database.</p> <p>It is recommended that you use the following database naming convention:  <i>datasenname_mng</i></p> <p><b>Tip:</b> Make note of the database name, as it may be needed when installing other components.</p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

3. On the **Management Database - Configuration Status** page, verify that the Management database configuration was completed successfully, and then click **Next**.
4. In the **Management Database - Load a License** page, check that a valid permanent license was found, and click **Next**.





The wizard recognizes the license entered in the previous version.

### Post-Install Wizard - Application Configuration Section

1. On the **Application Configuration - Configure Web Server Infrastructure Connectivity** page, enter the following:

**Application Configuration - Configure Web Server Infrastructure Connectivity** ?

Enter the following infrastructure configuration parameters.

**Data related configuration:**

\* Time zone:

**Web Server configuration:**

\* HTTP port:

\* HTTPS port:

**Business Objects enterprise:**

\* SSO shared secret:

\* Confirm SSO shared secret:

<< Back   Next >>   Cancel

**Data related configuration area:**

UI Element	Description
Time Zone	The Data Warehouse time zone used when consolidating the data extracted from the data sources.

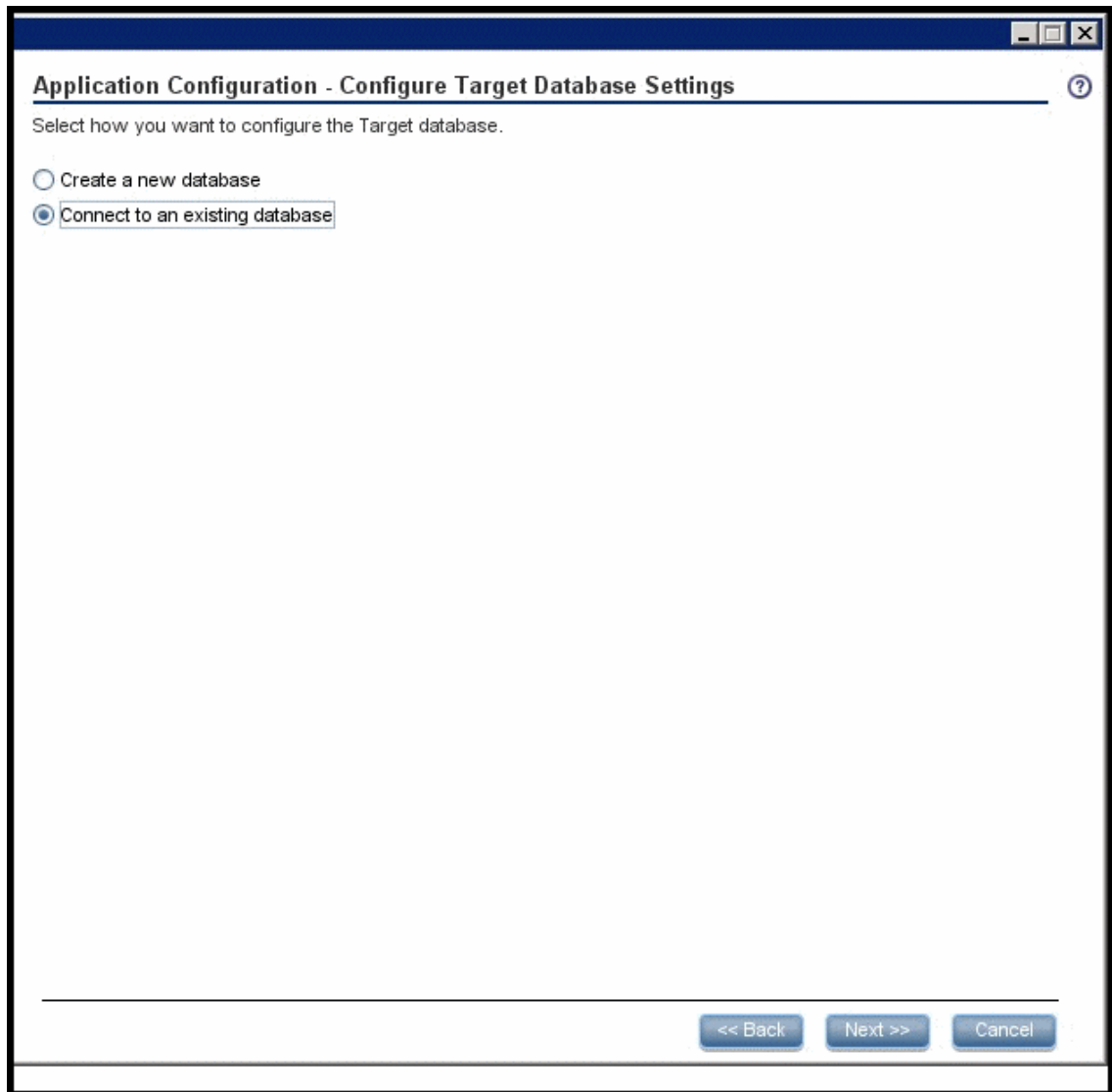
**Web Server Configuration area:**

UI Element	Description
<b>HTTP port</b>	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).  <b>Note:</b> If you want to use the default HTTP port in the Executive Scorecard installation, you must ensure that port 80 is not in use by another process.
<b>HTTPS port</b>	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site</a> ( <a href="http://h20230.www2.hp.com/selfsolve/manuals">http://h20230.www2.hp.com/selfsolve/manuals</a> or from the Installation DVD).

**Business Objects enterprise area:**

UI Element	Description
<b>SSO shared secret</b>	Enter the SSO shared secret.
<b>Confirm SSO shared secret</b>	Confirmation of the SSO shared secret.

2. On the **Application Configuration - Configure Target Database Settings** page, select **Connect to an existing database**:



UI Element	Description
<b>Create a new database</b>	Select to create a new target database.
<b>Connect to an existing database</b>	Select to connect to an existing target database.

3. On the **Application Configuration - Configure Target Database Connectivity Settings** page, enter the following:

**Application Configuration - Configure Target Database Connectivity Settings** ?

Enter connectivity and authentication parameters for the Target MS SQL Server database:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* Login Name:

\* Password:

<< Back   Next >>   Cancel

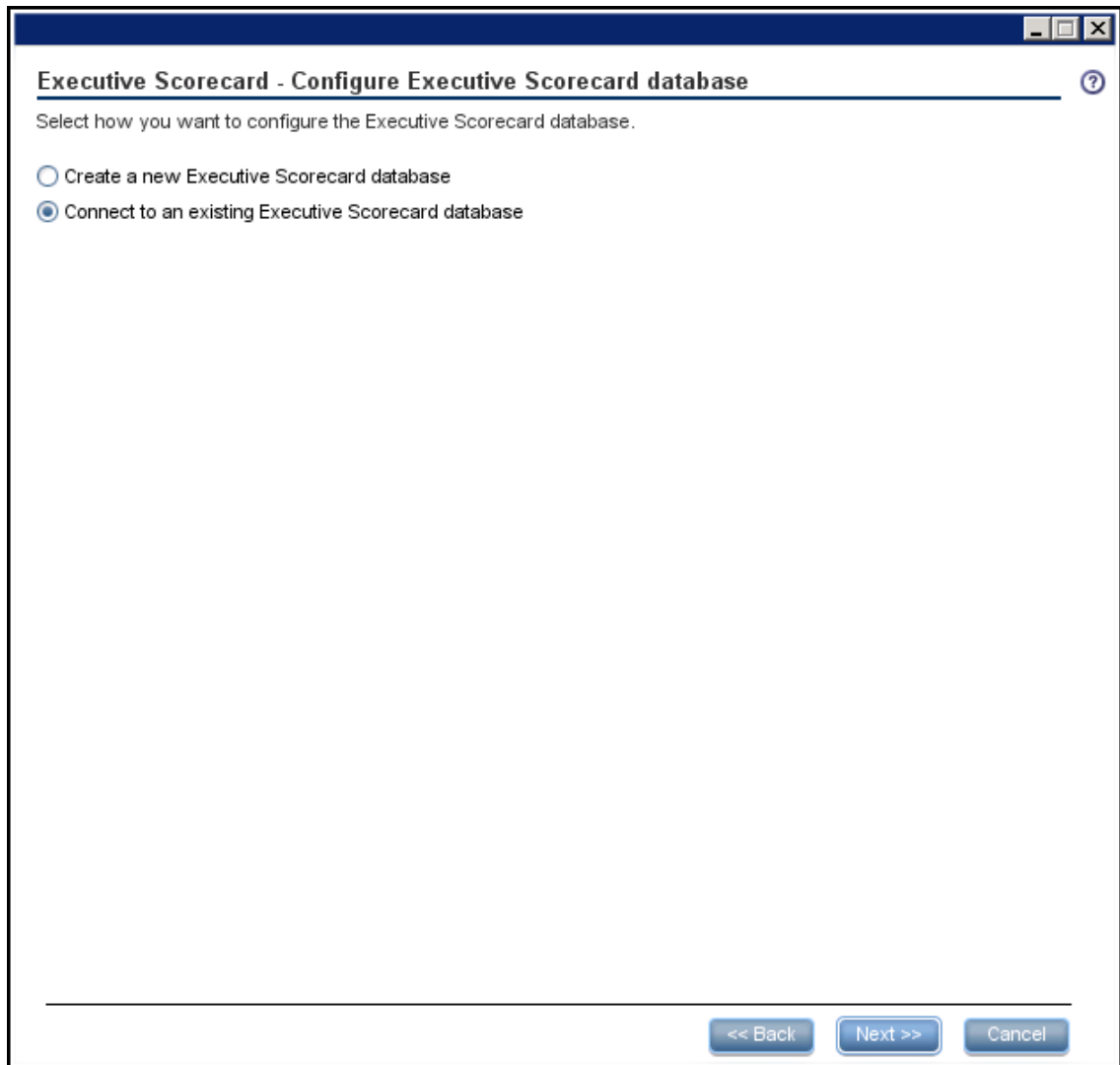
UI Element	Description
<b>Host name</b>	The fully qualified domain name (FQDN) or IP address of the MS SQL server hosting the target database.  <b>Note:</b>  If you work with the Named Instance feature, format Host Name as follows: <b>&lt;host_name&gt;\&lt;instance_name&gt;</b> .

UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the target database.</p> <p>It is recommended that you use the following database naming convention:</p> <p><i>datasenname_trg</i></p>

**SQL Server authentication area:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified login that creates the Target database.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

4. On the **Executive Scorecard- Configure Executive Scorecard database** page, select **Connect to an existing database**:



5. On the **Executive Scorecard - Executive Scorecard MS SQL Settings** page, enter the following, and then click **Next**.

**Executive Scorecard - Executive Scorecard MS SQL Settings** ?

Enter the Executive Scorecard database configuration parameters:

\* Host name:

\* Port: <1433>

\* Database name:

**SQL Server authentication:**

\* User name:

\* Password:

<< Back    Next >>    Cancel

UI Element	Description
<b>Host name</b>	<p>The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Management database.</p> <p>This is the management DB created on the DWH component</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, format Host Name as follows: &lt;host_name&gt;\&lt;instance_name&gt;.</p>



UI Element	Description
<b>Port &lt;1433&gt;</b>	<p>The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server.</p> <p>For more information about ports, see the Support Matrix document available from the <a href="http://h20230.www2.hp.com/selfsolve/manuals">Support Site (http://h20230.www2.hp.com/selfsolve/manuals)</a> or from the Installation DVD).</p> <p><b>Note:</b></p> <p>If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).</p>
<b>Database name</b>	<p>The name of the Management database.</p> <p>It is recommended that you use the following database naming convention: <i>database_name_mng</i></p> <p><b>Tip:</b> Make note of the database name, as it may be needed when installing other components.</p>

**SQL Server authentication:**

UI Element	Description
<b>Login Name</b>	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
<b>Password</b>	<p>The password for the specified user.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported.</li> <li>■ The password must be at least 6 characters in length, and must contain a combination of two of the following; upper case, lower case, numbers and punctuation.</li> <li>■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.</li> </ul>

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7. On the **Executive Scorecard - Executive Scorecard Summary** page, check that the operation completed successfully and click **Next**.

8. Configure and upgrade Financial Planning and Analysis:
  - a. On the **Financial Planning and Analysis - Installing FPA** page, click **Next** to install the Financial Planning and Analysis module.
  - b. On the **Financial Planning and Analysis - Summary** page, check that the operation completed successfully and click **Next**.
9. On the **Summary** page, check that the operation completed successfully and click **Next**.

You can now proceed with "[Additional Steps](#)" on the facing page.

## Additional Steps

This section explains additional steps for the 9.40 upgrade.

To understand what is new in version 9.40, see [What's New in Version 9.40](#) in the *IT Executive Scorecard Release Notes*.

The upgrade procedure uses the following addsteps:

["Integrating with HP Service Manager" on the next page](#)

["Integrating with HP Asset Manager and Service Manager" on the next page](#)

["Disaster Recovery" on the next page](#)

["Optional, When Working With a Non-English Language" on the next page](#)

["Display the Webi and the Xcelsius Reports" on page 96](#)

["Upgrade the 9.31 Content Acceleration Packs \(CAPs\)" on page 96](#)

## 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 Scorecard user interface. For more information, see [Data Source Management](#) in the *Administrator Guide*.

**Note:** When reactivating BSM and UCMDB after upgrade procedure, you may have to re-enter the UCMDB username and password. For details, see [Data Source Management](#) in the *Administrator Guide*.

2. **If the NNM Content Pack was activated in 9.31.** If the NNM Content Pack was activated in 9.31, 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**.

## 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, reactivate the SM Content Pack. Before running the ETL, run the XS batch command **dw\_abc\_cleandata.bat -batch 1 -entity CFGITEM** and go to **Admin > ETL Management** to start the clean data stream in order to delete the existing CFGITEM\_DIM data. This updates the data for the next run of the ETL.

## Integrating with HP Asset Manager and Service Manager

Before running the ETL, run the command **dw\_abc\_cleandata.bat -batch [Batch Id] -entity ASSET** and go to Admin Tab > ETL Management UI to start the clean data stream in order to delete the existing ASSET relevant data . This updates ASSET data for the next run of the ETL.

## Disaster Recovery

In case of disaster, find the latest disaster recovery procedure in the 9.4 *Administrator Guide* available from the Manuals site at [HP Software Product Manual Site](http://h20230.www2.hp.com/selfsolve/manuals) (<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\kptemplates\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
Turkish	tr	TR

- 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 **KPI Loader > 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.

During the upgrade to 9.40, all OOTB Page and Component categories in English and other languages are deleted and only the 9.40 Pages and Component categories in English are recreated. They include the OOTB pages and components for 9.40. If in the previous version

you had created pages and components and had assigned them to OOTB Page or Component categories, you have to reassign them manually.

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\ui mashup\import\languages\Components\<lang>\_<country\_code>\<name>.uim.xml or **<XS\_server>** \agora\glassfish\glassfish\domains\BTOA\config\ui mashup\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
Turkish	tr	TR

- b. Copy these .xml files to the **<XS\_installation\_directory>** \agora\glassfish\glassfish\domains\BTOA\config\ui mashup\import\to 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 (**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 ["Additional Steps" on page 91](#) 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\language\s\de_DE\VPOPS_de_DE.zip`

- **Localized user-defined CAP.** To upload a localized user-defined CAP proceed as described in ["Additional Steps" on page 91](#) 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 9.31 Content Acceleration Packs (CAPs)

### OOTB CAPs



If you worked with Content Acceleration Packs (CAPs) in version 9.31, you must upgrade the CAPs so they work in 9.4.

Copy the CAP kpi files from load folder: **<XS\_server>agora\glassfish\glassfish\domains\BTOA\config\cap\import\load\** to the loaded folder: **<XS\_server>agora\glassfish\glassfish\domains\BTOA\config\cap\import\loaded\**.

### User-Defined CAPs

To upgrade existing User-Defined CAPs:

1. Activate the version 9.31 CAPs.
2. Upgrade Executive Scorecard to version 9.4.
3. Create a new CAP based on the entities of the 9.31 CAP that you activated.
4. De-activate the original CAP.
5. Delete the original CAP.
6. Activate the new CAP.

For details on all CAP procedures, see [Content Acceleration Pack](#) in the *Administrator Guide*.

Item in the 9.30 manifest.properties file	Item in the 9.31 manifest.properties file	Do the following:
	<b>UUID=</b> < A unique ID for the Content Acceleration Pack >	
<b>universe=</b> <The names of the universes to be calculated (comma separated). For example, Period_Universe.>	<b>BCs=</b> <The names of the universes to be calculated (comma separated). For example, Period_Universe.>	
		This information stays the same.
		This information stays the same.
<b>version=</b> <The version of the Content Acceleration Pack >	<b>version=</b> <The version of the Content Acceleration Pack >	This information stays the same.

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Item in the 9.30 manifest.properties file	Item in the 9.31 manifest.properties file	Do the following:
	<b>xs.version=</b> <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 <b>About</b> dialog in the top right corner of the application.
	<b>name=</b> <The name of the Content Acceleration Pack. Mandatory>	Enter a name for the CAP.
	<b>description=</b> <The description of the Content Acceleration Pack.>	You can add a description for the CAP.
	<b>publisher=</b> <The name of the user, partner, or company that created the CAP.>	You can optionally add the name of the publisher.
	<b>documentation=</b> <The path to the file that documents the CAP. The document can be in Microsoft WORD, or PDF format.>	

## We appreciate your feedback!

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

**Feedback on IT Executive Scorecard, 9.40 Upgrade Guide**

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to [SW-Doc@hp.com](mailto:SW-Doc@hp.com).

