HP IT Executive Scorecard

For the Windows ® operating system

Software Version: 9.40

Installation and Configuration Guide

Document Release Date: June 2013

Software Release Date: June 2013

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Note: Some topics do not convert properly to PDF, causing format problems. Some elements of online help are completely removed from the PDF version. Those problem topics can be successfully printed from within the online help.

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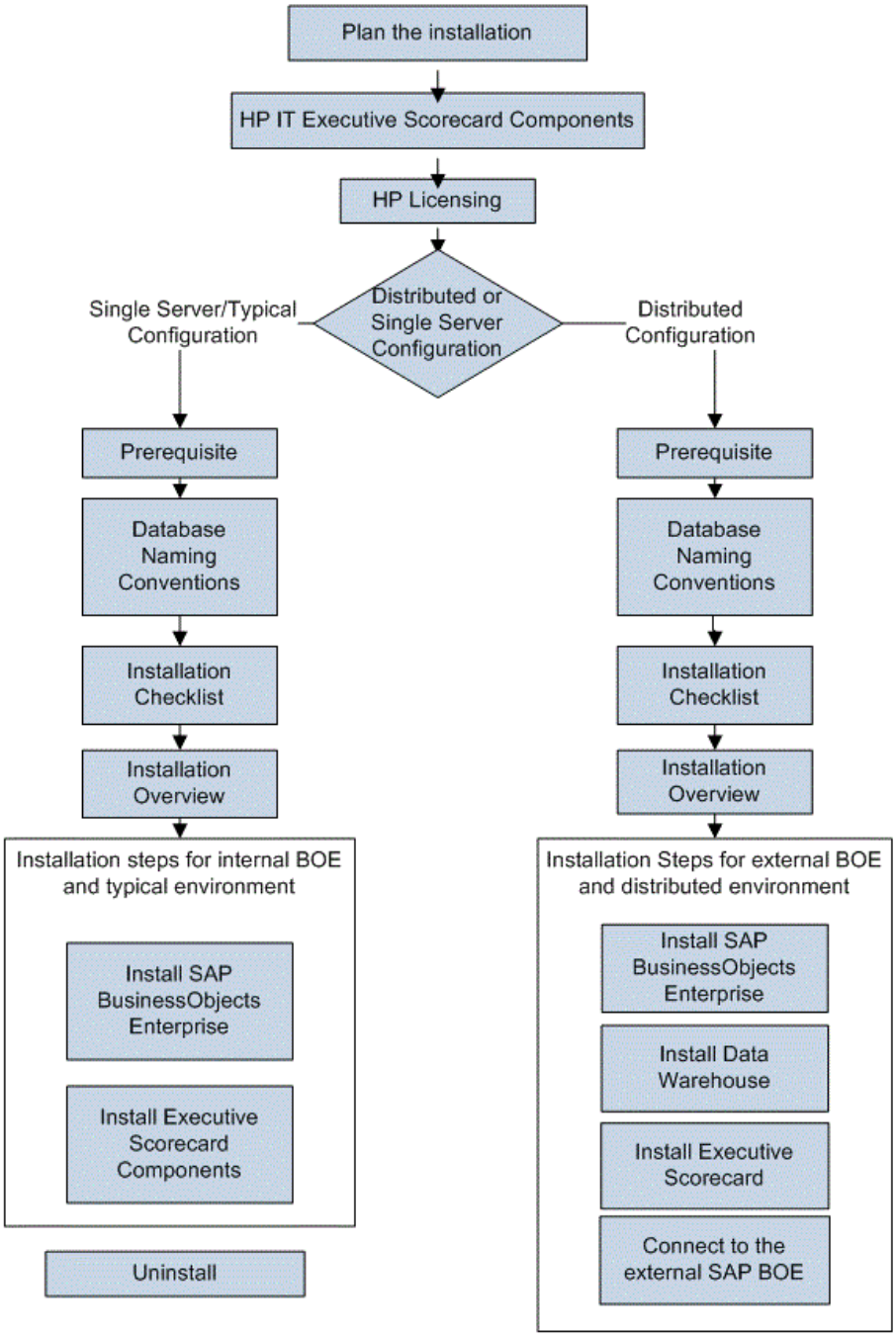
Overview

Welcome to the HP IT Executive Scorecard Installation and Configuration guide.

The flowchart below shows the main steps of the installation process for the supported configurations.



Plan the Installation

Before you begin your deployment of IT Executive Scorecard, you should:

- Understand the components of the application. For more information, see "HP IT Executive Scorecard Components" on page 9
- Decide which type of IT Executive Scorecard licensing you are implementing, and if necessary purchase the relevant license key file. For more information, see "HP Licensing" on page 10.
- Decide whether your deployment will be distributed or single server.

  For more information, see "Distributed or Single Server Environment" on page 12.
- Decide if you want to work with an external or an internal SAP Business Objects Enterprise.

  For more information, see "Distributed or Single Server Environment" on page 12.
- Ensure that your hardware and software meet the system requirements.

  The environments supported by IT Executive Scorecard are described in the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD).
- Ensure that you have reviewed the Installation checklists section. The section provides database naming and password limitations that could cause the installation to fail.

Limitation: Do not use the following characters in any of the folder names specified during the Executive Scorecard installation or post-installation procedures: % ^ & < > | ' ` , ; = ( ) ! \ [ ] "

HP IT Executive Scorecard Components

Executive Scorecard includes the following components that can be installed in a distributed or single server environment:

- **Data Warehouse** - a repository for key business data that is cleansed, consolidated, and organized to support efficient queries, reports, and to populate a variety of business analytics. The contents of the Data Warehouse depend on the external HP applications that generate business data. For example, the data may originate from external applications such as HP Asset Manager or HP HP Project and Portfolio Management.

  During the installation of Data Warehouse, SAP BusinessObjects Data Services, the access mechanism that performs physical data extraction from the source repositories to the target database, is also installed on the Data Warehouse server.

- **Executive Scorecard Application** - provides means to define IT goals and objectives, to measure performance, and provides actionable insights into performance improvement plans. It includes the Dashboard, Studio, Explorer, and Finance modules.

- **SAP BusinessObjects Enterprise** - a solution that provides reporting , analysis and information delivery via web applications.

  This is a required component in an Executive Scorecard deployment. An existing installation of SAP BusinessObjects Enterprise with SP3, can be used. It can be an external component or an internal component.

- **Common components** - foundations on which the IT Executive Scorecard deployment is built. Common components are automatically installed on servers when you install the Data Warehouse or Executive Scorecard components.

Other critical external components include:

- **A Relational Database Management System (RDBMS) Server** - A Microsoft SQL Server 2008 Enterprise Edition with SP 2 server that hosts the various SAP BusinessObjects Enterprise, Data Warehouse, and Executive Scorecard databases.

- **Source Application Servers** - Source data originates in external application repositories. Data Warehouse consolidates the data from one or more of these external application repositories, and makes it available for analysis by Executive Scorecard.

HP Licensing

The HP License Key Delivery Service web site (webware.hp.com) manages HP software licensing for the IT Executive Scorecard application. You can view or download the latest version of the ESD and Webware License Management Guide from this site. The guide describes the current process to obtain your entitlement certificate, which contains the HP order number that you need to generate your permanent license keys.

Follow the steps in the ESD and Webware License Management Guide to present your HP order number, select the products that need licenses, and provide other required information.

If you are a first time visitor to the web site, you will be asked to create an account with an email address and password. Most requests to generate permanent license keys require the following:

- IT Executive Scorecard product name and number shown on the product receipt or in the email sent by HP to acknowledge the order.
- The order number from the entitlement certificate.
- A target server name and IP address.
- Contact information, such as company name, your name, fax and phone numbers, and license ownership details.

If necessary, you can return to the HP License Key Delivery Service web site and retrieve the permanent or temporary license keys again by selecting Manage Licenses on the web site home page and logging into your account.

If you have an existing SAP BusinessObjects Enterprise installation, you can use that instance. If you purchase SAP BusinessObjects Enterprise with the HP Executive Scorecard, the purchase includes the required licenses.

Other applications that generate or use data, require separate licenses.

Permanent License Keys

After you create your user account on the HP License Key Delivery Service web site (webware.hp.com), generate the entitlement certificate, and generate the license keys, the License Key Delivery Service sends permanent keys to you in an email text file attachment. You load permanent license key files during the post-installation configuration. When a permanent IT Executive Scorecard license covering the components you are installing is loaded, details of the license are recorded to the Management database and there is no further requirement for loading the license when installing each component.

Temporary Licence Keys

After you create your user account on the HP License Key Delivery Service web site (webware.hp.com), generate the entitlement certificate, and generate the license keys, the License Key Delivery Service sends temporary keys to you in an email text file attachment. You load temporary license key files during the post-installation configuration. When a temporary IT Executive Scorecard license covering the components you are installing is loaded, details of the license are recorded to the Management database and there is no further requirement for loading the license when installing each component. However when the temporary license expires, you will

need to return to the HP License Key Delivery Service web site, retrieve another temporary or permanent license key, and then reload it in the post-install configuration.

Distributed or Single Server Environment

An IT Executive Scorecard deployment is made up of various components, such as SAP BusinessObjects Enterprise, Data Warehouse, and Executive Scorecard.

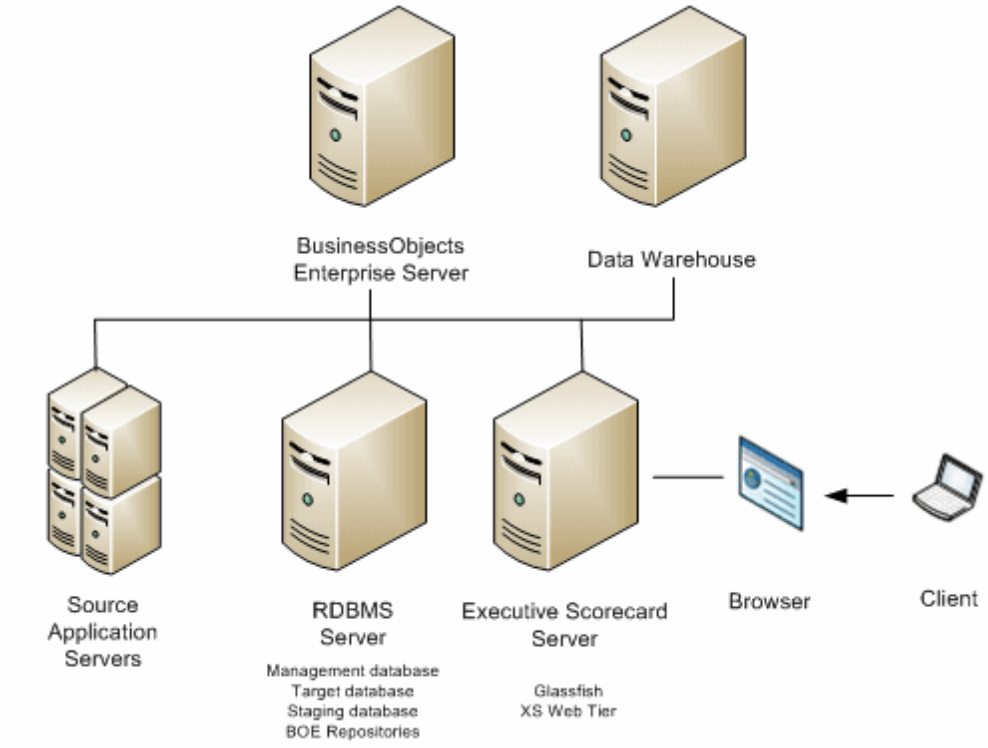
You can deploy the components as follows:

Distributed server environment - The SAP BusinessObjects Enterprise, Data Warehouse, and Executive Scorecard components are each installed on different servers. This type of configuration is useful in production environments.

SAP BusinessObjects Enterprise is installed on its own server and must be installed using the SAP installer before installing any of the other components with the Executive Scorecard installer.

You must have an RDBMS installation of Microsoft SQL Server 2008 Enterprise Edition with SP 2 before you begin the IT Executive Scorecard installation and configuration process. The data sources can be remote or local.

The following figure shows a suggested distributed configuration after you complete the IT Executive Scorecard installation process.

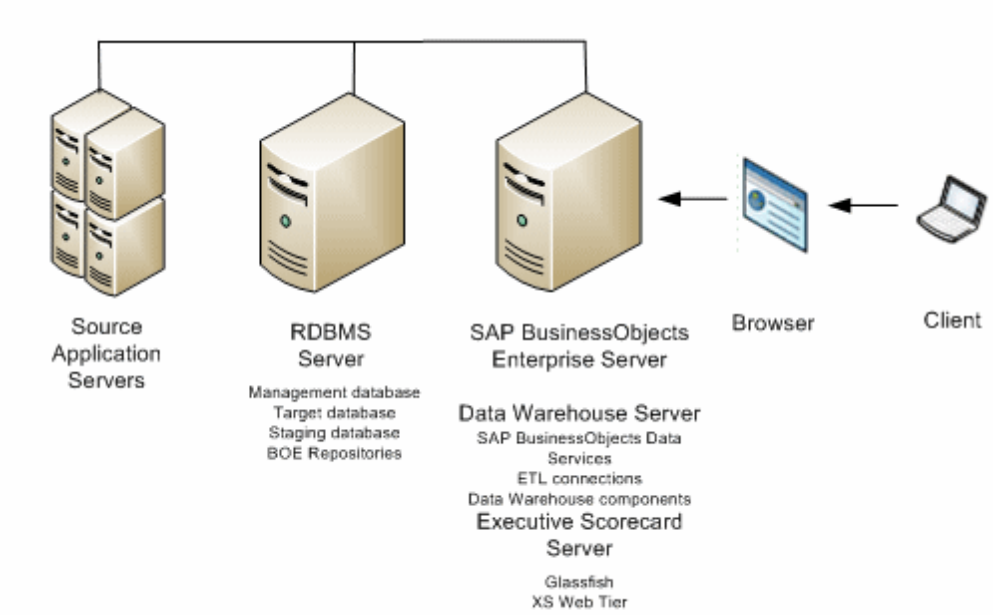


Single server environment - All the required IT Executive Scorecard components are installed on a single server. This type of configuration is useful for building prototypes and test environments.

You must have an RDBMS installation of Microsoft SQL Server 2008 Enterprise Edition with SP 2 before you begin the IT Executive Scorecard installation and configuration process. The data sources can be remote or local.

SAP BusinessObjects Data Services has an integrated installation with BusinessObjects Enterprise, where SAP BusinessObjects Data Services shares the Apache Tomcat instance installed with SAP BusinessObjects Enterprise.

The following figure shows a single server configuration where all IT Executive Scorecard components are on the same server.



Supported Configurations

The configurations that are supported, described in this document, and recommended are:

- **Typical configuration:** where IT Executive Scorecard, Data Warehouse, and BusinessObjects Enterprise are installed on the same server. This environment means that the Data Warehouse components are installed on the same server as the Executive Scorecard application and the SAP BusinessObjects application, but the Relational Database Management System (RDBMS) could reside on a separate server. This environment can be useful in test and POC deployments.
- **Distributed configuration:** where IT Executive Scorecard is installed on one server, Data Warehouse is installed on another server, and BusinessObjects Enterprise is installed on a third server. This is the recommended production environment.

Other configurations (IT Executive Scorecard and Data Warehouse on one server, and BusinessObjects Enterprise on another server, or Data Warehouse and BusinessObjects Enterprise on one server and IT Executive Scorecard on another server are supported but are not described in this document. If you want to install other configurations, contact HP Software Support Online web site (http://www.hp.com/go/hpsoftwaresupport).

External or Internal SAP BusinessObjects Enterprise Component

If SAP BusinessObjects Enterprise is already installed at your site, you do not have to install a second instance that is dedicated to Executive Scorecard, and you can connect to your existing SAP BusinessObjects Enterprise.

When installing Executive Scorecard in a distributed environment, SAP BusinessObjects Enterprise is installed on a server by itself. If SAP BusinessObjects Enterprise is installed on its own server, it must be installed using the SAP installer before installing any of the other components with the Executive Scorecard installer.

Prerequisites

Before you start the installation check the following prerequisites.

RDBMS

Make sure that:

1. You have obtained the supported Microsoft SQL Server software and license keys directly from Microsoft Corporation. Set up the RDBMS before you begin your IT Executive Scorecard deployment.
2. You configured your supported Microsoft SQL Server with the following:
   - Mixed Mode Authentication for the RDBMS Database Engine.
   - TCP/IP enabled as a communications protocol for MS SQL Server.

   For more information, see the Microsoft SQL Server 2008 Enterprise Edition with SP 2 documentation.

Licenses

During the Executive Scorecard Configuration, you are required to enter the application license details.

Data Warehouse Server

Make sure that the Data Warehouse server is configured as follows to avoid low virtual memory prompts when using M-iCP:

1. You have a hard disk capacity of at least 60G-80G.
2. You have set the server virtual memory to **system managed size**.
3. Restart the server.
4. In Folder Options, clear **Hide protected operating system files**.
5. Make sure that the **pagefile.sys** size is greater or equal to your physical memory size.
6. Make sure that you have enough free space on your system drive.

Install the following on the Data Warehouse server, before you start the Data Warehouse component installation:

1. SQLCMD utility as follows:

   a. 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.

   b. Select **New SQL Server Standalone Installation**.

   c. 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** or from the Installation DVD).

2. Supported version of Microsoft Excel - This must be installed if you intend on using the Excel spreadsheets provided by Data Warehouse. Because the use of Excel spreadsheets is optional, the pre-install checks inform you if it is not installed but allows you to carry on with the installation.

Administrator permission when working with an SQL server

Make sure that, in order for the administrator to successfully install Executive Scorecard when working with an SQL server, the user needs at least the following permission: **sysadmin**.

1. To assign these permissions, in the MSSQL database, expand the **Security** folder. Right-click the **Logins** folder that appears and select **New Login**.

2. In the **Login - New** page, enter the login name in the **Login name** field (the login name should have the following format: domain\username). The login name can then be used to install Executive Scorecard.

3. Select the **SQL Server authentication** option.

4. Enter a password and confirm it.

5. Click **OK**.
6. Select **Server Roles** in the left pane, and select the **sysadmin** Server role.
7. Click **OK**.

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.

Database Naming Conventions

It is recommended that you use the following database naming conventions when configuring databases in the Executive Scorecard Configuration Wizard:

Database Type	Naming convention
Management	databasename_mng
SAP BusinessObjects CMS	databasename_cms
SAP BusinessObjects Audit	databasename_audit
SAP BusinessObjectsData Services	databasename_bods
Data Warehouse Staging	databasename_stg
Data Warehouse Target	databasename_trg
Executive Scorecard Application	databasename_app

Installation Overview

The HP Executive Scorecard Installation and Configuration Wizards are self-directing with embedded instructions and default values. You can change these values to suit your local environment. The Wizards consists of the following:

- The Installer builds the directory structure and prepares the files for configuration.
- The Configuration Wizard runs automatically on completion of the installer, collects relevant information, and installs the selected components.

The installation of a component often depends on the successful installation of other components.

Components must be installed in the following order:

1. **SAP BusinessObjects Enterprise**

   If you already use BusinessObjects Enterprise XI 3.1 with SP3 for other applications, you do not have to install a second instance that is dedicated to IT Executive Scorecard. You can use an existing SAP BusinessObjects Enterprise installation on a separate server, but it must be BusinessObjects Enterprise XI 3.1 with SP3 installed.

   When installing Executive Scorecard in a distributed environment, SAP BusinessObjects Enterprise may be installed on a server by itself, or on a server together with Data Warehouse. Executive Scorecard is on a separate server. If SAP BusinessObjects Enterprise is installed on its own server, it must be installed using the SAP installer before installing any of the other components with the Executive Scorecard installer.

   SAP BusinessObjects Enterprise Wizard Flow

   The SAP BusinessObjects Enterprise section of the IT Executive Scorecard Configuration Wizard enables you to:

   - Install SAP BusinessObjects Enterprise (for typical).
   - Create the Central Management Server (CMS) database - The CMS database stores data that allows the CMS to maintain security, manage objects, and manage servers.
   - Create an Audit database - The Audit database stores and then forwards audit records to the SAP BusinessObjects Enterprise servers.
   - Configure connection properties for the SAP BusinessObjects Enterprise server.

2. **Data Warehouse**

   You must install Data Warehouse.

   Data Warehouse Wizard Flow

   The Data Warehouse section of the IT Executive Scorecard Configuration Wizard enables you

to:

- Install SAP BusinessObjects Data Services.
- Create the SAP BusinessObjects Data Services database.
- Create a Data Warehouse Staging database and define its logins - The Staging database, contains tables and snapshots critical to the Extract, Transform, and Load (ETL) process.
- Define the Data Warehouse Target database login - The Target database, contains models that describe the format of the data that produces IT Executive Scorecard analytical information.
- Assign the Data Warehouse default currency.
- Configure an external source file location and an external source file archive location - The external file location contains Excel files that can be used by an ETL process to load data into the Data Warehouse.
- Install Data Warehouse.

For more information on Data Warehouse, see the *Administrator Guide*.

3. **Executive Scorecard**

   Executive Scorecard Wizard Flow

   The Executive Scorecard section of the IT Executive Scorecard Configuration Wizard enables you to:

   - Install IT Executive Scorecard.
   - Install the IT Executive Scorecard database.
   - Install IT Financial Management.

Installation with internal SAP BusinessObjects Enterprise in a Typical Environment

This section includes the following step:

"Install Executive Scorecard Components" below

Install Executive Scorecard Components

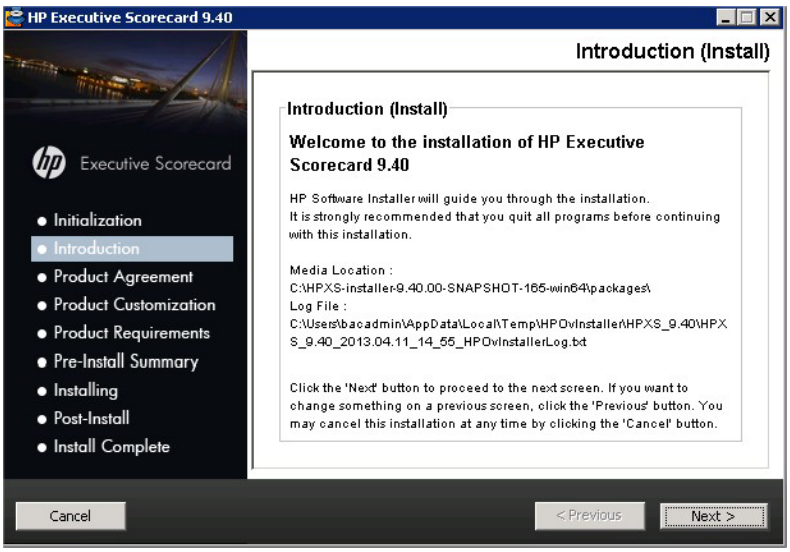
Note: Virus scanning software may interfere with the installation of SAP BusinessObjects Enterprise. Turn off all virus scanning software before installing.

Prerequisites:

- Close all Windows before you start the installation process.

Start the Installation:

1. Insert the XS media into the CD/DVD drive. The installation wizard opens.



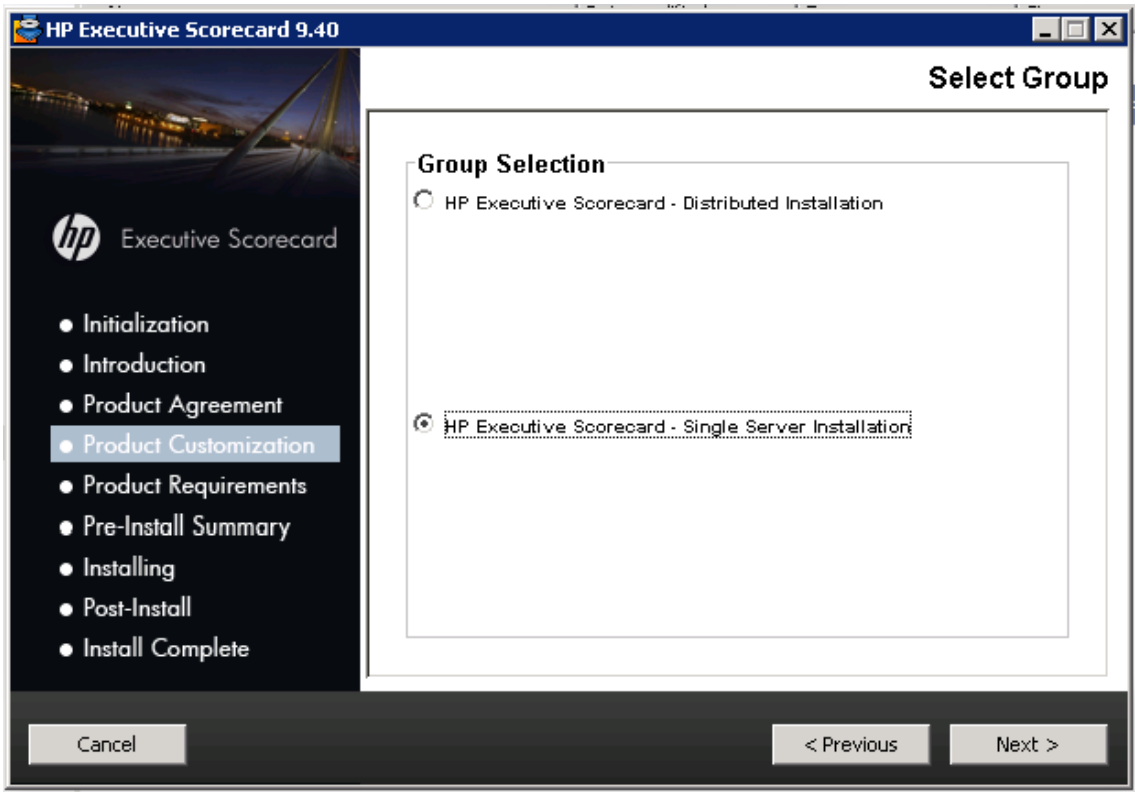
Caution: The CD/DVD must remain in the drive until you complete the Executive Scorecard Configuration Wizard.

Note: If the installation wizard does not start automatically, extract the files from the .ZIP file and 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 Wizard

1. Follow the prompts until you get to the **Select Group** page.
2. On the **Select Group** page, select **HP Executive Scorecard - Single Server Installation**, and then click **Next**.

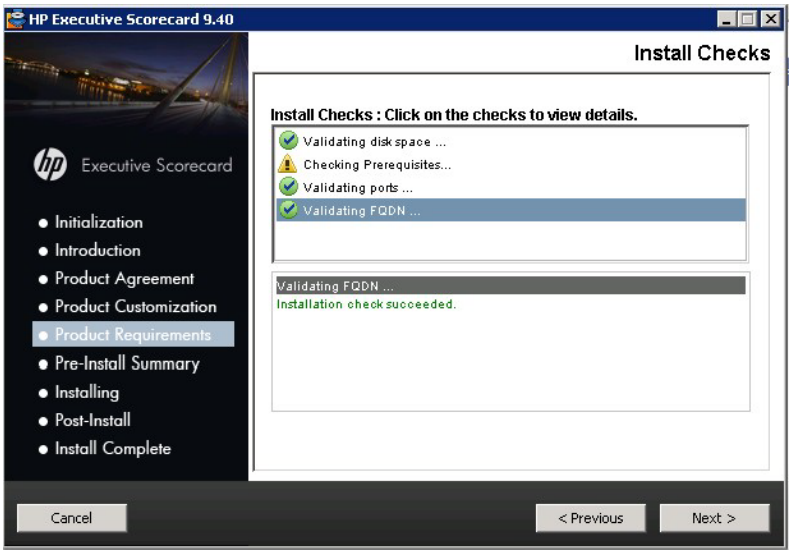


3. On the **Choose the folders** page, click **Next** to accept the default application folder, or **Browse** to navigate to and then select a new application folder location, and then click **Next**.

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

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

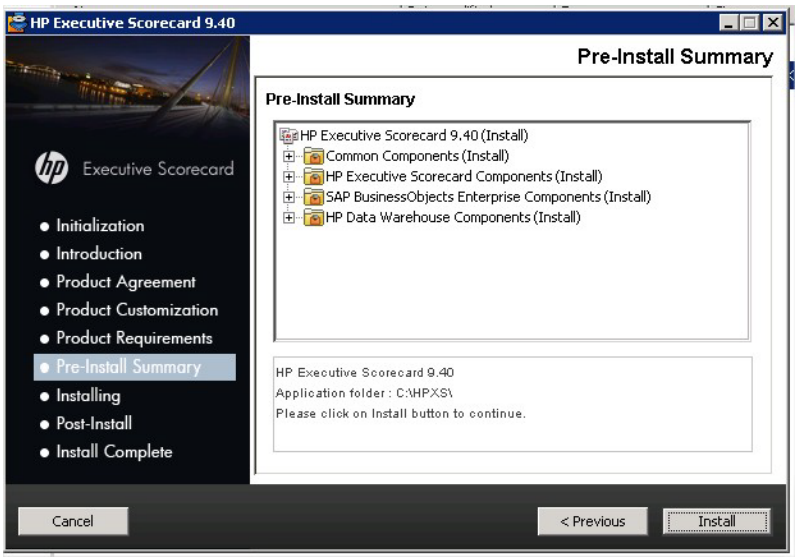
- On the **Install Checks** page, ensure that all the installation checks are successful, and then click **Next**.



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.

Pre-Install Summary page:

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



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

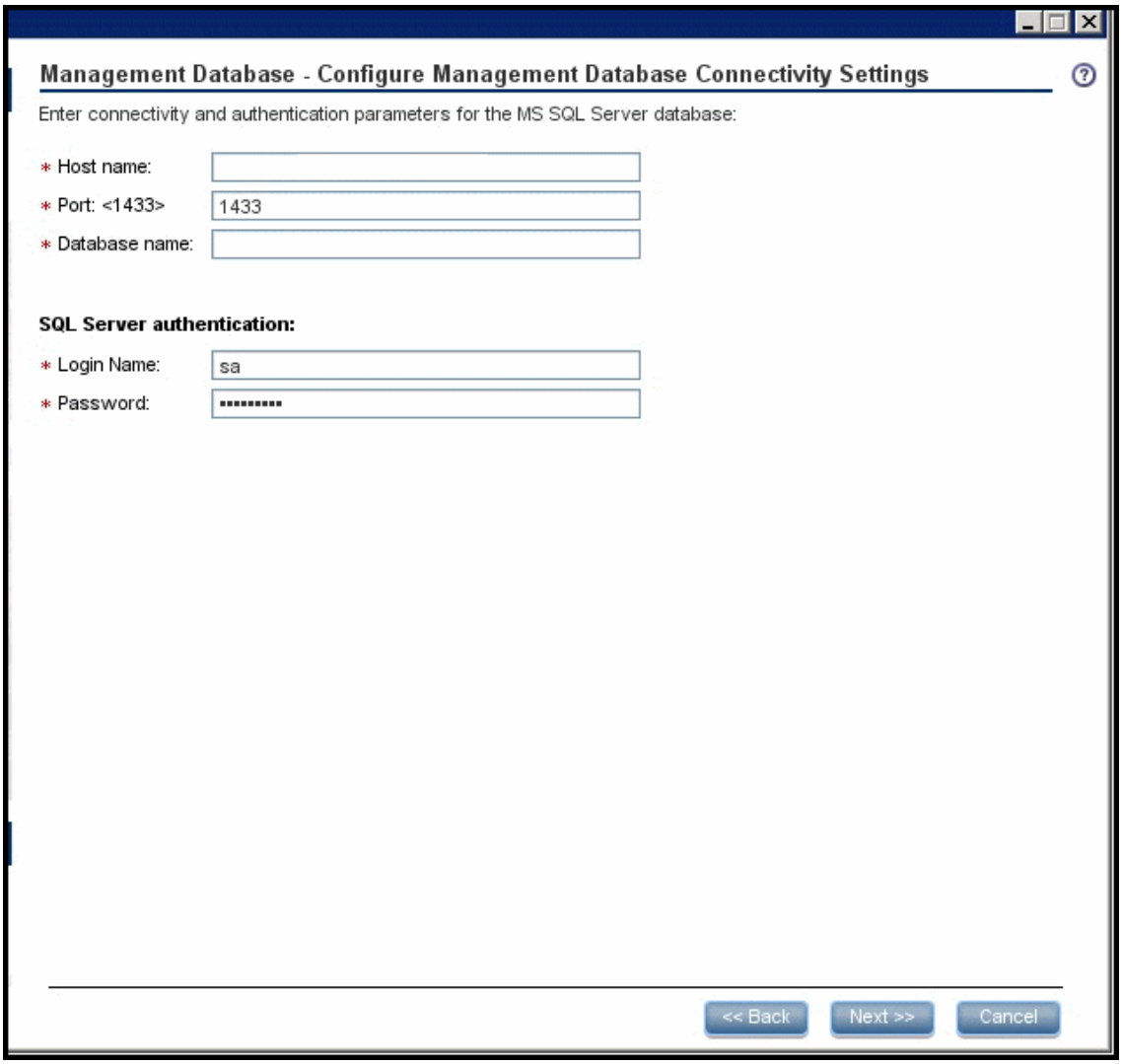
Post-Installation Section of Wizard

- On the **Post-Install Introduction Wizard** page, click **Next**.

Post-Install Wizard - Management Database Section

1. On the **Management Database - Configure Management Database Settings** page, select **Create a new database**, and then click **Next**.

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



UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Management database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.
Port <1433>	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the Management database. It is recommended that you use the following database naming convention: *databasename_mng* **Tip:** Make note of the database name, as it may be needed when installing other components.

SQL Server authentication:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

3. On the **Management Database Configuration Status** page, verify that the Management database configuration was completed successfully, and then click **Next**.

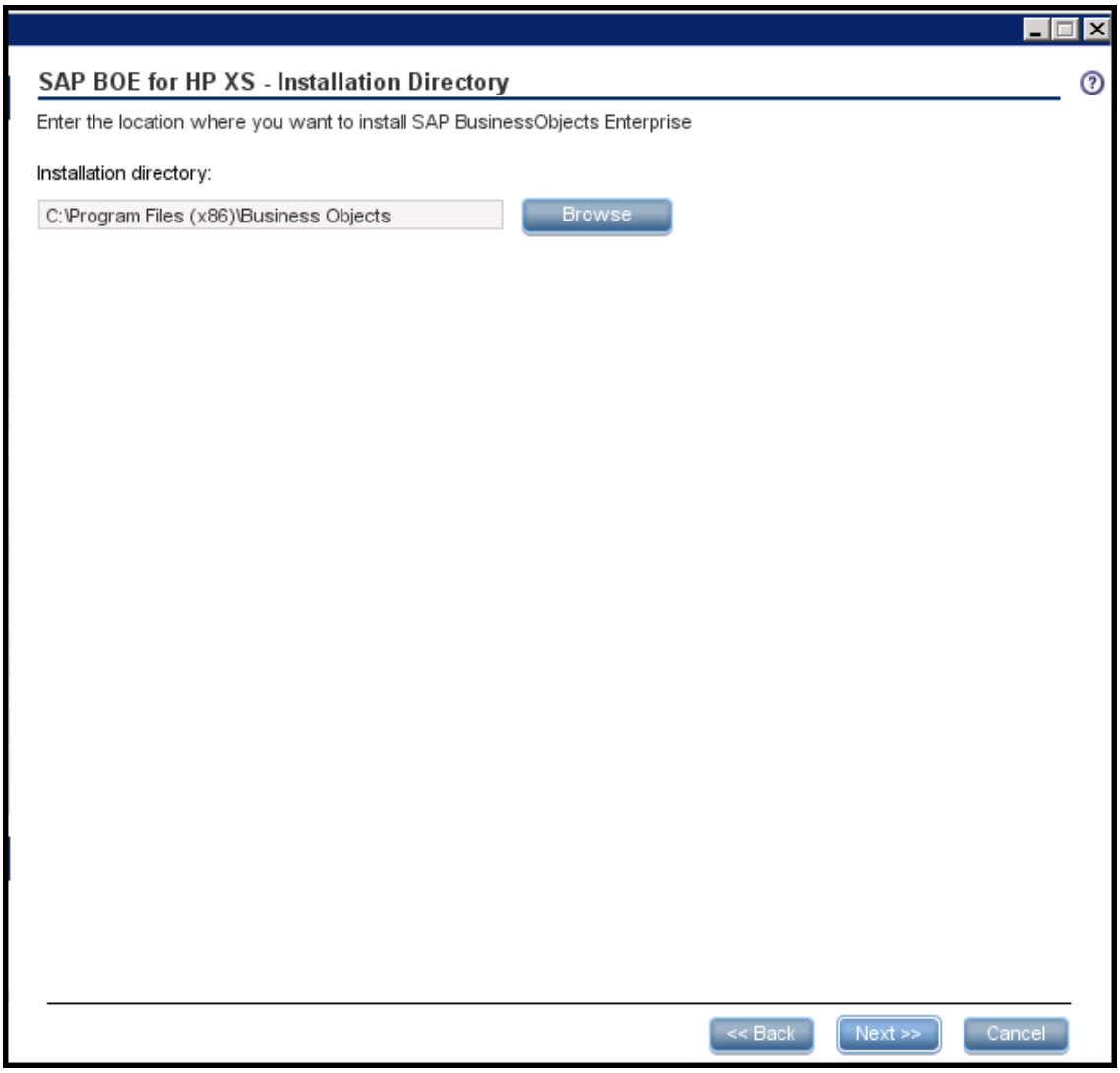
Post-Install Wizard - License Management Section

1. On the **License Management** - **Load a License** page, select **Load a permanent or temporary license**, and then click **Next**.

UI Element	Description
Load a permanent or temporary license	Select to load one of the following license types: ▪ **Permanent** - Has no expiry date and is loaded once during the post-install. ▪ **Temporary** - Has an expiry date. On expiration, a new license must be loaded. To load a license, select **Load a permanent or temporary license**, click **Load**, Navigate to the license file provided by your supplier, and then click **Load License**.
Get an evaluation license	Select to load a one-off 60 day evaluation license. The remaining valid period of the license is displayed. Once the evaluation license terminates, you must load a temporary or permanent license.

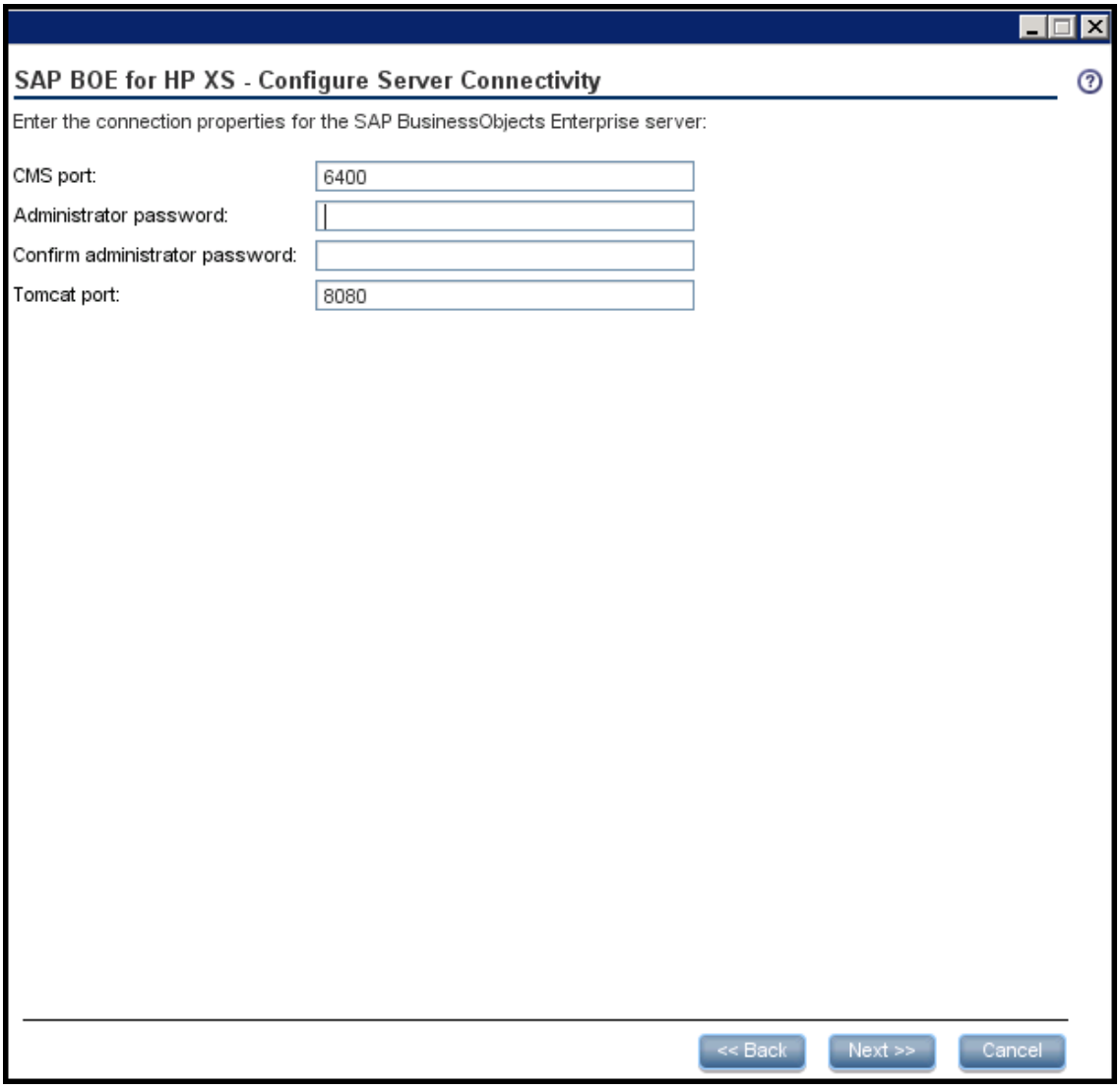
Post-Install Wizard - SAP BusinessObjects Enterprise for HP XS Section

1. In the **SAP BusinessObjects Enterprise for HP XS - Installation Directory** page, click **Next** to accept the default installation directory, or **Browse** to navigate to and then select a new installation directory, and then click **Next**.



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

2. On the **SAP BusinessObjects Enterprise for HP XS - Configure Server Connectivity** page, enter the following, and then click **Next**.

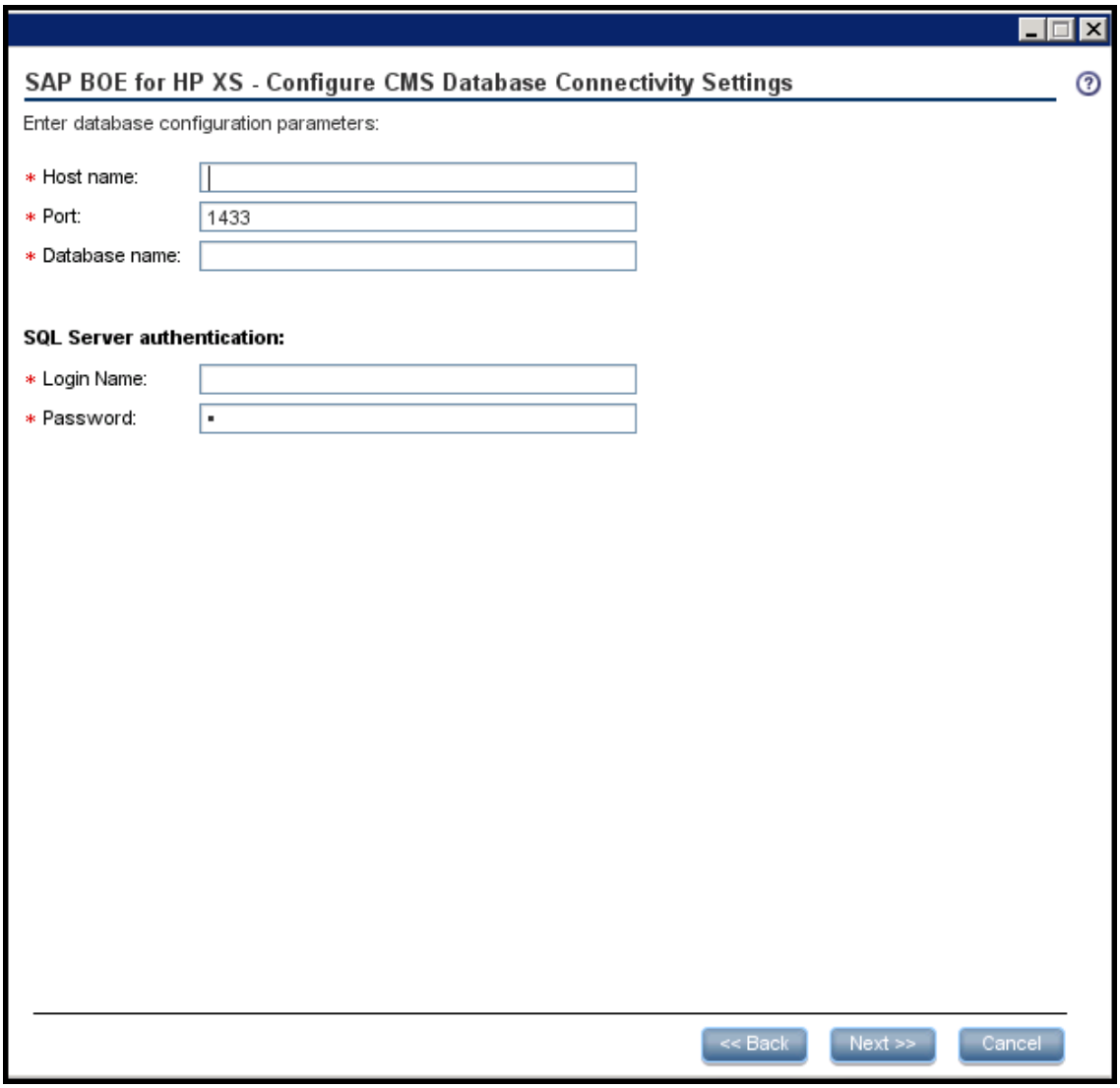


UI Element	Description
CMS port	The port number of the CMS listener. The default value is 6400. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD).

UI Element	Description
Administrator password	The SAP BusinessObjects Enterprise Administrator password. This password is used only to login to SAP BusinessObjects Enterprise. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.
Confirm administrator password	Confirm the Administrator password.
Tomcat port	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 Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD).

3. On the **SAP BusinessObjects Enterprise for HP XS - Configure Central Management Server (CMS) Database** page, select **Create a new CMS database**, or **Connect to an existing CMS database**, and then click **Next**.

4. 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**.



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

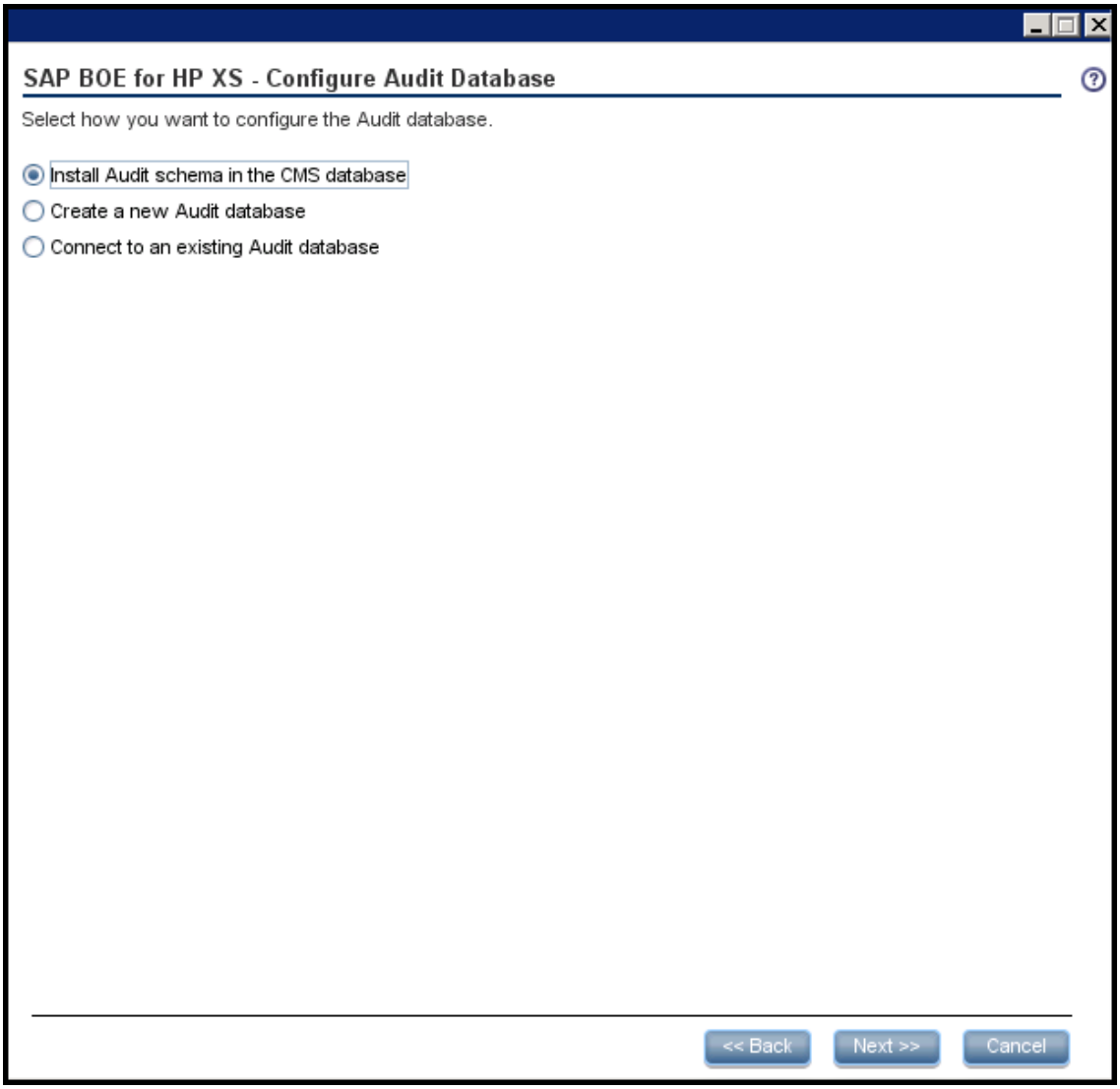
UI Element	Description
Port	The port of the MS SQL server listener. The default port is 1433. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the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

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

5. On the **SAP BusinessObjects Enterprise for HP XS - CMS Database Configuration Status** page, verify that the CMS database configuration was completed successfully, and then click **Next**.

6. 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
Install Audit schema in the CMS database	Installs the Audit database schema as part of the CMS database previously created.
Create a new Audit database	Creates a new Audit database.
Connect to an existing Audit database	Connect to an existing Audit database.

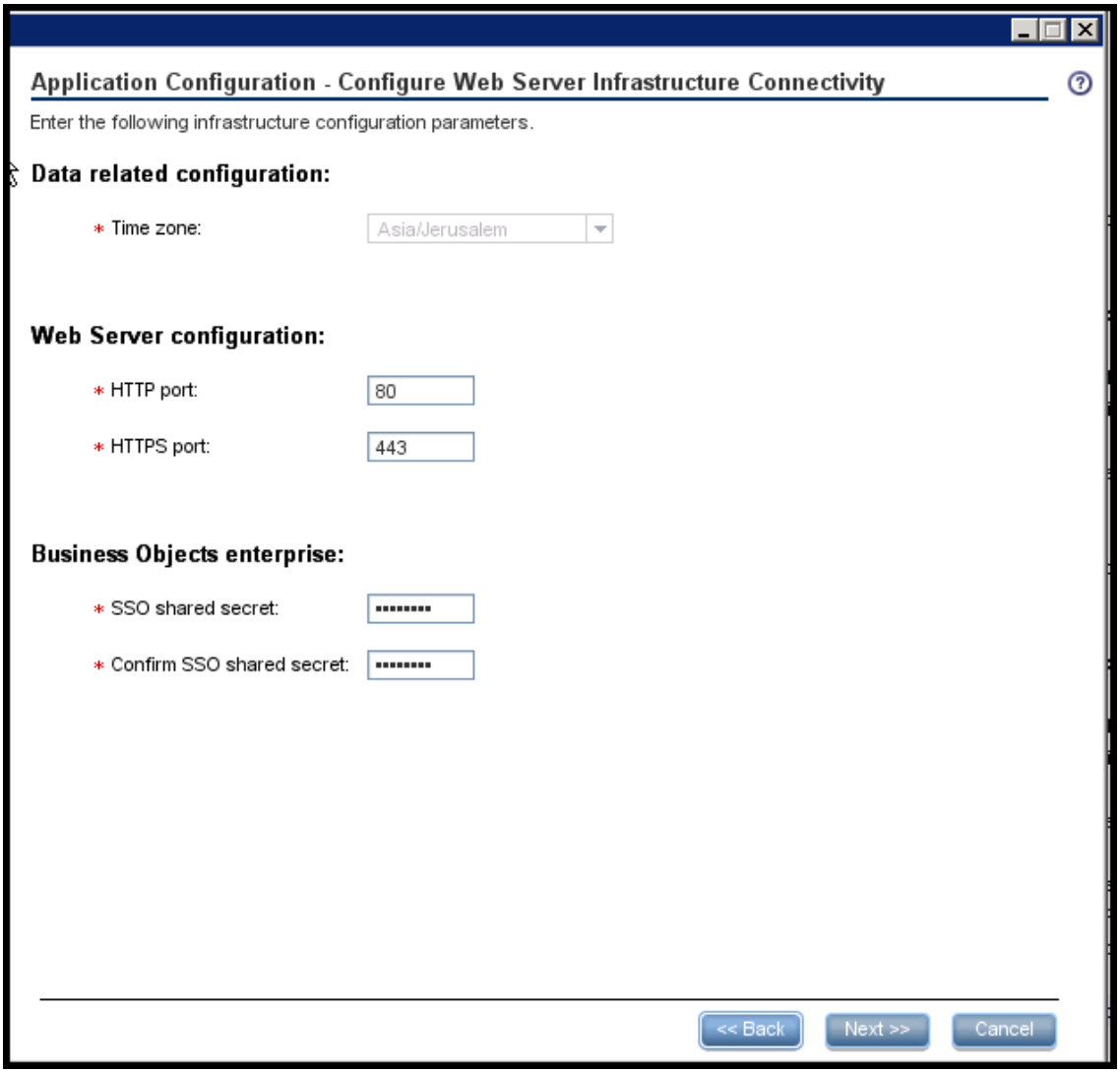
7. On the **SAP BusinessObjects Enterprise for HP XS - Audit Database Configuration Status** page, verify that the Audit database configuration was completed successfully, and then click **Next** to install SAP BusinessObjects Enterprise.

   This step can take up to two hours to complete.

8. On the **SAP BusinessObjects Enterprise for HP XS -Enterprise Configuration Status** page, verify that the SAP BusinessObjects Enterprise configuration was completed successfully, and then click **Next**.

Post-Install Wizard - Application Configuration Section

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



Data related configuration area:

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

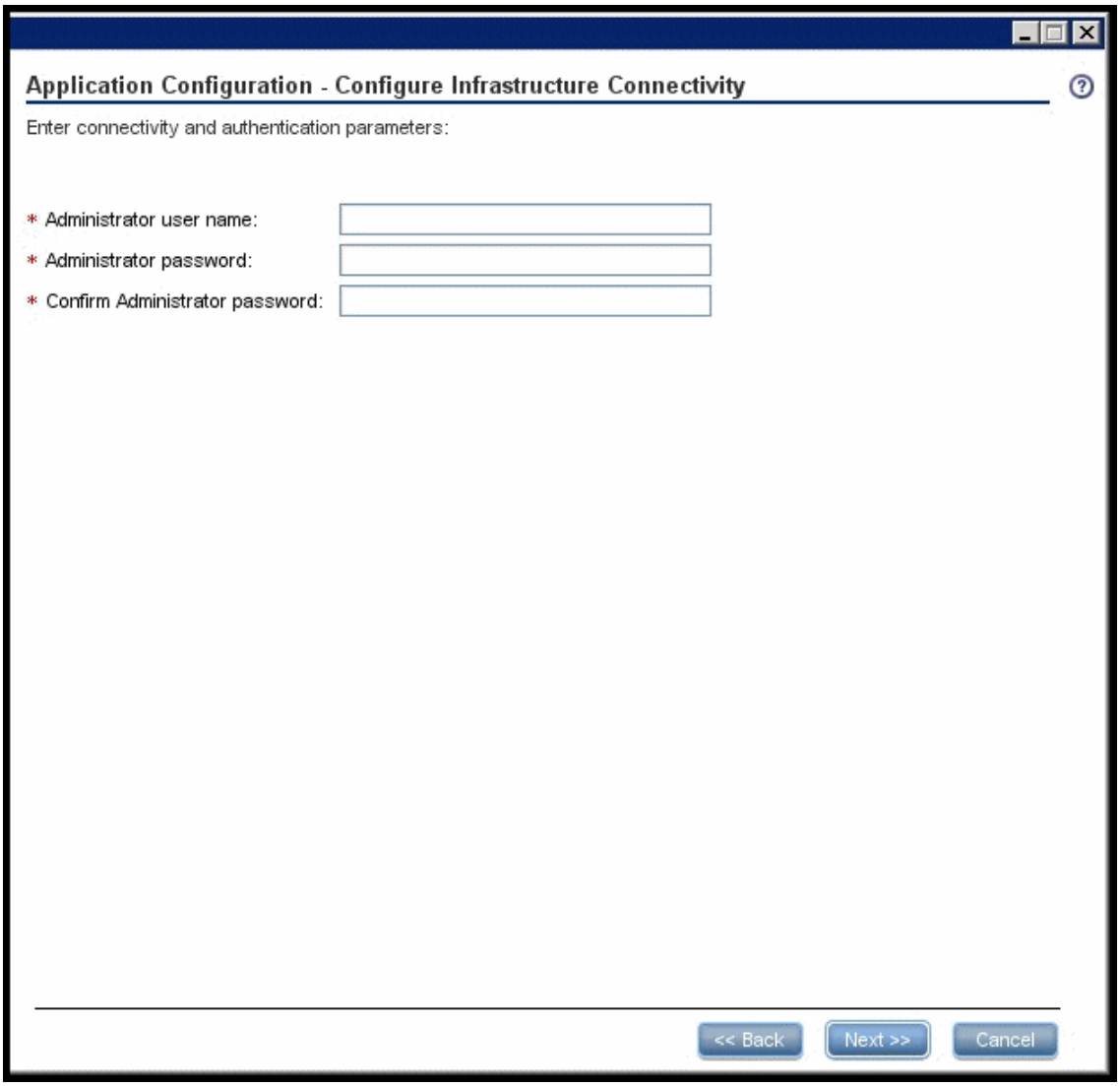
Web Server Configuration area:

UI Element	Description
HTTP port	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note**: 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.
HTTPS port	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD).

Business Objects enterprise area:

UI Element	Description
SSO shared secret	Enter the SSO shared secret.
Confirm SSO shared secret	Confirmation of the SSO shared secret.

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

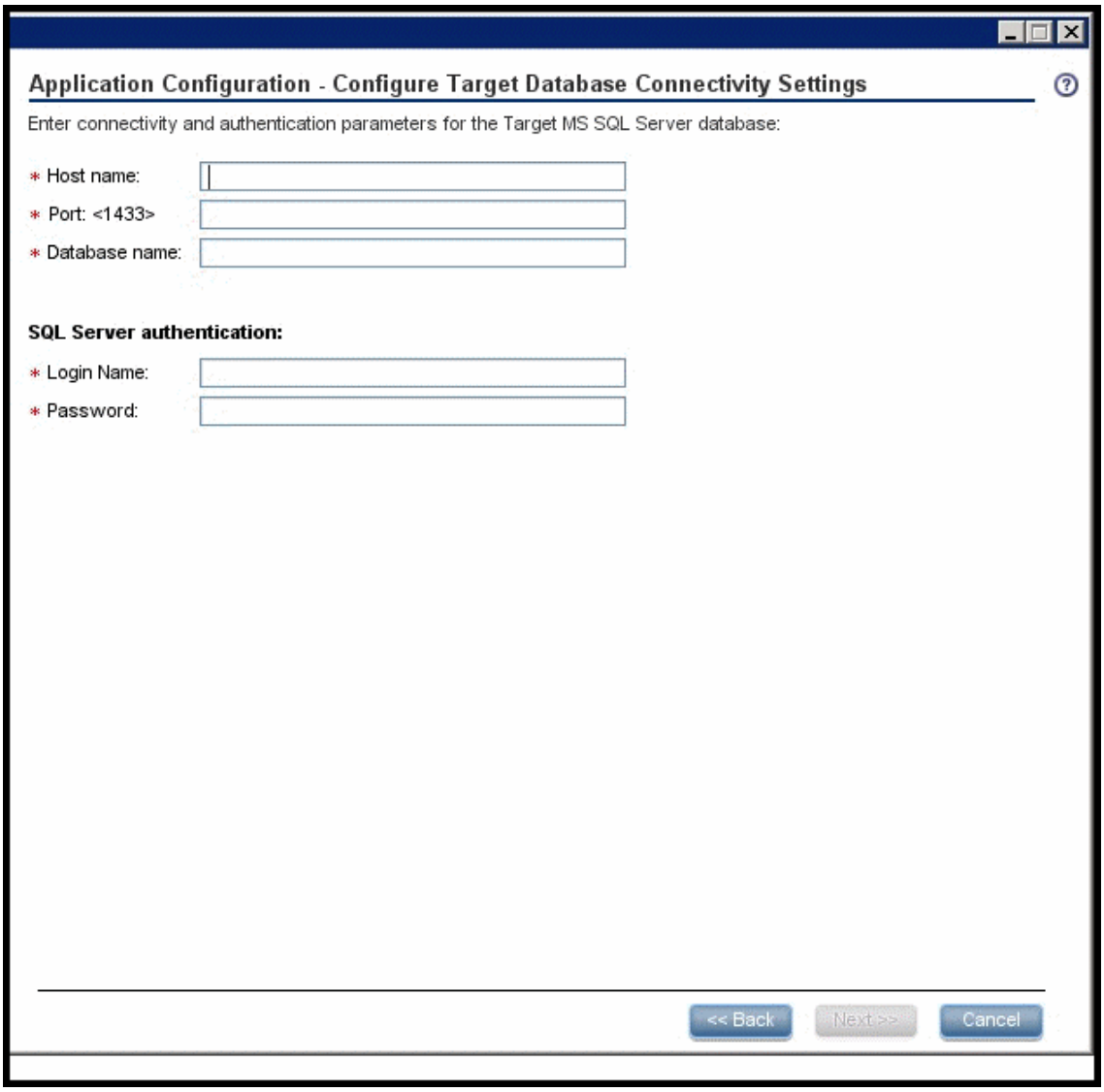


UI Element	Description
Administrator user name	The user name for the administrator. Use this user to log into Executive Scorecard for the first time.

UI Element	Description
Administrator password	The password for the administrator. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.
Confirm Administrator password	Confirmation of the administrator password.

3. On the **Application Configuration - Configure Target Database Settings** page, select **Create a new database**, and then click **Next**.

4. On the **Application Configuration - Configure Target Database Connectivity Settings** page, enter the following, and then click **Next**.



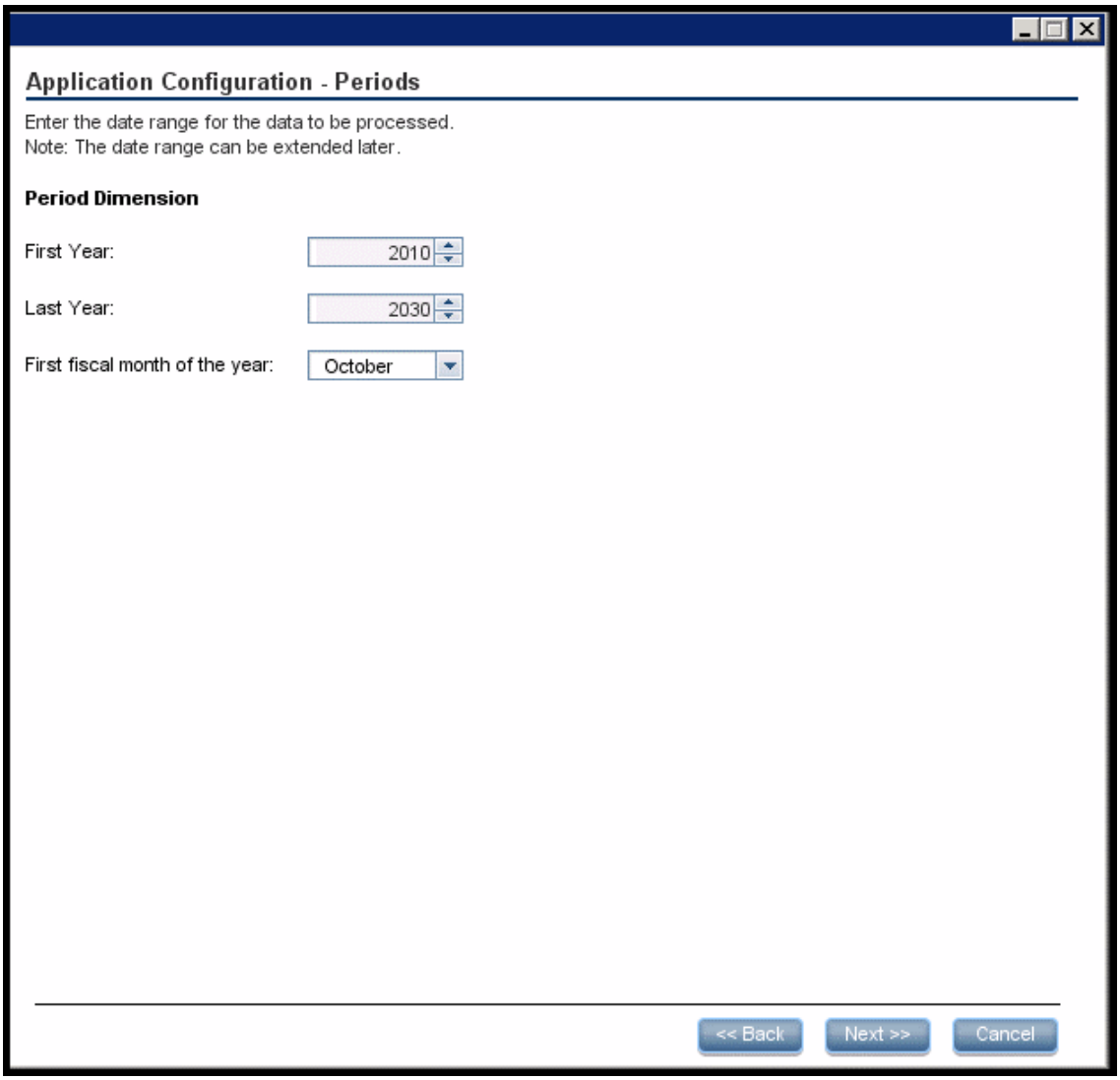
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL server hosting the target database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.

UI Element	Description
Port <1433>	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the target database. It is recommended that you use the following database naming convention: *databasename_trg*

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified login that creates the Target database. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

5. On the **Application Configuration - Periods** page, enter the following, and then click **Next**.

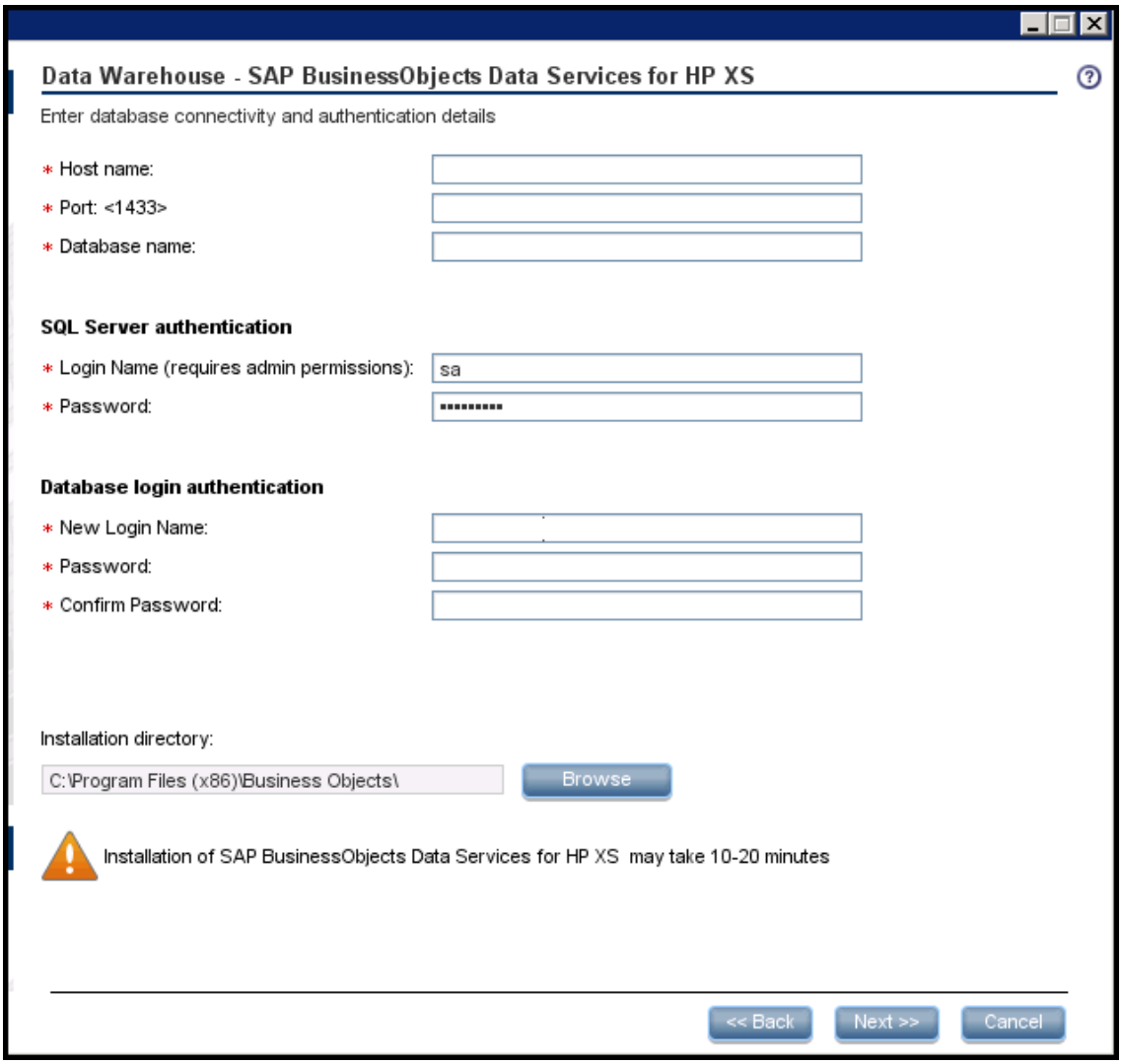


UI Element	Description
First Year	The first year in the period dimension is the first year used when automatically populating Data Warehouse tables with yearly, quarterly, monthly, weekly and daily records. Change the First Year value by clicking the up or down arrows. **Note:** The First Year can be changed later in the Executive Scorecard Admin application, followed by running the dw_period_dim_generator utility. For more information, see **Change the Data Warehouse Period dimensions** in the *Administrator Guide*.

UI Element	Description
Last Year	The last year in the period dimension is the last year used when automatically populating Data Warehouse tables with yearly, quarterly, monthly, weekly and daily records. Change the Last Year value by clicking the up or down arrows. **Note:** ■ The Last Year must not be lower than the current year. ■ The Last Year can be changed later in the Executive Scorecard Admin application, followed by running the dw_period_dim_generator utility. For more information see **Change the Data Warehouse Period dimensions** in the *Administrator Guide*.
First fiscal month of the year	The first fiscal month of the year in your organization.

Post-Install Wizard - Data Warehouse Section

1. On the **Data Warehouse - SAP BusinessObjects Data Services for HP XS** page, enter the following, and then 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):
sa
* Password:
Database login authentication
* New Login Name:
* Password:
* Confirm Password:
Installation directory:
C:\Program Files (x86)\Business Objects\
Browse
Installation of SAP BusinessObjects Data Services for HP XS may take 10-20 minutes
<< Back
Next >>
Cancel

UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the SAP BusinessObjects Data Services database. ■ Do not use localhost as the host name. ■ The sum of the number of characters of the following names must not exceed 65: ○ The Host name FQDN ○ The SAP BusinessObjects Data Services database name ○ The number of the server port. ○ The Login Name. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.
Port	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 Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the SAP BusinessObjects Data Services database. It is recommended that you use the following database naming convention: *databasename_bods*

SQL Server authentication area:

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

UI Element	Description
Password	The password of the specified login. **Note:** ■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ■ 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. ■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

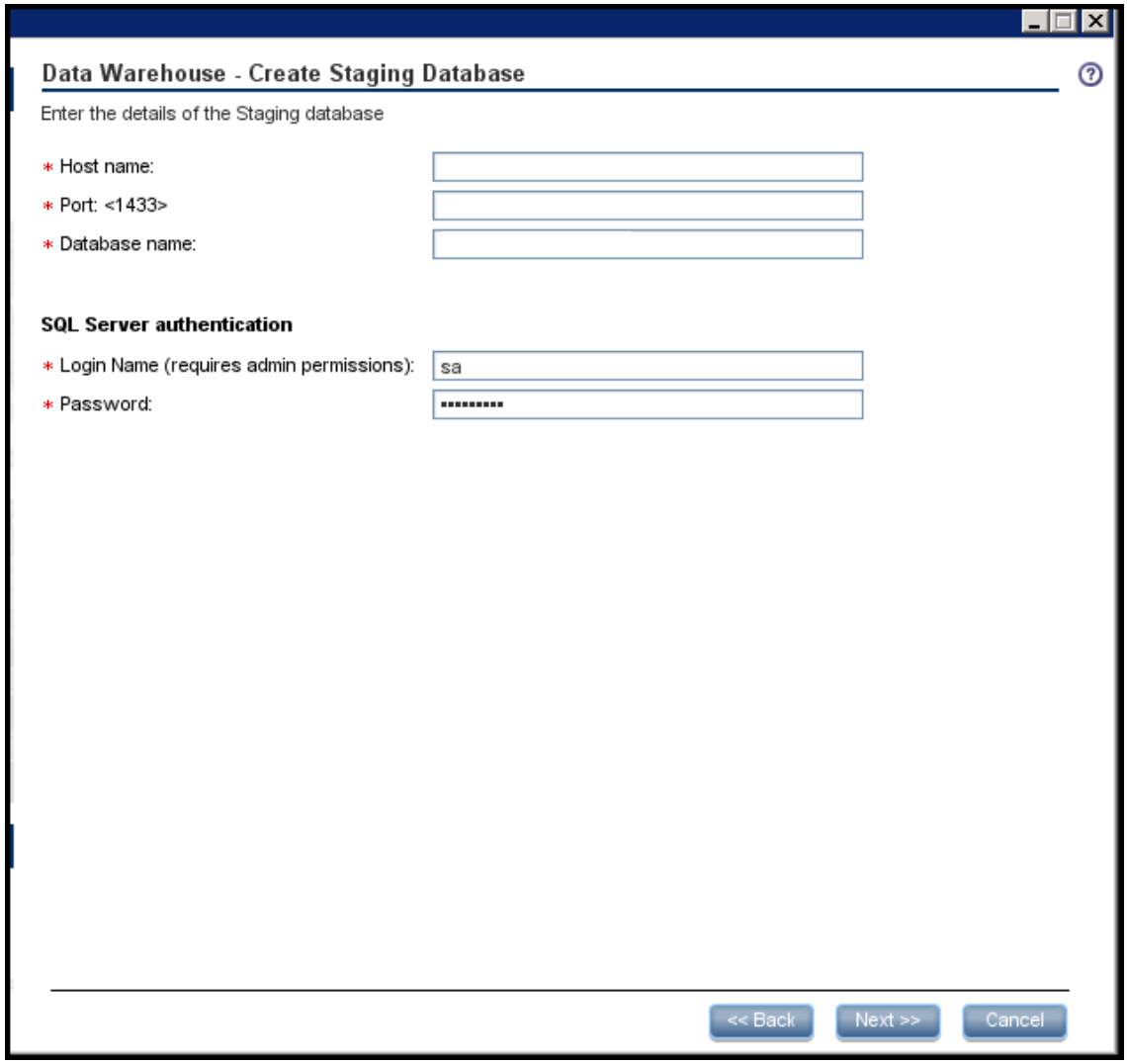
Database login authentication area:

UI Element	Description
New Login name	A new MS SQL login created for the SAP BusinessObjects Data Services database. A SAP BusinessObjects Data Services database user account with the same name is automatically created. **Note:** ■ The Login Name can only comprise alphanumeric characters and if required an underscore. ■ Do not use XS as a new database login name because the XS user name is already used internally.
Password	The password for the new login. The same password is also applied to the database user account. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password for the new login.

Installation directory area:

UI Element	Description
Installation directory	The location where you want to install SAP BusinessObjects Data Services. 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. To run the Designer, a user requires both read and write access to the installation directory.

2. On the **Data Warehouse - Create Staging Database** page, enter the following, and then click **Next**.

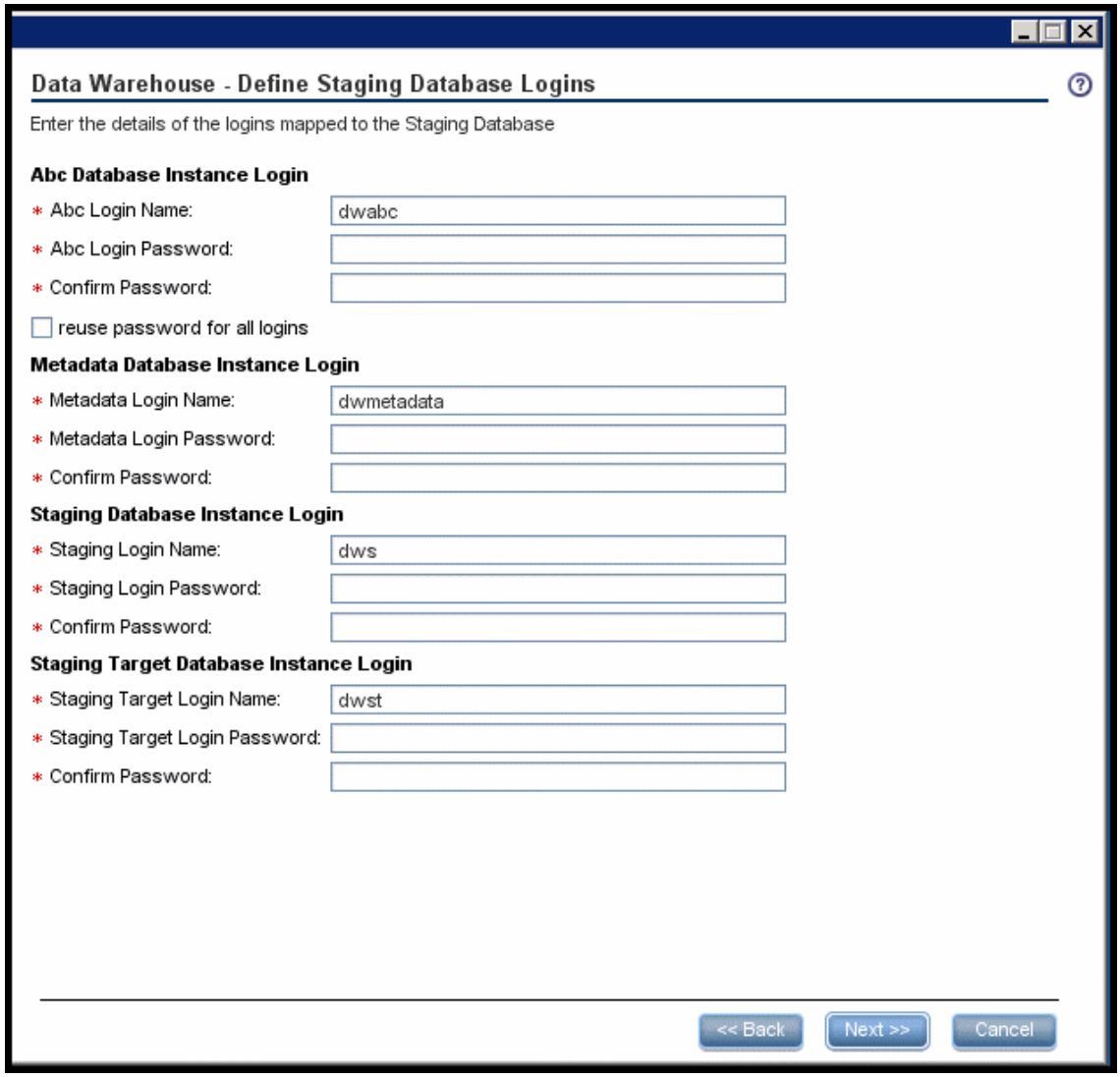


UI Element	Description
Host name	The fully qualified domain name (FQDN), or IP address of the server hosting the Staging database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.
Port	The port of the MS SQL server listener. The default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

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified login. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

3. On the **Data Warehouse - Define Staging Database Logins** page, enter the following, and then click **Next**.



Important information	The logins will be used as specified, but the users and the schemas mapped to these logins will be dwabc, dws, dwst, dwmetadata, and dwt respectively. You are recommended to use new logins. This ensures that the logins receive the proper permissions. If you must use existing logins, please contact support from the support site (http://www.hp.com/go/hpsoftwaresupport).

Abc Database Instance Login area:

UI Element	Description
Abc Login Name	The Abc database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. Do not use XS as a new database login name because the XS user name is already used internally.
Abc Login Password	The Abc database login password. **Note:** ▪ The password can comprise alphanumeric characters and an underscore. ▪ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.
Reuse password for all logins	Select to reuse the password for the Metadata login, Staging Database login, and Staging Target Database login.

Metadata Database Instance Login area:

UI Element	Description
Metadata Login Name	The Metadata database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. Do not use XS as a new database login name because the XS user name is already used internally.

UI Element	Description
Metadata Login Password	The Metadata database login password. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.

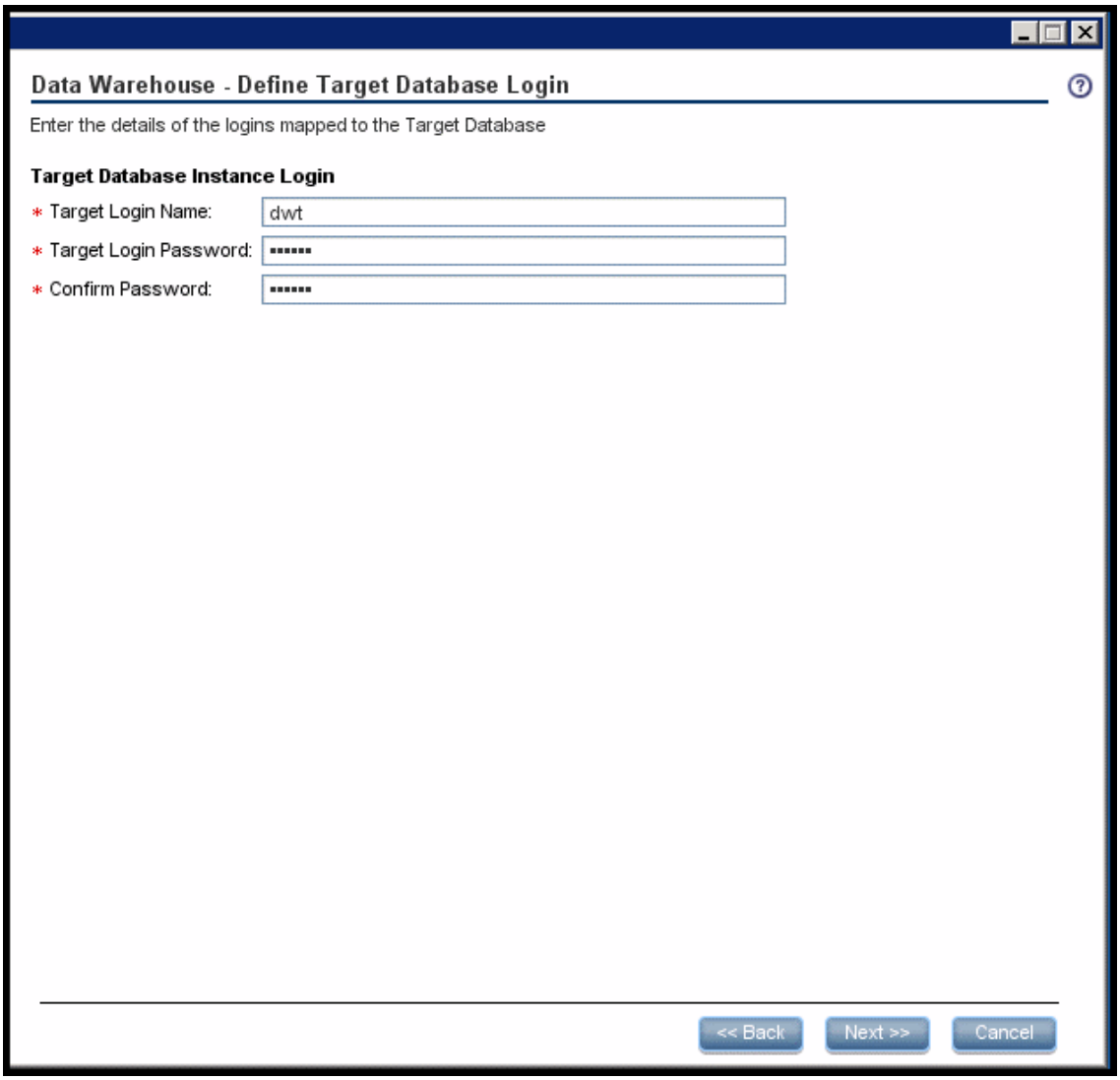
Staging Database Instance Login area:

UI Element	Description
Staging Login Name	The Staging database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. **Note:** If you install the Staging and Target databases on different instances or on different database servers, the administrator login creates a linked server with a specific name. The linked server feature enables the metadata login access to the Target database that is installed on the other instance or on the other database server. Make sure to use the Fully Qualified Domain Name (FQDN). Do not use XS as a new database login name because the XS user name is already used internally.
Staging Login Password	The Staging database login password. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.

Staging Target Database Instance Login area:

UI Element	Description
Staging Target Login Name	The Staging Target database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. **Note:** If you install the Staging and Target databases on different instances or on different database servers, the administrator login creates a linked server with a specific name. The linked server feature enables the metadata login access to the Target database that is installed on the other instance or on the other database server. Make sure to use the Fully Qualified Domain Name (FQDN). Do not use XS as a new database login name because the XS user name is already used internally.
Staging Target Login Password	The Staging Target database login password. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.

4. On the **Data Warehouse - Define Target Database Login** page, enter the following, and then click **Next**.

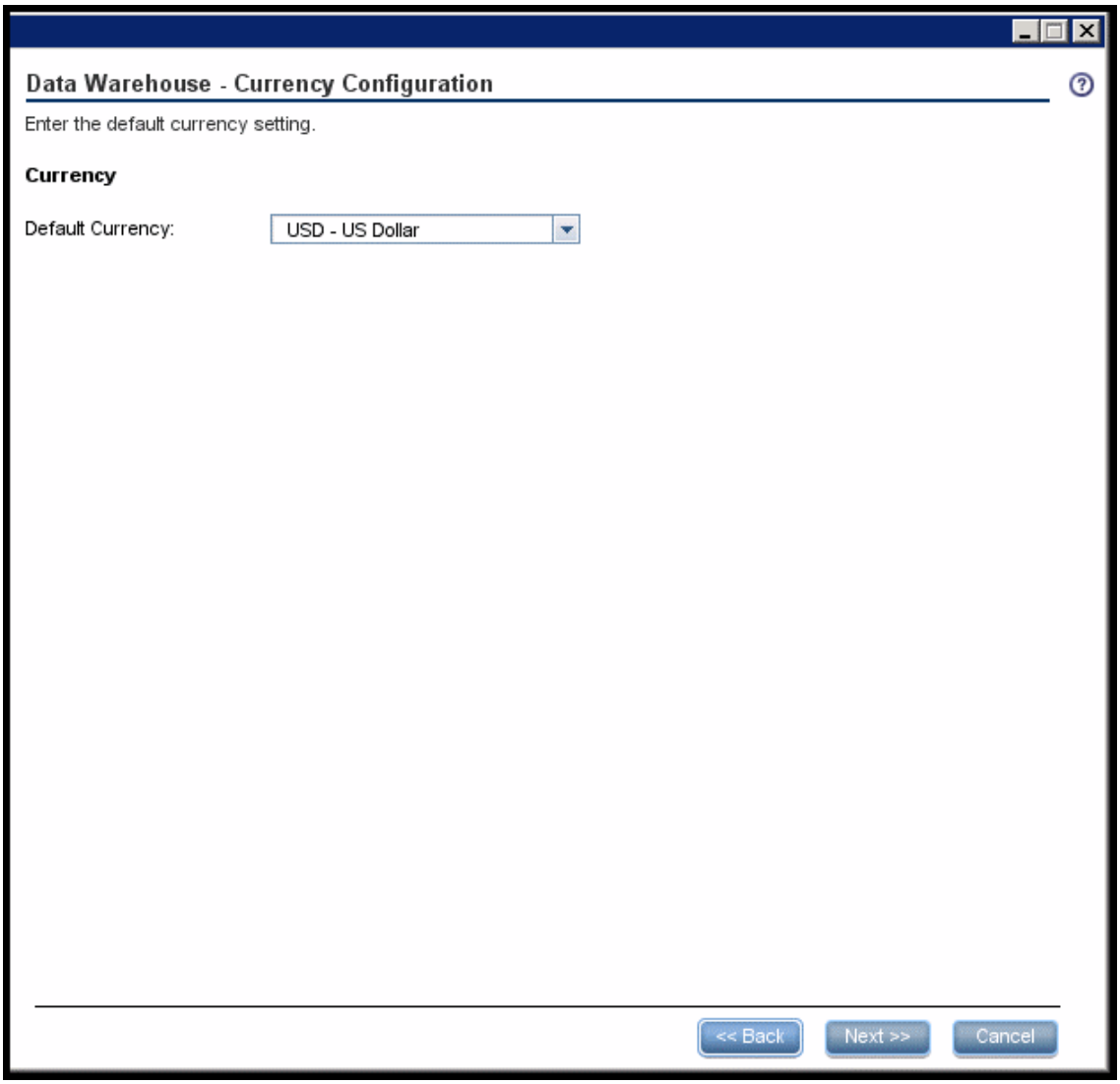


Target Database Instance Login area:

UI Element	Description
Target Login Name	The Target database login name. Do not use XS as a new database login name because the XS user name is used internally.

UI Element	Description
Target Login Password	The password for the specified login. **Note:** ■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ■ 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. ■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.
Confirm Password	Confirmation of the password.

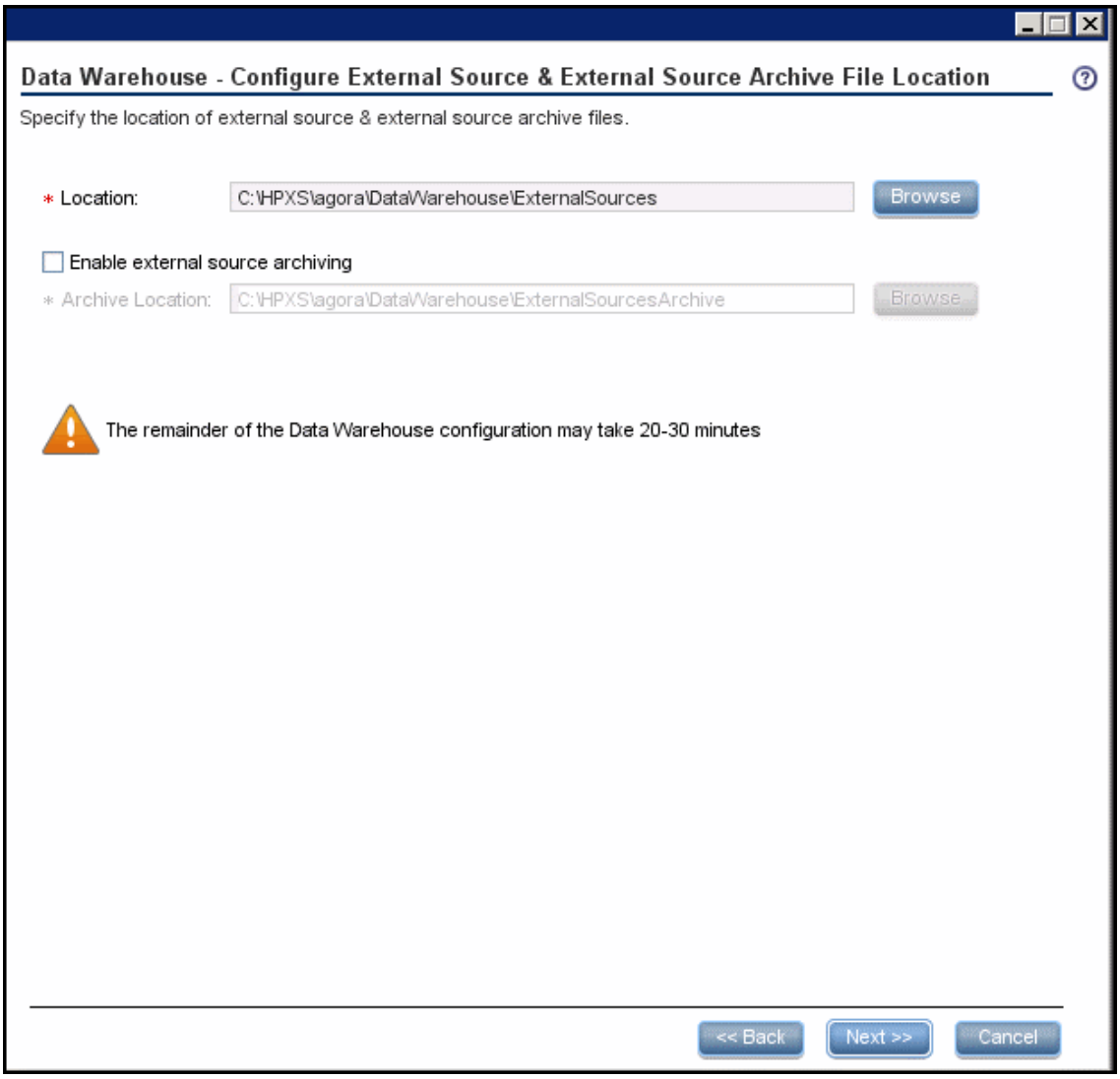
5. On the **Data Warehouse - Currency Configuration** page, enter the following, and then click **Next**.



Currency area:

UI Element	Description
Default Currency	The currency to use as default. You can select $ as a default. **Tip:** If you are using the HP Project and Portfolio Management or the HP Asset Manager applications as data sources, make sure that you select the currency corresponding to the currency defined in these applications. For a list of currencies, see "Supported Currencies".

6. On the **Data Warehouse - Configure External Source & External Source Archive File Location** page, enter the following, and then click **Next**.



UI Element	Description
Location	The location of the external source files used by Data Warehouse. The default location is: **<Installationdirectory>\agora\DataWarehouse\ExternalSources**
Enable external source archiving	Select to enable archiving external data source data files. When you select this option, Data Warehouse backs up the flat files created during the SOURCE EXTRACT phase by the FBI Framework. This backup is used in case of fault and recovery, to execute the ETL without SOURCE EXTRACT phase, meaning independently on the data source.

UI Element	Description
Archive Location	Specify where you want to archive the external data source data files. **Note:** Because archiving data files can be memory intensive, it is recommended to archive to a dedicated separate logical drive.

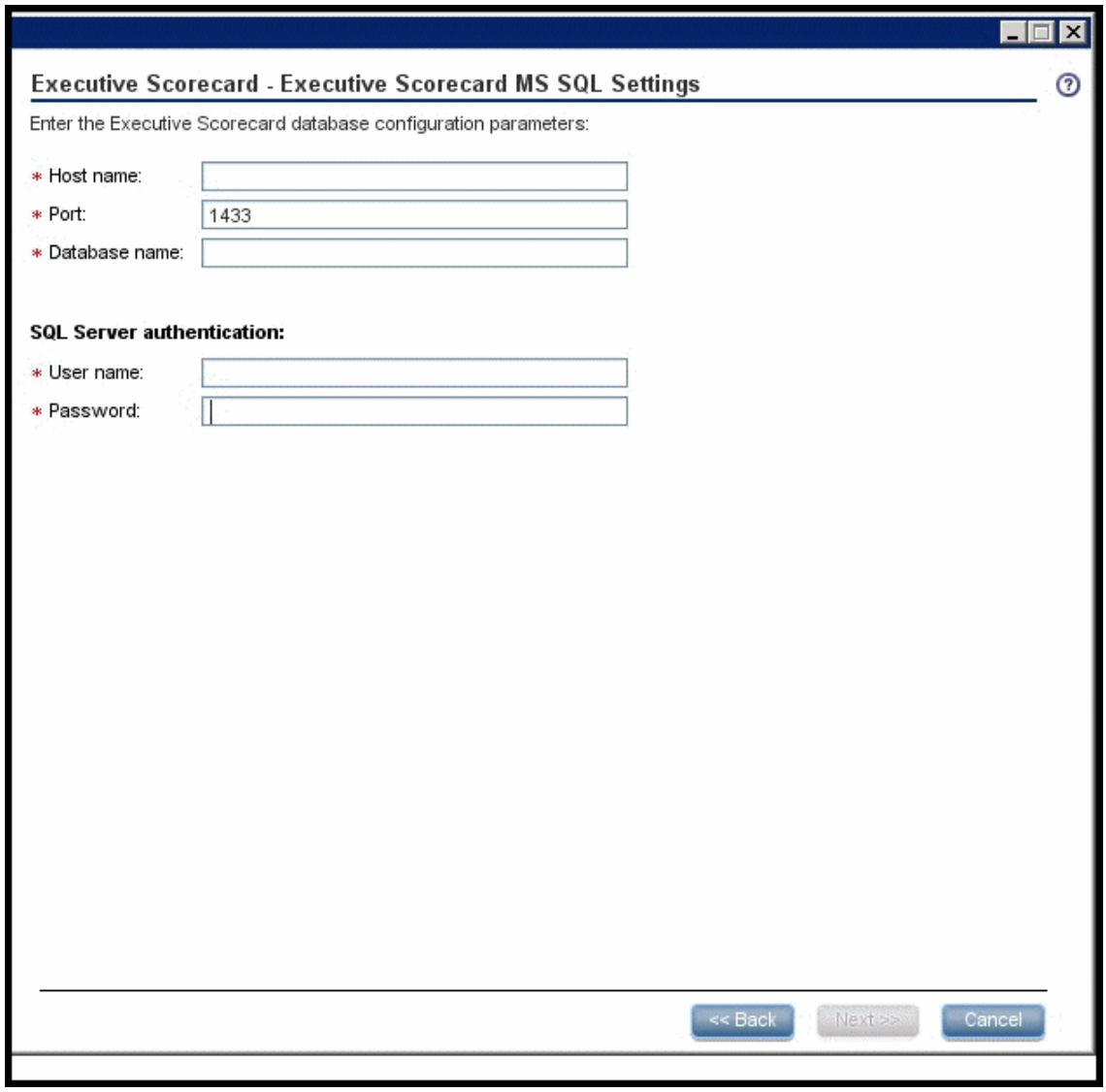
7. On the **Data Warehouse - Configuration Status** page, ensure that all the Data Warehouse components were successfully configured, and then click **Next**.

8. On the **Executive Scorecard - Configure Executive Scorecard database** page, select **Create a new Executive Scorecard database** , and then click **Next**.

Post-Install Wizard - Executive Scorecard Section

Note: Executive Scorecard includes out-of-the-box Content Acceleration Packs (CAPs). These CAPs are automatically uploaded during the post-installation process. These CAPs are then listed in the CAPs Management page in the Admin tab. They are not activated. For details on CAPs, see Manage Content Acceleration Packs in the *Administrator Guide*.

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



UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the server hosting the Executive Scorecard database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.

UI Element	Description
Port	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the Executive Scorecard database. It is recommended that you use the following database naming convention: *databasename_app*

SQL Server authentication:

UI Element	Description
User Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified login. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

2. On the **Executive Scorecard - Executive Scorecard Database Configuration Status** page, verify that the Executive Scorecard database was created successfully, and then click **Next** to install Executive Scorecard.

3. On the **Executive Scorecard Summary** page, ensure that the Executive Scorecard configuration was completed successfully, and then click **Next**.

Post-Install Wizard - Financial Planning Analysis Section

1. On the **Financial Planning and Analysis - Installing FPA** page, click **Next** to install IT

Financial Management.

2. On the **Financial Planning and Analysis - Summary** page, ensure that the Configuration Wizard completed successfully, and then click **Finish**.

3. You must then perform further configuration on the data sources and content packs, as well as running the relevant ETLs to get data in the Executive Scorecard application. For more information on configuring Data Warehouse, see Getting Started with Administration Tasks in the *Administrator Guide*.

Installation with External SAP BusinessObjects Enterprise in a Distributed Environment

This section includes the following steps:

"Install BusinessObjects Enterprise" below

"Install Data Warehouse" on page 61

"Install Executive Scorecard" on page 90

"Installation with External SAP BusinessObjects Enterprise in a Distributed Environment" above

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 CMS database in the DB server.
2. In the server on which you want to install SAP BusinessObjects Enterprise, if you use a 64 bit operating system, run the command: **C:\Windows\SysWOW64\odbcad32.exe**.
3. In the **ODBC Data Source Administrator**, click the **System DSN** 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 following information to create the ODBC data source for your BOE database:
   a. In the **Name** field, enter the name of the CMS database you previously created in the database.
   b. In the **Description** field, you can enter the name of the CMS database.
   c. In the **Server** field, enter the FQDN of the database server 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 **Change the default database to** option, and select the database that you created in step 1. 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!**.
10. Click **OK** to exit and then **OK** to close the **ODBC Data Source Administrator** window.

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 **SAP BusinessObjects Enterprise XI 3.1 SP3 Setup welcome** page, click Next.
4. In the **SAP BusinessObjects Enterprise XI 3.1 SP3 Setup License Agreement** page, select **I accept the License Agreement** and click **Next**.
5. In the **SAP BusinessObjects Enterprise XI 3.1 SP3 Setup choose language packs** page, select the relevant language pack and click **Next**.
6. In the **BusinessObjects Enterprise XI 3.1 Setup - User Information** page**,** insert the license key in the **Product Keycode** field. Click **Next**.
7. 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**.
8. 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**.

9. 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**.

10. 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.

11. In the SQL Server Logon dialog box, click **Browse** to select the relevant data source in the **Data Source Name** field, enter the password in the **Password** field, and select the Database that you have created in step 1. Click **OK** and then click **Next**.

12. 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**.

13. Click **Next** using all the default ports (do not change them).

    Note: The **BOWInstall_0.log** Installation log file is saved in the **temp** folder.

14. In the Start Installation page, click **Next**. Note that the installation takes about 45 minutes.

15. To login to BusinessObjects Enterprise after installation, use the following URL:

    http://<server name>:8080/CmcApp

    User: administrator, Password: (empty).

16. In the **BusinessObjects Enterprise XI 3.1 Setup - Automatically Re-Deploy Web Applications?** page, select **Yes, automatically re-deploy the web application**s. Click **Next**.

17. 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, and save the file:

```
<ClassPath>
   <Path>C:\Program Files (x86)\Business Objects\common\4.0\java\lib\externa
l\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;
   ```

BusinessObjects Enterprise is now ready to be integrated with Executive Scorecard.

Install Data Warehouse

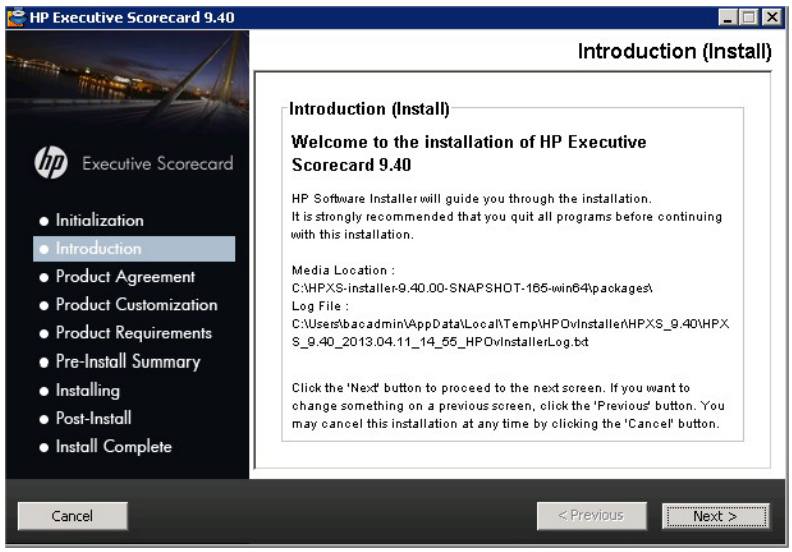
The Data Warehouse component should be installed on a separate server after the installation of SAP Business Objects Enterprise on a separate server.

Prerequisites:

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.

Start the installation:

1. Insert the XS media into the CD/DVD drive. The installation wizard opens.

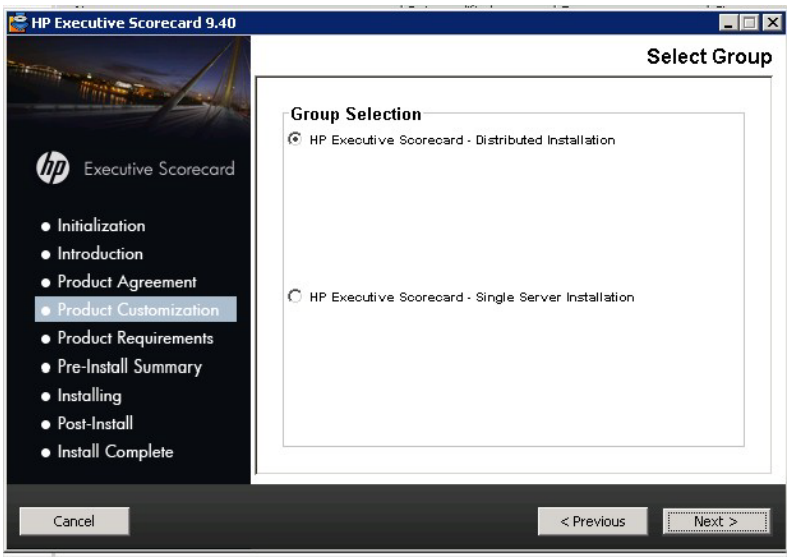


Caution: The CD/DVD must remain in the drive until you complete the Executive Scorecard Configuration Wizard.

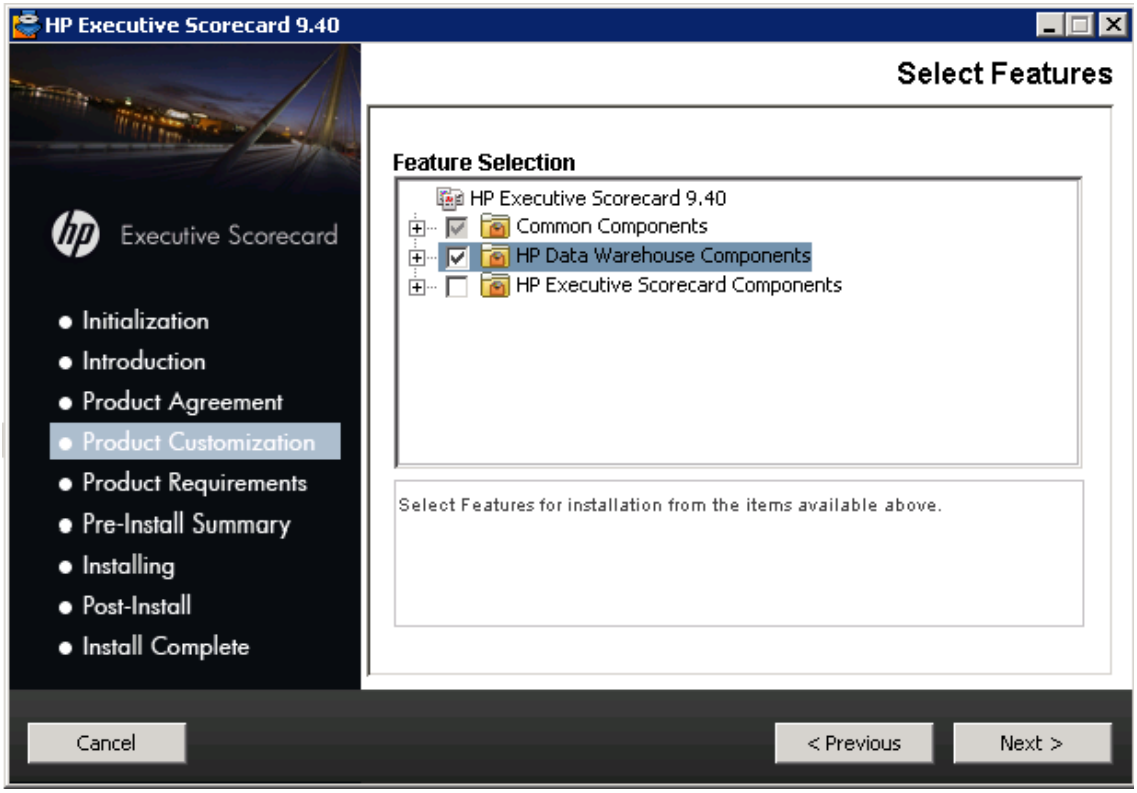
Note: If the installation wizard does not start automatically, extract all the files from

the .ZIP file and run the file: **<DVD_ROOT>\Windows_Setup\HPXS_9.4q_setup.exe**.

2. Follow the prompts until you get to the **Select Group** page.
3. On the **Select Group** page, select **HP Executive Scorecard - Distributed Installation**, and then click **Next**.

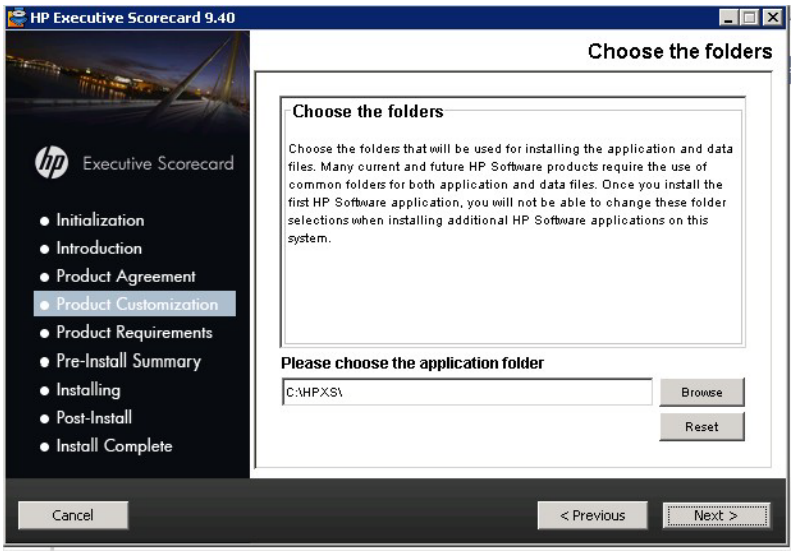


4. On the **Select Features** page, select the component you are installing on this server, and then click **Next**.



Common Components are automatically selected and installed with each component.

5. 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.

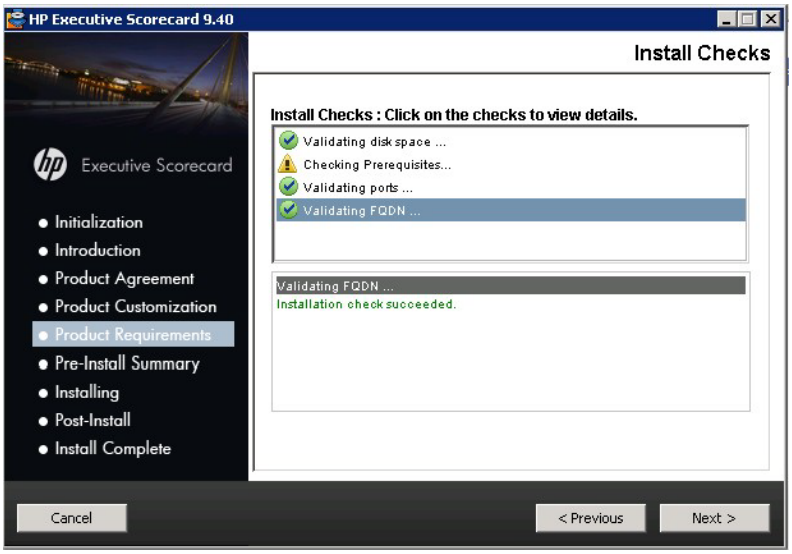


Note: If you enter a new application folder name, it cannot contain embedded spaces. For example a folder with a name **HP XS** is invalid.

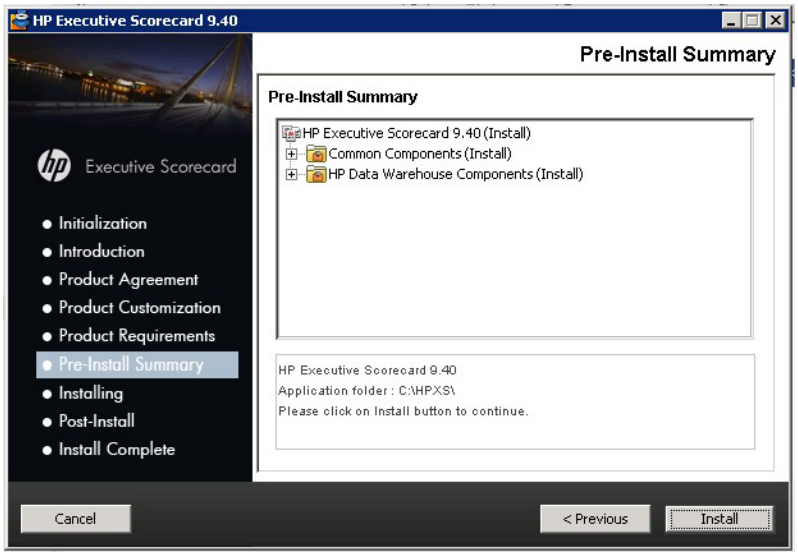
The wizard then runs a series of checks to validate system requirements.

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.

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



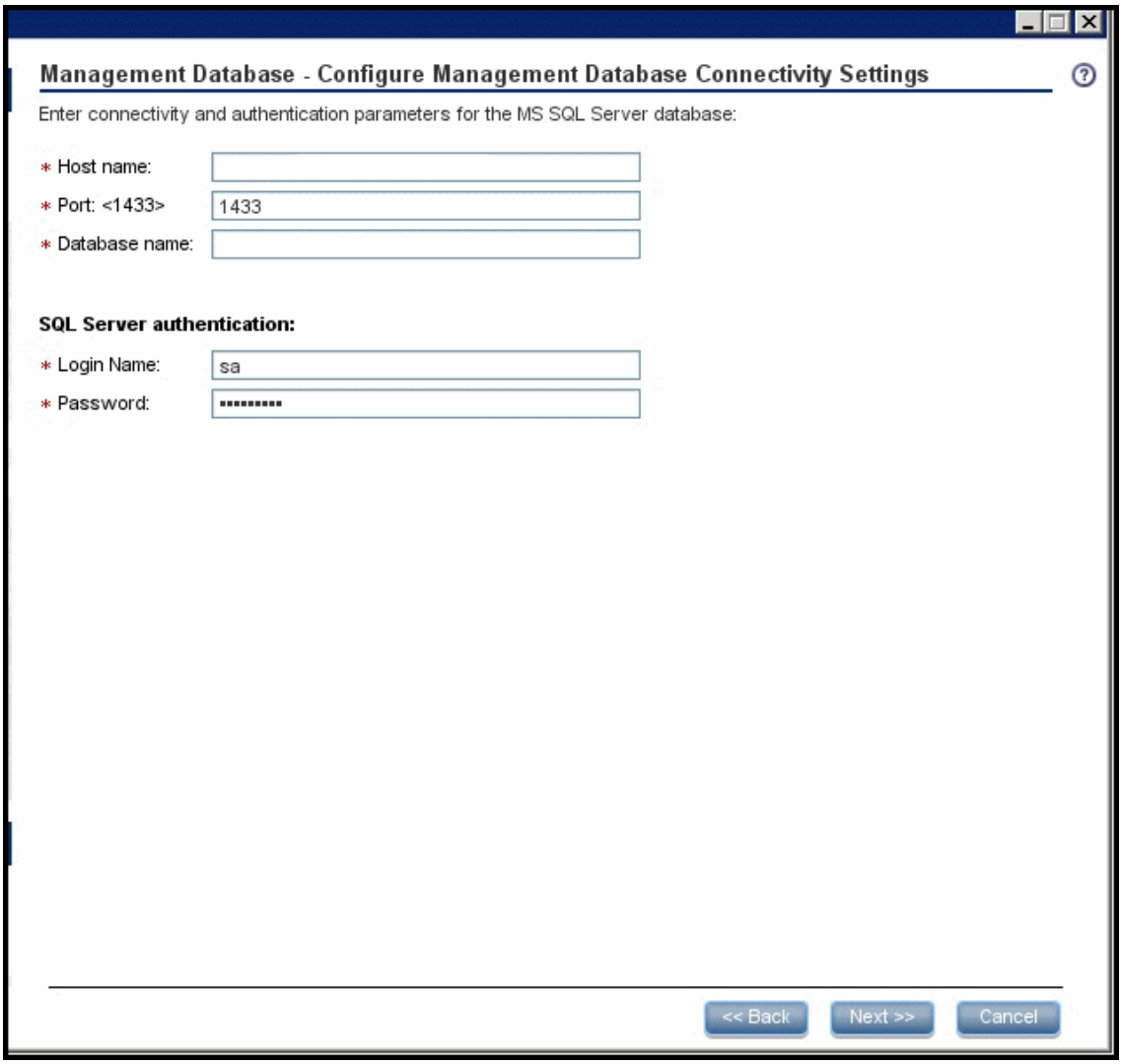
7. On the **Pre-Install Summary** page, verify that the components you wish to install are listed, and then click **Install**.



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

Post-Install Wizard - Management Database Section

1. On the **Introduction** page, click **Next**.
2. On the **Management Database - Configure Management Database Settings** page, select **Create a new database**, and then click **Next**.
3. On the **Management Database - Configure Management Database Connectivity Settings** page, enter the information and then click **Next**.



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

UI Element	Description
Port <1433>	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the Management database. It is recommended that you use the following database naming convention: *databasename_mng* **Tip:** Make note of the database name, as it may be needed when installing other components.

SQL Server authentication:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

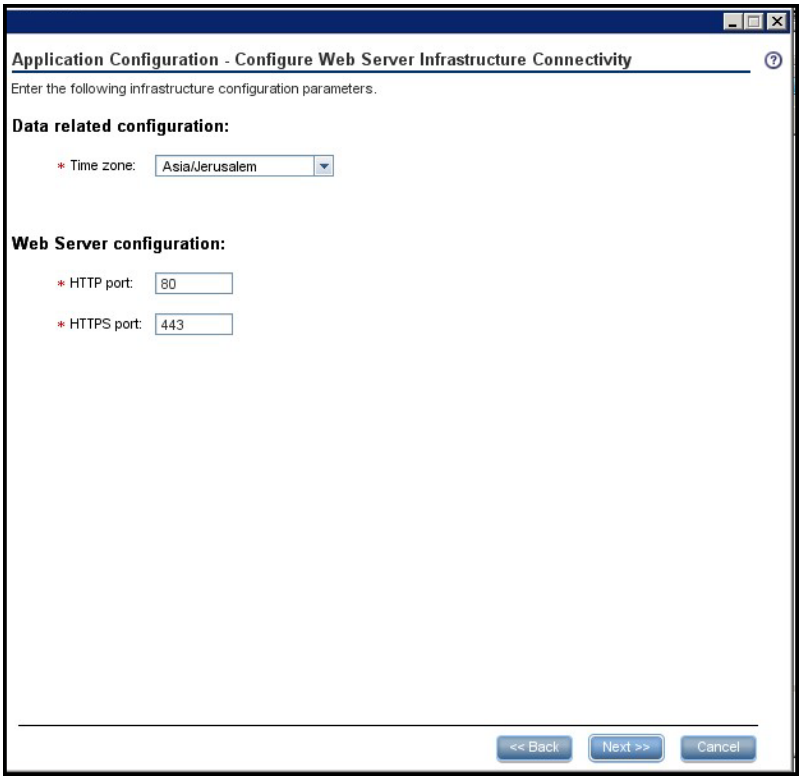
4. On the **Management Database - Management Configuration Status** page, verify that the operation completed successfully. and then click **Next**.

Post-Install Wizard - License Management Section

- On the **License Management -Load a License** page, select **Load a permanent or temporary license**, enter the license, and then click **Next**.

Post-Install Wizard - Application Configuration Section

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



Data related configuration area:

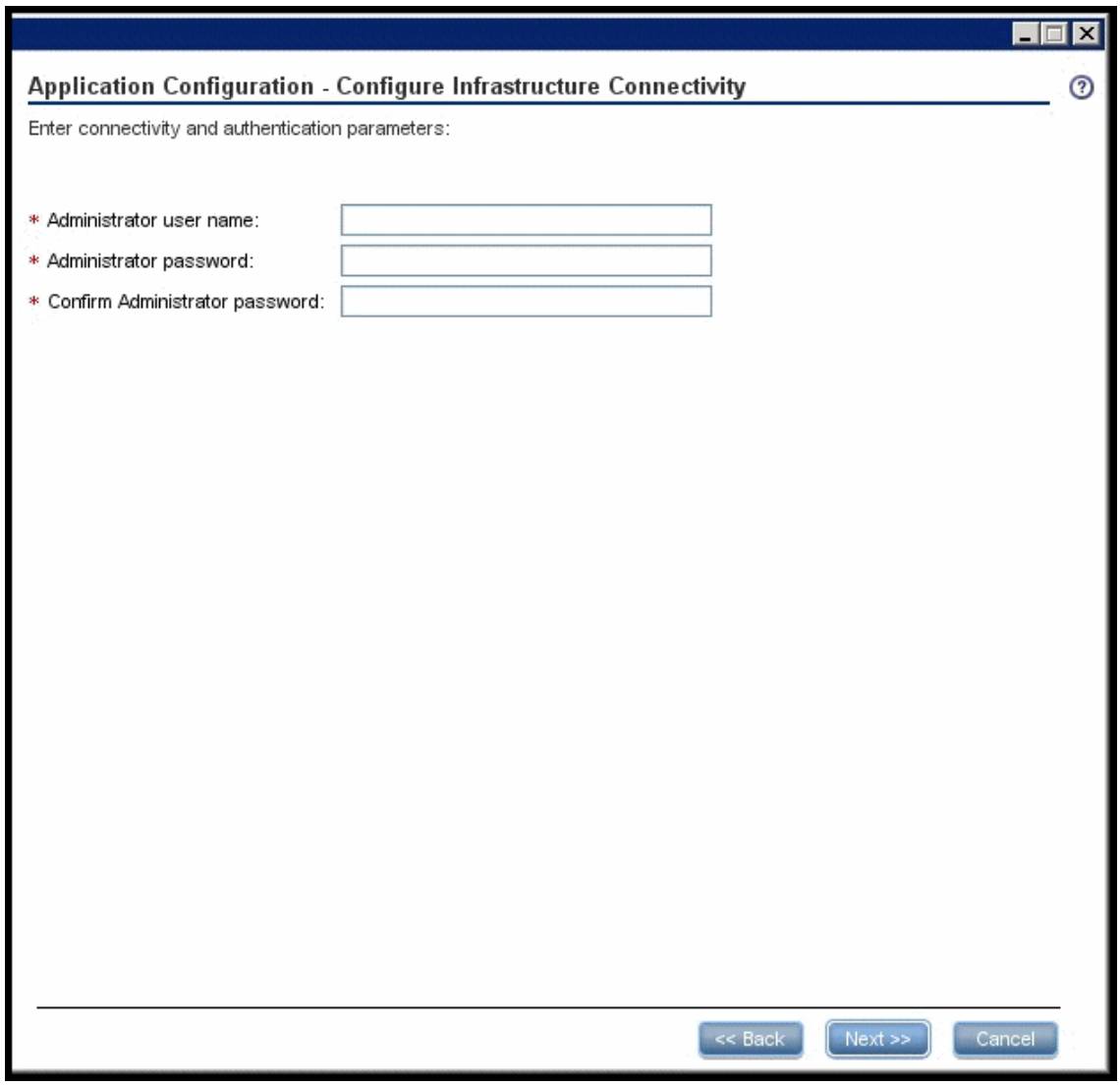
UI Element	Description
Time Zone	The Data Warehouse time zone used when consolidating the data extracted from the data sources.

Web Server Configuration area:

UI Element	Description
HTTP port	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note**: 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.

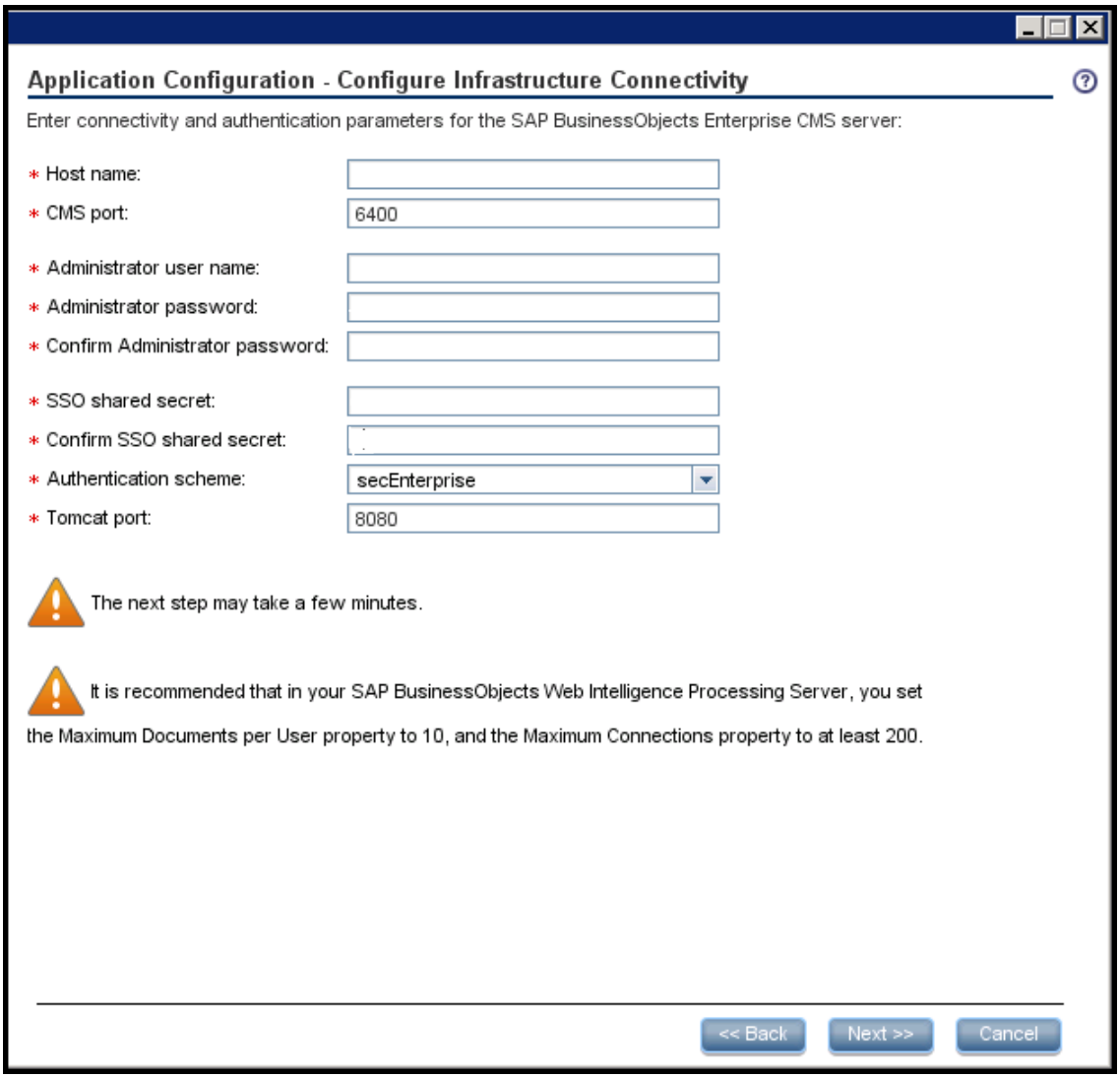
UI Element	Description
HTTPS port	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD).

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



UI Element	Description
Administrator user name	The user name for the administrator. Use this user to log into Executive Scorecard for the first time.
Administrator password	The password for the administrator. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.
Confirm Administrator password	Confirmation of the administrator password.

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

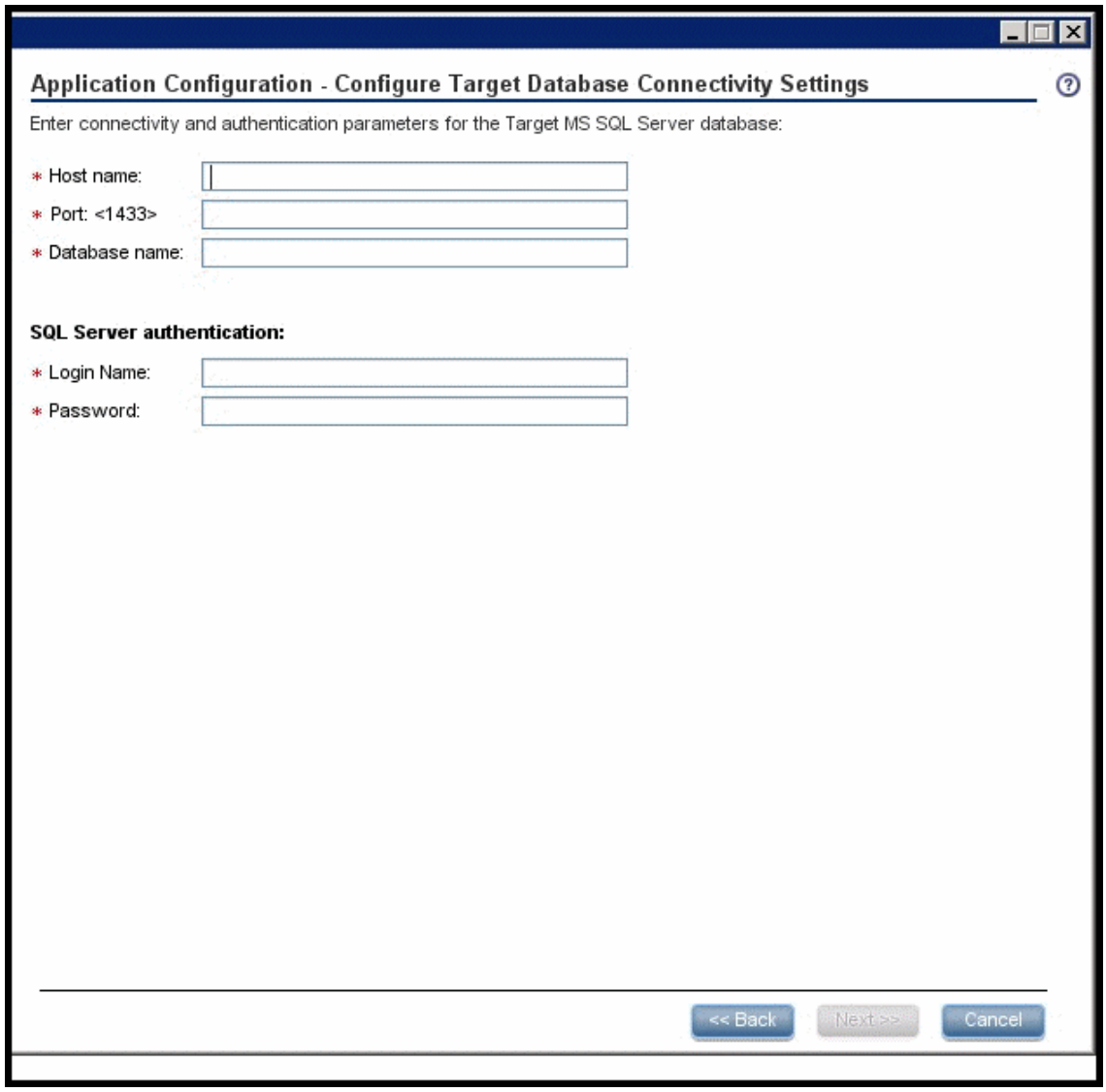


UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the SAP BusinessObjects Enterprise XI 3.1 server.
CMS Port	The port number used by the CMS listener. The default value when SAP BusinessObjects Enterprise is installed as part of the Executive Scorecard installation,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

UI Element	Description
Confirm Administrator password	Confirmation of the administrator password.
SSO shared secret	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.
Confirm SSO shared secret	Confirmation of the SSO shared secret.
Authentication scheme	Select one of the following SAP BusinessObjects Enterprise XI 3.1 authentication schemes that contains the administrator account: ▪ **secEnterprise** - When the SAP BusinessObjects administrator account is a native Enterprise account. ▪ **secLDAP** - When the SAP BusinessObjects administrator account originates from an LDAP user database.
Tomcat Port	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 Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD).

4. On the **Application Configuration - Target Database Settings** page, select the **Create a new database** option, and then click **Next**.

5. On the **Application Configuration - Configure Target Database Connectivity Settings** page, enter the information and then click **Next**.



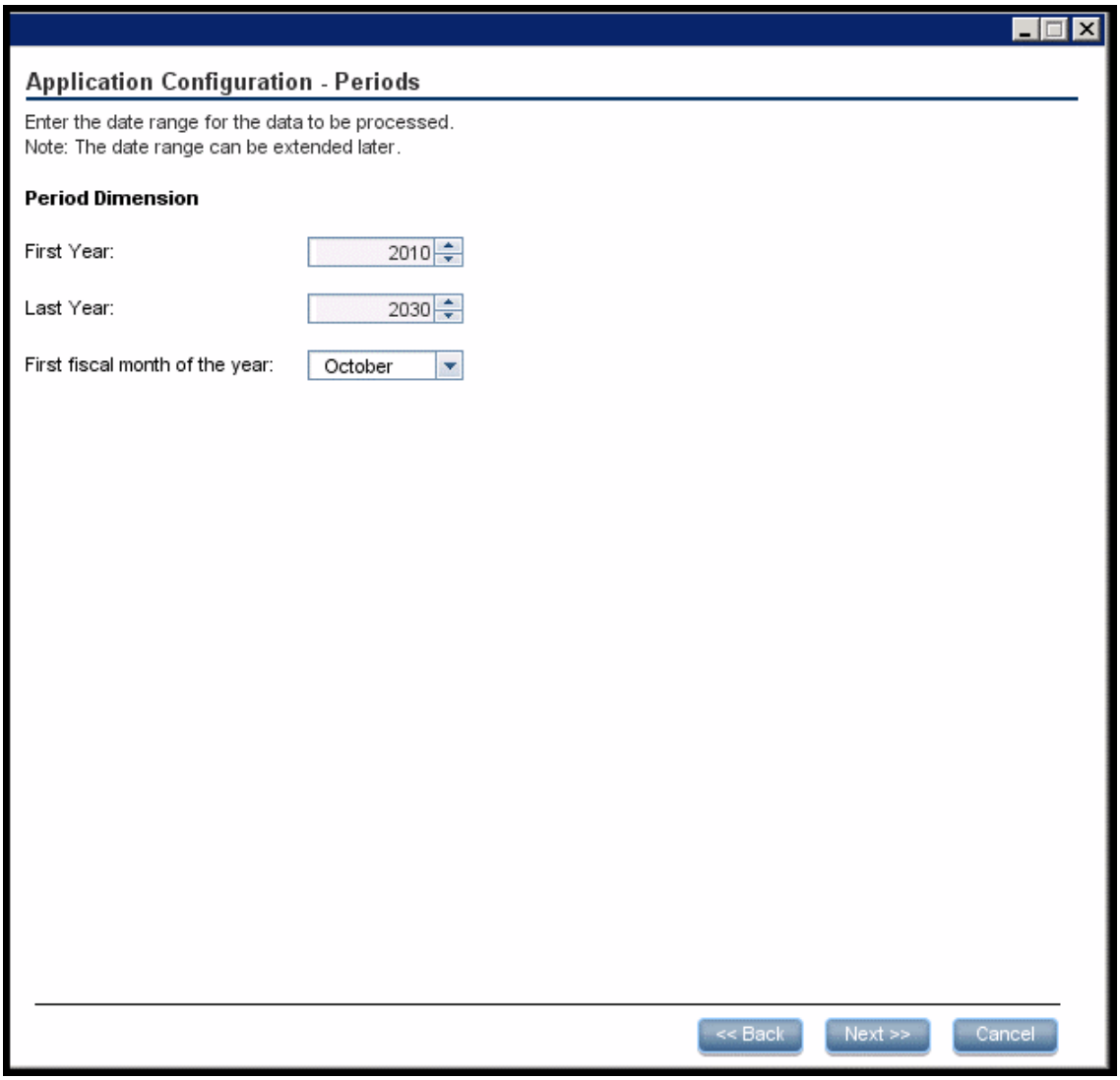
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL server hosting the target database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.

UI Element	Description
Port <1433>	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the target database. It is recommended that you use the following database naming convention: *databasename_trg*

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified login that creates the Target database. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

6. On the **Application Configuration - Periods** page, enter the following, and then click **Next**.

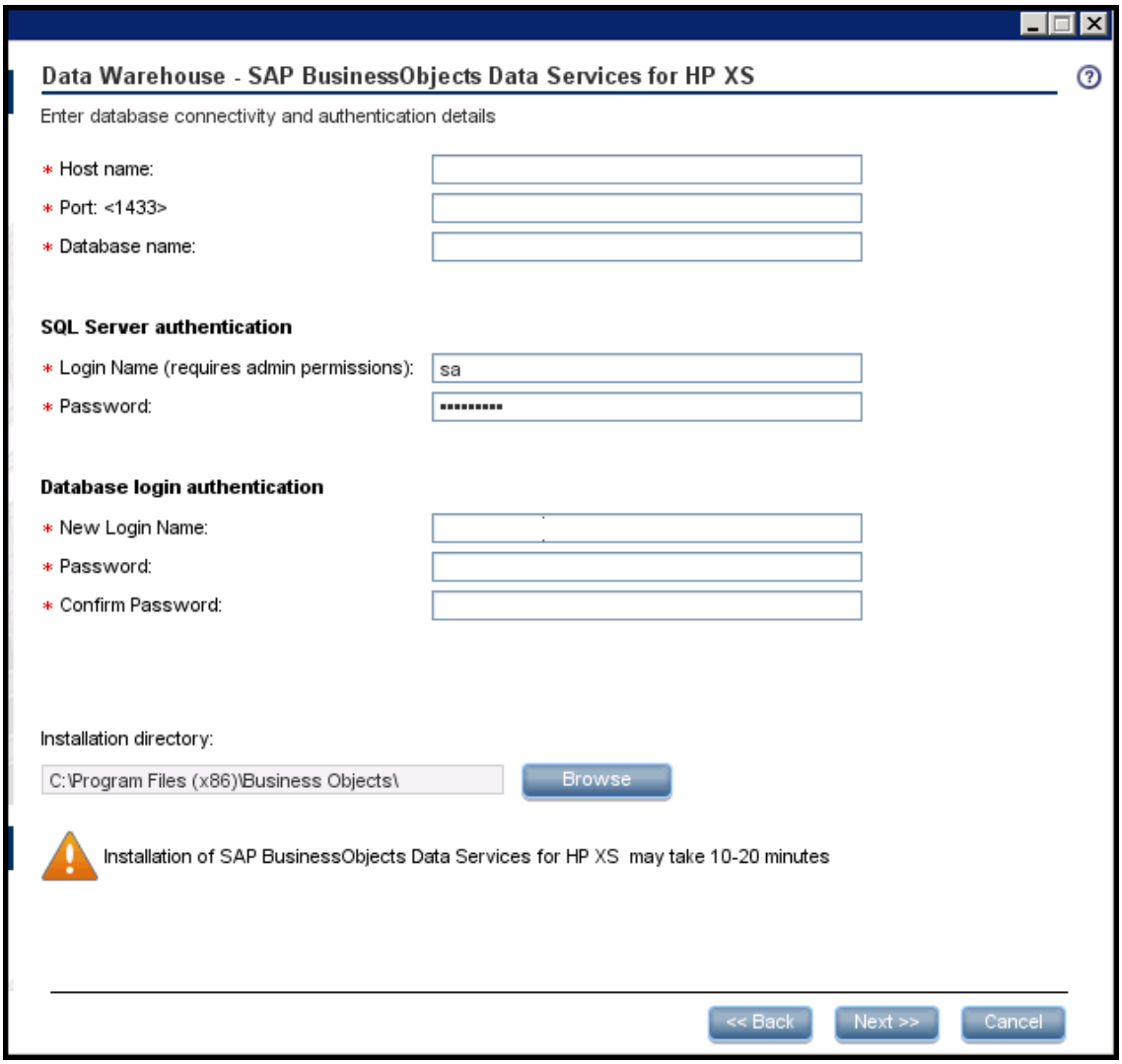


UI Element	Description
First Year	The first year in the period dimension is the first year used when automatically populating Data Warehouse tables with yearly, quarterly, monthly, weekly and daily records. Change the First Year value by clicking the up or down arrows. **Note:** The First Year can be changed later in the Executive Scorecard Admin application, followed by running the dw_period_dim_generator utility. For more information, see **Change the Data Warehouse Period dimensions** in the *Administrator Guide*.

UI Element	Description
Last Year	The last year in the period dimension is the last year used when automatically populating Data Warehouse tables with yearly, quarterly, monthly, weekly and daily records. Change the Last Year value by clicking the up or down arrows. **Note:** ■ The Last Year must not be lower than the current year. ■ The Last Year can be changed later in the Executive Scorecard Admin application, followed by running the dw_period_dim_generator utility. For more information see **Change the Data Warehouse Period dimensions** in the *Administrator Guide*.
First fiscal month of the year	The first fiscal month of the year in your organization.

Post-Install Wizard - Data Warehouse Section

1. On the **Data Warehouse - SAP BusinessObjects Data Service for HP XS** page, enter the following, and then 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):
sa
* Password:
Database login authentication
* New Login Name:
* Password:
* Confirm Password:
Installation directory:
C:\Program Files (x86)\Business Objects\
Browse
Installation of SAP BusinessObjects Data Services for HP XS may take 10-20 minutes
<< Back
Next >>
Cancel

UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the SAP BusinessObjects Data Services database. ▪ Do not use localhost as the host name. ▪ The sum of the number of characters of the following names must not exceed 65: ○ The Host name FQDN ○ The SAP BusinessObjects Data Services database name ○ The number of the server port. ○ The Login Name. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.
Port	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 Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the SAP BusinessObjects Data Services database. It is recommended that you use the following database naming convention: *databasename_bods*

SQL Server authentication area:

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

UI Element	Description
Password	The password of the specified login. **Note:** ■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ■ 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. ■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

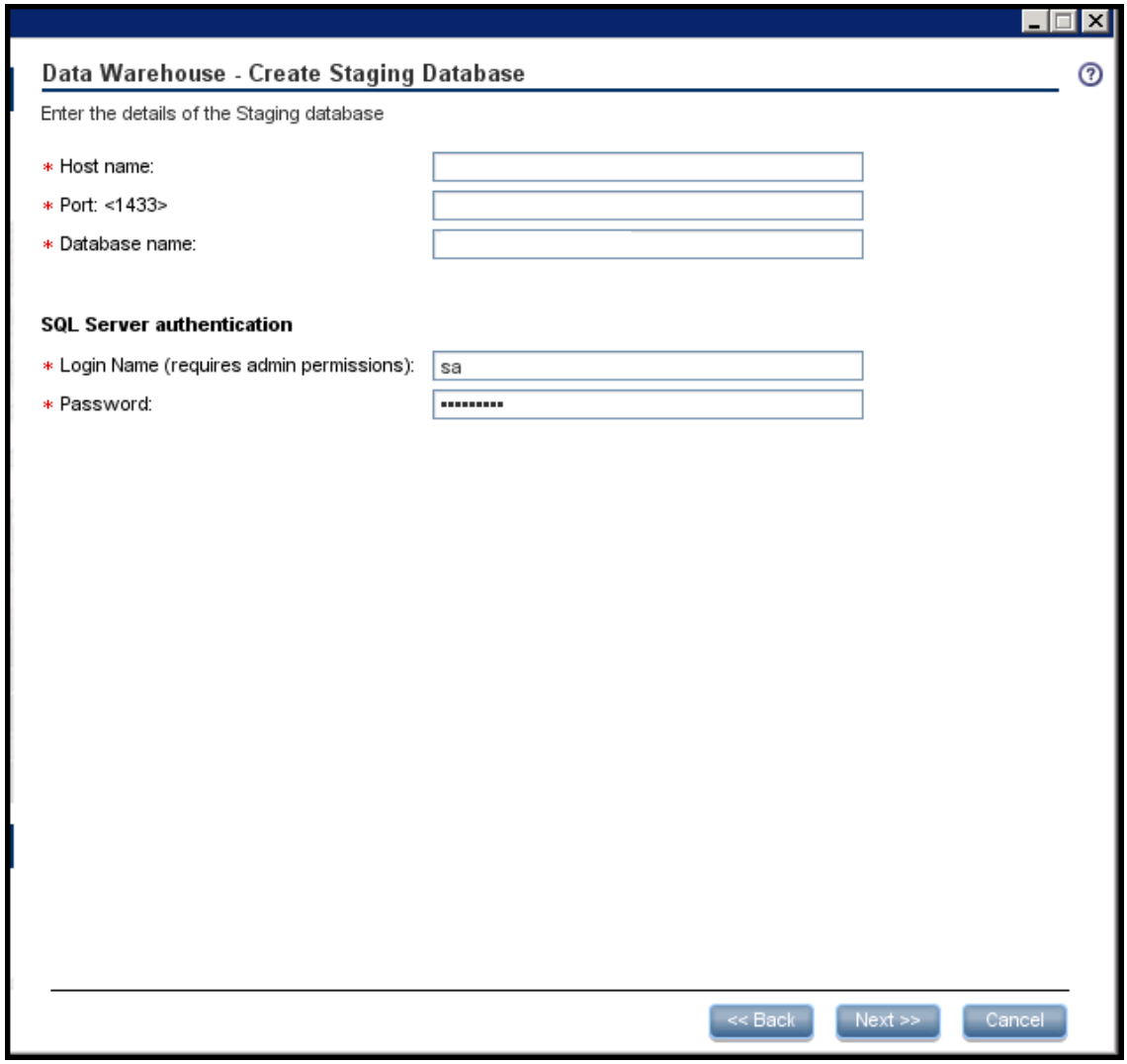
Database login authentication area:

UI Element	Description
New Login name	A new MS SQL login created for the SAP BusinessObjects Data Services database. A SAP BusinessObjects Data Services database user account with the same name is automatically created. **Note:** ■ The Login Name can only comprise alphanumeric characters and if required an underscore. ■ Do not use XS as a new database login name because the XS user name is already used internally.
Password	The password for the new login. The same password is also applied to the database user account. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password for the new login.

Installation directory area:

UI Element	Description
Installation directory	The location where you want to install SAP BusinessObjects Data Services. 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. To run the Designer, a user requires both read and write access to the installation directory.

2. On the **Data Warehouse - Create Staging Database** page, enter the following, and then click **Next**.

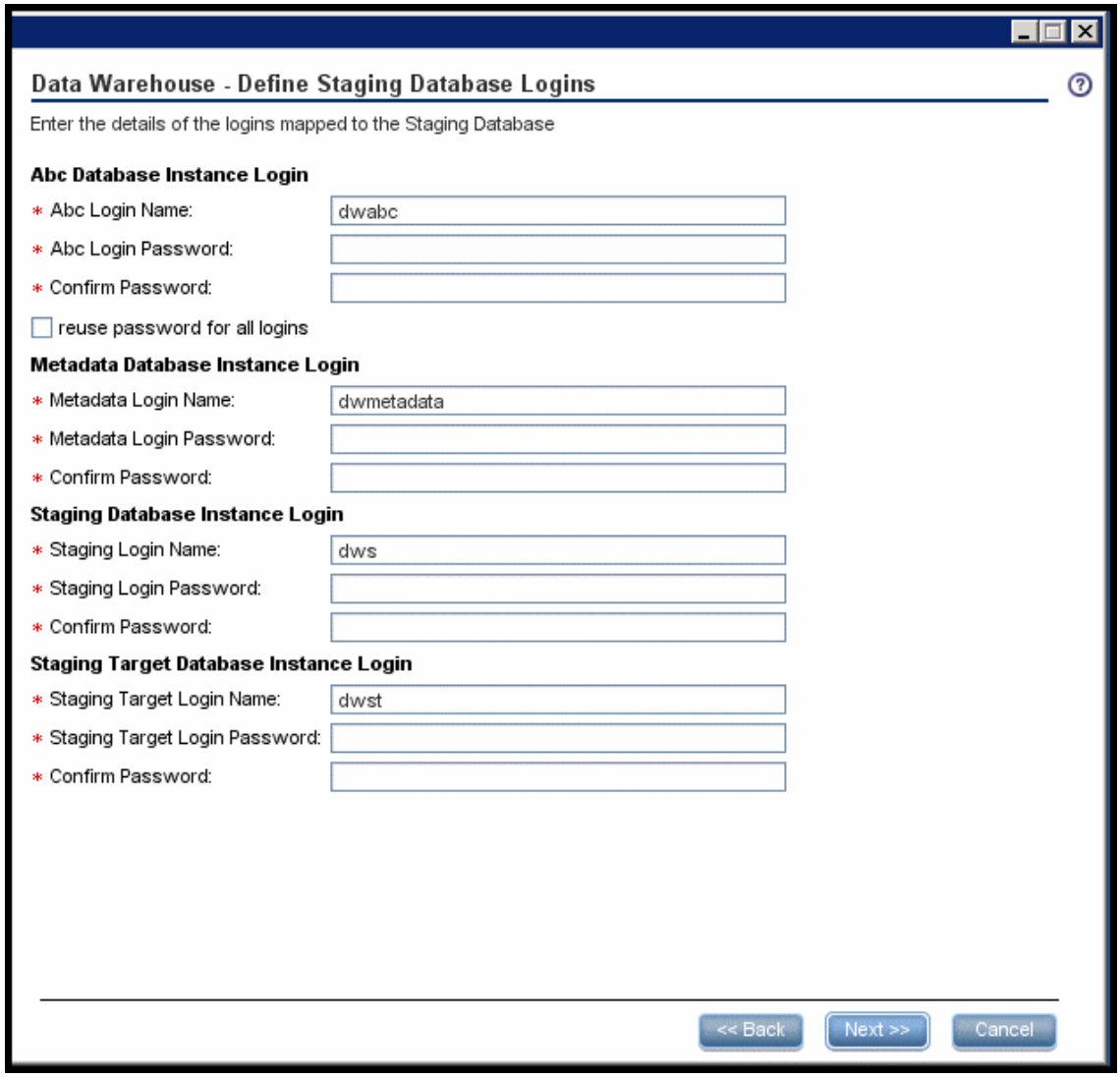


UI Element	Description
Host name	The fully qualified domain name (FQDN), or IP address of the server hosting the Staging database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.
Port	The port of the MS SQL server listener. The default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

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified login. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

3. On the **Data Warehouse - Define Staging Database Logins** page, enter the following, and then click **Next**.



Important information	The logins will be used as specified, but the users and the schemas mapped to these logins will be dwabc, dws, dwst, dwmetadata, and dwt respectively. You are recommended to use new logins. This ensures that the logins receive the proper permissions. If you must use existing logins, please contact support from the support site (http://www.hp.com/go/hpsoftwaresupport).

Abc Database Instance Login area:

UI Element	Description
Abc Login Name	The Abc database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. Do not use XS as a new database login name because the XS user name is already used internally.
Abc Login Password	The Abc database login password. **Note:** ▪ The password can comprise alphanumeric characters and an underscore. ▪ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.
Reuse password for all logins	Select to reuse the password for the Metadata login, Staging Database login, and Staging Target Database login.

Metadata Database Instance Login area:

UI Element	Description
Metadata Login Name	The Metadata database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. Do not use XS as a new database login name because the XS user name is already used internally.

UI Element	Description
Metadata Login Password	The Metadata database login password. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.

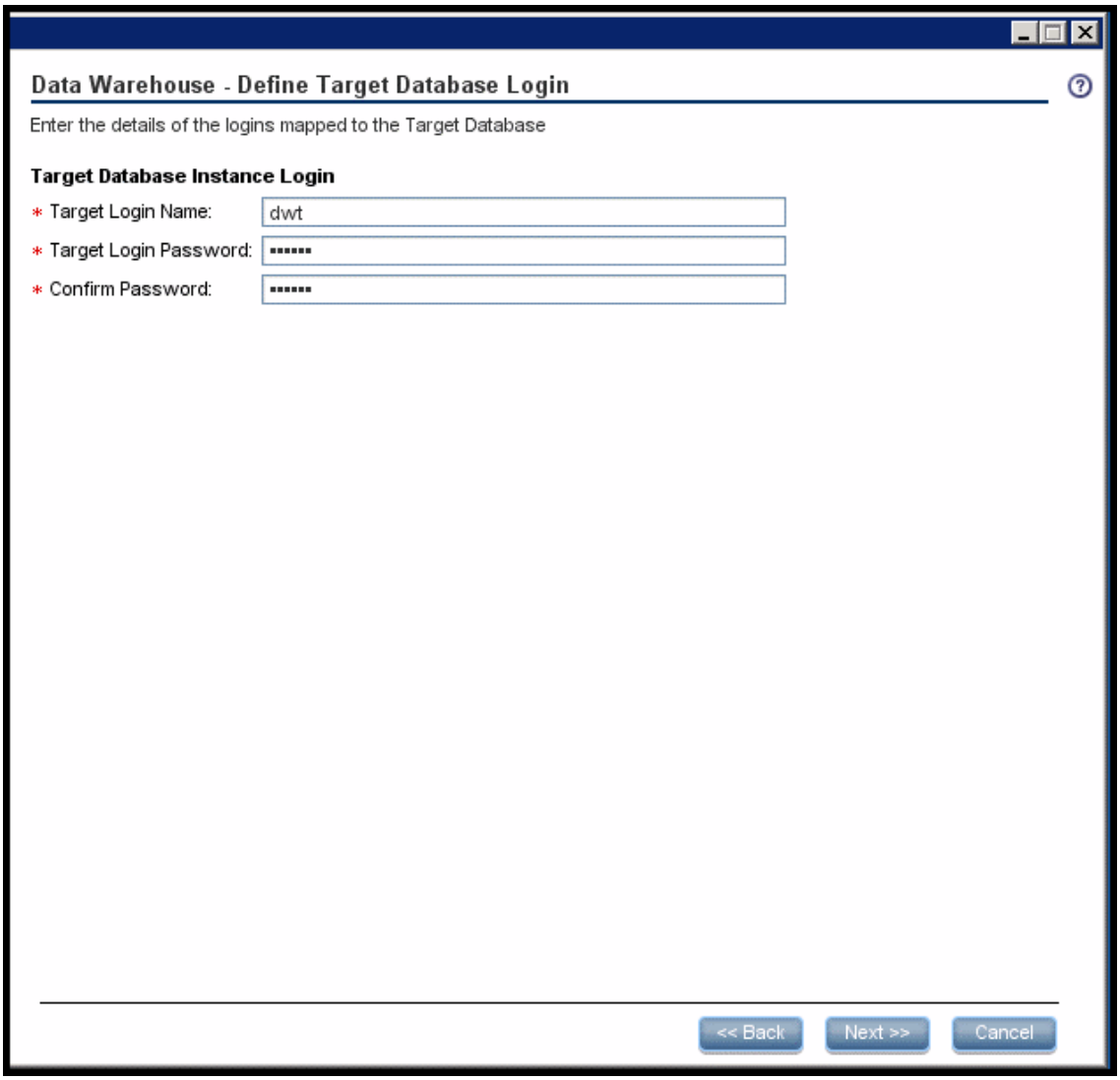
Staging Database Instance Login area:

UI Element	Description
Staging Login Name	The Staging database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. **Note:** If you install the Staging and Target databases on different instances or on different database servers, the administrator login creates a linked server with a specific name. The linked server feature enables the metadata login access to the Target database that is installed on the other instance or on the other database server. Make sure to use the Fully Qualified Domain Name (FQDN). Do not use XS as a new database login name because the XS user name is already used internally.
Staging Login Password	The Staging database login password. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.

Staging Target Database Instance Login area:

UI Element	Description
Staging Target Login Name	The Staging Target database login name. **Tip:** In each database instance, it is recommended to use different login names that are unique if you plan to install several databases on the same server. **Note:** If you install the Staging and Target databases on different instances or on different database servers, the administrator login creates a linked server with a specific name. The linked server feature enables the metadata login access to the Target database that is installed on the other instance or on the other database server. Make sure to use the Fully Qualified Domain Name (FQDN). Do not use XS as a new database login name because the XS user name is already used internally.
Staging Target Login Password	The Staging Target database login password. **Note:** ■ The password can comprise alphanumeric characters and an underscore. ■ It is important that you save the password in a safe place as it may be required in certain disaster recovery scenarios.
Confirm Password	Confirmation of the password.

4. On the **Data Warehouse - Define Target Database Login** page, enter the following, and then click **Next**.

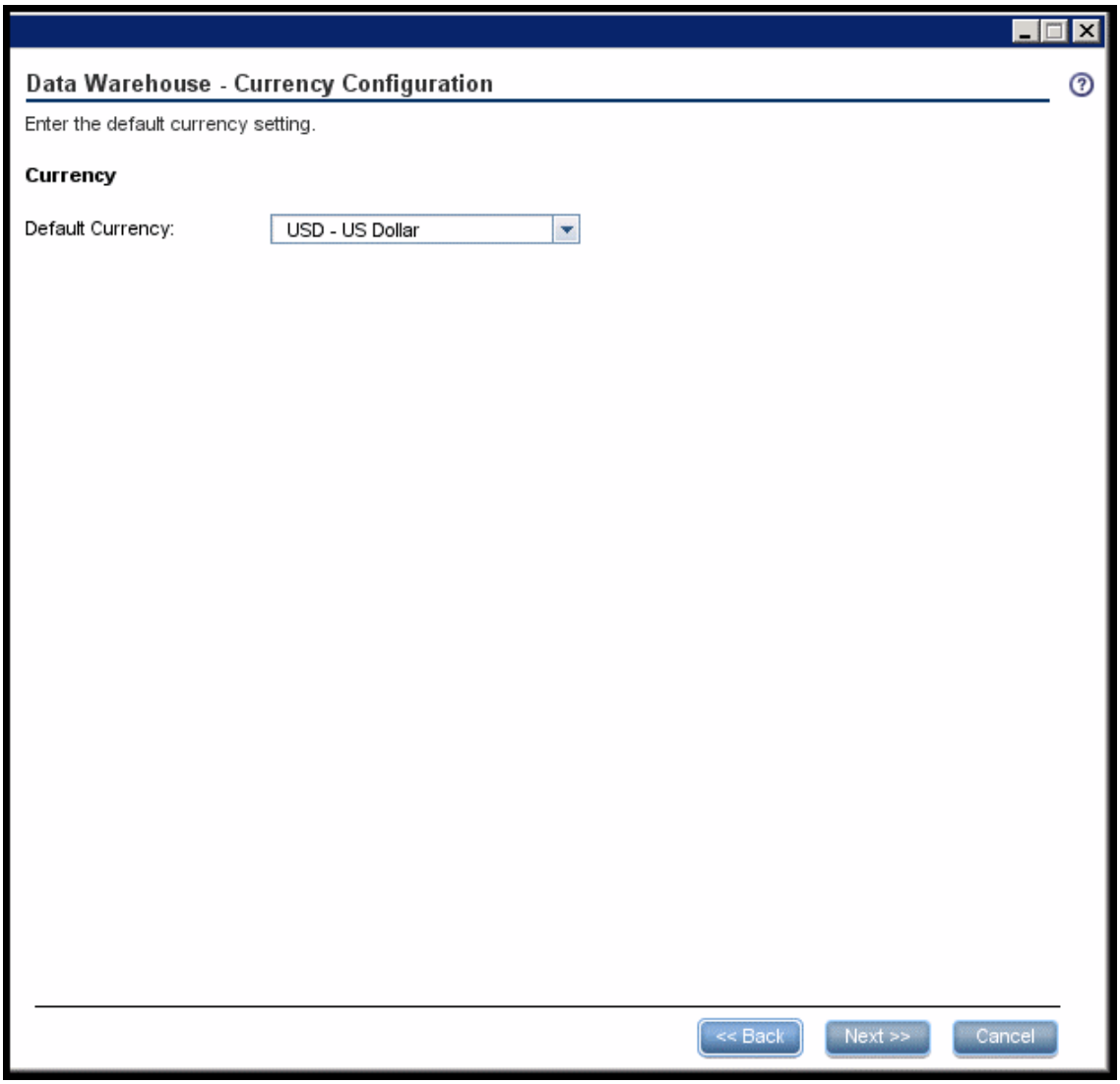


Target Database Instance Login area:

UI Element	Description
Target Login Name	The Target database login name. Do not use XS as a new database login name because the XS user name is used internally.

UI Element	Description
Target Login Password	The password for the specified login. **Note:** ■ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ■ 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. ■ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.
Confirm Password	Confirmation of the password.

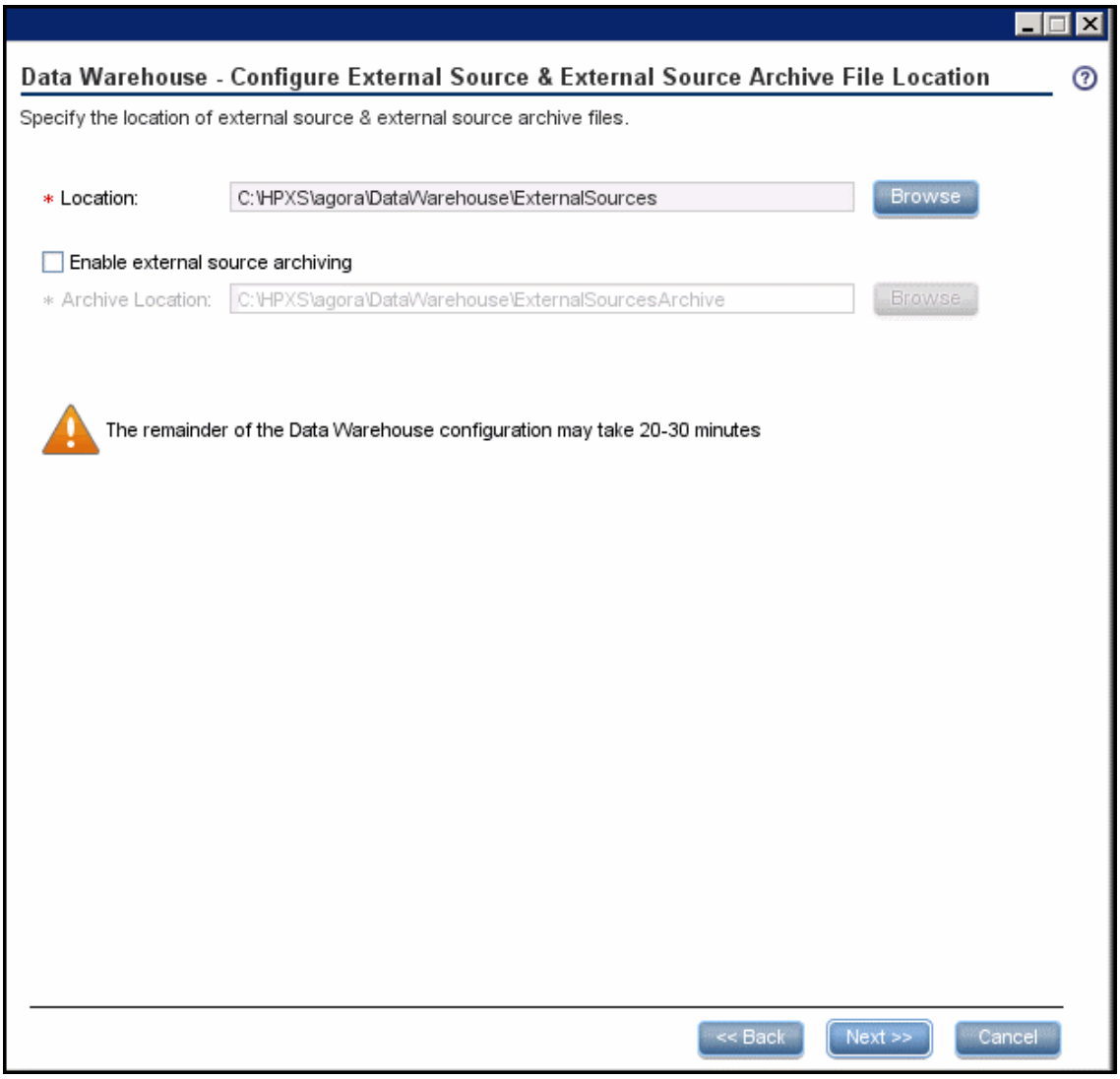
5. On the **Data Warehouse - Currency Configuration** page, enter the following, and then click **Next**.



Currency area:

UI Element	Description
Default Currency	The currency to use as default. You can select $ as a default. **Tip:** If you are using the HP Project and Portfolio Management or the HP Asset Manager applications as data sources, make sure that you select the currency corresponding to the currency defined in these applications. For a list of currencies, see "Supported Currencies".

6. On the **Data Warehouse - Configure External Source & External Source Archive File Location** page, enter the following, and then click **Next**.



UI Element	Description
Location	The location of the external source files used by Data Warehouse. The default location is: **<Installationdirectory>\agora\DataWarehouse\ExternalSources**
Enable external source archiving	Select to enable archiving external data source data files. When you select this option, Data Warehouse backs up the flat files created during the SOURCE EXTRACT phase by the FBI Framework. This backup is used in case of fault and recovery, to execute the ETL without SOURCE EXTRACT phase, meaning independently on the data source.

UI Element	Description
Archive Location	Specify where you want to archive the external data source data files. **Note:** Because archiving data files can be memory intensive, it is recommended to archive to a dedicated separate logical drive.

7. On the **Data Warehouse - Configuration Status** page, ensure that all the Data Warehouse components were successfully configured, and then click **Next**.

8. On the **Summary** page, verify that the operations completed successfully, and then click **Next**.

Install Executive Scorecard

The SAP BusinessObjects Enterprise component should be installed first, then the Data Warehouse component, and finally the Executive Scorecard component.

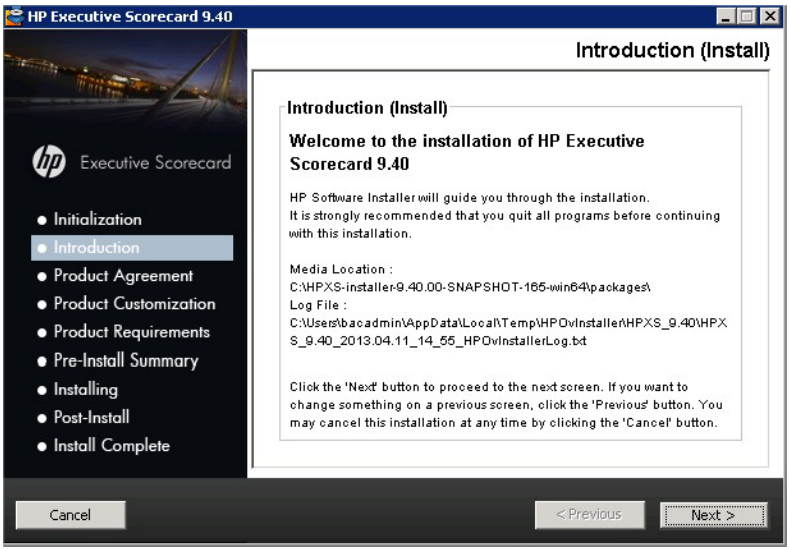
Prerequisites:

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.

Start the installation:

1. Insert the XS media into the CD/DVD drive. The installation wizard opens.

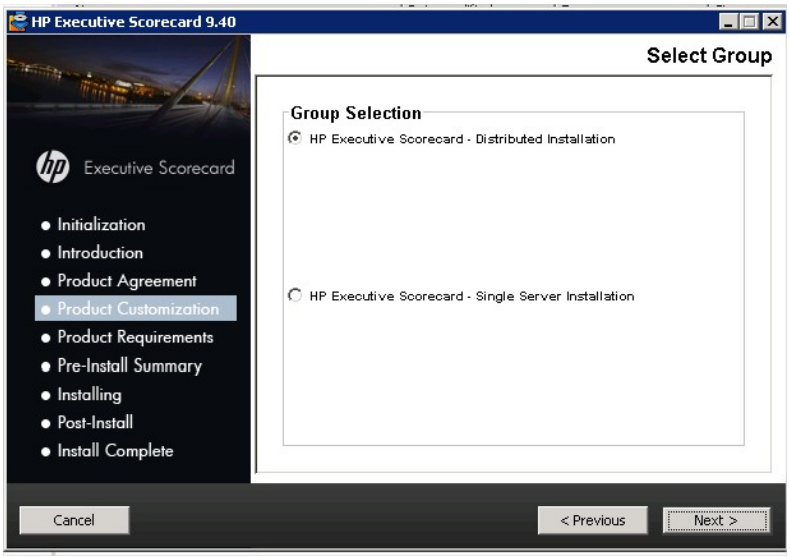


Caution: The CD/DVD must remain in the drive until you complete the Executive

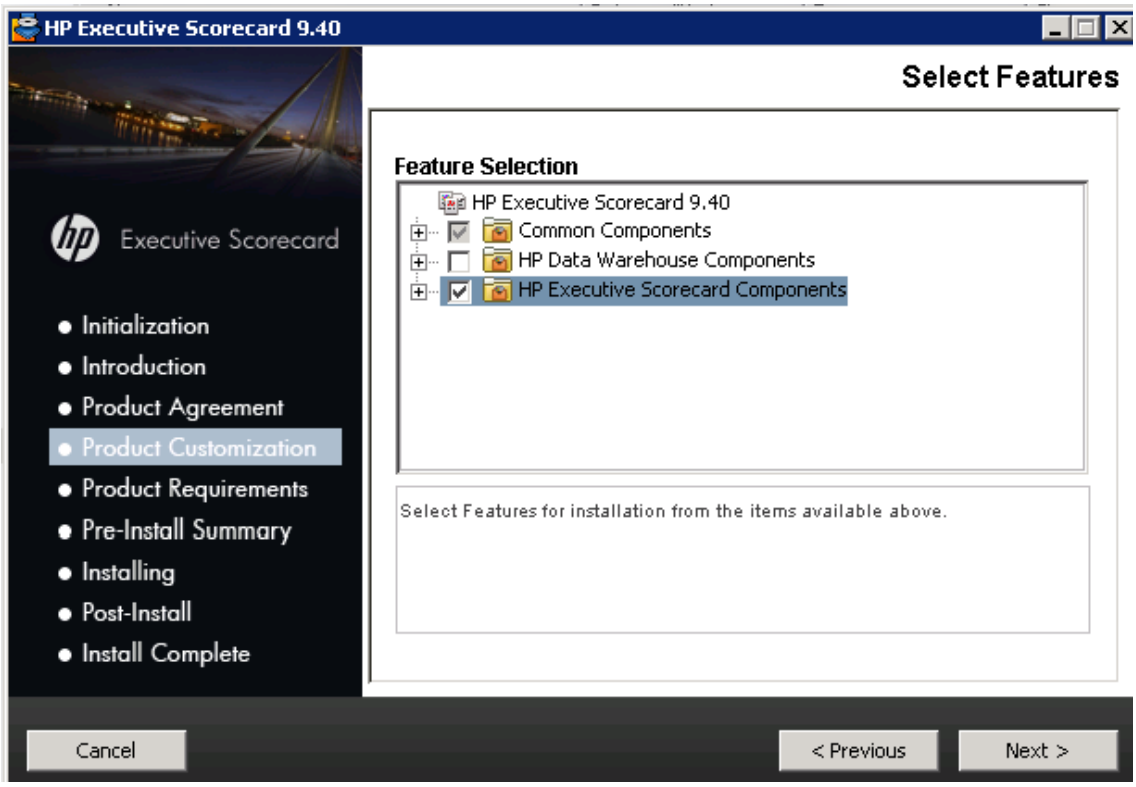
Scorecard Configuration Wizard.

Note: If the installation wizard does not start automatically, extract all the files from the .ZIP file and run the file: **<DVD_ROOT>\Windows_Setup\HPXS_9.4q_setup.exe**.

2. Follow the prompts until you get to the **Select Group** page.
3. On the **Select Group** page, select **HP Executive Scorecard - Distributed Installation**, and then click **Next**.

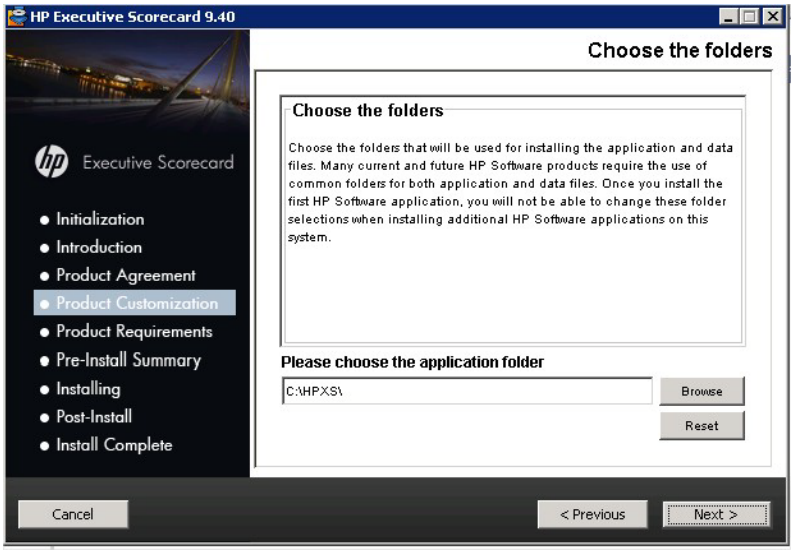


4. On the **Select Features** page, select the component you are installing on this server, and then click **Next**.



Common Components are automatically selected and installed with each component.

5. 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.

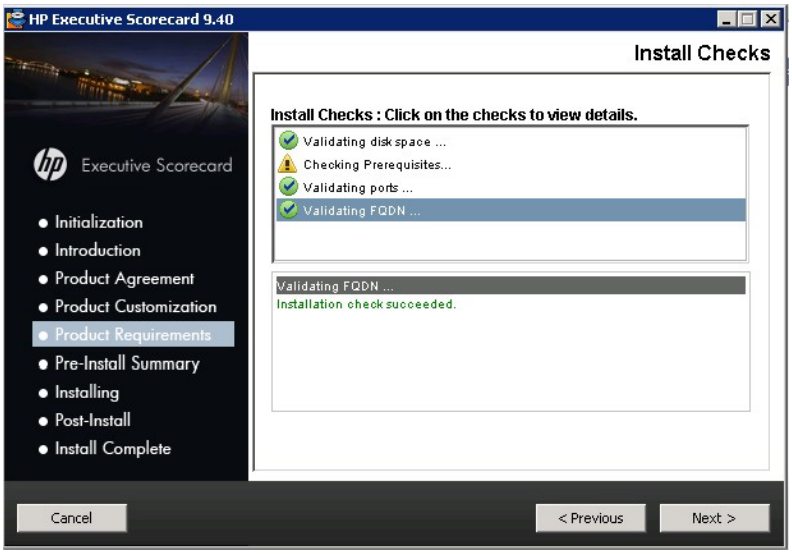


> **Note:** If you enter a new application folder name, it cannot contain embedded spaces. For example a folder with a name **HP XS** is invalid.

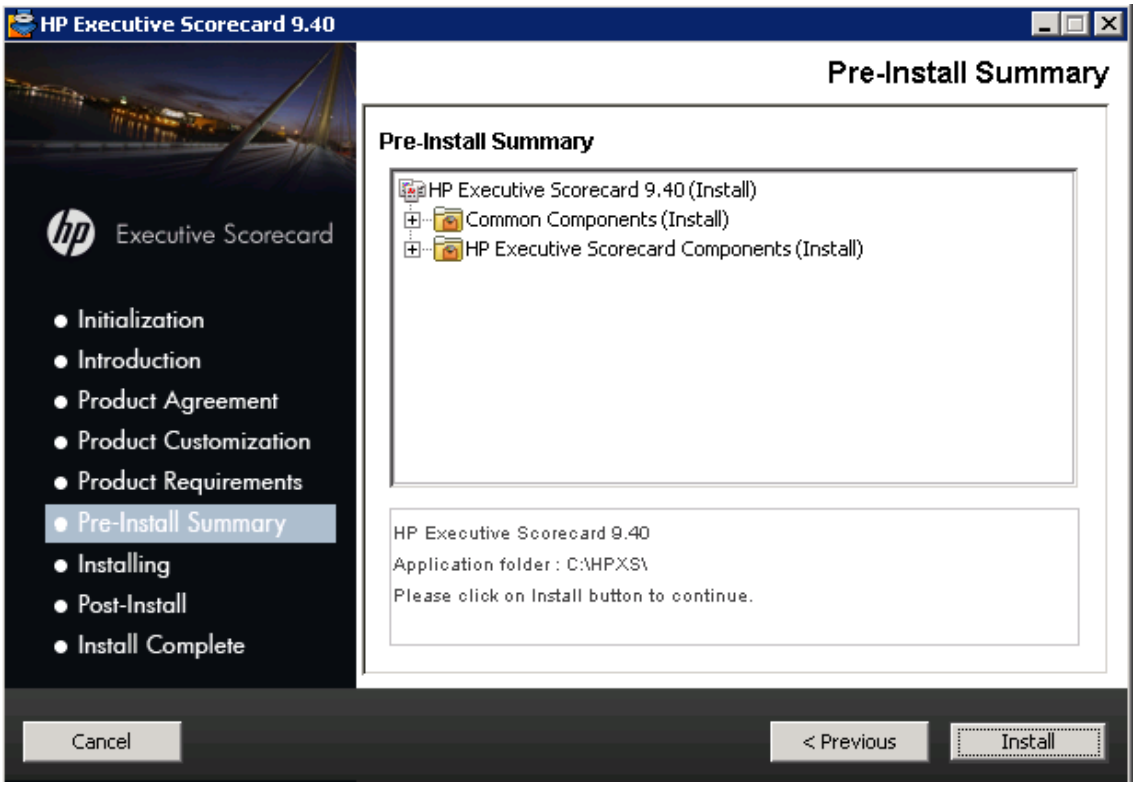
The wizard then runs a series of checks to validate system requirements.

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.

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



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

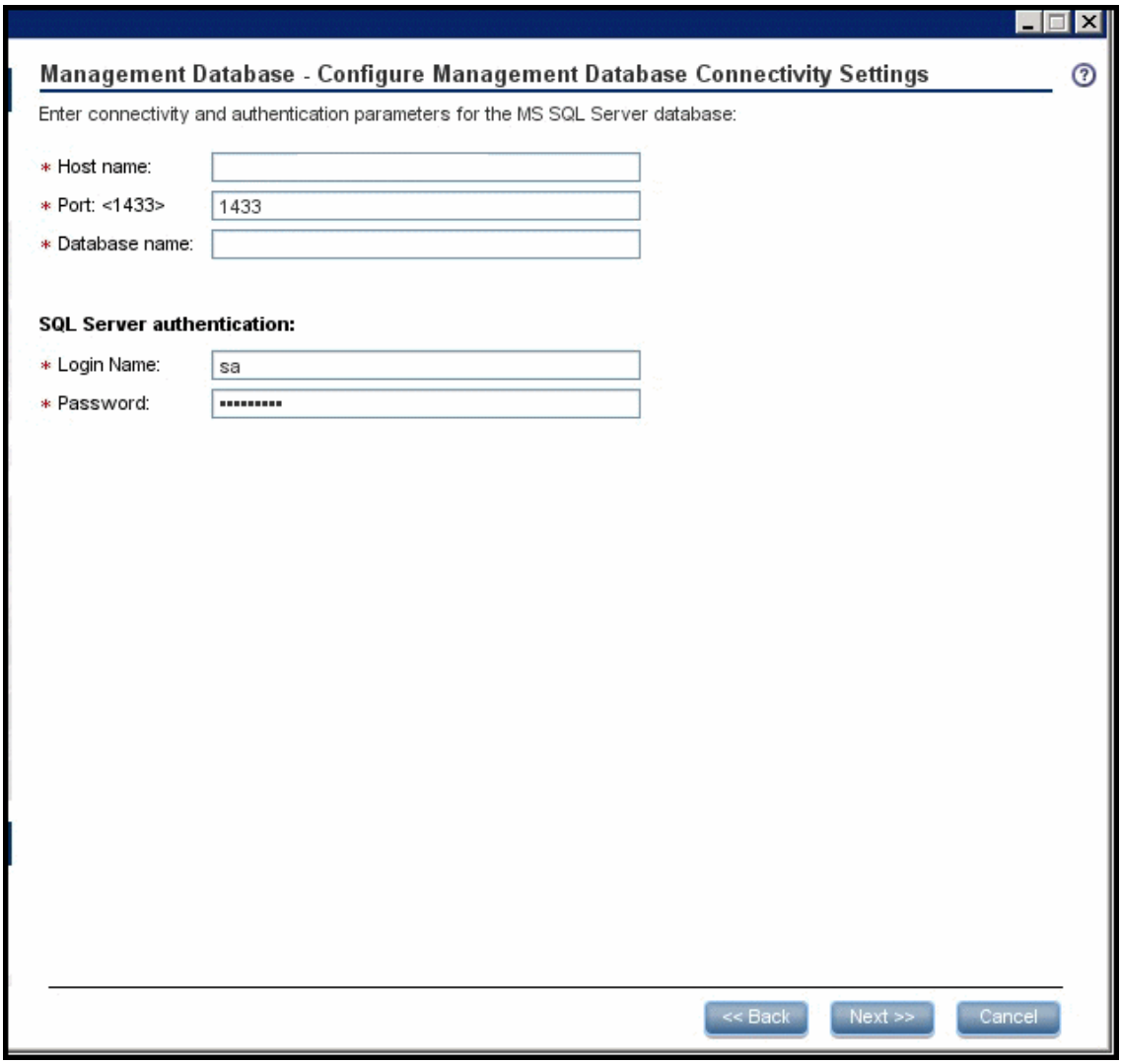


The file copying process starts. On completion, the Configuration Wizard begins.

Post-Install Wizard - Management Database Section

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**.



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

UI Element	Description
Port <1433>	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the Management database. It is recommended that you use the following database naming convention: *databasename_mng* **Tip:** Make note of the database name, as it may be needed when installing other components.

SQL Server authentication:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

3. On the **Management Database - Configuration Status** page, verify that the Management database configuration was completed successfully, and then click **Next**.

Post-Install Wizard - License Management Section

1. **License Management Section of Wizard**

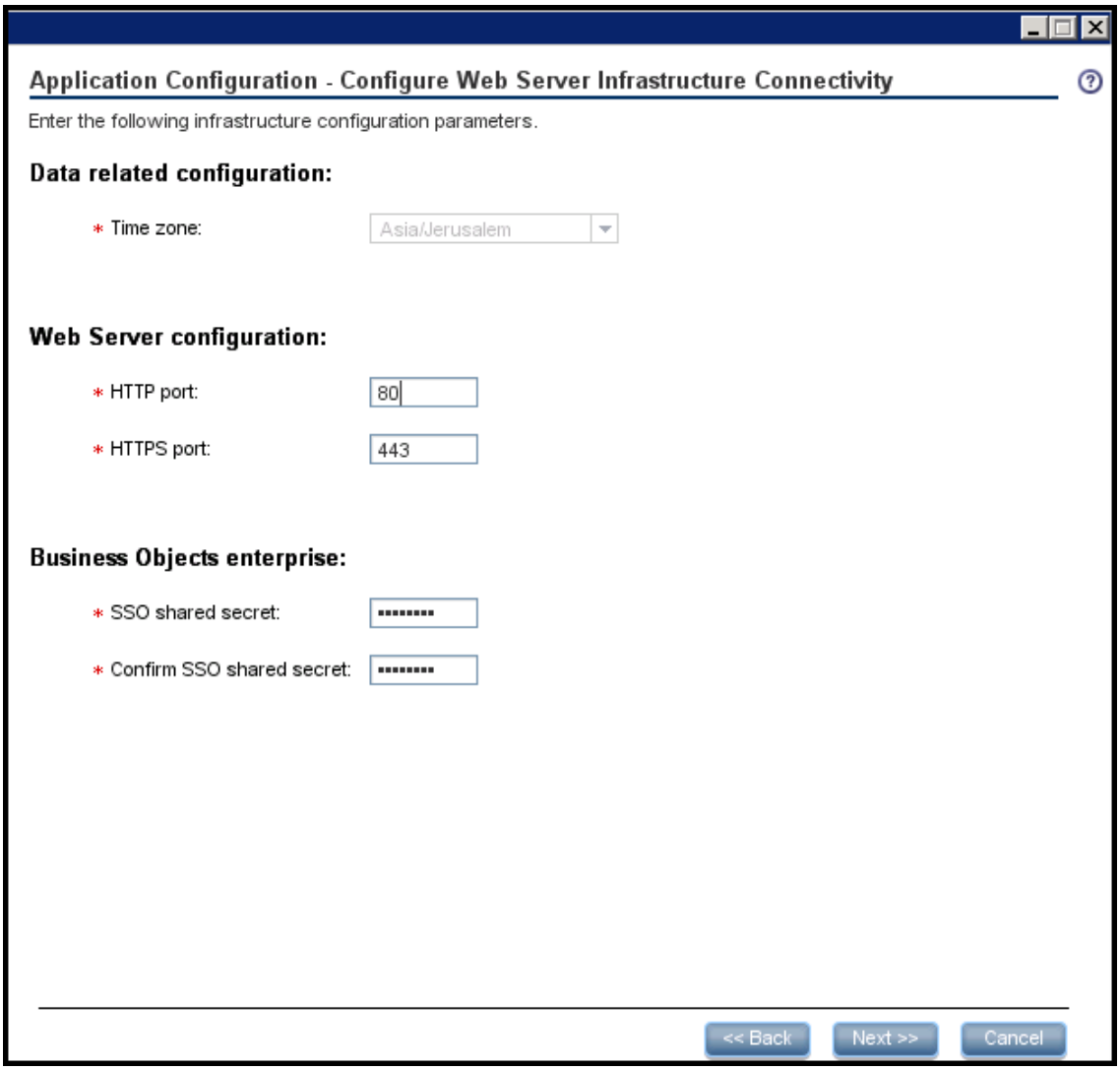
On the **Load a License** page, select one of the following, and then click **Next**.

Note: If a license was previously entered, the wizard will recognize the license.

UI Element	Description
Load a permanent or temporary license	Select to load one of the following license types: ▪ **Permanent** - Has no expiry date and is loaded once during the post-install. ▪ **Temporary** - Has an expiry date. On expiration, a new license must be loaded. To load a license, select **Load a permanent or temporary license**, click **Load**, Navigate to the license file provided by your supplier, and then click **Load License**.
Get an evaluation license	Select to load a one-off 60 day evaluation license. The remaining valid period of the license is displayed. Once the evaluation license terminates, you must load a temporary or permanent license.

Post-Install Wizard - Application Configuration Section

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



Data related configuration area:

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

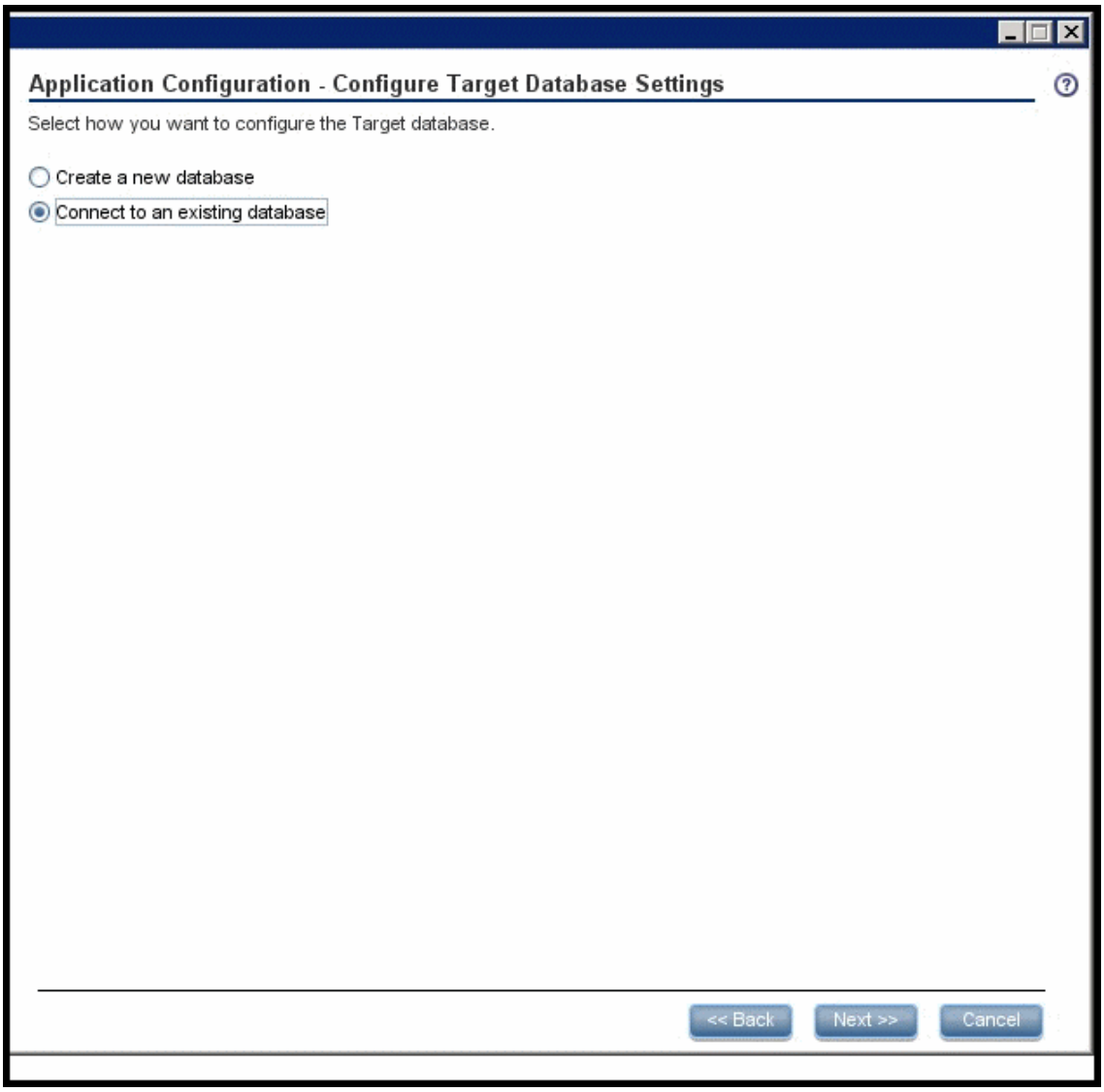
Web Server Configuration area:

UI Element	Description
HTTP port	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note**: 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.
HTTPS port	The port of the HTTPS listener. The default port is 443. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD).

Business Objects enterprise area:

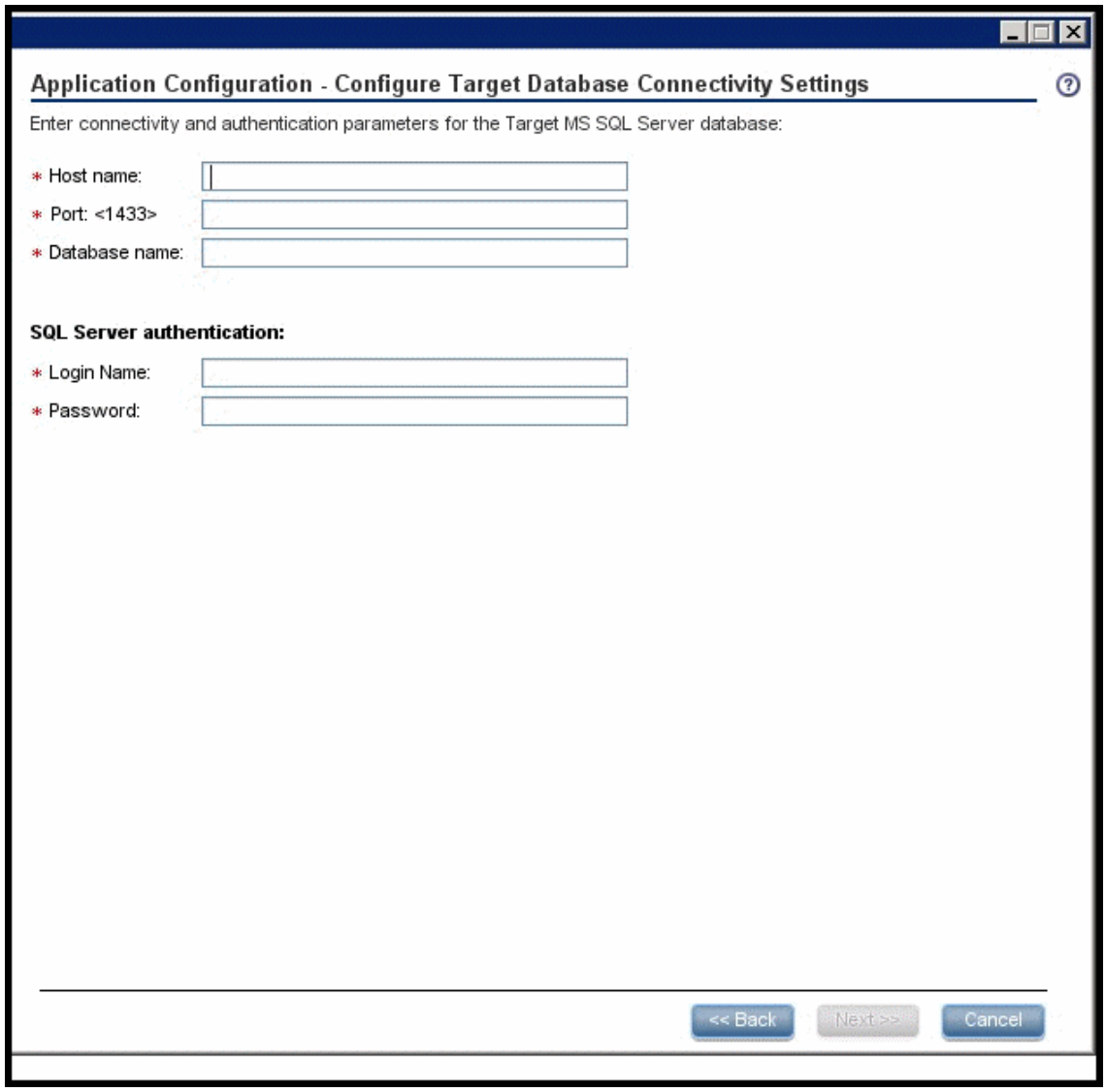
UI Element	Description
SSO shared secret	Enter the SSO shared secret.
Confirm SSO shared secret	Confirmation of the SSO shared secret.

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



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

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



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

UI Element	Description
Port <1433>	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the target database. It is recommended that you use the following database naming convention: *databasename_trg*

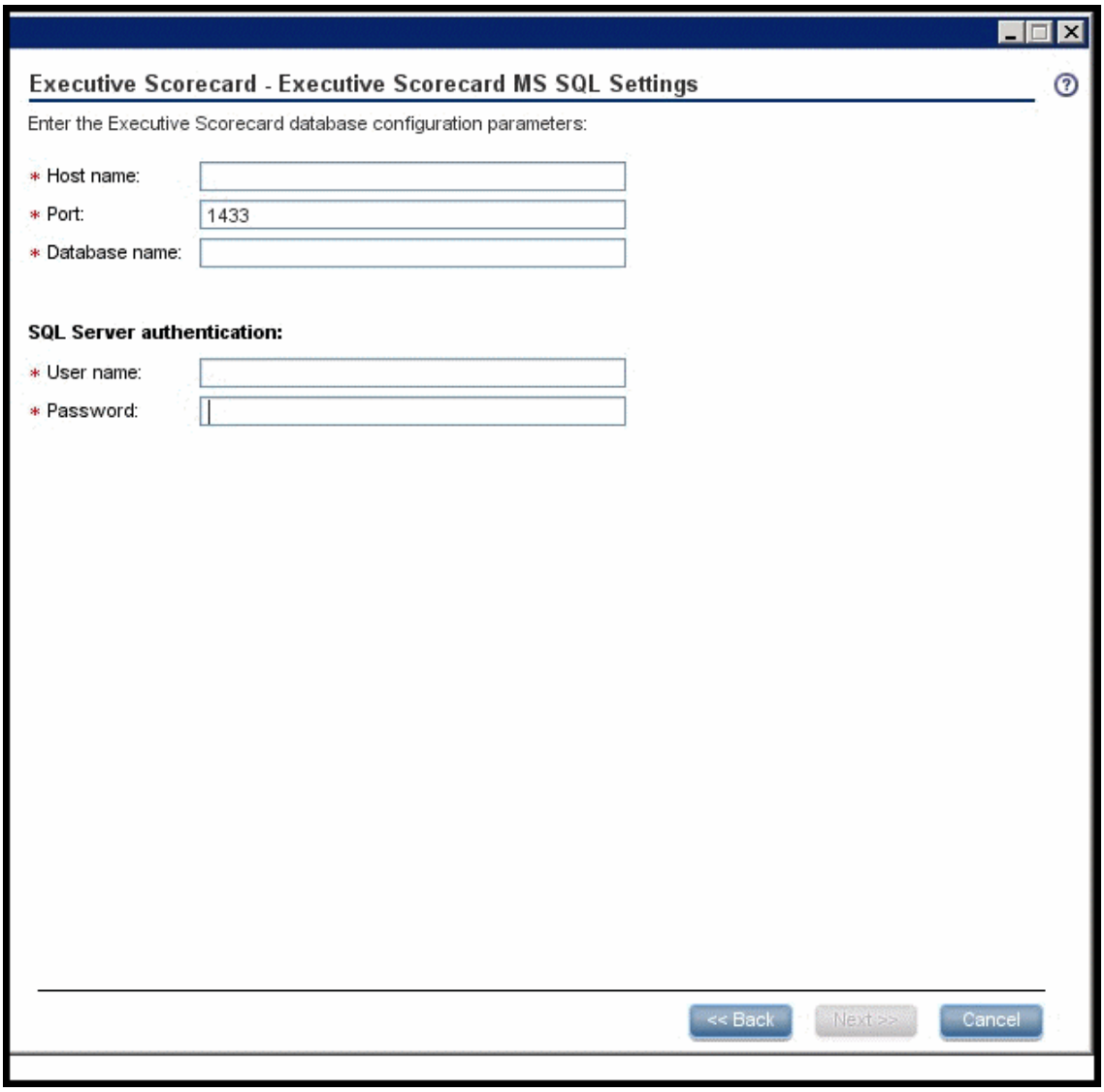
SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified login that creates the Target database. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

Post-Install Wizard - Executive Scorecard Section

Note: Executive Scorecard includes out-of-the-box Content Acceleration Packs (CAPs). These CAPs are automatically uploaded during the post-installation process. These CAPs are then listed in the CAPs Management page in the Admin tab. They are not activated. For details on CAPs, see Manage Content Acceleration Packs in the *Administrator Guide*.

1. On the **Executive Scorecard - Configure Executive Scorecard database** page, select whether you want to connect to an existing database or create a new one.
2. On the **Executive Scorecard - Executive Scorecard MS SQL Settings** page, enter the following:



UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the server hosting the Executive Scorecard database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**.
Port	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. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note:** If you work with the Named Instance feature, you can omit the port number (it is automatically detected during the installation).
Database name	The name of the Executive Scorecard database. It is recommended that you use the following database naming convention: *databasename_app*

SQL Server authentication:

UI Element	Description
User Name	The MS SQL login name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified login. **Note:** ▪ The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. ▪ 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. ▪ The password can be changed by the Administrator. In such a case, the relevant password setting should be changed accordingly.

3. On the **Executive Scorecard - Database Configuration Status** page, verify that the Executive Scorecard database was created successfully, and then click **Next** to install Executive Scorecard.

4. On the **Executive Scorecard - Summary** page, ensure that the Executive Scorecard configuration was completed successfully, and then click **Next**.

Post-Install Wizard - Financial Planning Analysis Section

1. On the **Installing FPA** page, click **Next** to install IT Financial Management.

2. On the **Financial Planning and Analysis - Summary** page, insure that the IT Financial Management configuration was completed successfully, and then click **Next**.

3. On the **Summary** page, verify that the Configuration Wizard completed successfully, and then click **Finish**.

Uninstall IT Executive Scorecard

Uninstall Executive Scorecard components as follows:

- On the task bar of each server with an Executive Scorecard component, click **Start** > **All Programs** > **HP Executive Scorecard** > **Administration** > **Uninstall HP Executive Scorecard**.

  This performs the un-installation procedure as follows:

  a. The installed component and all patches and content packs.

  b. The Web Server service on the Data Warehouse and Executive Scorecard servers.

  c. All files created in the installation process.

  d. SAP BusinessObjects Enterprise, and SAP BusinessObjects Data Services.

  Note: The HPXS folder may remain after performing the uninstall of Executive Scorecard 9.4. If it does, remove it manually.

- After you perform an uninstall operation, you must delete both the SAP BusinessObjects Enterprise and SAP BusinessObjects Data Services folders.