HP IT Executive Scorecard

Software Version: 9.50
Windows ® operating system

Upgrade Guide

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Software Release Date: June 2014

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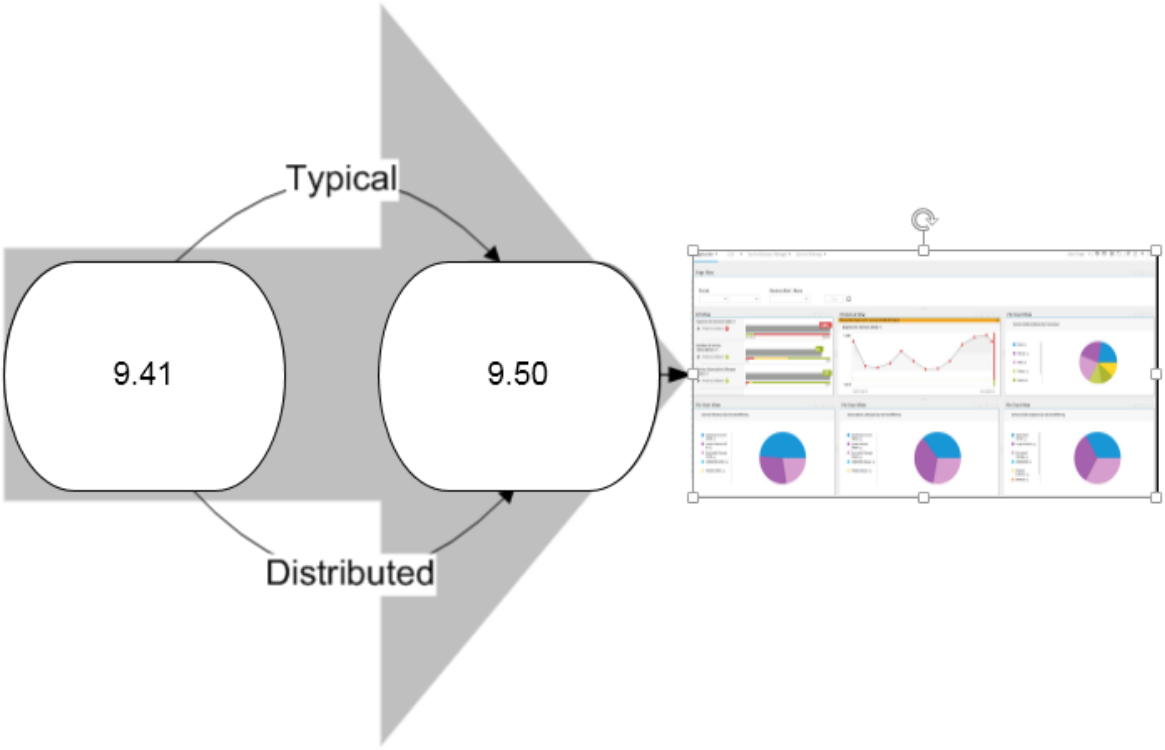
Upgrade

This document explains the upgrade procedure from version 9.41 to Executive Scorecard version 9.50.

To understand what is new in version 9.50, see What's New in Version 9.50 in the *IT Executive Scorecard Release Notes*.

Note: The upgrade path that is currently supported is:
9.41 => 9.50

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



Important: Upgrading to the new 9.50 instance will disable the existing 9.41 instance.

This section includes the following topics:

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"Upgrade Steps - Distributed Environment" on page 57

"Additional Steps" on page 145

Upgrade Steps - Typical Environment

The upgrade procedure in a typical environment uses the following steps:

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Prerequisite

Prerequisites

1. It is recommended to install the 9.5 version on a new server in order to have both 9.41 and 9.5 up and running after the upgrade.

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

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

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

5. **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.

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

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

   a. Copy the <CAP_name>.ZIP files from:
   <installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\load and **<installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\loaded** folders located on the source server to the same folders on the target server.

   b. If you work with localized CAP files, they should be copied at the same time.

8. Back up the 9.41 **Version.txt** file located at: **<HP_XS>\agora\dat** for disaster recovery purposes.

9. Back up the 9.41 **<HP_XS>\agora\DataWarehouse\ExternalSources** folder before starting the upgrade.

Install Access Database Engine on the BODS Server

Install the access engine as follows:

1. Download Microsoft Access Database Engine 2010 Redistributable from the Microsoft official website:
   http://www.microsoft.com/en-us/download/details.aspx?id=13255

2. Click **Start > Run** and enter CMD. In the CMD window, enter:
   AccessDatabaseEngine_x64.exe/passive and press **Enter**.

Extended Content Backup

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

   Note: Make sure that every change that was done in the BODS workflows is synchronized with the content packs xml files. For information see the HP Software Support Online web site (http://www.hp.com/go/hpsoftwaresupport), or contact your HP Support representative.

   Backup the following folders:

   - **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction_CUSTOMIZATION**
     to the new installation machine under:
     <backup folder>\<cp name>\dataModel\dataIntegration\extraction

   - **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source_CUSTOMIZATION**
     to the new installation machine under:
     <backup folder>\<cp name>\dataModel\dataIntegration\source

   - **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities_CUSTOMIZATION**
     to the new installation machine under:
     <backup folder>\<cp name>\ETL\entities

2. If you had created new content packs in 9.41:

   Note: Make sure that every change that was done in the BODS workflows is synchronized with the content packs .xml files. For information see the HP Software Support Online web site (http://www.hp.com/go/hpsoftwaresupport), or contact your HP Support representative.

   Backup the content pack folder from:
   <install drive>\<Installation directory>\agora\ContentPacks\<cp name>
   to the new installation machine under:
   <backup folder>\ContentPacks

3. If you have extensions to the FBI extractor:

   a. Back up the 9.41 fbi-web.war from the folder:
      <install drive>\<Installation directory>\agora\apps
      to the new installation machine under:
      <backup folder>\fbi.

Install the SQLCMD Utility

Install the SQLCMD Utility on the typical server, before you start the 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).

   d. Update the system environment variable, **Path**, to the location of the sqlcmd utility: **<Driver>:\Program Files\Microsoft SQL Server\100\Tools\Binn**

Back Up and Restore All Databases

It is recommended to duplicate all the 9.41 schemas before starting the upgrade procedure in order to have both 9.41 and 9.5 up and running after the upgrade. To duplicate a schema in MSSQL, right-click the schema, select **Tasks > Back Up**. In the Back Up Database <file_name> dialog box, enter the name of the back up file in the **Name** field in the Backup Set area, select where you want to save the duplicate in the **Destination** area, and click **OK**. Make sure that the back up is successful.

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

Before performing backup and restore make sure:

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

To backup and restore the databases:

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

1. Backup the source Staging, Target, Management, and Results databases using SQL Server 2008 Studio. Make sure that the backup file names are unique and that they do not exist on the destination database server.
2. Restore the backup of the source databases on the destination server using the same DB name. Note the DB name must be same as original DB name. Make a note of the restored names to be used during the upgrade.
3. Back up the database logons and that each user's status is enabled and not locked.
4. To restore the Management, Result, Target, and Staging databases, right-click **Database** in the relevant SQL server and select **Restore Database**. In the Restore Database dialog box, select **From device**, and click the button. In the Specify Backup dialog box, click **Add**. Select the duplicate file, and click **OK**.

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

Install 9.50 on a New Server

Note: No data will be lost during the upgrade process. All data that is created during the upgrade process will be retrieved upon completion of the process directly from the data source.

Prerequisites

1. Ensure that you have the relevant installation settings required for the installation/upgrade. For details, see the *IT Executive Scorecard Support Matrix*.
2. Close all open Windows before you start the installation process.

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.

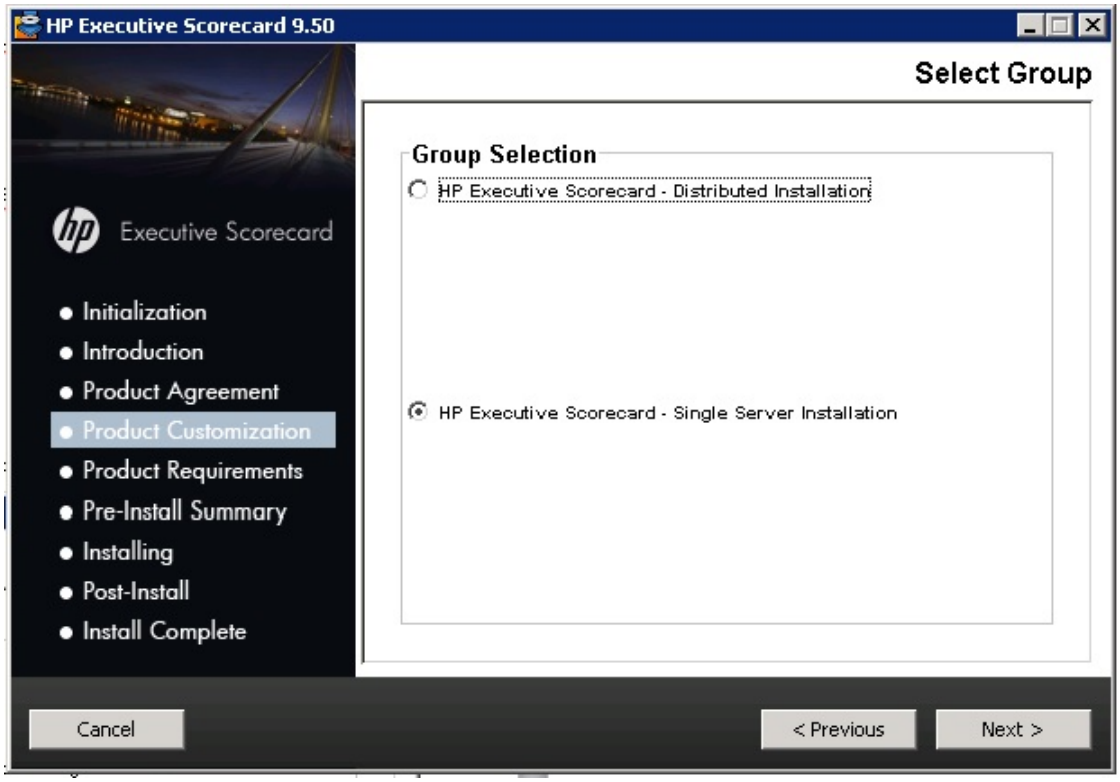
   Note: If the installation wizard does not start automatically, run the file: **<DVD_ROOT>\Windows_Setup\HPXS_9.5_setup.exe**

   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.

2. **Installation Section of the wizard.**

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

3. In the **Select Group** page, select the type of installation you are performing: **HP Executive Scorecard - Single Server installation**, and then click **Next**.



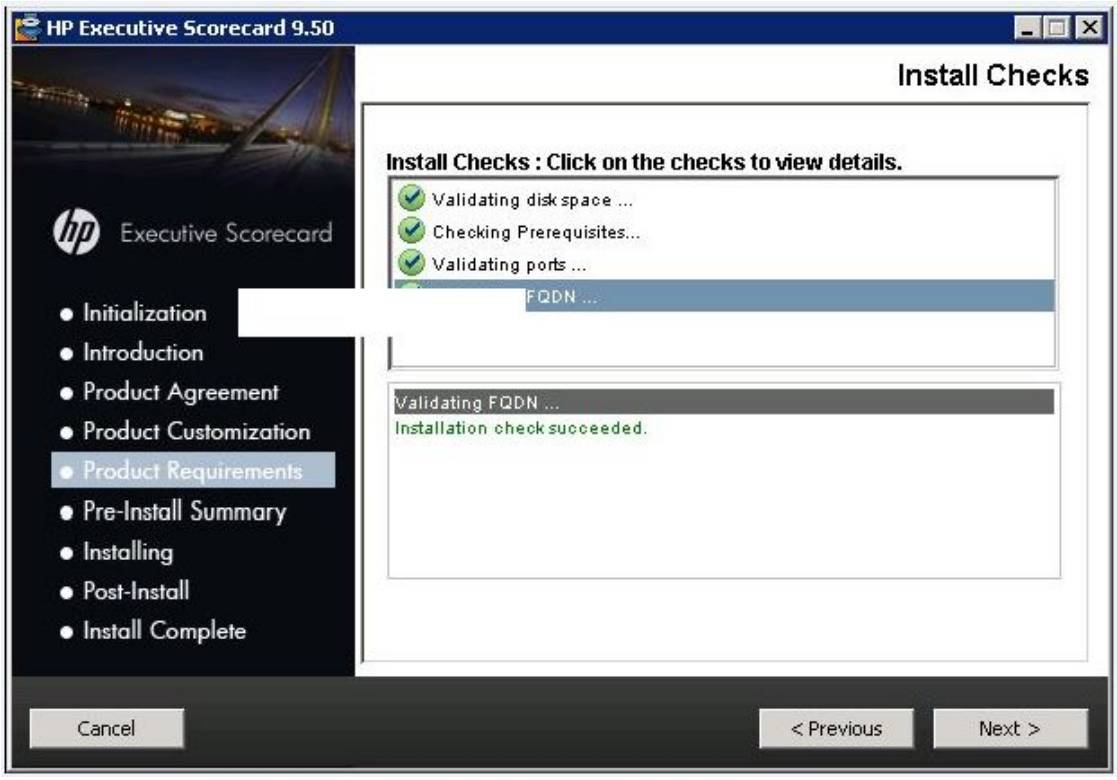
4. In the **Choose the folders** page, click **Next** to accept the default application folder, or **Browse** to navigate to and then select a new application folder location.

   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.

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



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

7. Copy the external sources folder :
   <backup folder >\agora\DataWarehouse\ExternalSources
   to the new installation machine under:
   <install drive>\<Installation diectory>\agora\ DataWarehouse.

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

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

Extended Content

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

    a. Copy the backup files from:
    <backup folder>\<cp name>\dataModel\dataIntegration\extraction_CUSTOMIZATION
    To:
    <install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction_CUSTOMIZATION

    b. Copy the backup files from:
    <backup folder>\<cp name>\dataModel\dataIntegration\source_CUSTOMIZATION
    To:
    <install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source_CUSTOMIZATION

    c. Copy the backup files from:
    <backup folder>\<cp name>\ETL\entities_CUSTOMIZATION
    To:
    <install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities_CUSTOMIZATION

2. If you had created new content packs in 9.41:

    a. Copy the back files from:
    <backup folder>\ContentPacks\<cp name>
    To:
    <install drive>\<Installation directory>\agora\ContentPacks

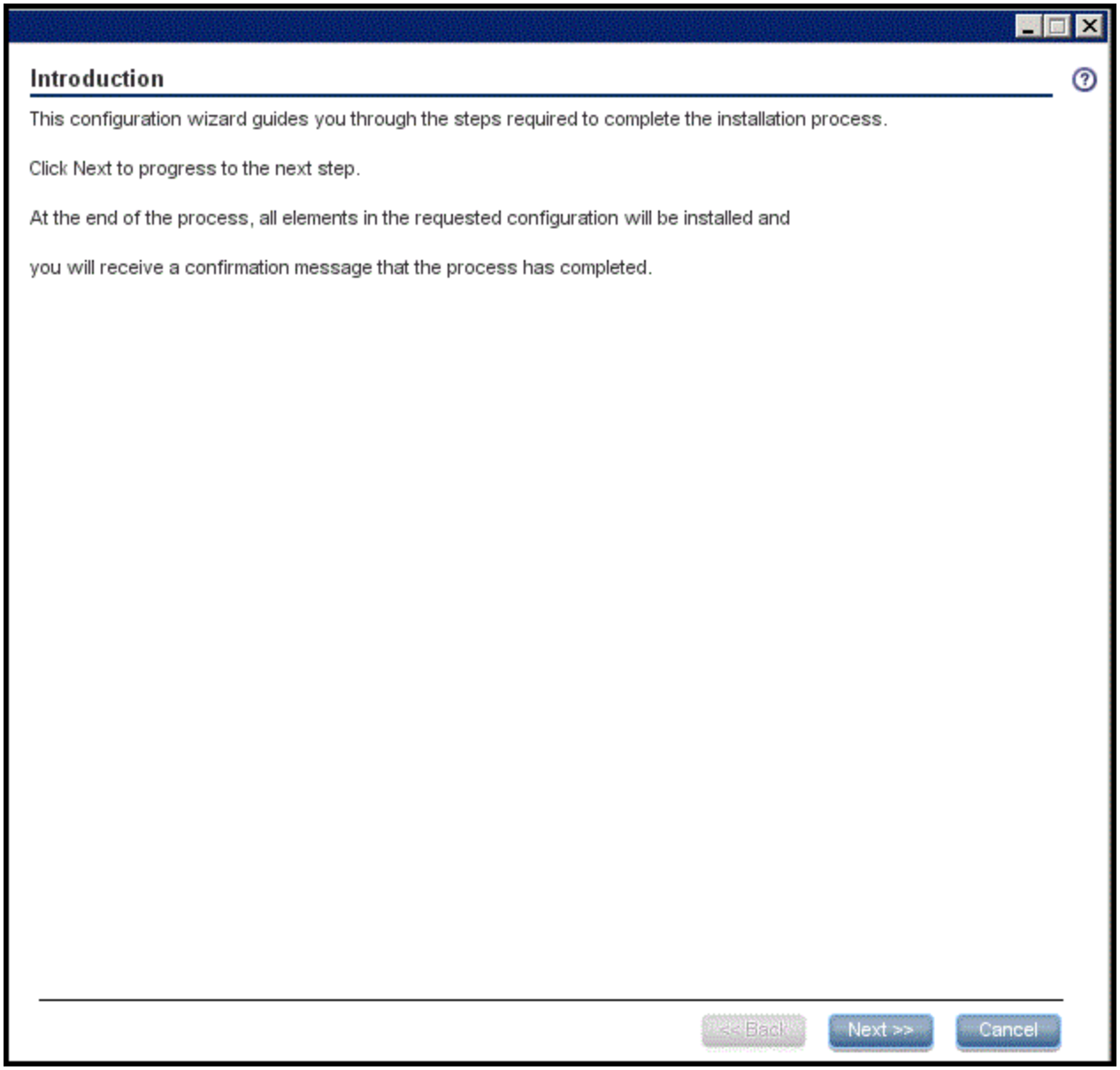
Extended Content for the FBI Extractor

If you have extensions to the FBI Extractor

1. Open the **<backup folder>\fbi\fbi-web.war** file using Win RAR in the new installation machine.
2. Copy the extension JAR to the **WEB-INF\lib** directory in the war file.
3. Overwrite the **fbi-web.war** file in the **<install drive>\<Installation directory>\agora\apps** directory with the updated war file.
4. Open the **fbi-web.war** file to make sure that the new JAR is located in the right path.
5. Resume the post-install.

Run the Post-Install Wizard

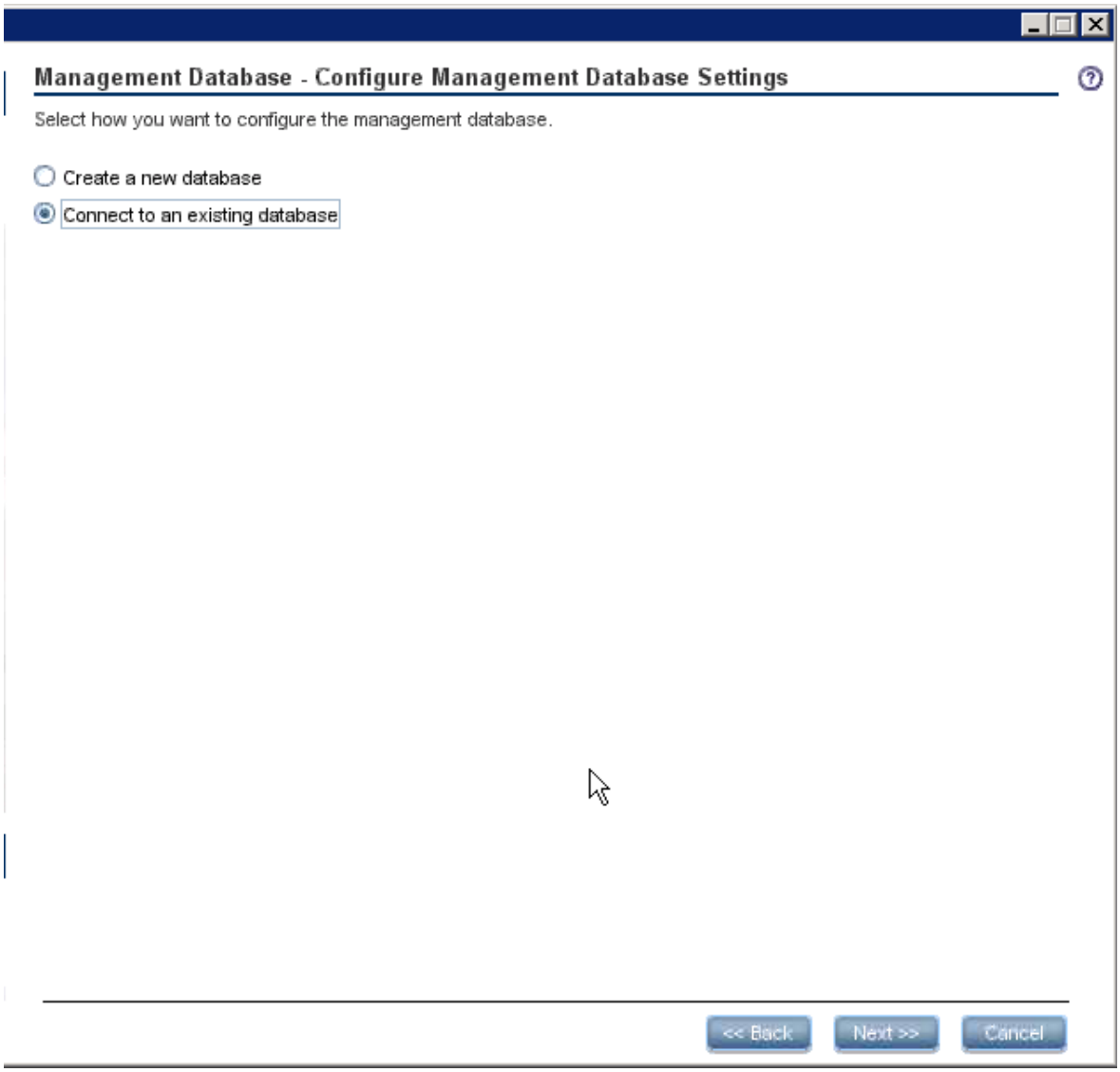
The **Introduction** page of the Post-Install Configuration wizard opens. Click **Next**.



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

Management Database - Configure Management Database Settings Page

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



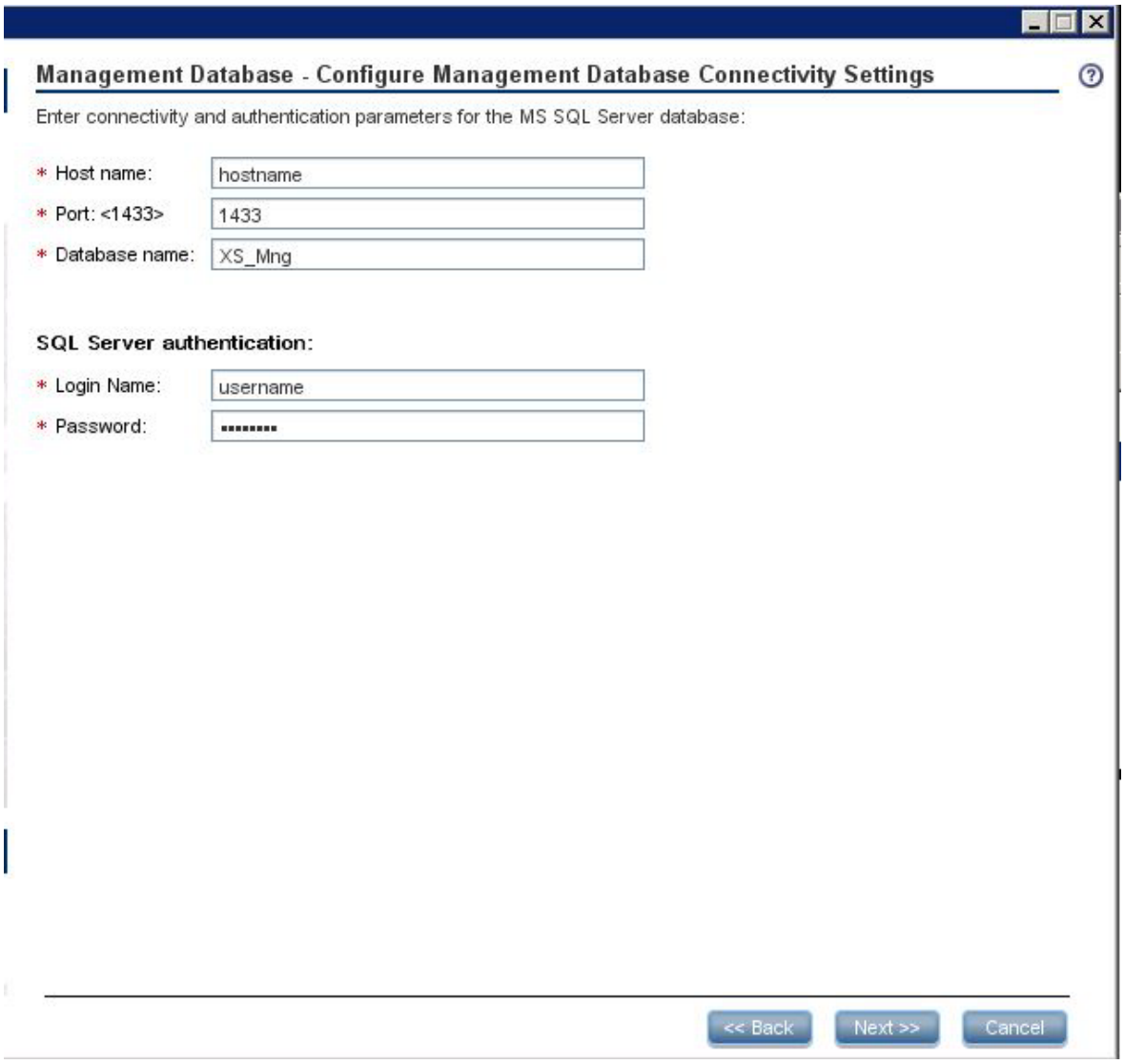
UI Element	Description
Create a new database	Select this option to create a new Management database. Select this option when installing the first HP IT Executive Scorecard component.

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

Management Database - Configure Management Database Connectivity Settings Page

In the **Management Database - Configure Management Database Connectivity Settings** page, enter the relevant information, and then click **Next**.

- XS supports only one Management database. The Management database cannot be changed after it has been defined.
- In a distributed environment, make sure that the Management database and the Result database are installed on the same database server.



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>**. XS does not support dynamic ports.
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). XS does not support dynamic ports.
Database name	The name of the Management database. **Tip:** If needed, take note of the database name, as it may be needed when installing other components. For an installation, use the database naming convention. For details, see Database Naming Conventions.

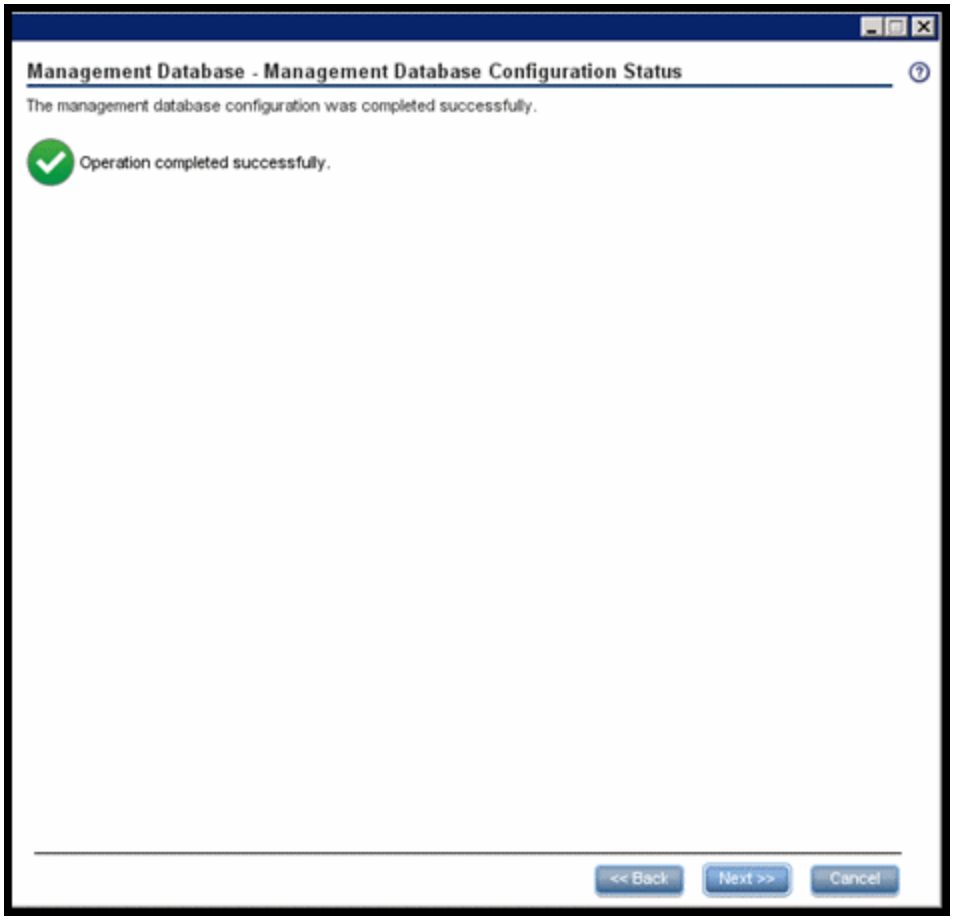
SQL Server authentication:

To work with the Data Warehouse, the user must have access to the SQLServer definition. Make sure that the permission has been assigned accordingly. For example, the SQL permission GRANT VIEW ANY DEFINITION TO public grants access to the SQL Server definition to everyone.

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Management Database - Management Database Configuration Status

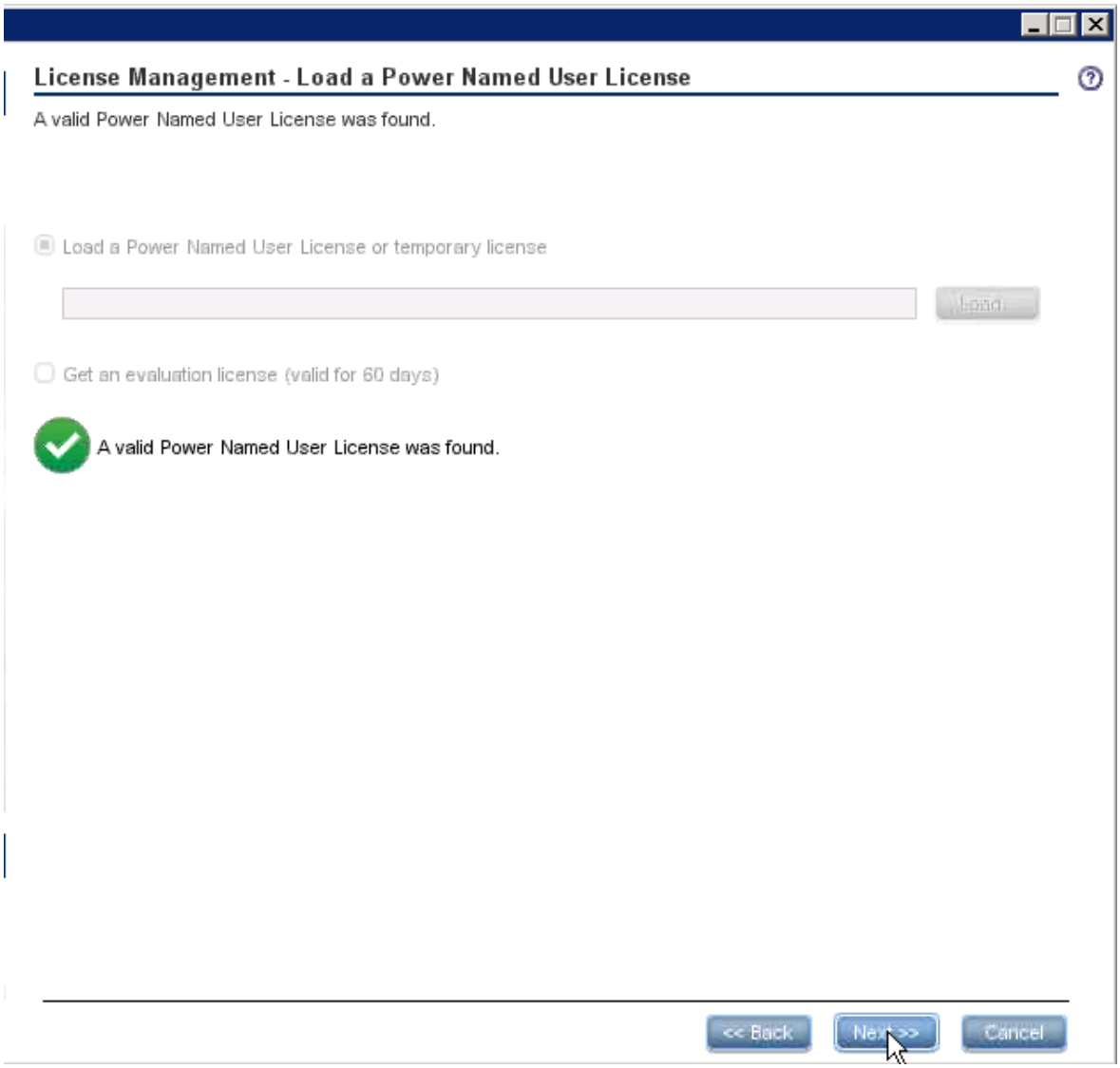
In the **Management Database - Management Database Configuration Status** page, verify that the Management database configuration was completed successfully, and then click **Next**.



License Management – Load a Power Named User License

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

The wizard recognizes the license entered in the previous version.



UI Element	Description
Load a Power Named User License or temporary license	Select to load one of the following license types: • **Power Named User License** - 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, 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 using the License Renewal feature. For details, see Renew your license using the Start menu in the *IT Executive Scorecard Administrator Guide*.

Configure SAP BusinessObjects Enterprise

This section includes the following steps:

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SAP BOE for HP XS - Configure CMS Database 33

SAP BOE for HP XS - Configure CSM Database Connectivity Settings Page 34

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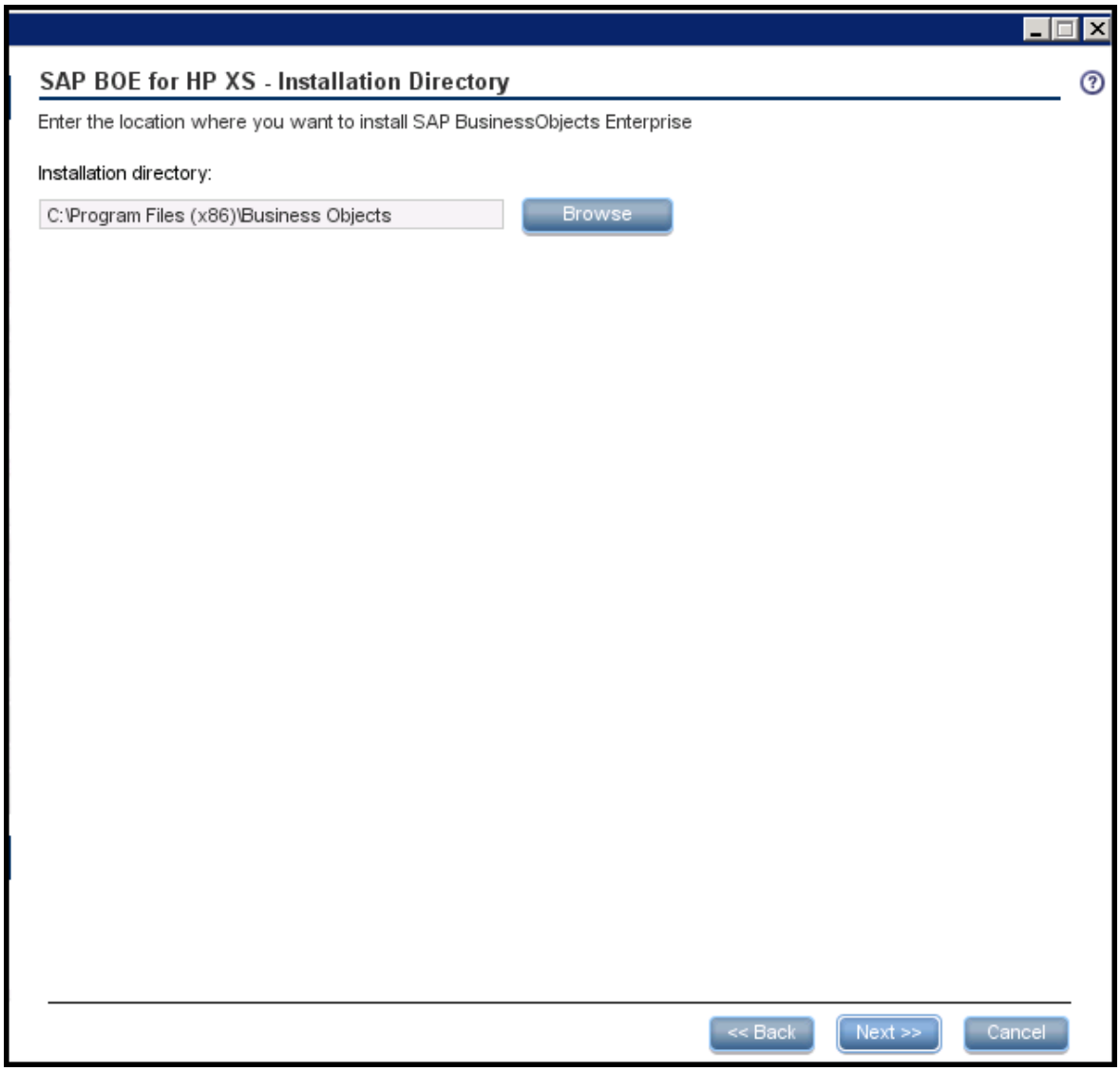
Application Configuration - Configure Web Server Infrastructure Connectivity Page 38

Application Configuration - Configure Infrastructure Connectivity Page 40

SAP BOE for HP XS - Installation Directory

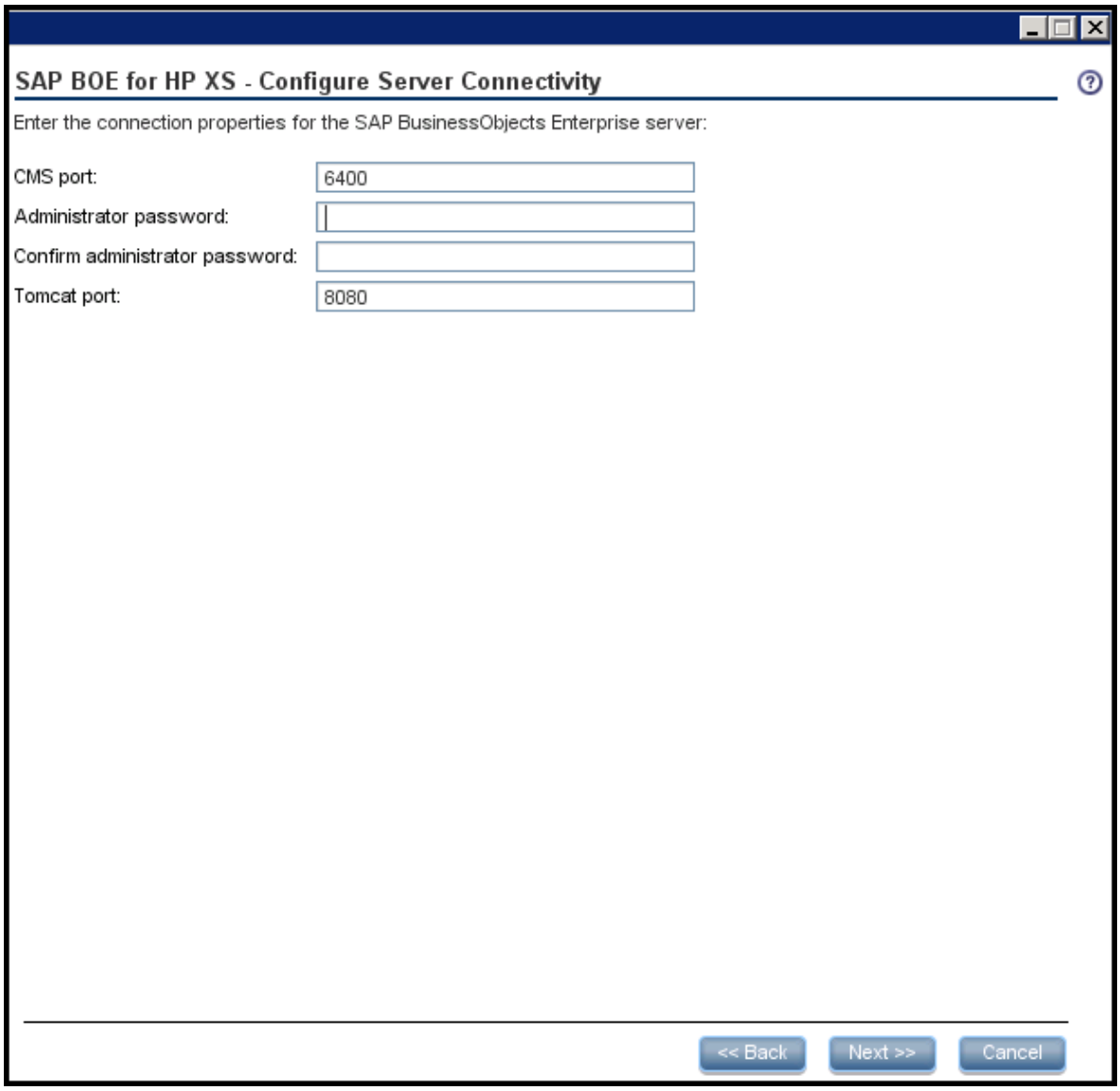
In the **SAP BOE for HP XS - Installation Directory** page, enter the path to the installation directory in the Installation Directory field, and click **Next**.



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. It cannot be a root directory, such as c:\.

SAP BOE for HP XS - Configure Server Connectivity Page

In the **SAP BOE for HP XS - Configure Server Connectivity**page, enter the relevant information, and 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).

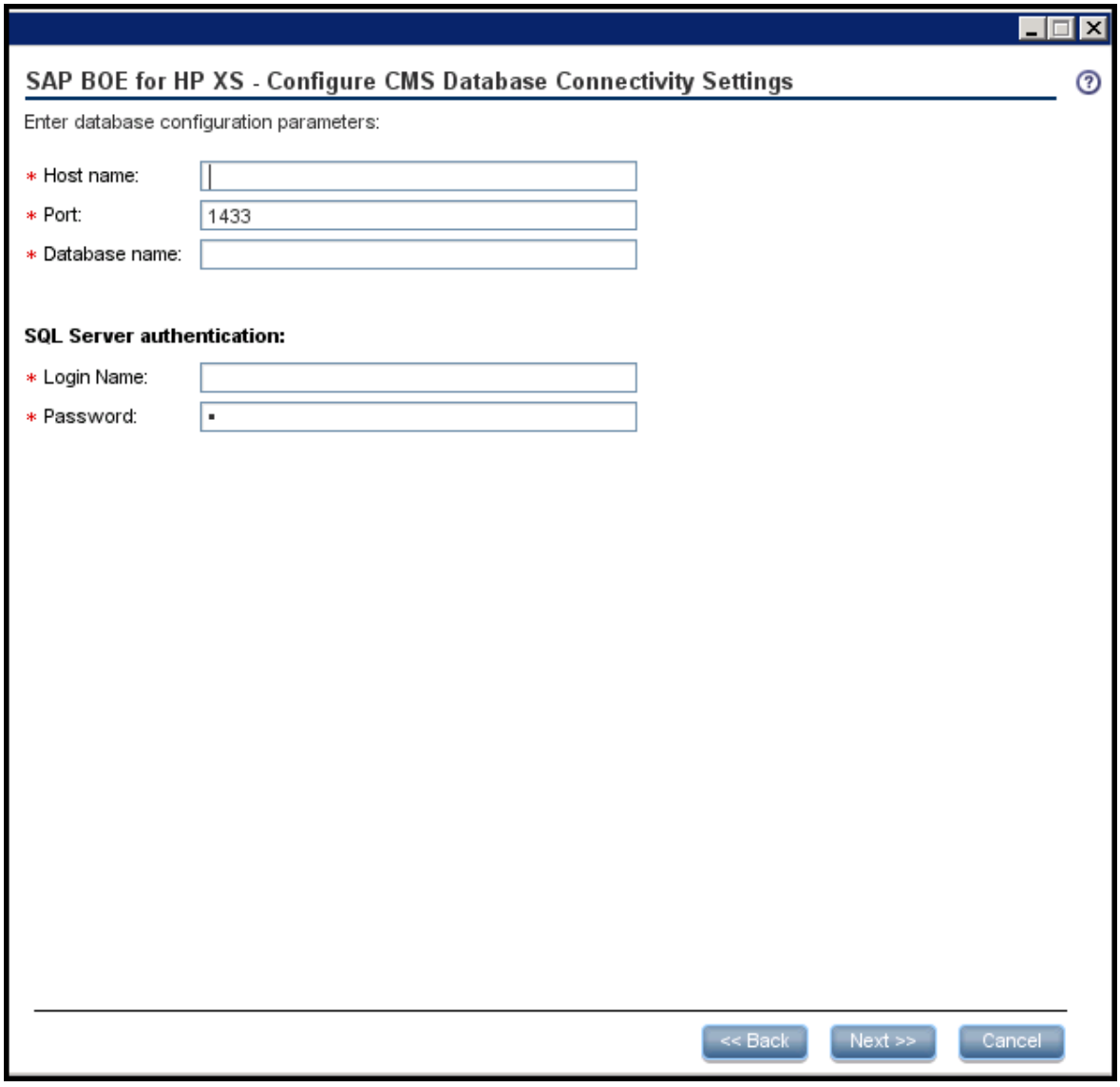
UI Element	Description
Administrator password	The SAP BusinessObjects Enterprise Administrator password. This password is used only to log on to SAP BusinessObjects Enterprise. **Note:** • The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. • The password cannot contain the word: administrator. • 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 is case-sensitive. • 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).

SAP BOE for HP XS - Configure CMS Database

In the **SAP BOE for HP XS - Configure CMS Database** page, select **Create a new CMS database**, and click **Next**.

SAP BOE for HP XS - Configure CSM Database Connectivity Settings Page

In the **SAP BOE for HP XS - Configure CMS Database Connectivity Settings** page, if required, enter the relevant information, and 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>**. XS does not support dynamic ports.
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). XS does not support dynamic ports.
Database name	The name of the CMS database. For an installation, use the database naming convention. For details, see Database Naming Conventions.

SQL Server authentication area:

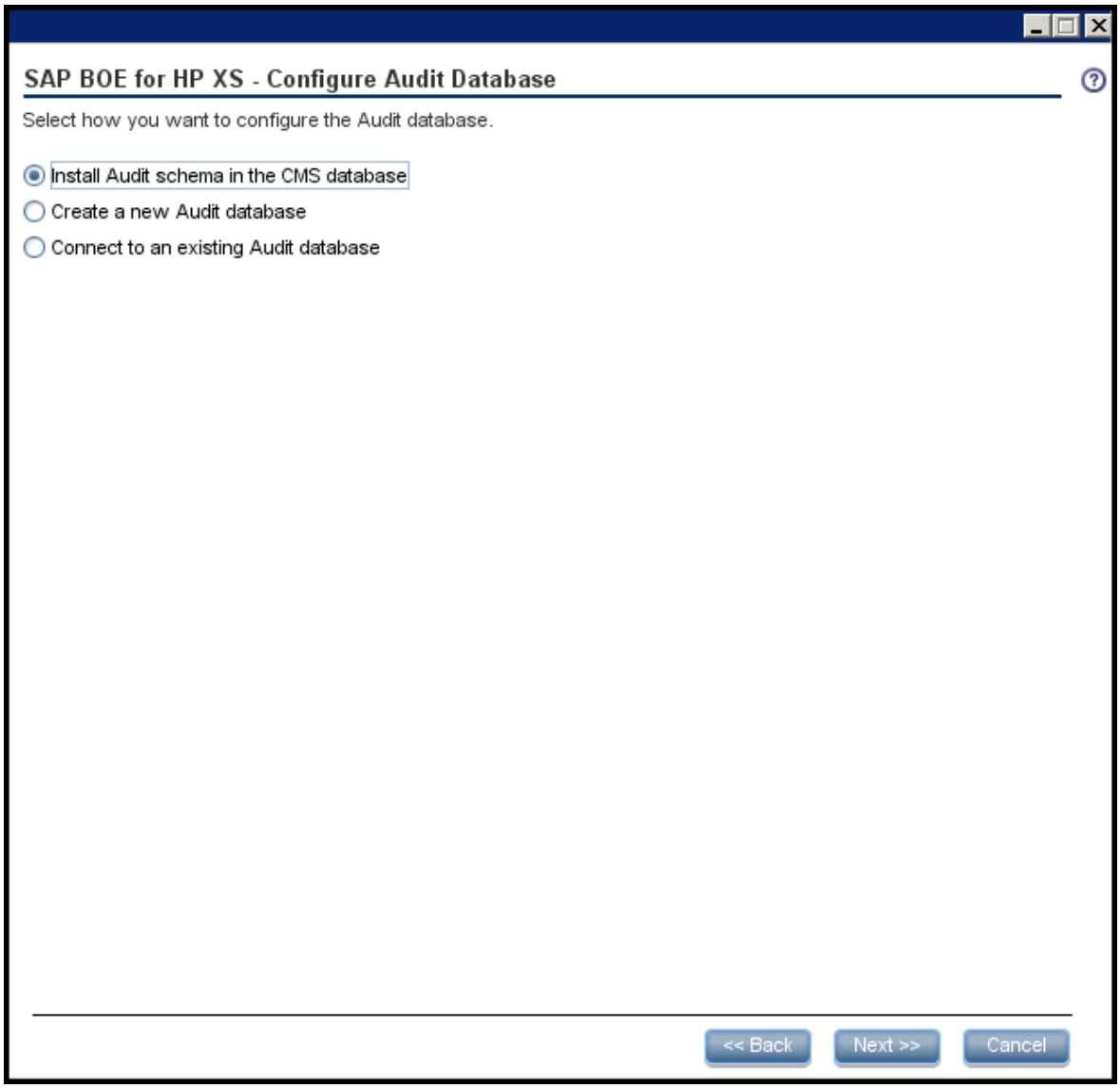
UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

SAP BOE for HP XS - CMS Database Configuration Status Page

In the **SAP BOE for HP XS - CMS Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.

SAP BOE for HP XS - Configure Audit Database Page

In the **SAP BOE 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.

SAP BOE for HP XS - Audit Database Configuration Status Page

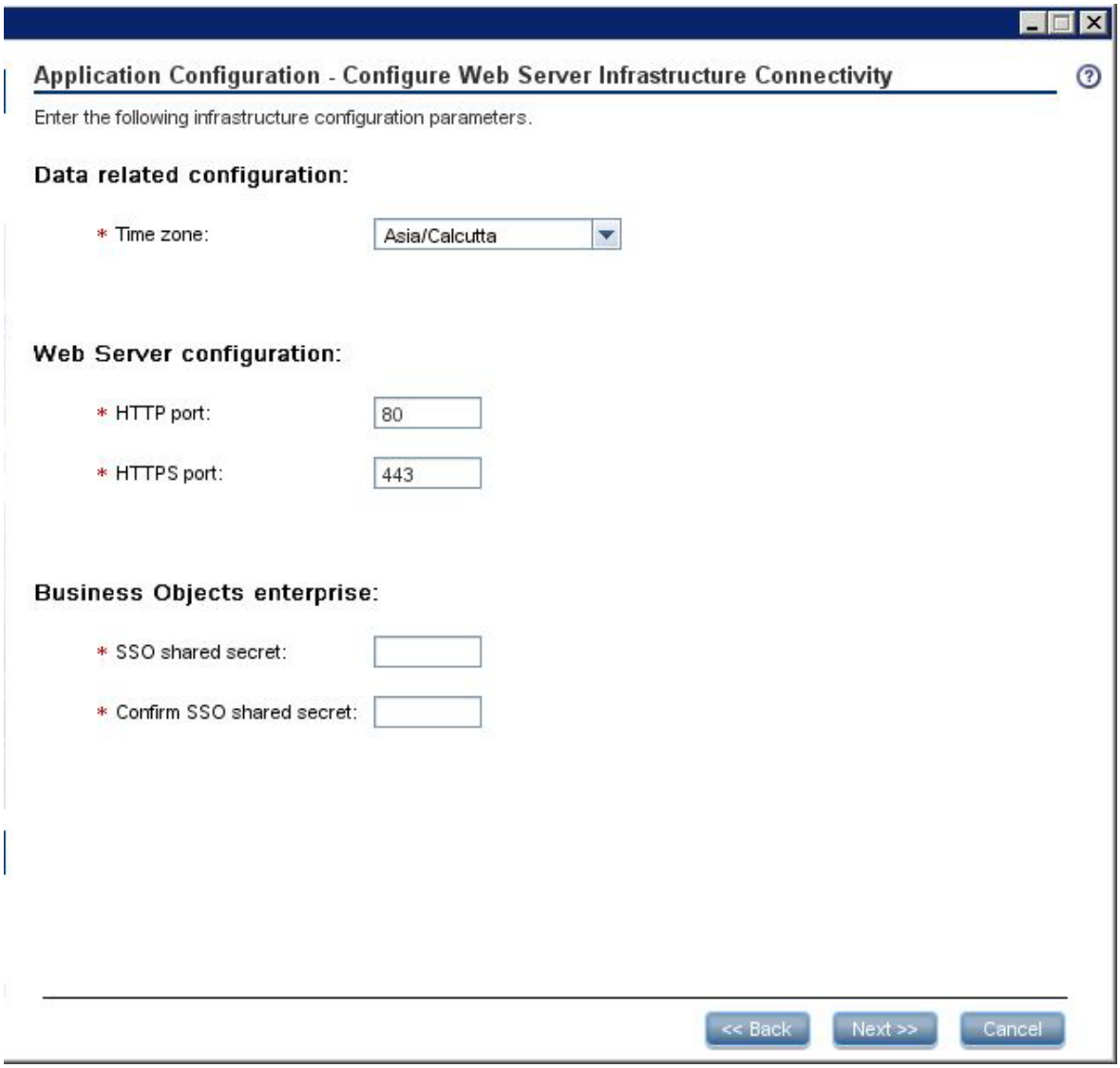
In the **SAP BOE for HP XS - Audit Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.

SAP BOE for HP XS - Configuration Status Page

In the **SAP BOE for HP XS - Configuration Status** page, make sure that the operation completed successfully, and click **Next**.

Application Configuration - Configure Web Server Infrastructure Connectivity Page

In the **Application Configuration - Configure Web Server Infrastructure Connectivity** page, enter the relevant 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. You cannot modify it after it has been defined as it impacts the calculations.

Web Server Configuration area:

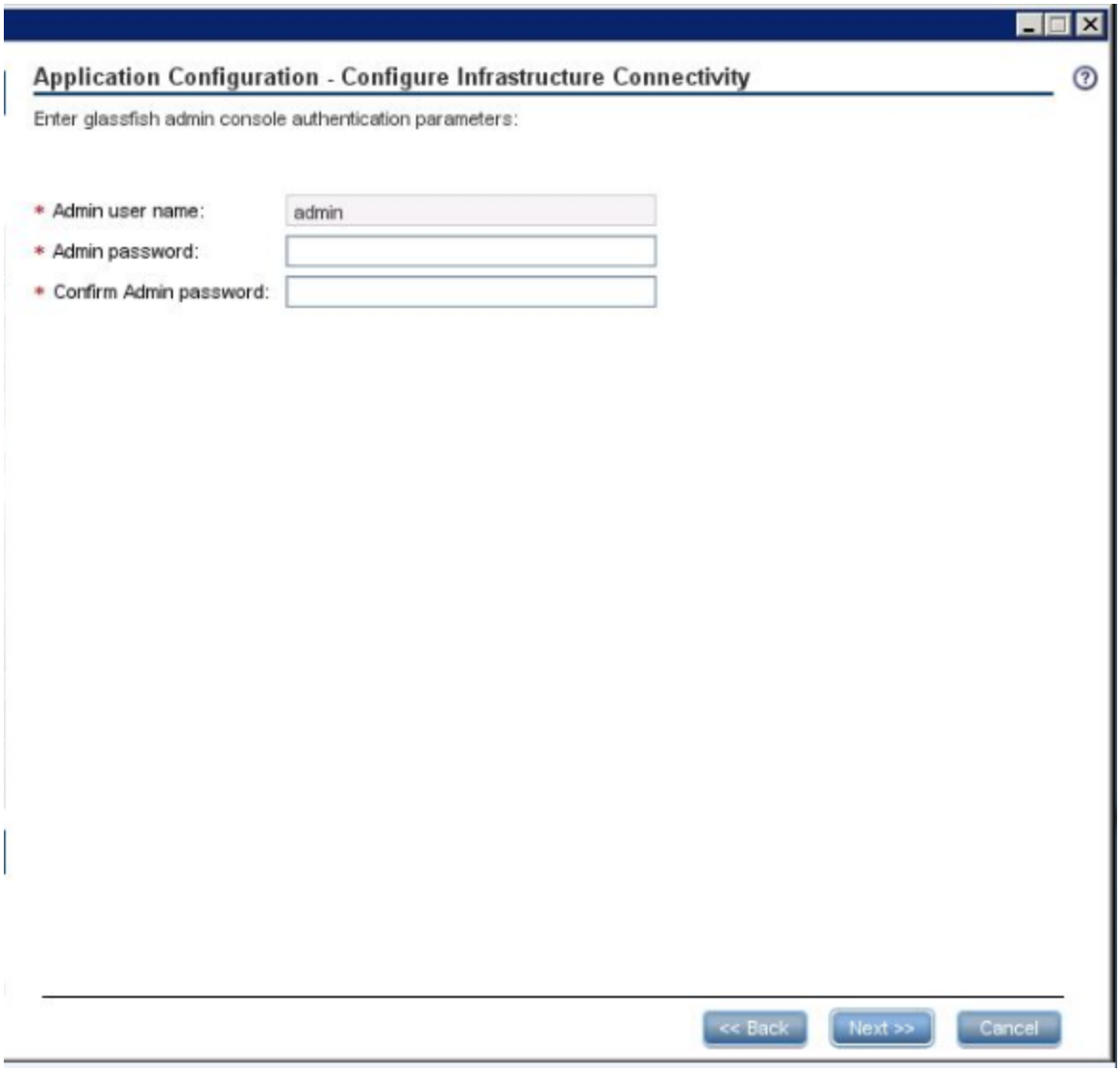
UI Element	Description
HTTP port	The port of the HTTP listener. The default port is 80. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** or from the Installation DVD). **Note: Note**: • If you want to use the default HTTP port in the Executive Scorecard installation, you must ensure that port 80 is not in use by another process. • Do not use the Tomcat port to install BOE.
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). **Note:** Do not use the Tomcat port to install BOE.

Business Objects Enterprise area:

UI Element	Description
SSO Shared Secret	The shared secret that is used to authenticate communications with the SAP BusinessObjects BI platform 4.0 SP6 server. If trusted authentication is configured, the shared secret entered is validated against the SAP BusinessObjects BI platform 4.0 SP6 server. If trusted authentication is not configured, the entered shared secret is configured on the SAP BusinessObjects BI platform 4.0 SP6 server.
Confirm SSO Shared Secret	Confirmation of the SSO shared secret.

Application Configuration - Configure Infrastructure Connectivity Page

On the **Application Configuration - Configure Infrastructure Connectivity** page, enter the relevant glassfish admin console authentication parameters, and then click **Next**.



UI Element	Description
Administrator user name	The user name for the glassfish. Use this user to log on to glassfish.

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 cannot contain the word: administrator. • 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 is case-sensitive. • 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.

Upgrade to 9.50

Note:

- No data will be lost during the upgrade process. All data that is created during the upgrade process will be retrieved upon completion directly from the data sources.

This section includes the following steps:

Application Configuration - Upgrade Required 43

Application Configuration – Configure Result DB Connectivity Settings for Upgrade Page 44

Application Configuration - Configure Target Database Connectivity Settings Page 46

Application Configuration - Configure Staging Database Connectivity Settings for the Upgrade Page 47

Application Configuration - Upgrade Summary 49

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Data Warehouse - Configure External Source & External Source Archive File Location Page 53

Data Warehouse - Configuration Status Page 54

Executive Scorecard - Executive Scorecard Summary Page 54

Financial Planning Analysis - Installing FPA Page 54

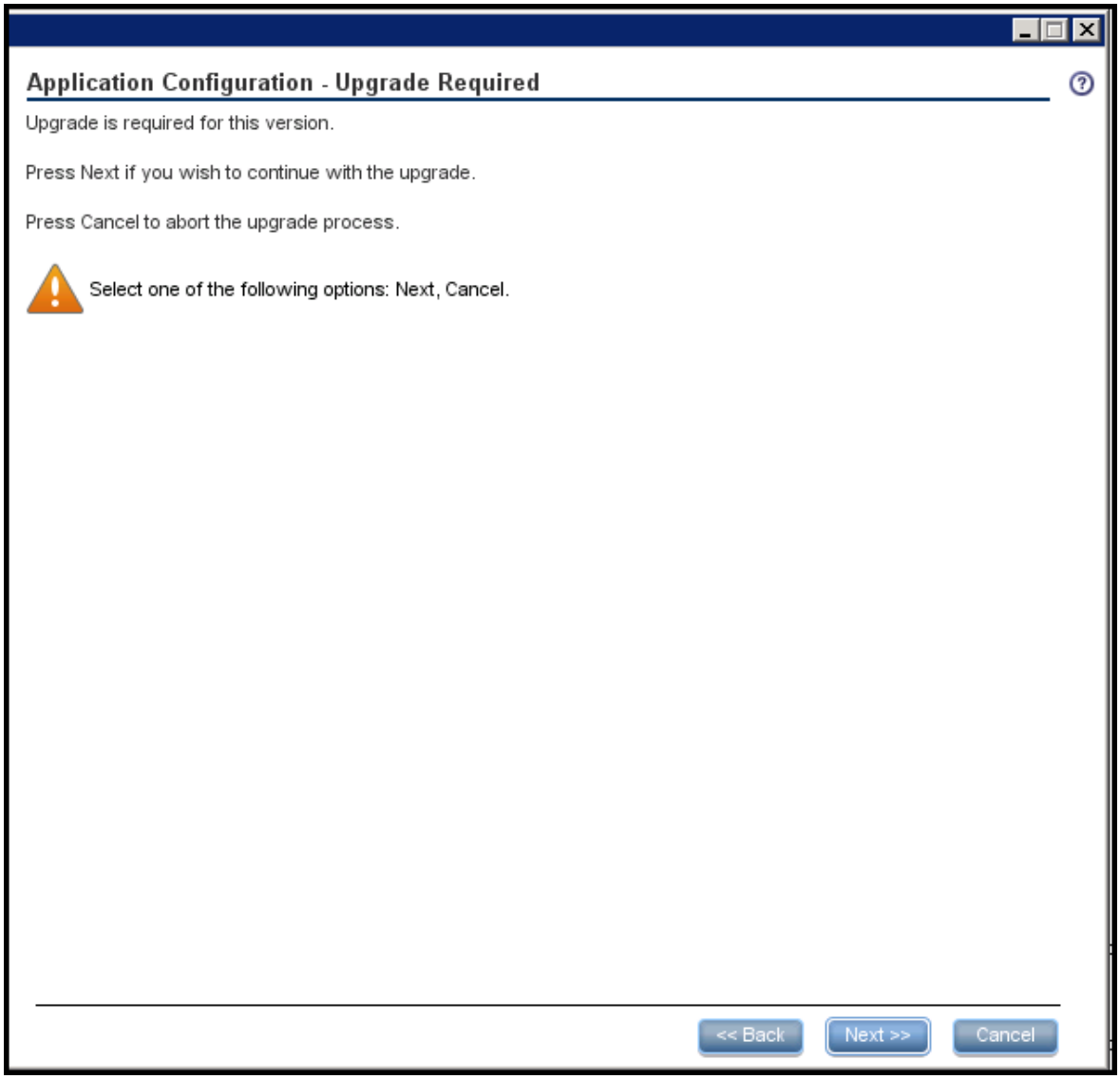
Financial Planning Analysis - Summary Page 54

Summary Page 55

Go to Additional Steps 56

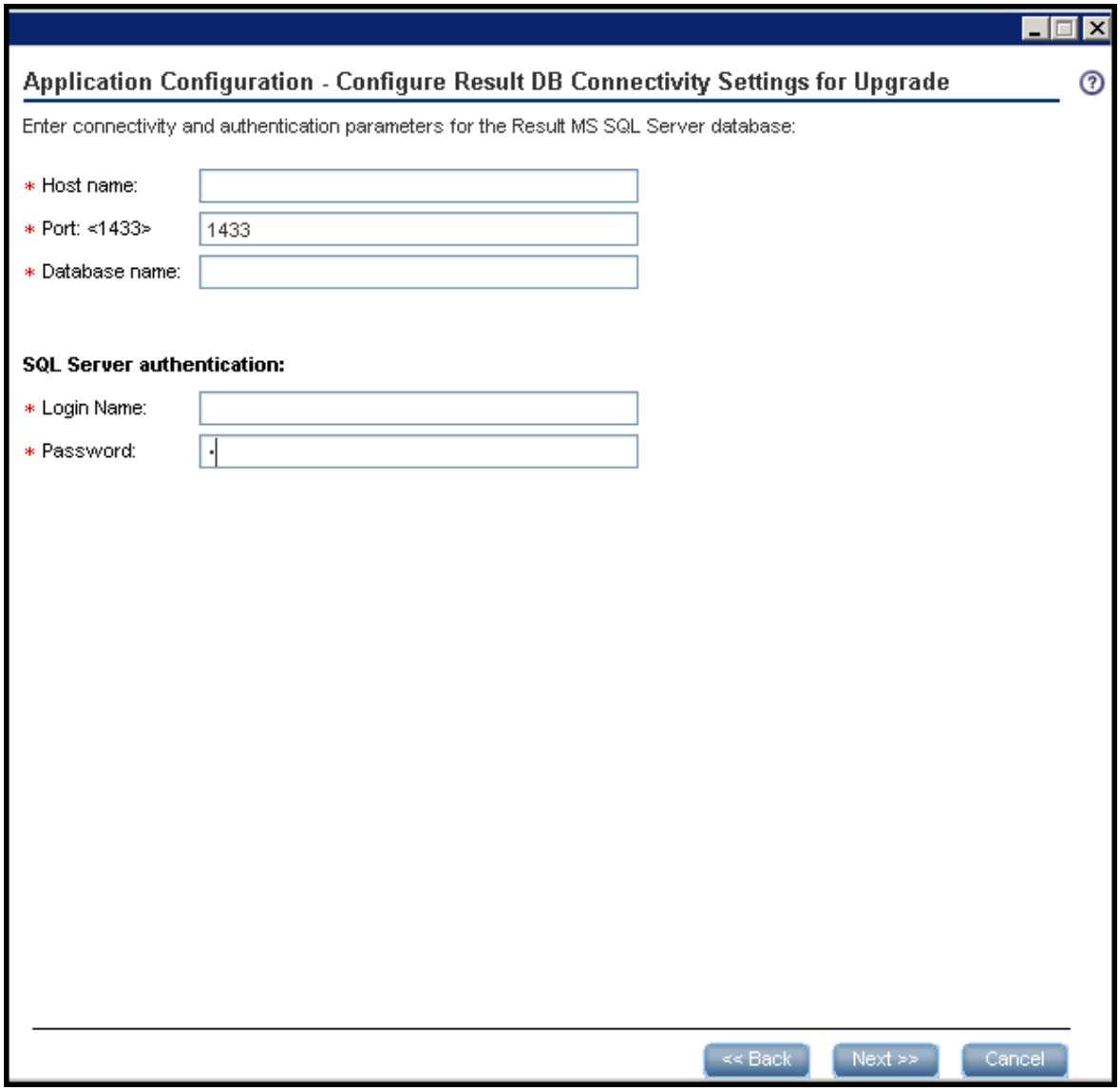
Application Configuration - Upgrade Required

In the **Application Configuration- Upgrade required** page, click **Next** to perform the upgrade.



Application Configuration – Configure Result DB Connectivity Settings for Upgrade Page

In the **Application Configuration – Configure Result DB Connectivity Settings for Upgrade** page, enter the relevant information and click **Next**.



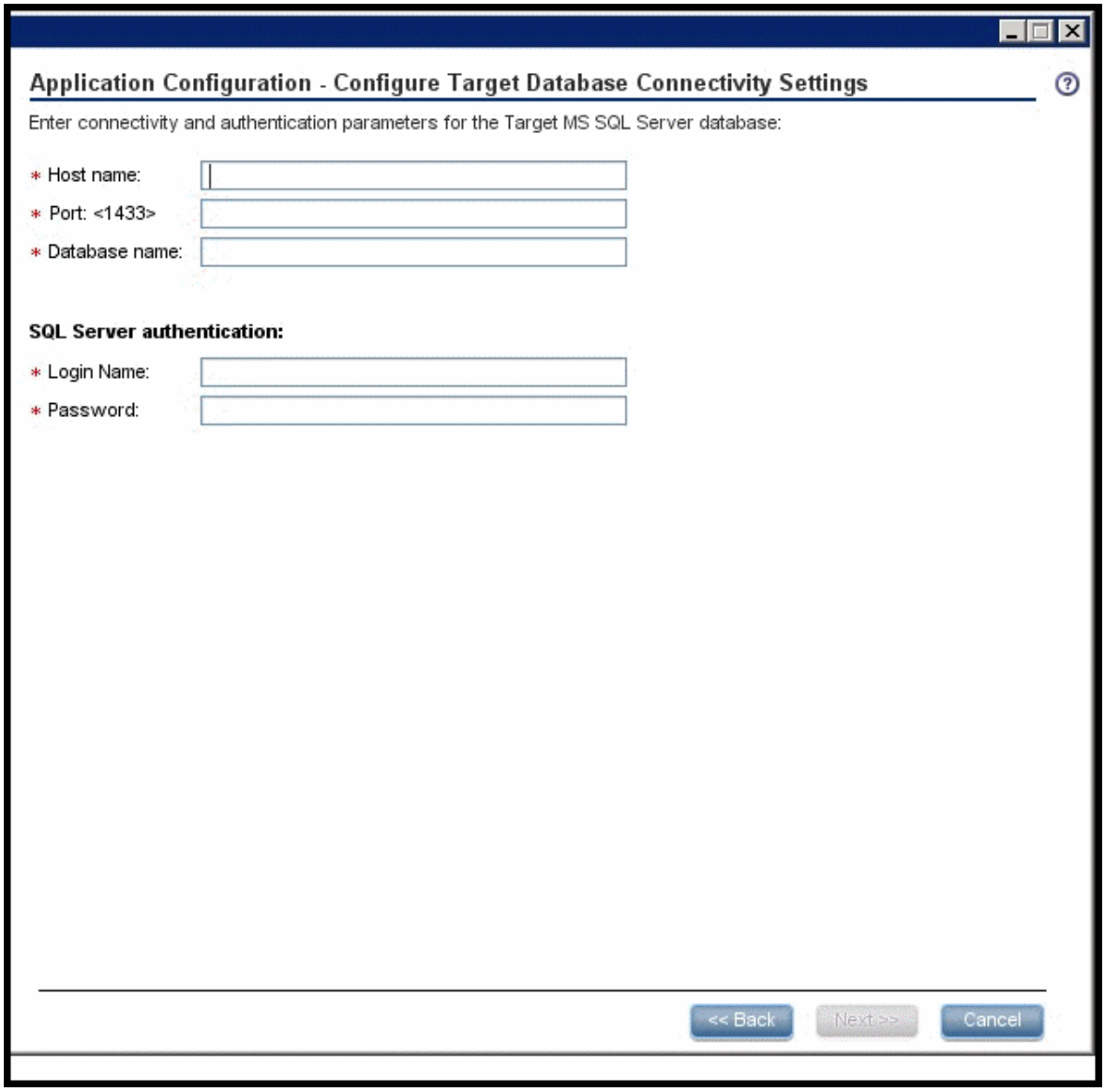
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Result database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.
Port <1433>	The 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). XS does not support dynamic ports.
Database name	The name of the Result database that was restored earlier.

SQL Server authentication:

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Application Configuration - Configure Target Database Connectivity Settings Page

In the **Application Configuration - Configure Target Database Connectivity Settings** page, enter the relevant information, and click **Next**.



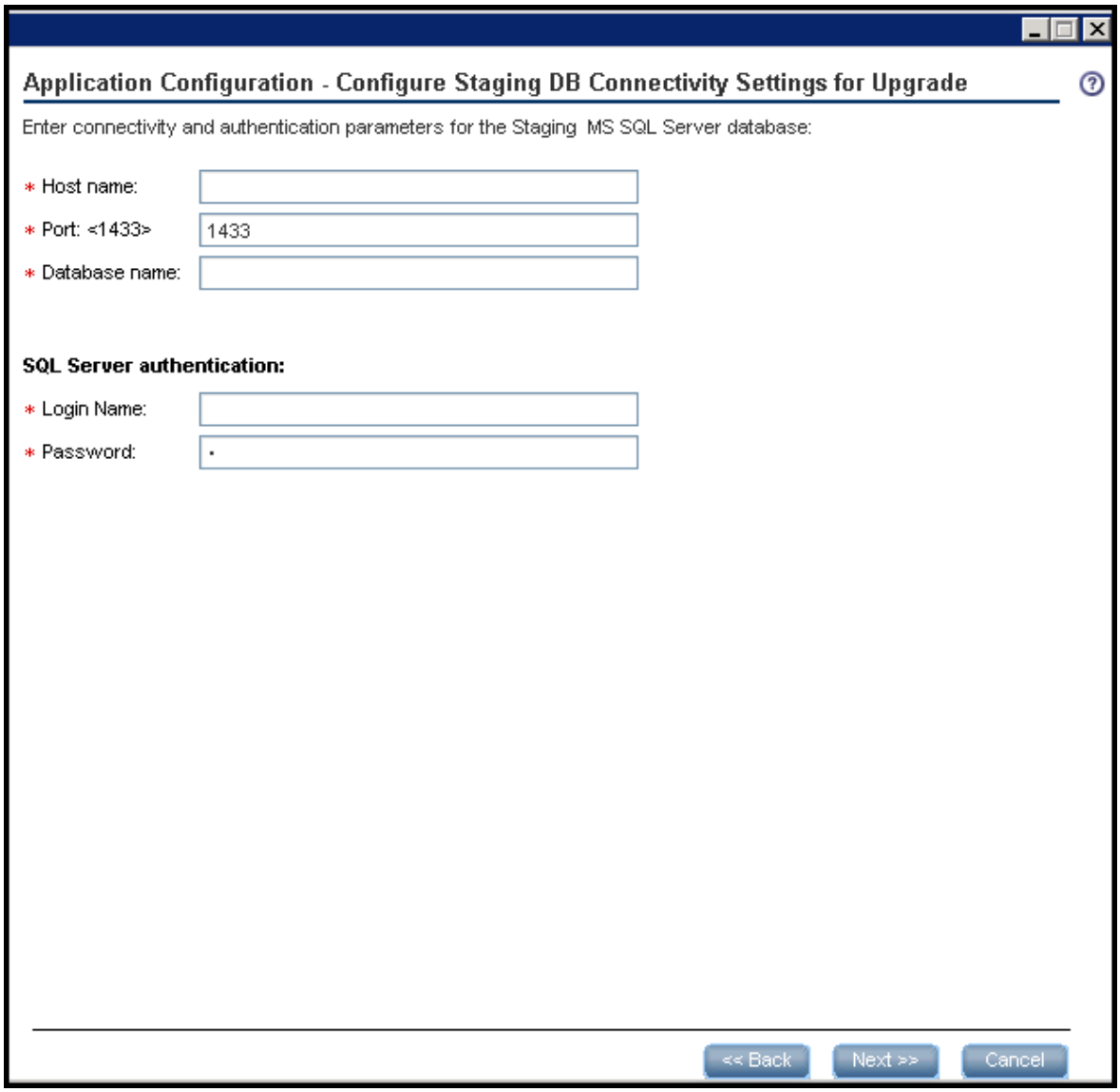
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL server hosting the target database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.
Port <1433>	The 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). XS does not support dynamic ports.
Database name	The name of the target database. For an installation, use the database naming convention. For details, see Database Naming Conventions.

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified logon that creates the Target database.

Application Configuration - Configure Staging Database Connectivity Settings for the Upgrade Page

In the **Application Configuration - Configure Staging Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the duplicated 9.41 Staging Schema, and click **Next**.



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

UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Staging database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.

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). XS does not support dynamic ports.
Database name	The name of the Staging database that was restored earlier.

SQL Server authentication:

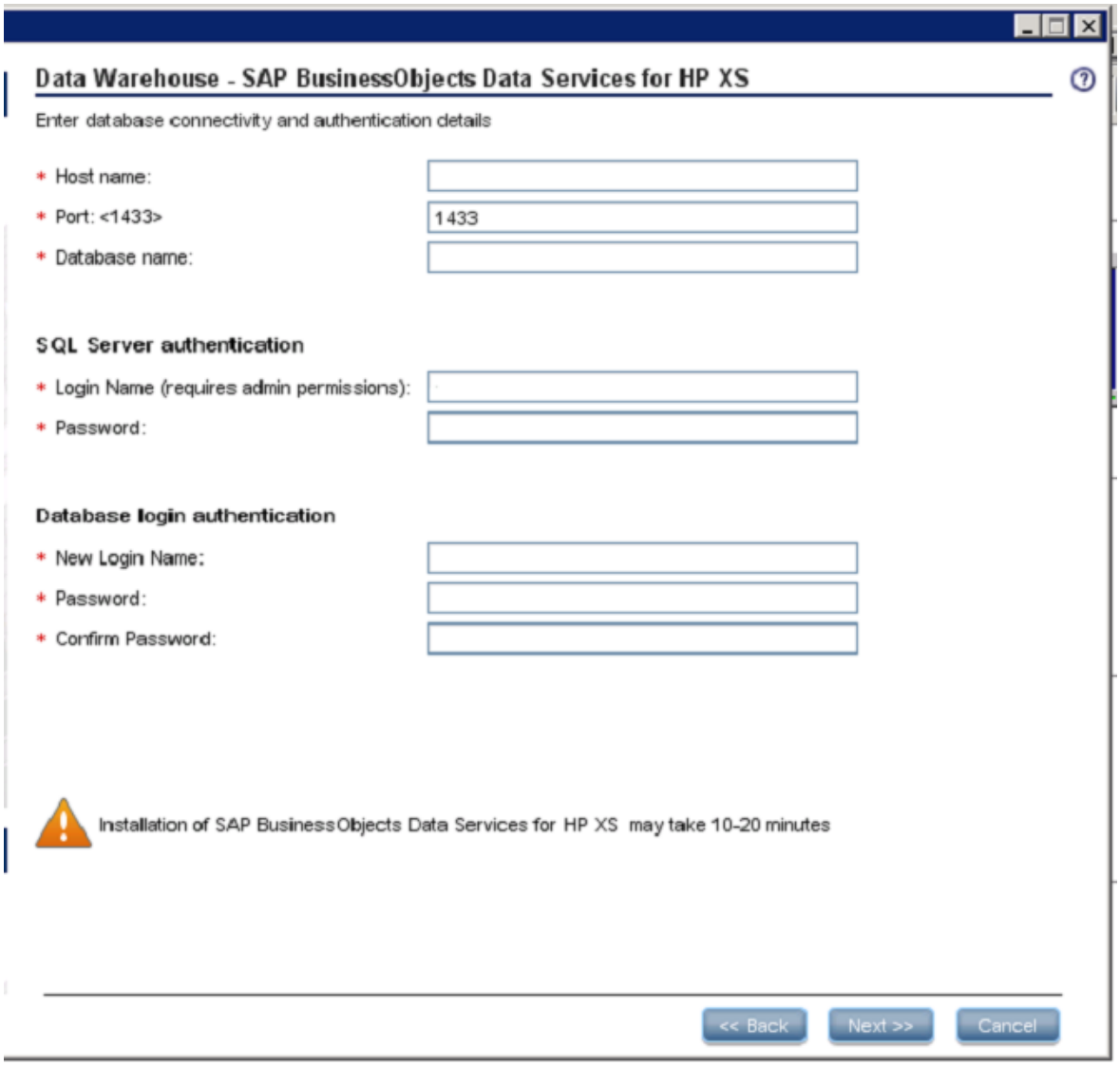
UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Application Configuration - Upgrade Summary

In the **Application Configuration - Upgrade Summary** page confirm the upgrade was completed successfully and click **Next**.

Data Warehouse - SAP BusinessObjects Data Services for HP XS Page

On the **Data Warehouse - SAP BusinessObjects Data Services for HP XS** page, enter the relevant 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 SAP BusinessObjects Data Services database.
	• Do not use localhost as the host name.
	• Do not use the server name 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>**. XS does not support dynamic ports.

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). XS does not support dynamic ports.
Database name	The name of the SAP BusinessObjects Data Services database. For an installation, use the database naming convention. For details, see Database Naming Conventions.

SQL Server authentication area:

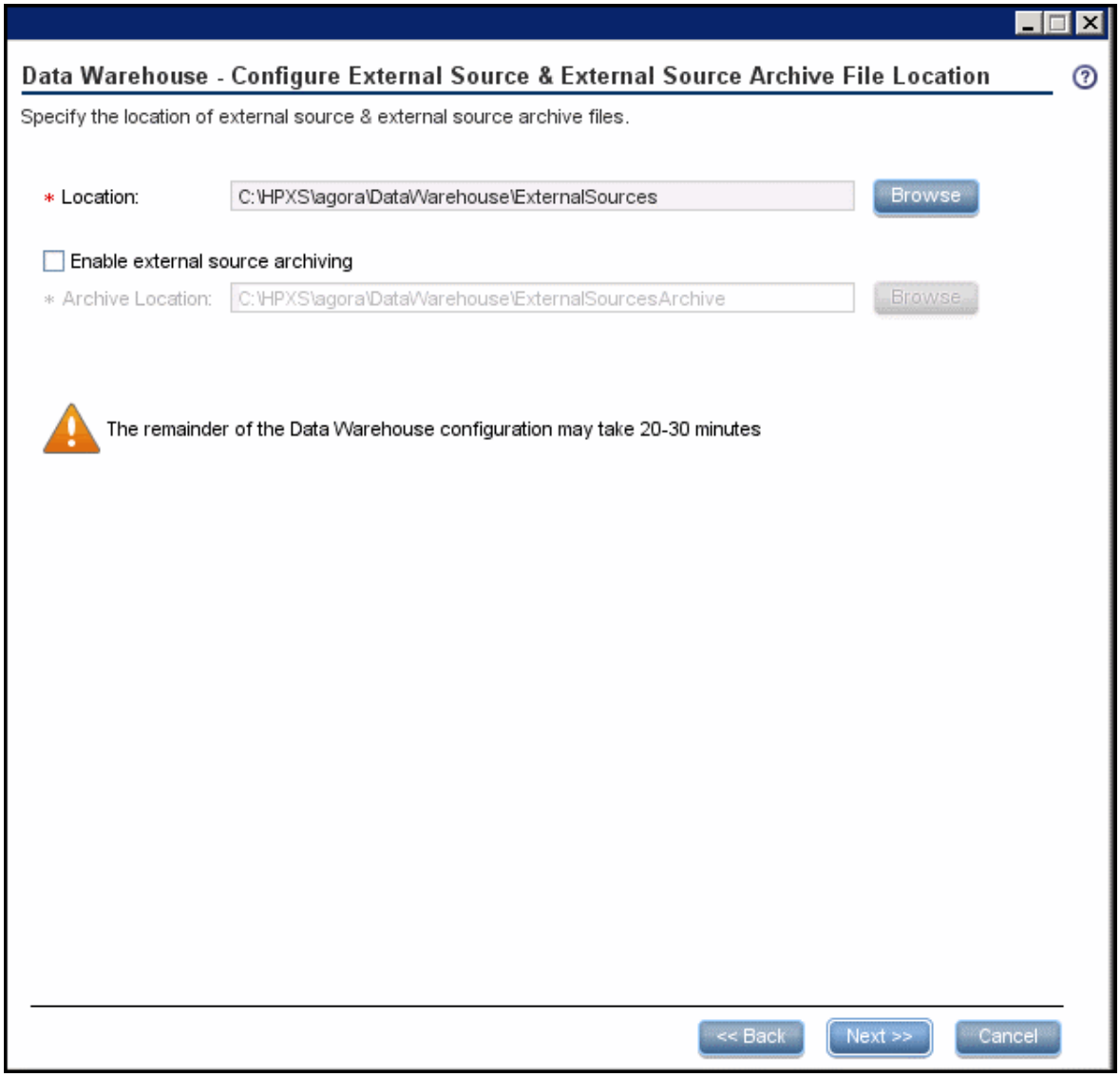
UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password of the specified logon.

Database login authentication area:

UI Element	Description
New Login name	A new MS SQL logon 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 logon name because the XS user name is already used internally.
Password	The password for the new logon. 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 logon.

Data Warehouse - Configure External Source & External Source Archive File Location Page

On the **Data Warehouse - Configure External Source & External Source Archive File Location** page, select the relevant information, 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** **Note:** Make sure you have already copied the folder from XS 9.41.
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.
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.

Data Warehouse - Configuration Status Page

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

Executive Scorecard - Executive Scorecard Summary Page

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

Financial Planning Analysis - Installing FPA Page

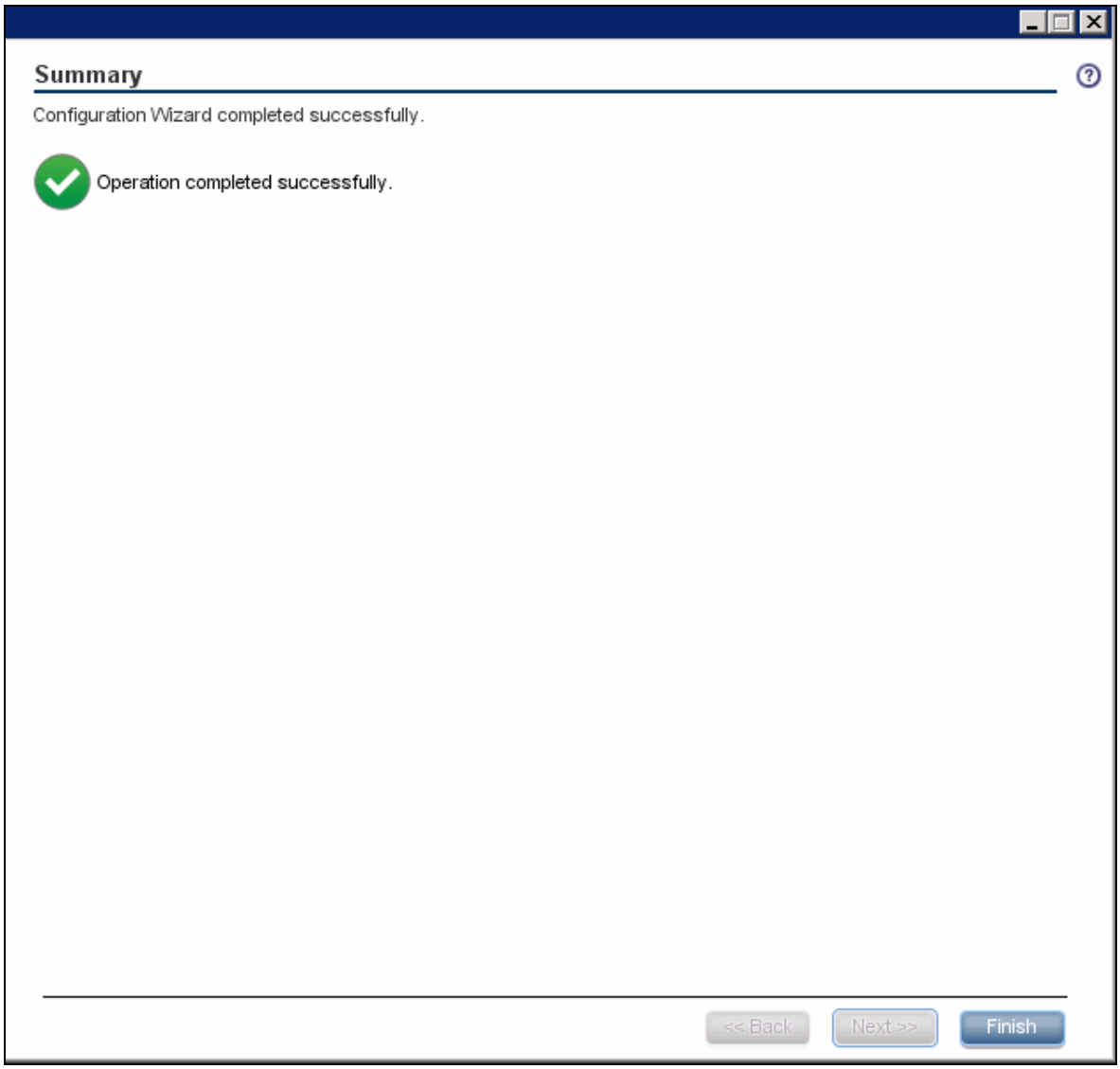
On the **Financial Planning and Analysis - Installing FPA** page, click **Next** to install IT Financial Management.

Financial Planning Analysis - Summary Page

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

Summary Page

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



Note:

- At the end of the upgrade, verify the log files. If you find errors in the log files, investigate, correct, and consider re-running the upgrade process. For details on the log files, see Logs and the LogTool in the *IT Executive Scorecard Administrator Guide*.

Go to Additional Steps

You can now proceed with "Additional Steps" on page 145.

Upgrade Steps - Distributed Environment

The upgrade procedure on a distributed environment uses the following steps:

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Prerequisite

Prerequisites

1. It is recommended to install the 9.5 version on a new server in order to have both 9.41 and 9.5 up and running after the upgrade.

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

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

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

5. **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.

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

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

   a. Copy the <CAP_name>.ZIP files from:
   <installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\load and **<installation directory>\agora\glassfish\glassfish\domains\btoa\config\cap\import\loaded** folders located on the source server to the same folders on the target server.

   b. If you work with localized CAP files, they should be copied at the same time.

8. Back up the 9.41 **Version.txt** file located at: **<HP_XS>\agora\dat** for disaster recovery purposes.

9. Back up the 9.41 **<HP_XS>\agora\DataWarehouse\ExternalSources** folder before starting the upgrade.

Install Access Database Engine on the BODS Server

Install the access engine as follows:

1. Download Microsoft Access Database Engine 2010 Redistributable from the Microsoft official website:
   http://www.microsoft.com/en-us/download/details.aspx?id=13255

2. Click **Start > Run** and enter CMD. In the CMD window, enter:
   AccessDatabaseEngine_x64.exe/passive and press **Enter**.

Extended Content Backup

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

   Note: Make sure that every change that was done in the BODS workflows is synchronized with the content packs xml files. For information see the HP Software Support Online web site (http://www.hp.com/go/hpsoftwaresupport), or contact your HP Support representative.

   Backup the following folders:

   - **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction_CUSTOMIZATION**
     to the new installation machine under:
     <backup folder>\<cp name>\dataModel\dataIntegration\extraction
   - **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source_CUSTOMIZATION**
     to the new installation machine under:
     <backup folder>\<cp name>\dataModel\dataIntegration\source
   - **<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities_CUSTOMIZATION**
     to the new installation machine under:
     <backup folder>\<cp name>\ETL\entities

2. If you had created new content packs in 9.41:

   Note: Make sure that every change that was done in the BODS workflows is synchronized with the content packs .xml files. For information see the HP Software Support Online web site (http://www.hp.com/go/hpsoftwaresupport), or contact your HP Support representative.

   Backup the content pack folder from:
   <install drive>\<Installation directory>\agora\ContentPacks\<cp name>
   to the new installation machine under:
   <backup folder>\ContentPacks

3. If you have extensions to the FBI extractor:

   a. Back up the 9.41 fbi-web.war from the folder:
      <install drive>\<Installation directory>\agora\apps
      to the new installation machine under:
      <backup folder>\fbi.

Install the SQLCMD Utility

Install the SQLCMD Utility on the typical server, before you start the 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).

   d. Update the system environment variable, **Path**, to the location of the sqlcmd utility: **<Driver>:\Program Files\Microsoft SQL Server\100\Tools\Binn**

Back Up and Restore All Databases

It is recommended to duplicate all the 9.41 schemas before starting the upgrade procedure in order to have both 9.41 and 9.5 up and running after the upgrade. To duplicate a schema in MSSQL, right-click the schema, select **Tasks > Back Up**. In the Back Up Database <file_name> dialog box, enter the name of the back up file in the **Name** field in the Backup Set area, select where you want to save the duplicate in the **Destination** area, and click **OK**. Make sure that the back up is successful.

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

Before performing backup and restore make sure:

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

To backup and restore the databases:

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

1. Backup the source Staging, Target, Management, and Results databases using SQL Server 2008 Studio. Make sure that the backup file names are unique and that they do not exist on the destination database server.
2. Restore the backup of the source databases on the destination server using the same DB name. Note the DB name must be same as original DB name. Make a note of the restored names to be used during the upgrade.
3. Back up the database logons and that each user's status is enabled and not locked.
4. To restore the Management, Result, Target, and Staging databases, right-click **Database** in the relevant SQL server and select **Restore Database**. In the Restore Database dialog box, select **From device**, and click the button. In the Specify Backup dialog box, click **Add**. Select the duplicate file, and click **OK**.

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

SAP BOE Installation

This section includes the following steps:

Install SAP BusinessObjects Enterprise on a New Server 64
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Management Database - Configure Management Settings Page 69
Management Database - Configure Management Database Connectivity Settings Page 71
Management Database - Management Database Configuration Status 73
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SAP BOE for HP XS - Installation Directory 77
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Install SAP BusinessObjects Enterprise on a New Server

SAP BusinessObjects Enterprise must be the first component you install.

Install BusinessObjects Enterprise:

1. Ensure that you have the relevant installation settings required for the installation as described in the *IT Executive Scorecard Support Matrix*.
2. Close all Windows before you start the installation process.
3. Insert the XS media into the CD/DVD drive. The installation wizard opens.

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

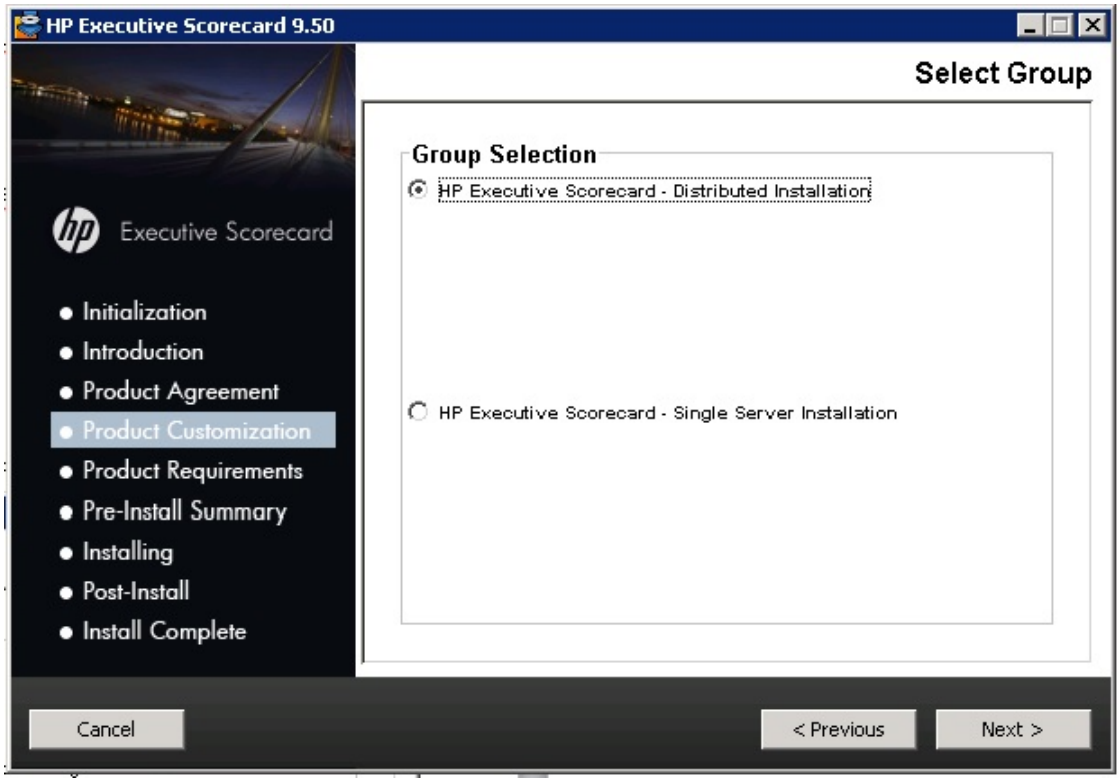
Note: If the installation wizard does not start automatically, run the file: **<DVD_ROOT>\Windows_Setup\HPXS_9.5_setup.exe**

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

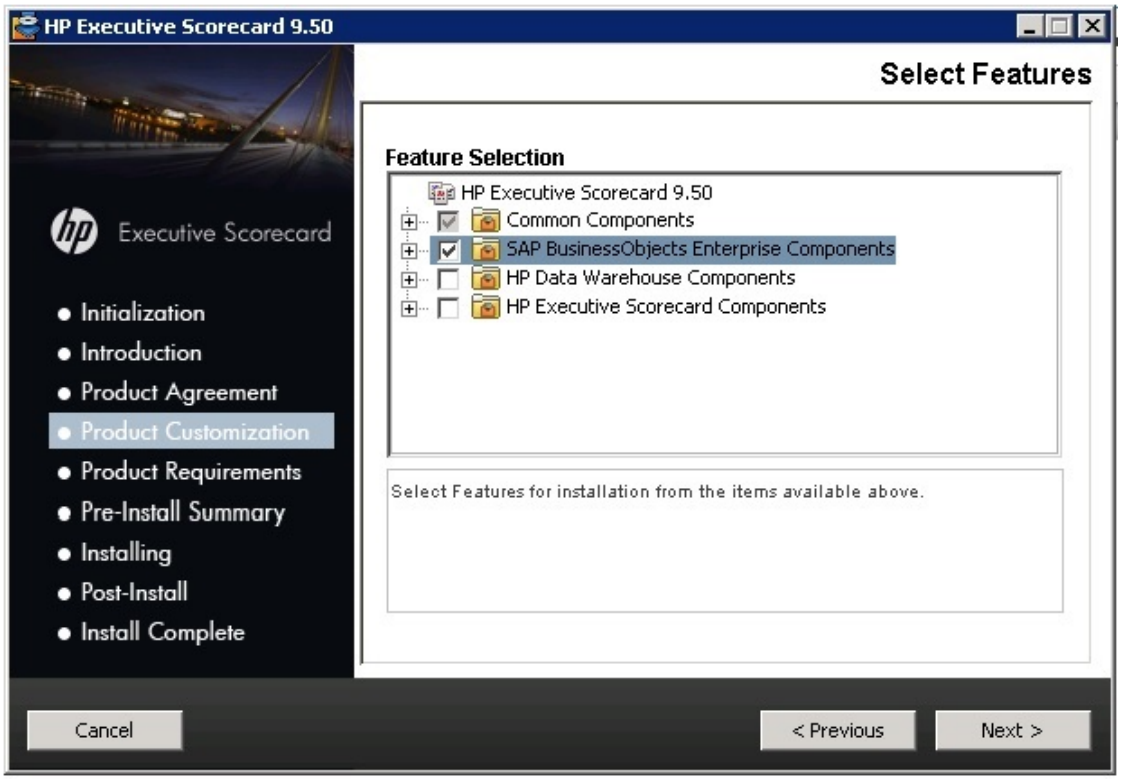
Installation Section of the wizard.

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

1. In the **Select Group** page, select the type of installation you are performing: **Distributedinstallation**, and then click **Next**.



2. In the **Select Features** page, select **SAP BusinessObjects Enterprise**.



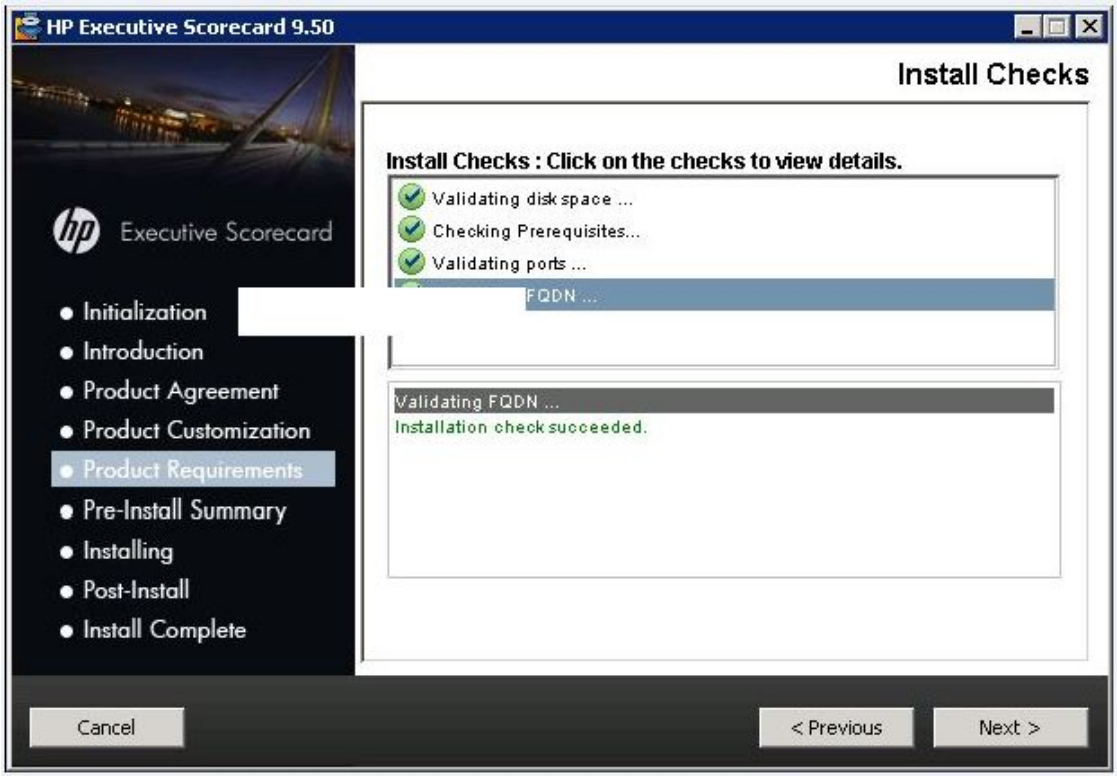
3. In the **Choose the folders** page, click **Next** to accept the default application folder, or **Browse** to navigate to and then select a new application folder location.

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

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

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

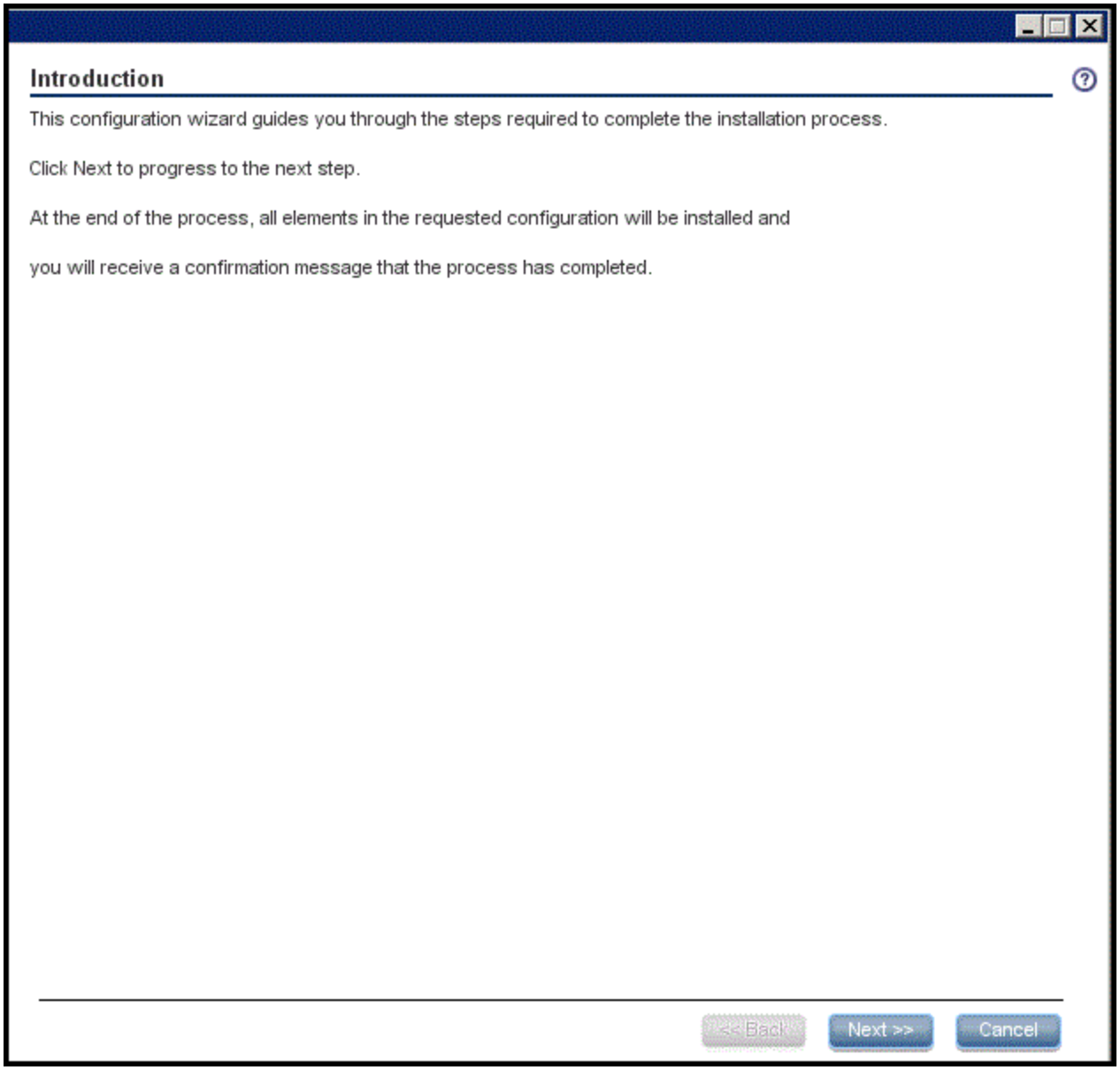
4. In the **Install Checks** page, ensure that all the installation checks are successful, and then click **Next**.



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

Run the Post-Install Wizard

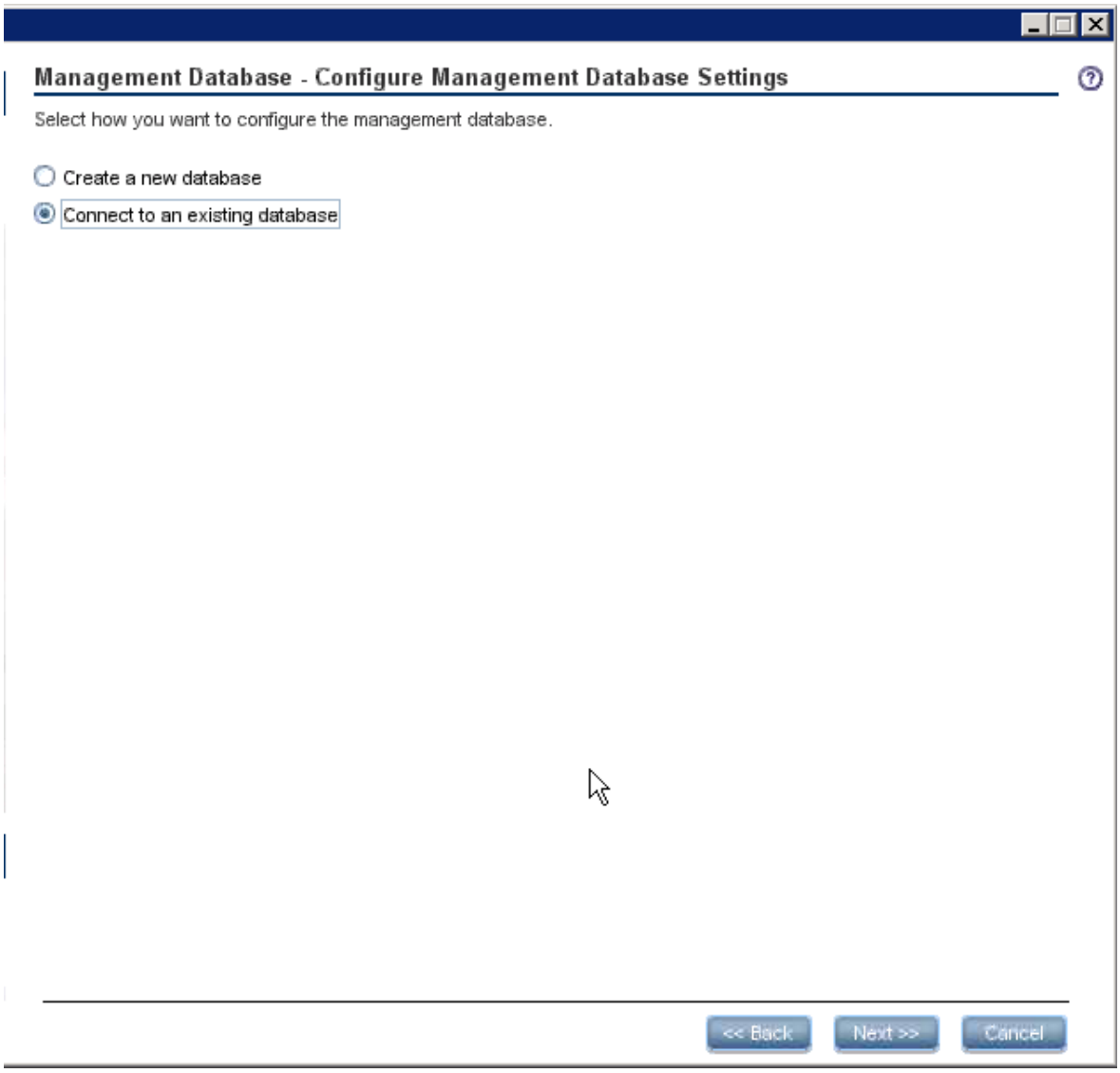
The **Introduction** page of the Post-Install Configuration wizard opens. Click **Next**.



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

Management Database - Configure Management Settings Page

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



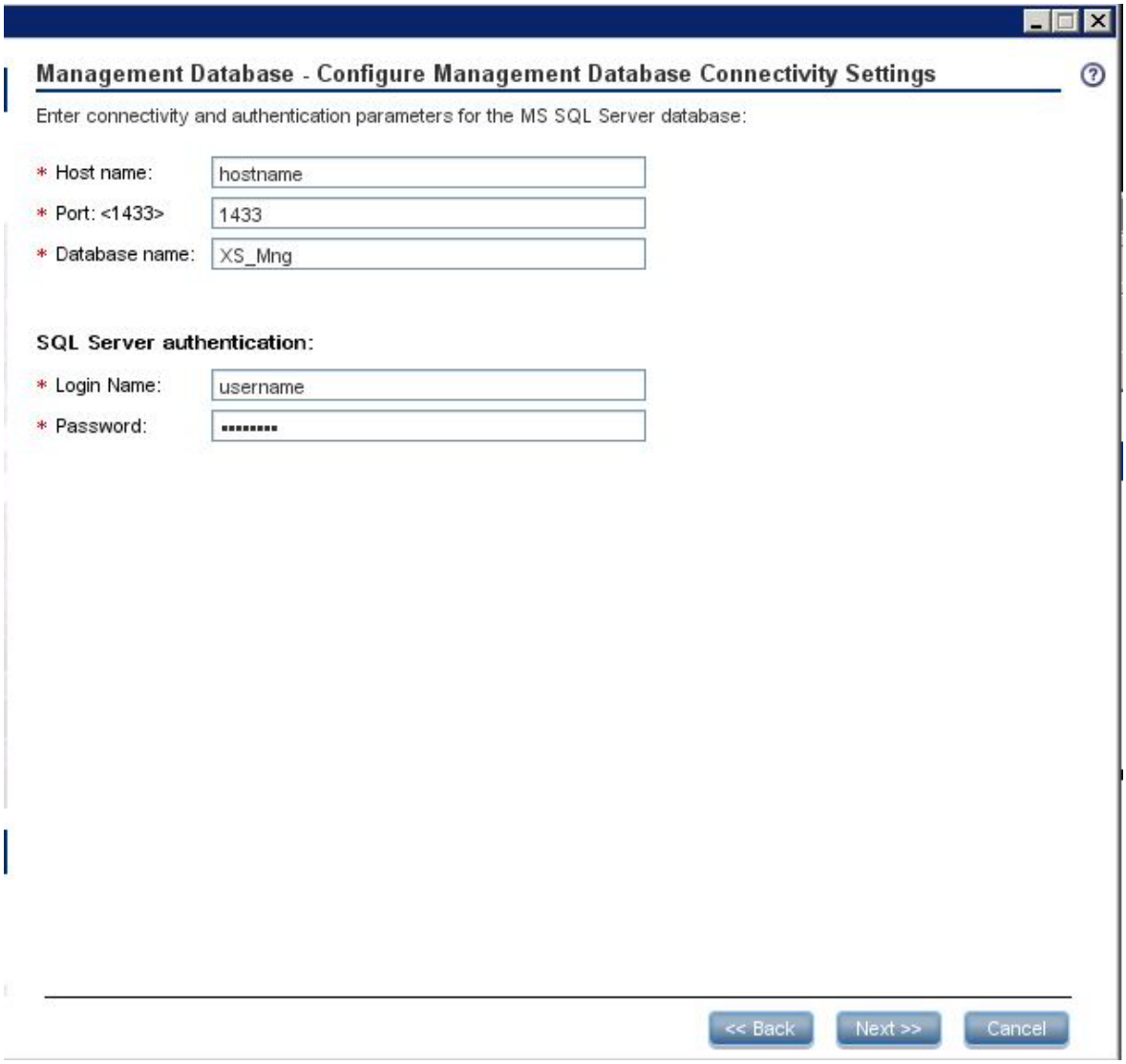
UI Element	Description
Create a new database	Select this option to create a new Management database. Select this option when installing the first HP IT Executive Scorecard component.

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

Management Database - Configure Management Database Connectivity Settings Page

In the **Management Database - Configure Management Database Connectivity Settings** page, enter the relevant information, and then click **Next**.

- XS supports only one Management database. The Management database cannot be changed after it has been defined.
- In a distributed environment, make sure that the Management database and the Result database are installed on the same database server.



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>**. XS does not support dynamic ports.
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). XS does not support dynamic ports.
Database name	The name of the Management database. **Tip:** If needed, take note of the database name, as it may be needed when installing other components. For an installation, use the database naming convention. For details, see Database Naming Conventions.

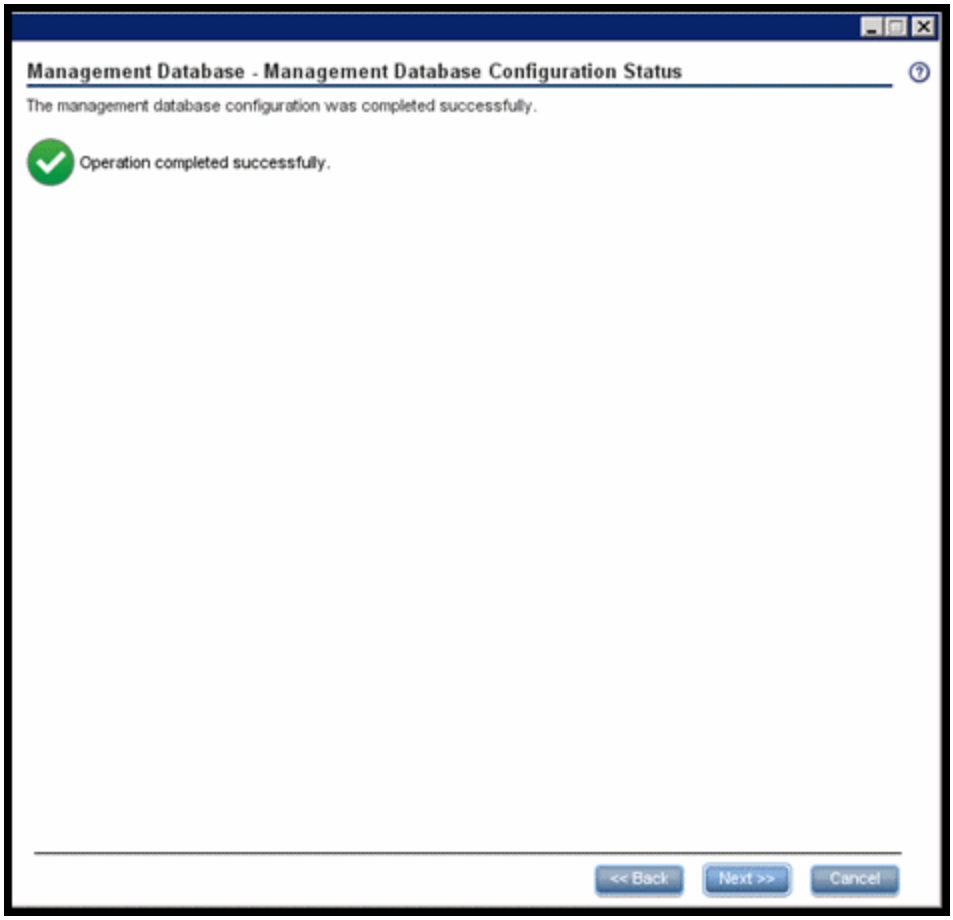
SQL Server authentication:

To work with the Data Warehouse, the user must have access to the SQLServer definition. Make sure that the permission has been assigned accordingly. For example, the SQL permission GRANT VIEW ANY DEFINITION TO public grants access to the SQL Server definition to everyone.

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Management Database - Management Database Configuration Status

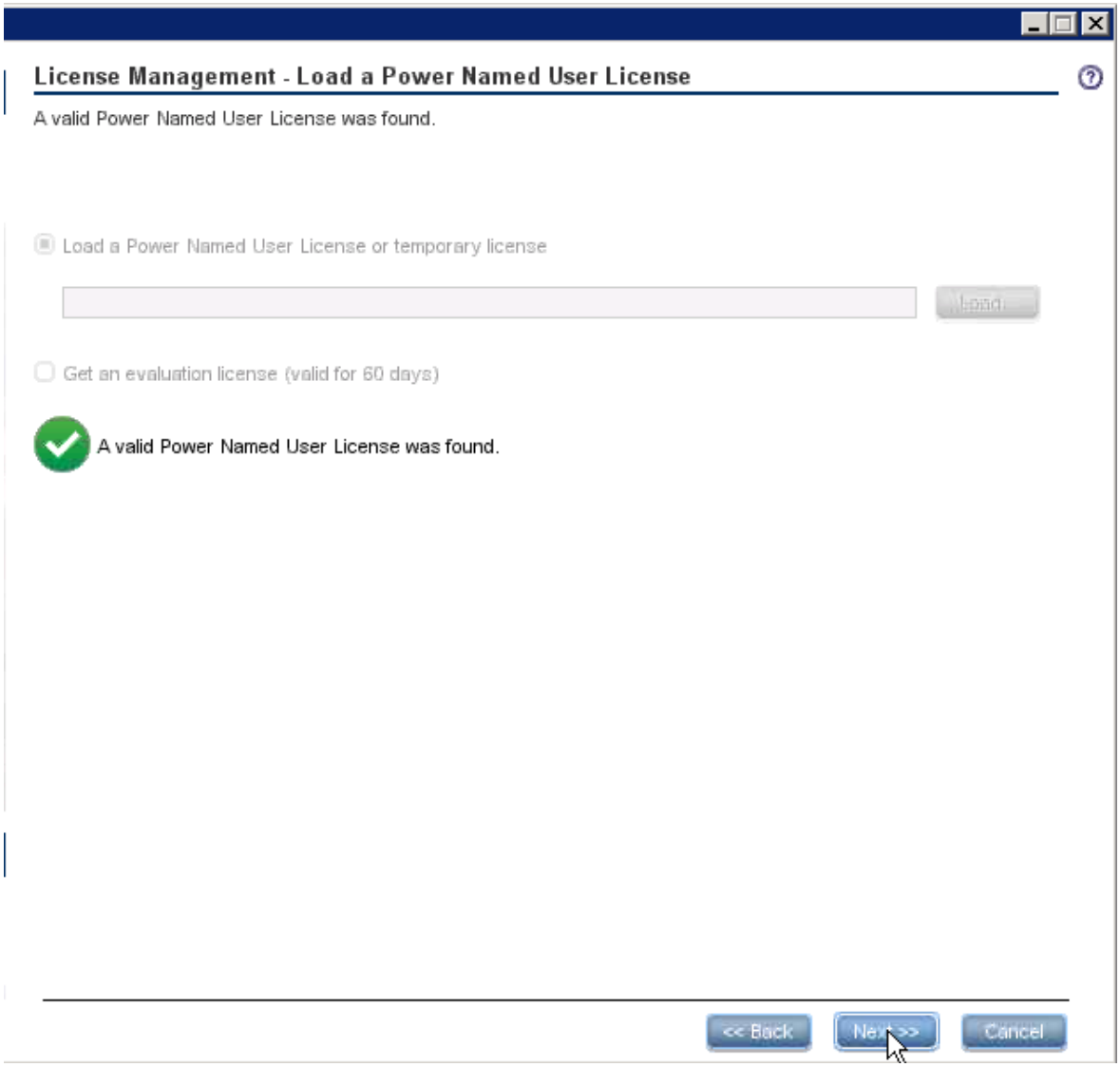
In the **Management Database - Management Database Configuration Status** page, verify that the Management database configuration was completed successfully, and then click **Next**.



License Management - Load a Power Named User License

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

The wizard recognizes the license entered in the previous version.



UI Element	Description
Load a Power Named User License or temporary license	Select to load one of the following license types: • **Power Named User License** - 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, click **Load**, Navigate to the license file provided by your supplier, and then click **Load License**.

UI Element	Description
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 using the License Renewal feature. For details, see Renew your license using the Start menu in the *IT Executive Scorecard Administrator Guide*.

Configure SAP BusinessObjects Enterprise

This section includes the following steps:

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SAP BOE for HP XS - Configure Server Connectivity Page 78

SAP BOE for HP XS - Configure CMS Database 79

SAP BOE for HP XS - Configure CSM Database Connectivity Settings Page 80

SAP BOE for HP XS - CMS Database Configuration Status Page 81

SAP BOE for HP XS - Configure Audit Database Page 82

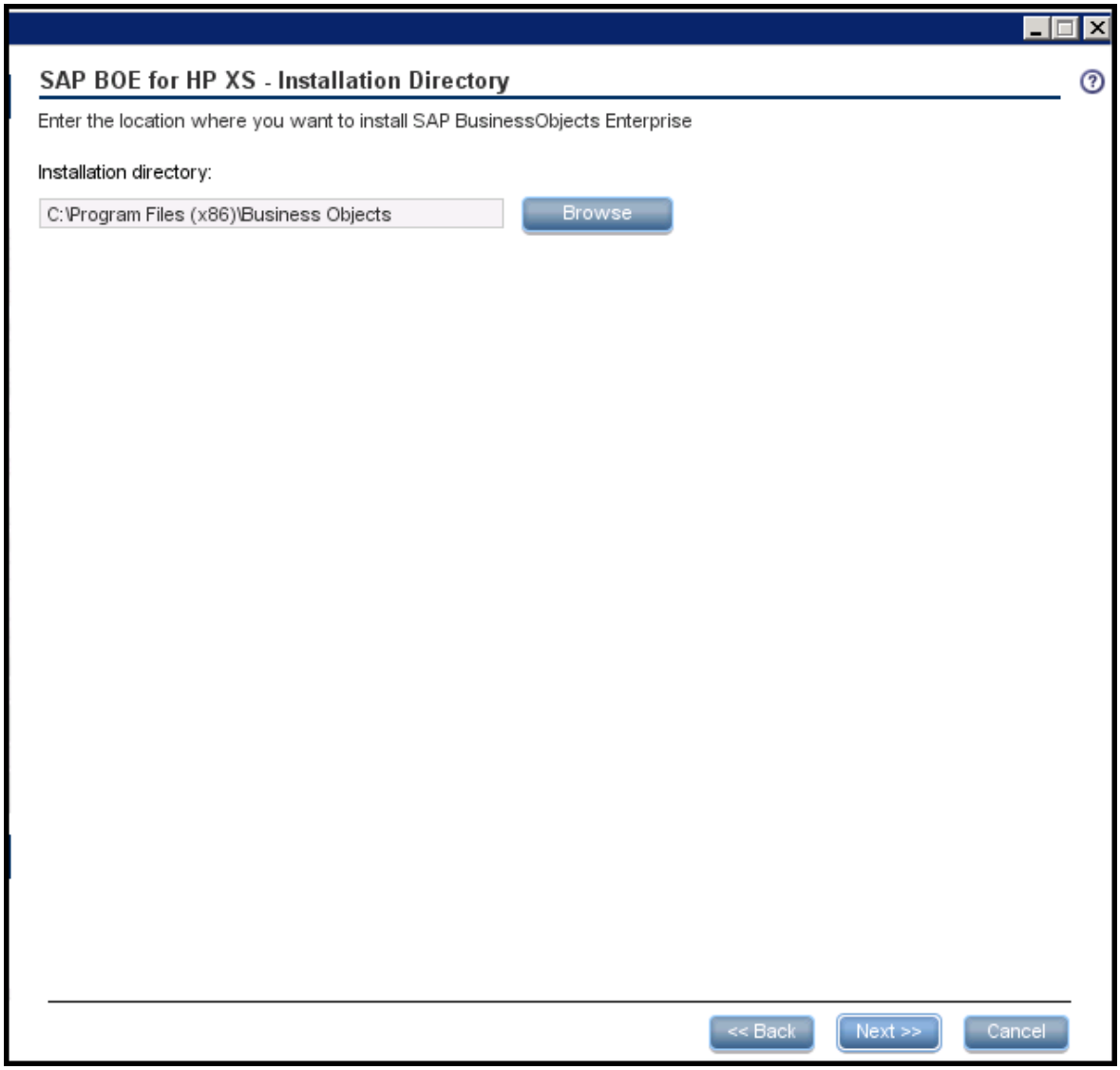
SAP BOE for HP XS - Audit Database Configuration Status Page 83

SAP BOE for HP XS - Configuration Status Page 83

Summary Page 83

SAP BOE for HP XS - Installation Directory

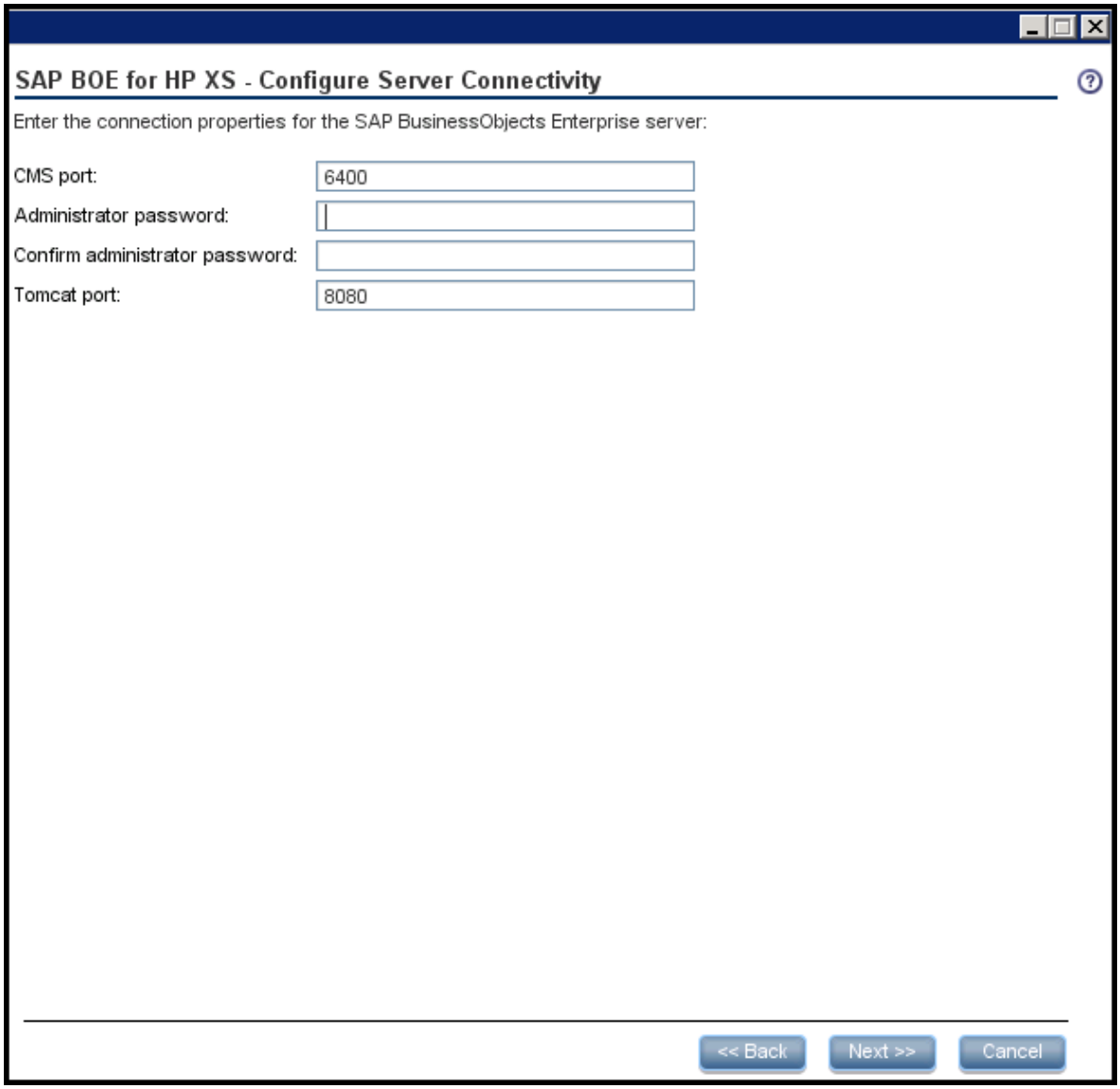
In the **SAP BOE for HP XS - Installation Directory** page, enter the path to the installation directory in the Installation Directory field, and click **Next**.



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. It cannot be a root directory, such as c:\.

SAP BOE for HP XS - Configure Server Connectivity Page

In the **SAP BOE for HP XS - Configure Server Connectivity**page, enter the relevant information, and 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).

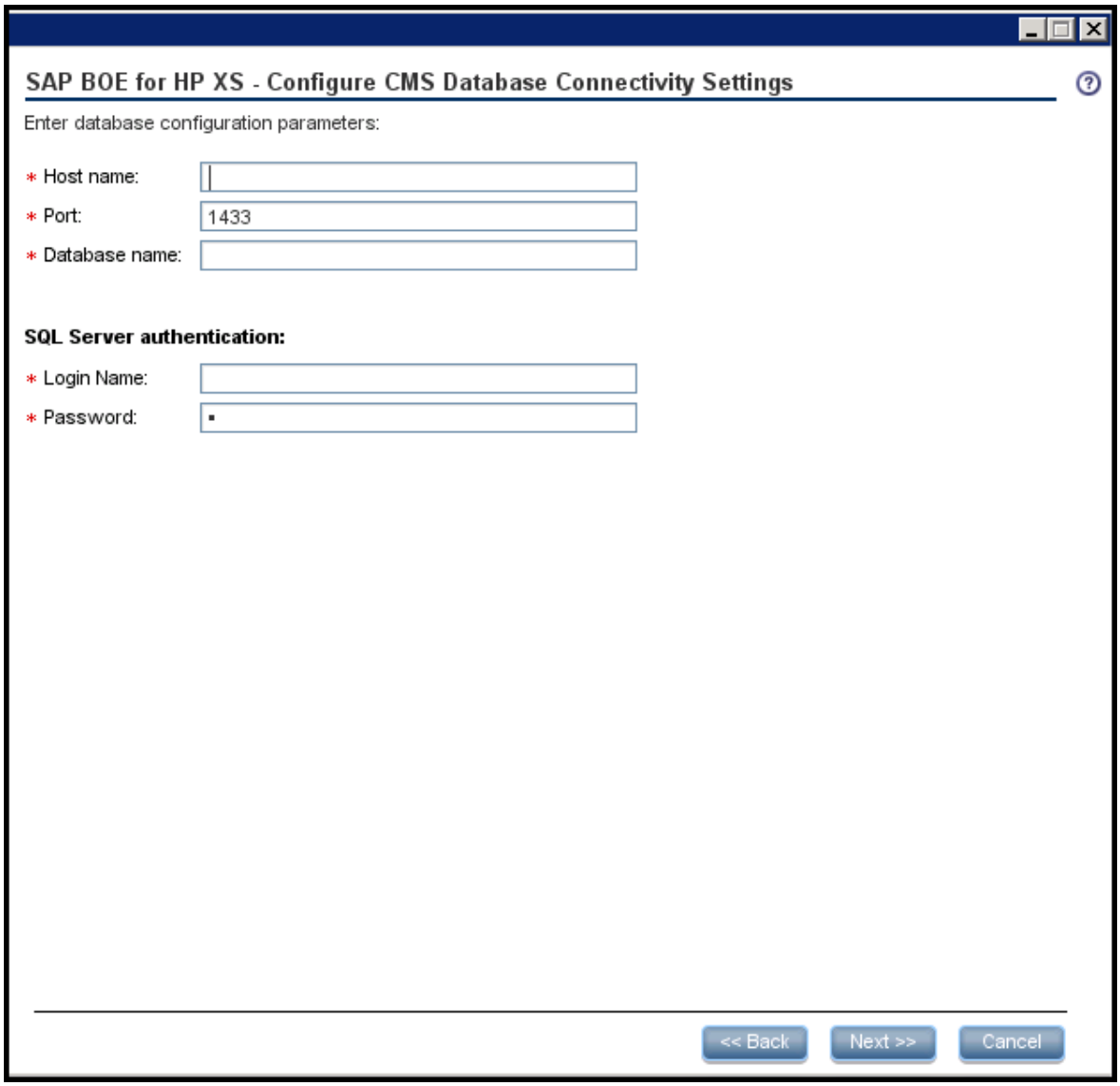
UI Element	Description
Administrator password	The SAP BusinessObjects Enterprise Administrator password. This password is used only to log on to SAP BusinessObjects Enterprise. **Note:** • The following characters: a-z, A-Z, 0-9, _ (underscore) are supported. • The password cannot contain the word: administrator. • 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 is case-sensitive. • 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).

SAP BOE for HP XS - Configure CMS Database

In the **SAP BOE for HP XS - Configure CMS Database** page, select **Create a new CMS database**, and click **Next**.

SAP BOE for HP XS - Configure CSM Database Connectivity Settings Page

In the **SAP BOE for HP XS - Configure CMS Database Connectivity Settings** page, if required, enter the relevant information, and 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>**. XS does not support dynamic ports.
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). XS does not support dynamic ports.
Database name	The name of the CMS database. For an installation, use the database naming convention. For details, see Database Naming Conventions.

SQL Server authentication area:

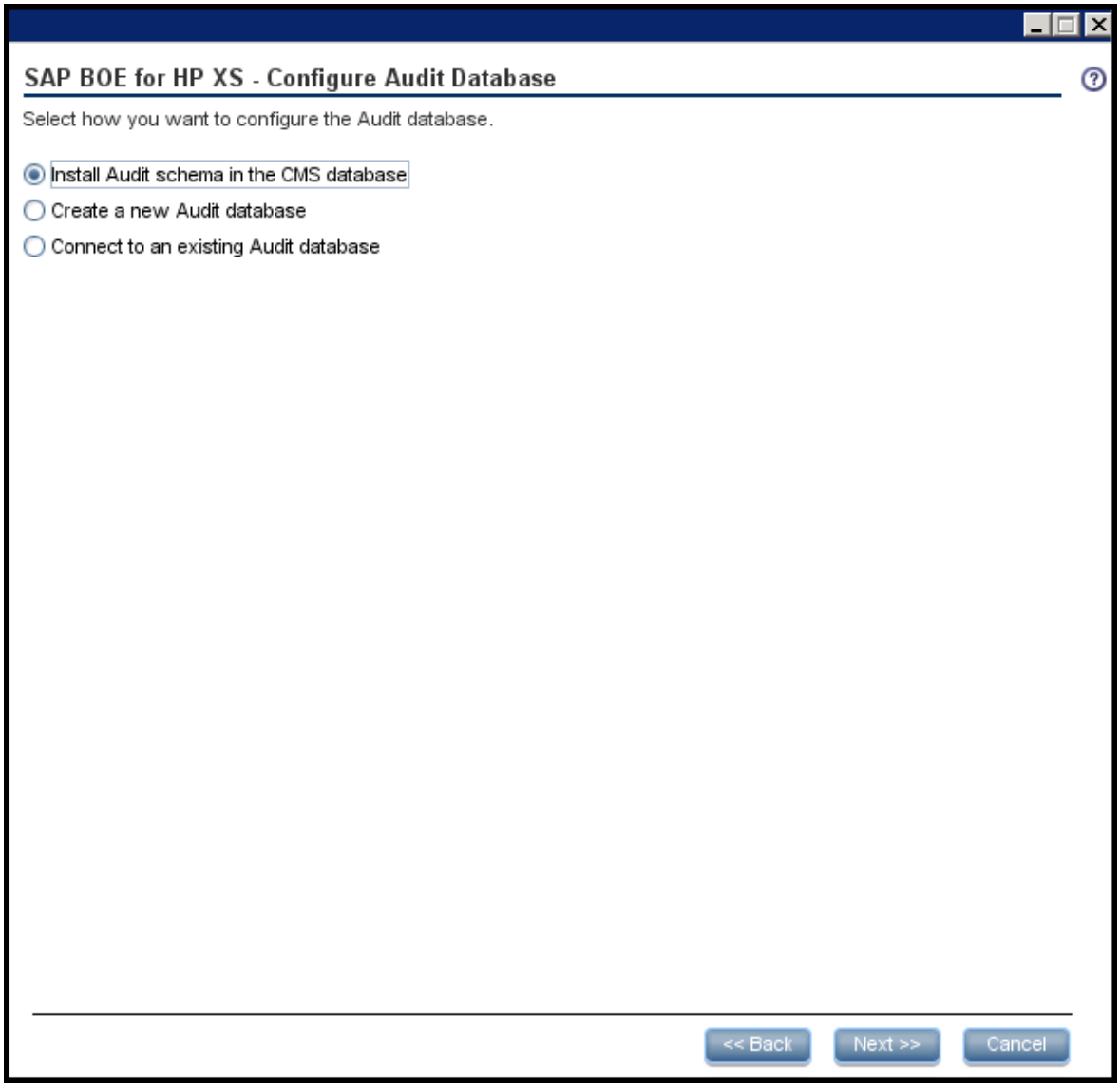
UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

SAP BOE for HP XS - CMS Database Configuration Status Page

In the **SAP BOE for HP XS - CMS Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.

SAP BOE for HP XS - Configure Audit Database Page

In the **SAP BOE 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.

SAP BOE for HP XS - Audit Database Configuration Status Page

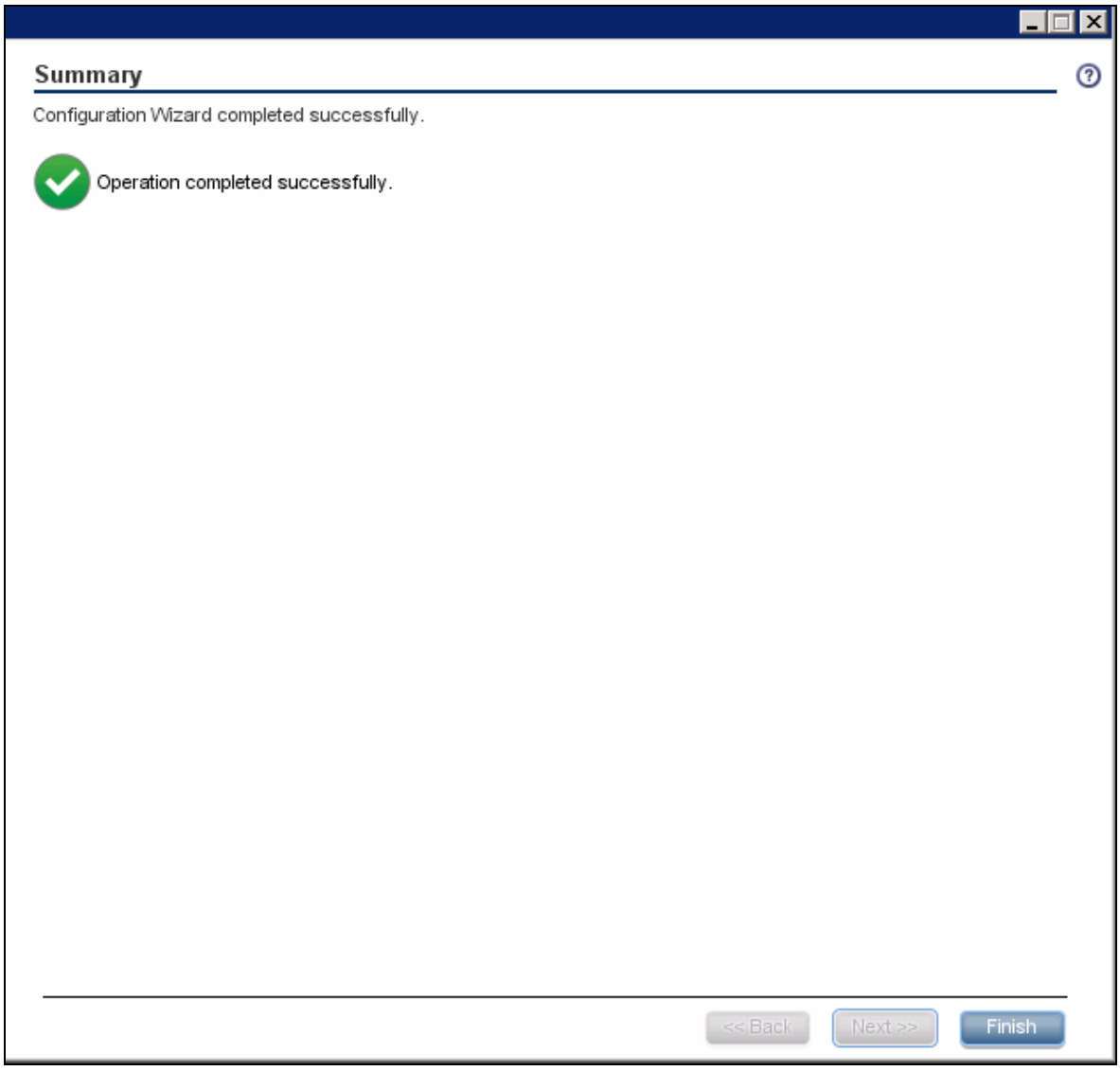
In the **SAP BOE for HP XS - Audit Database Configuration Status** page, make sure that the operation completed successfully, and click **Next**.

SAP BOE for HP XS - Configuration Status Page

In the **SAP BOE for HP XS - Configuration Status** page, make sure that the operation completed successfully, and click **Next**.

Summary Page

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



Note:

- At the end of the upgrade, verify the log files. If you find errors in the log files, investigate, correct, and consider re-running the upgrade process. For details on the log files, see Logs and the LogTool in the *IT Executive Scorecard Administrator Guide*.

Install Version 9.50 on the DWH Server

This section includes the following steps:

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Management Database - Configure Management Settings Page 92

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Management Database - Management Database Configuration Status 96

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Application Configuration - Configure Web Server Infrastructure Connectivity Page 99

Application Configuration - Configure Infrastructure Connectivity Page 101

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Application Configuration - Upgrade Required 105

Application Configuration - Configure Result Database Connectivity Settings for the Upgrade Page 105

Application Configuration - Configure Target Database Connectivity Settings for the Upgrade Page 107

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Data Warehouse - SAP BusinessObjects Data Services for HP XS Page 112

Data Warehouse - Configure External Source & External Source Archive File Location Page 115

Data Warehouse - Configuration Status Page 116

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Installation Steps of 9.50 on the DWH Server

Note: No data will be lost during the upgrade process. All data that is created during the upgrade process will be retrieved upon completion of the process directly from the data source.

Prerequisites

1. Ensure that you have the relevant installation settings required for the installation/upgrade. For details, see the *IT Executive Scorecard Support Matrix*.
2. Close all open Windows before you start the installation process.

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.

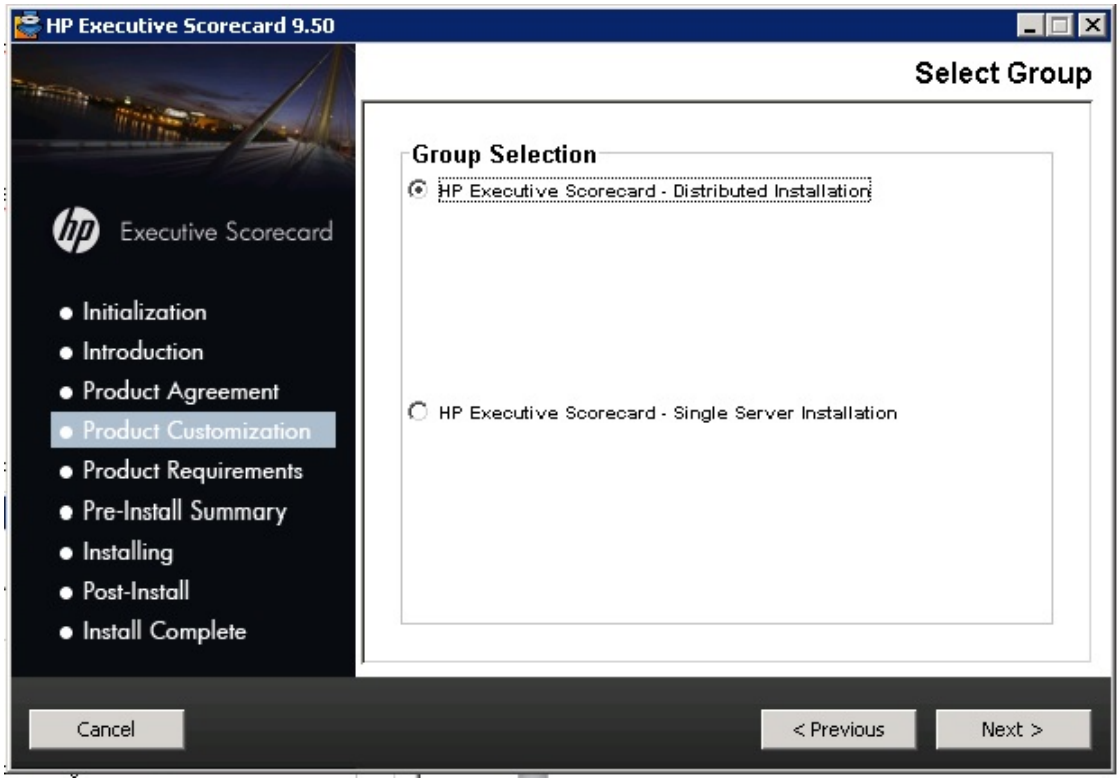
   Note: If the installation wizard does not start automatically, run the file: **<DVD_ROOT>\Windows_Setup\HPXS_9.50_setup.exe**

   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.

2. **Installation Section of the wizard.**

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

3. In the **Select Group** page, select the type of installation you are performing: **Distributedinstallation**, and then click **Next**.



4. If necessary, in the **Select Features** page, select the DWH component on this server, and click **Next**.

   Common Components are automatically selected and installed with each component.

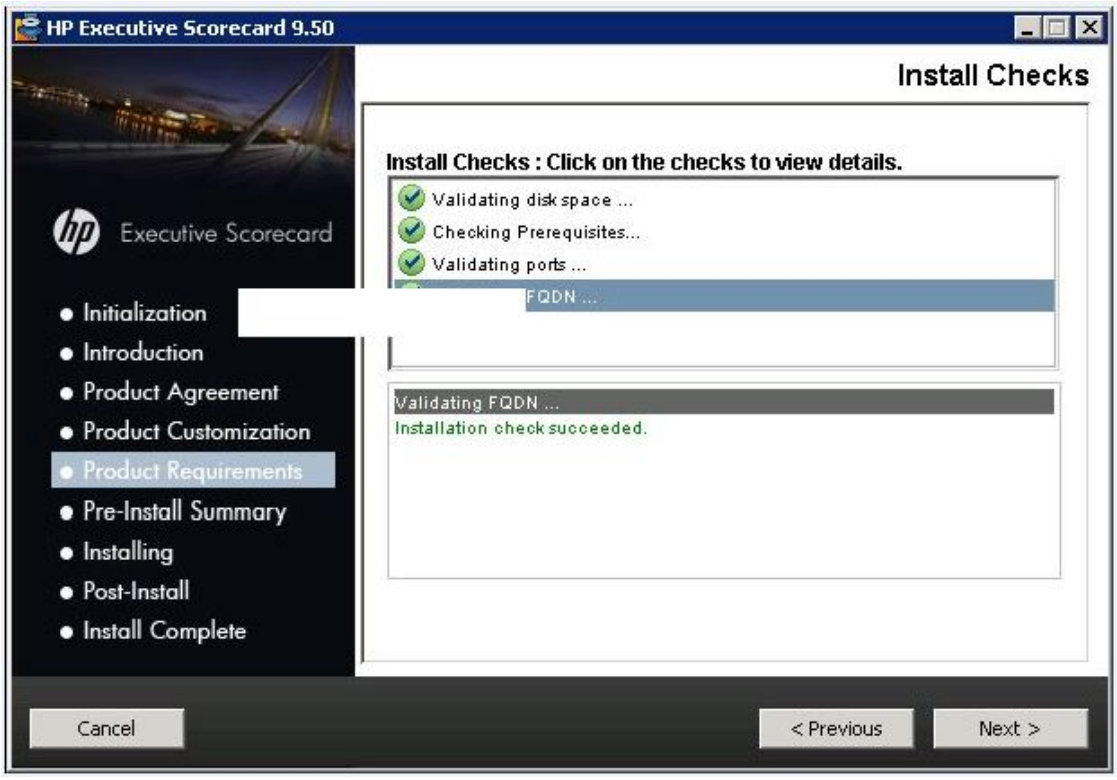
5. In the **Choose the folders** page, click **Next** to accept the default application folder, or **Browse** to navigate to and then select a new application folder location.

   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.

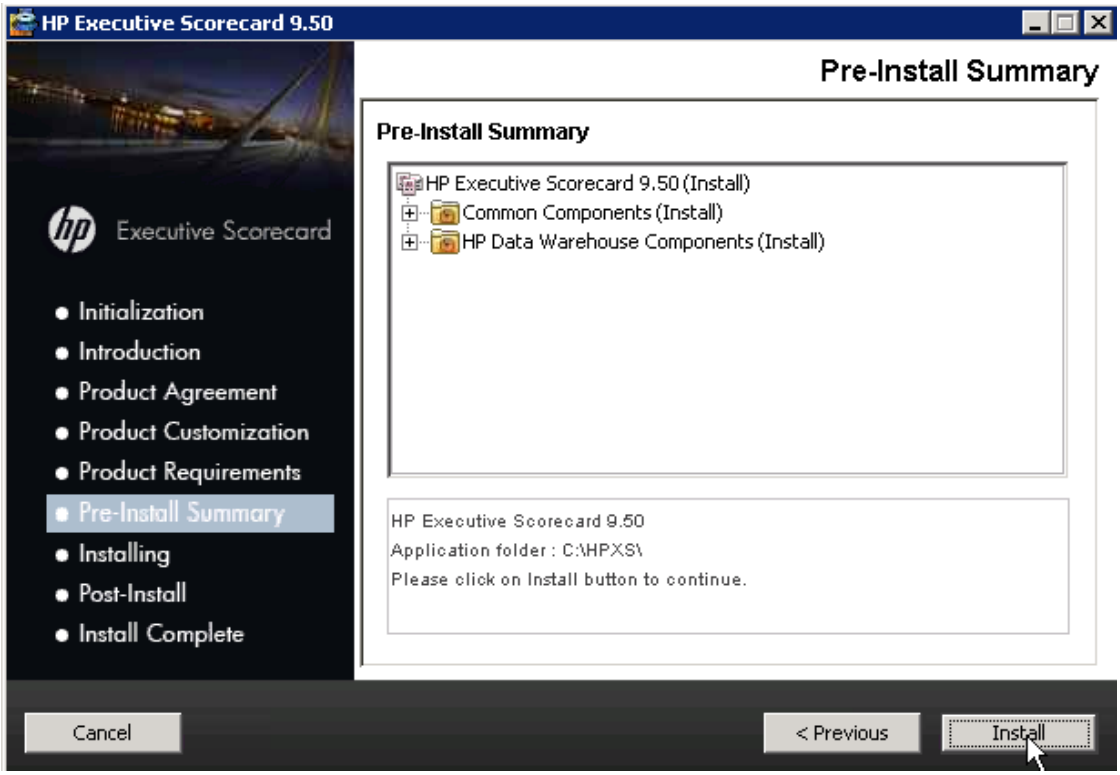
   The wizard then runs a series of checks to validate system requirements.

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



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



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

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

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

Extended Content

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

   a. Copy the backup files from:
   <backup folder>\<cp name>\dataModel\dataIntegration\extraction_CUSTOMIZATION
   To:
   <install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\extraction_CUSTOMIZATION

b. Copy the backup files from:
<backup folder>\<cp name>\dataModel\dataIntegration\source_CUSTOMIZATION
To:
<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\dataModel\dataIntegration\source_CUSTOMIZATION

c. Copy the backup files from:
<backup folder>\<cp name>\ETL\entities_CUSTOMIZATION
To:
<install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\entities_CUSTOMIZATION

2. If you had created new content packs in 9.41:

a. Copy the back files from:
<backup folder>\ContentPacks\<cp name>
To:
<install drive>\<Installation directory>\agora\ContentPacks

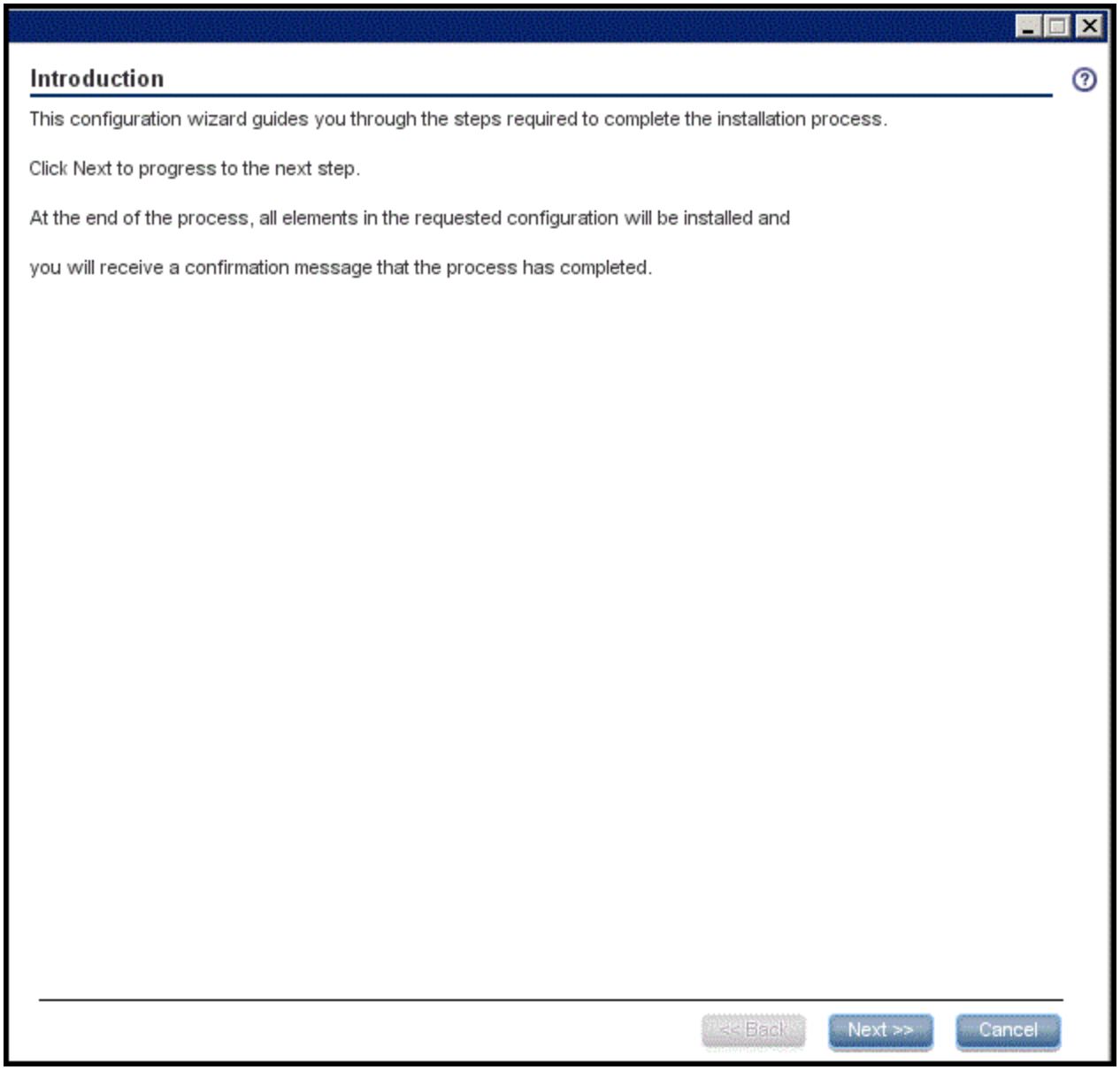
Extended Content for the FBI Extractor

If you have extensions to the FBI Extractor

1. Open the **<backup folder>\fbi\fbi-web.war** file using Win RAR in the new installation machine.
2. Copy the extension JAR to the **WEB-INF\lib** directory in the war file.
3. Overwrite the **fbi-web.war** file in the **<install drive>\<Installation directory>\agora\apps** directory with the updated war file.
4. Open the **fbi-web.war** file to make sure that the new JAR is located in the right path.
5. Resume the post-install.

Run the Post-Install Wizard

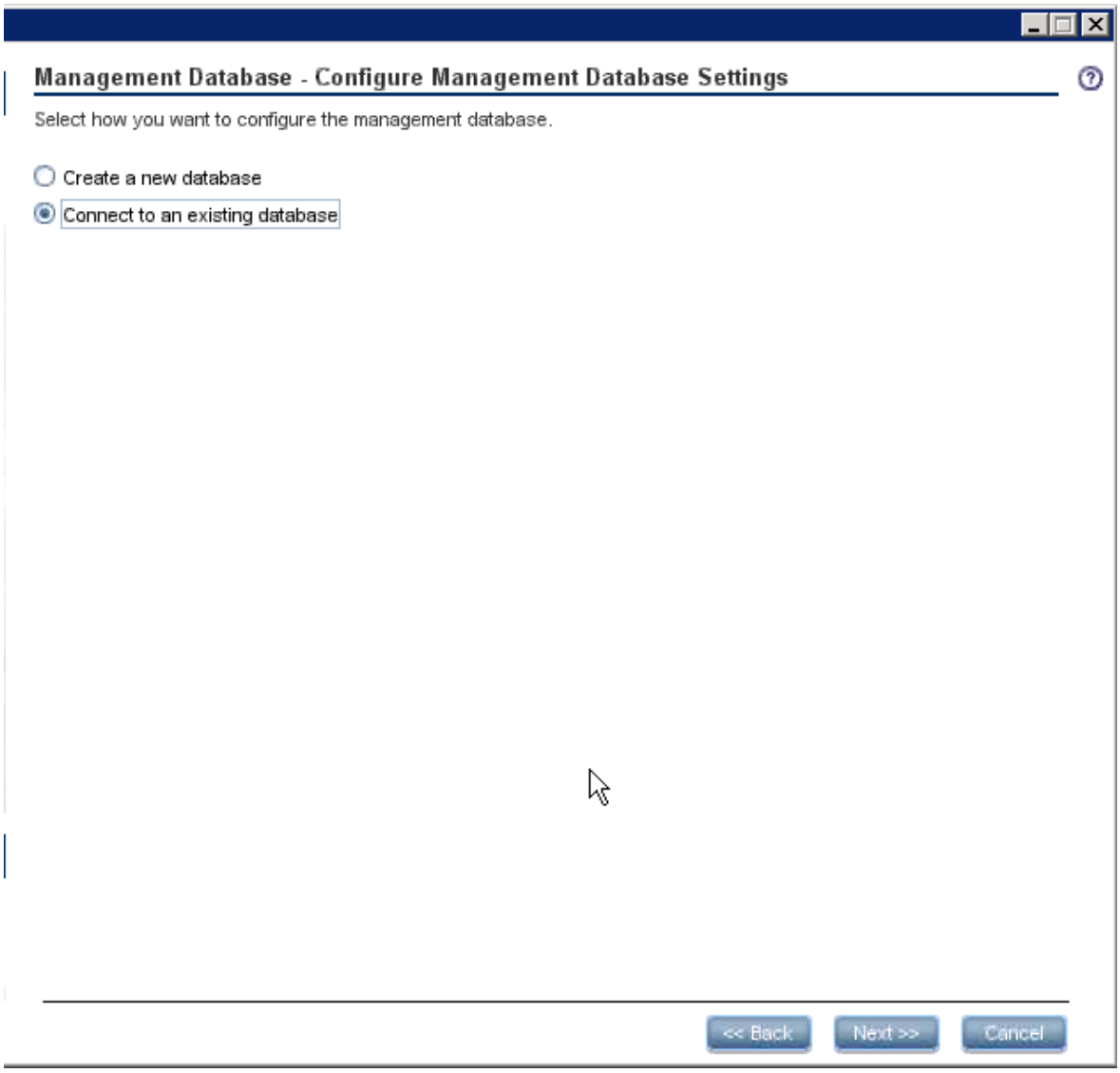
The **Introduction** page of the Post-Install Configuration wizard opens. Click **Next**.



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

Management Database - Configure Management Settings Page

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



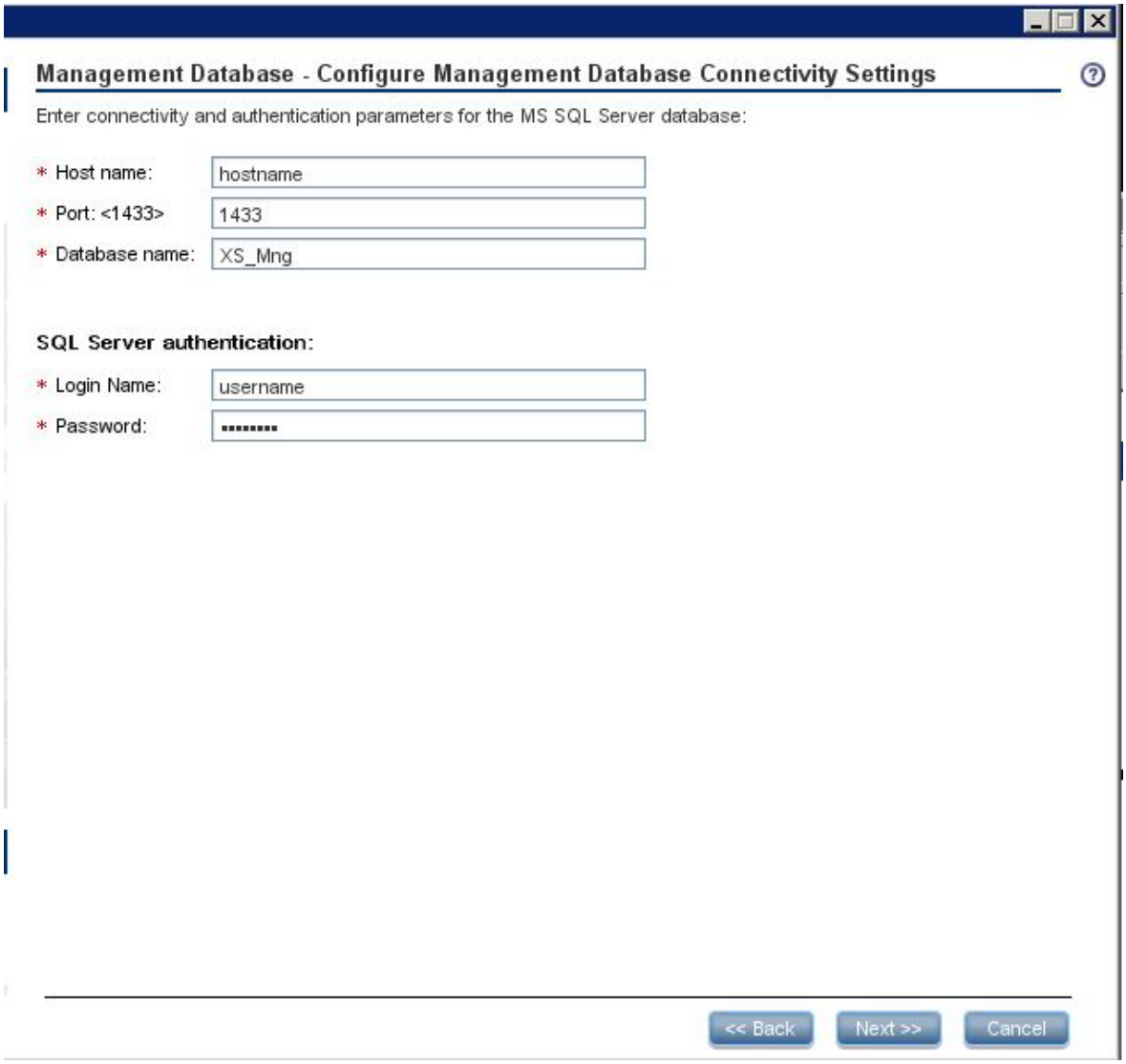
UI Element	Description
Create a new database	Select this option to create a new Management database. Select this option when installing the first HP IT Executive Scorecard component.

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

Management Database - Configure Management Database Connectivity Settings Page

In the **Management Database - Configure Management Database Connectivity Settings** page, enter the relevant information, and then click **Next**.

- XS supports only one Management database. The Management database cannot be changed after it has been defined.
- In a distributed environment, make sure that the Management database and the Result database are installed on the same database server.



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>**. XS does not support dynamic ports.
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). XS does not support dynamic ports.
Database name	The name of the Management database. **Tip:** If needed, take note of the database name, as it may be needed when installing other components. For an installation, use the database naming convention. For details, see Database Naming Conventions.

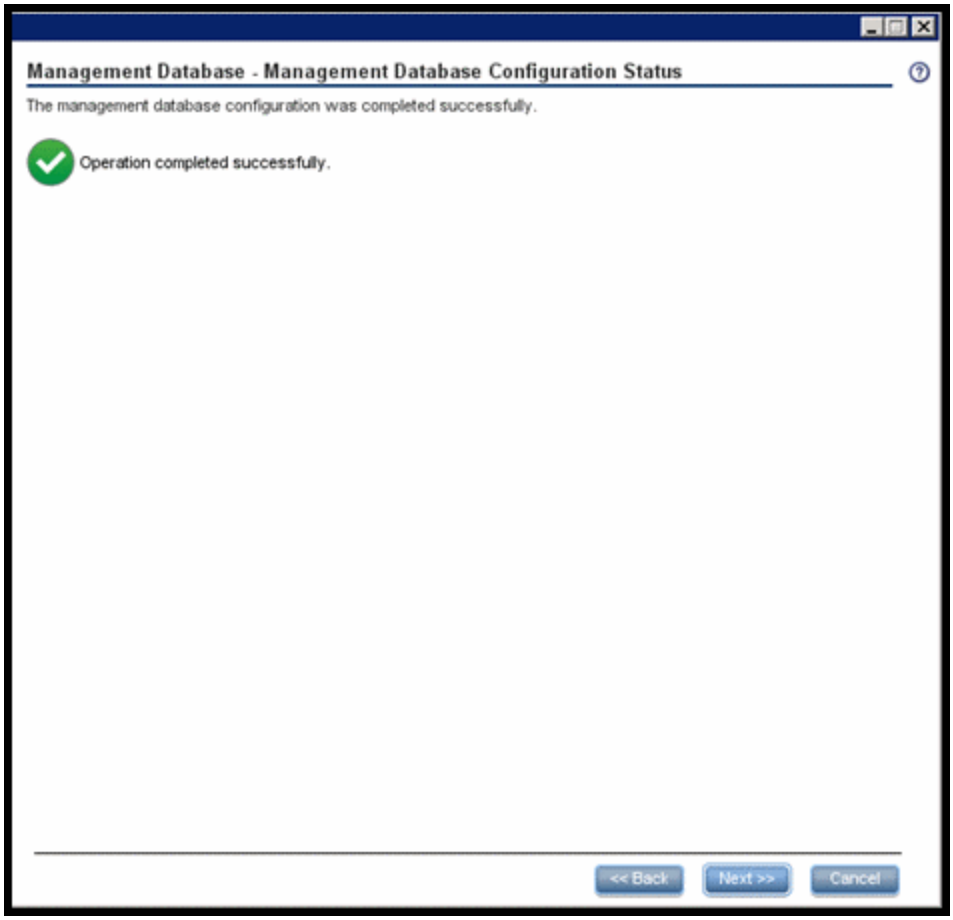
SQL Server authentication:

To work with the Data Warehouse, the user must have access to the SQLServer definition. Make sure that the permission has been assigned accordingly. For example, the SQL permission GRANT VIEW ANY DEFINITION TO public grants access to the SQL Server definition to everyone.

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Management Database - Management Database Configuration Status

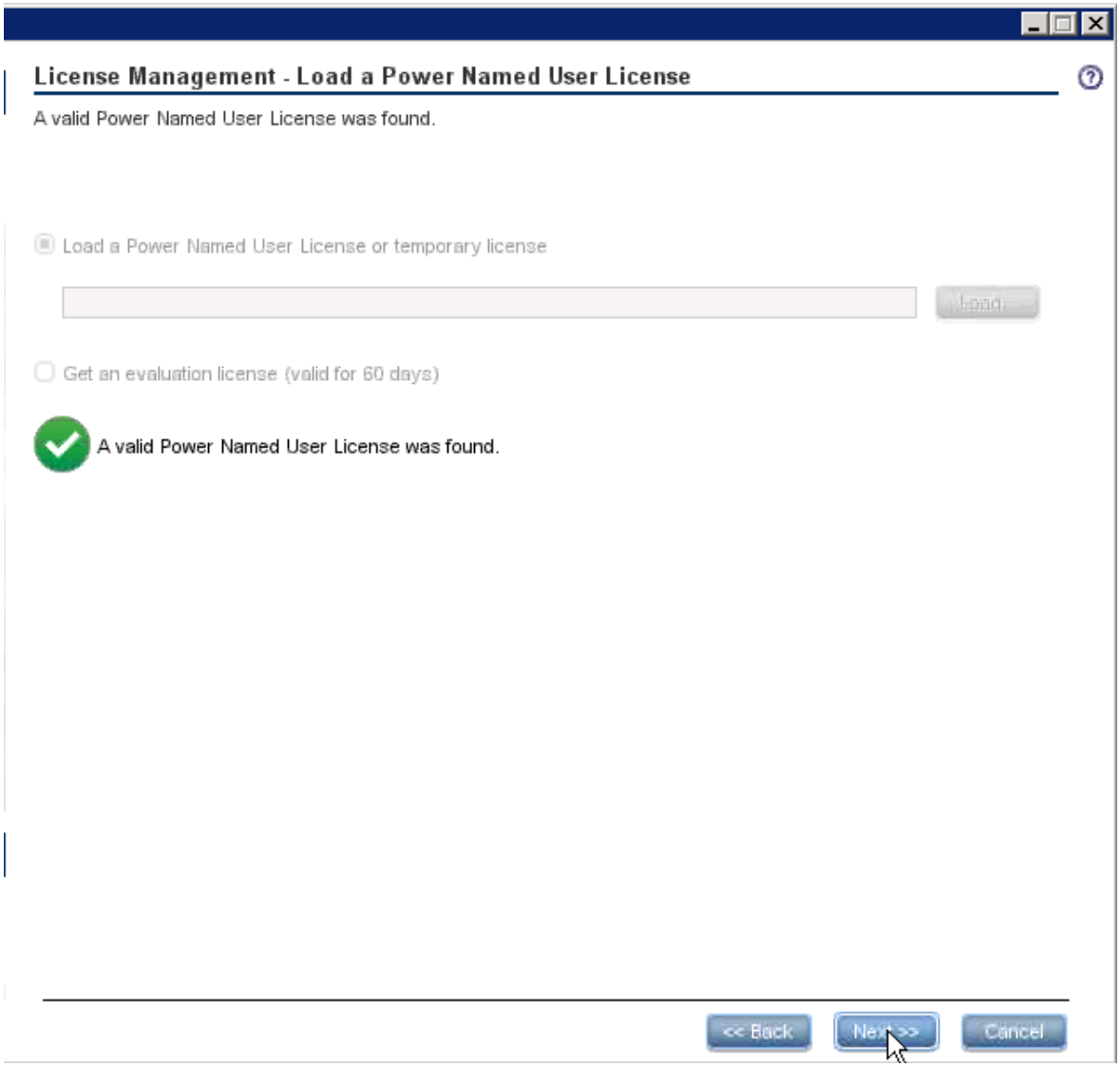
In the **Management Database - Management Database Configuration Status** page, verify that the Management database configuration was completed successfully, and then click **Next**.



License Management - Load a Power Named User License

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

The wizard recognizes the license entered in the previous version.

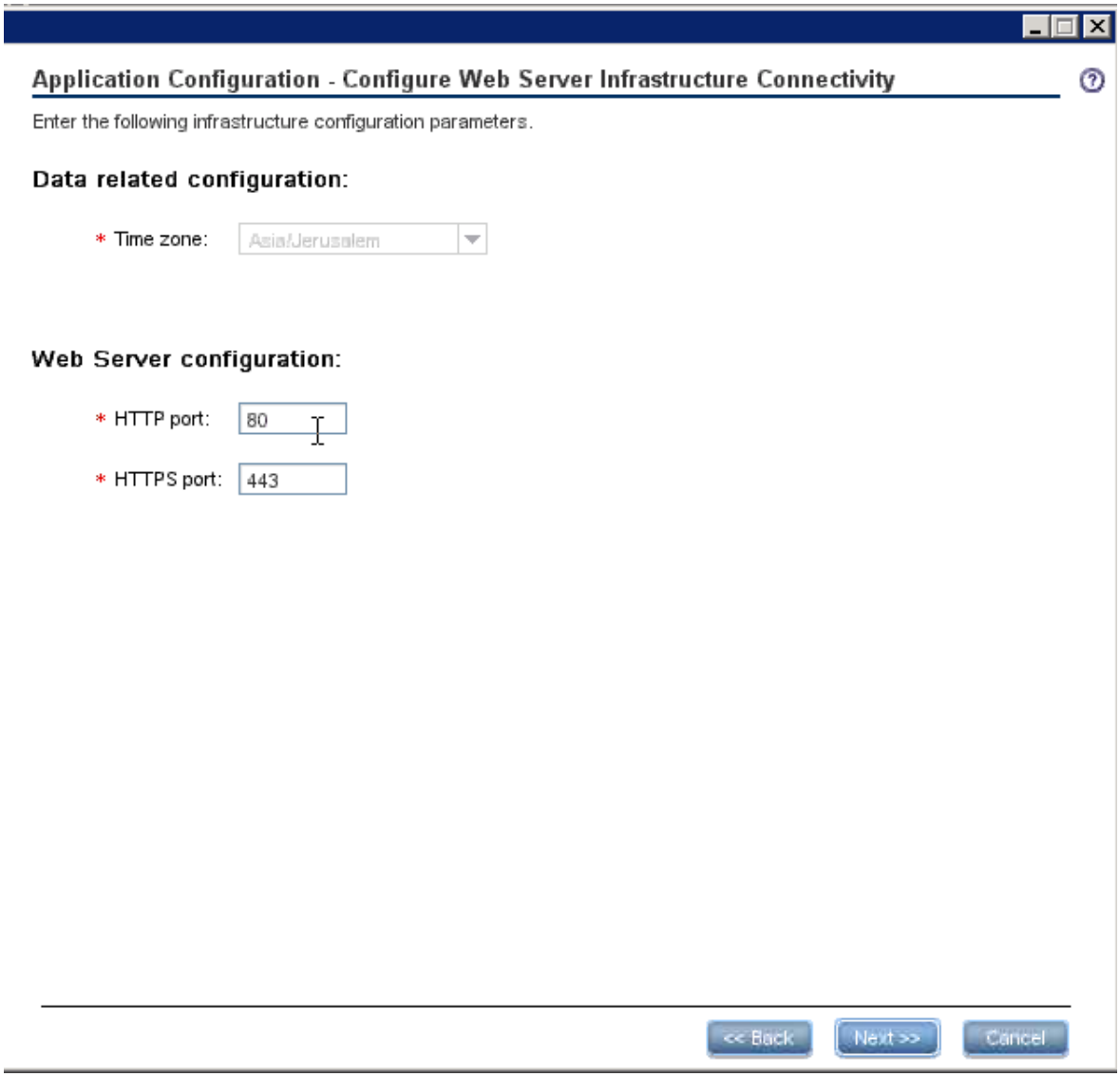


UI Element	Description
Load a Power Named User License or temporary license	Select to load one of the following license types: • **Power Named User License** - Has no expiry date and is loaded once during the post-install. • **Temporary** - Has an expiry date. On expiration, a new license must be loaded. To load a license, click **Load**, Navigate to the license file provided by your supplier, and then click **Load License**.

UI Element	Description
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 using the License Renewal feature. For details, see Renew your license using the Start menu in the *IT Executive Scorecard Administrator Guide*.

Application Configuration - Configure Web Server Infrastructure Connectivity Page

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



Data related configuration area:

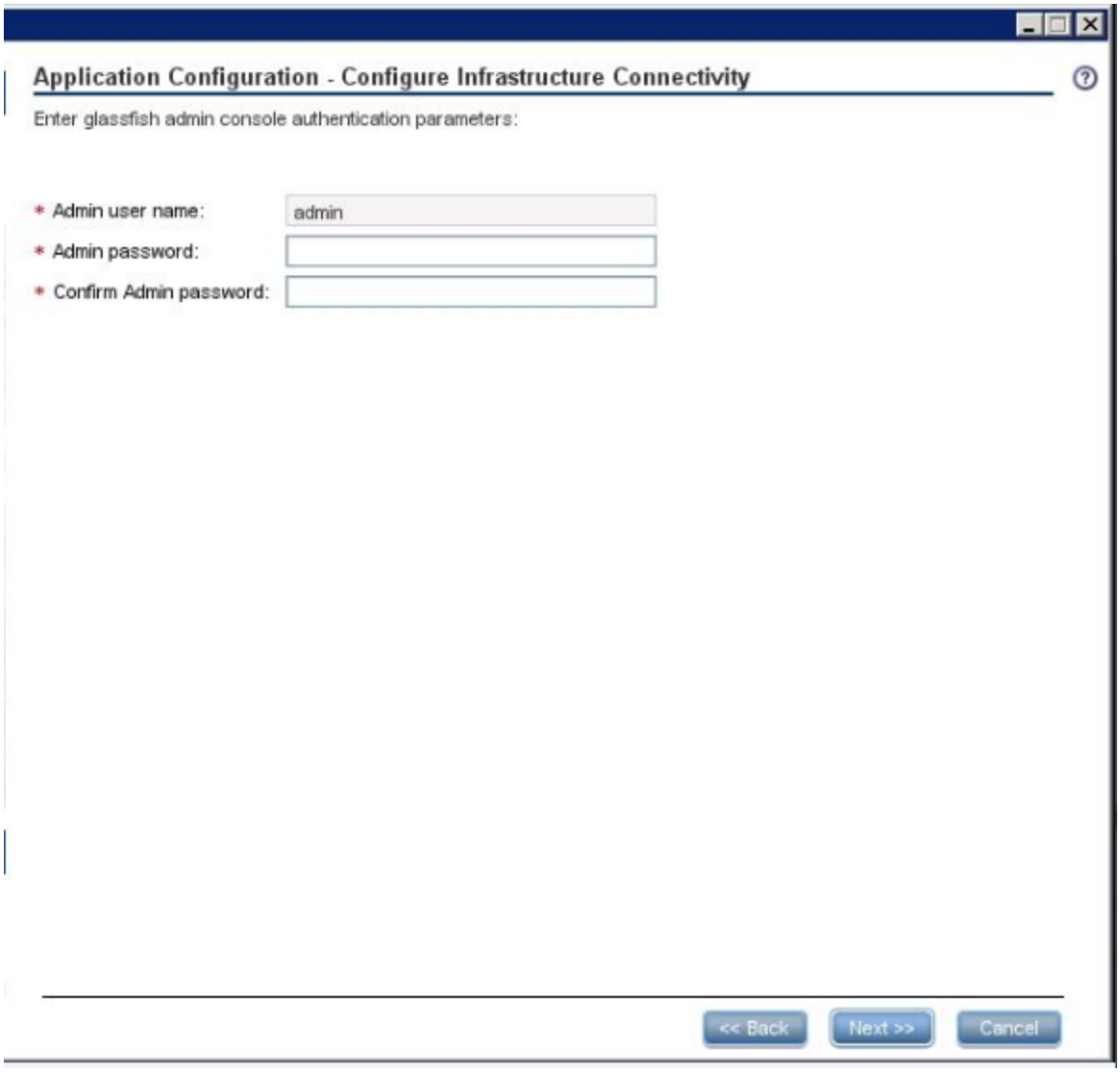
UI Element	Description
Time Zone	The Data Warehouse time zone used when consolidating the data extracted from the data sources. You cannot modify it after it has been defined as it impacts the calculations.

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: 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. • Do not use the Tomcat port to install BOE.
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). **Note:** Do not use the Tomcat port to install BOE.

Application Configuration - Configure Infrastructure Connectivity Page

On the **Application Configuration - Configure Infrastructure Connectivity** page, enter the relevant glassfish admin console authentication parameters, and then click **Next**.

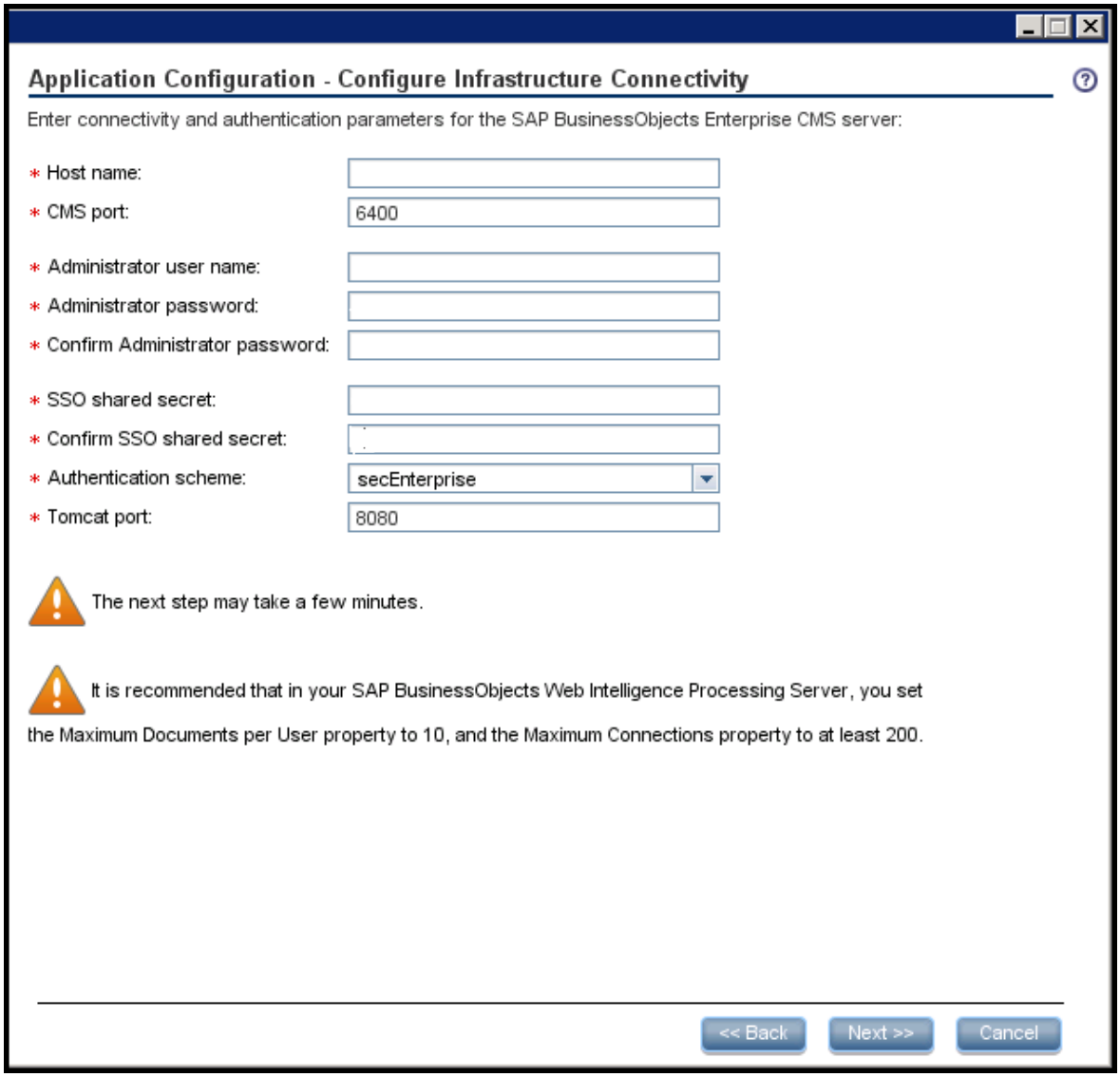


UI Element	Description
Administrator user name	The user name for the glassfish. Use this user to log on to glassfish.

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 cannot contain the word: administrator. • 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 is case-sensitive. • 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.

Application Configuration - Configure Infrastructure Connectivity Page

In the **Application Configuration - Configure Infrastructure Connectivity** page, enter the connectivity and authentication parameters for the SAP BOE CMS Server and then click **Next**.

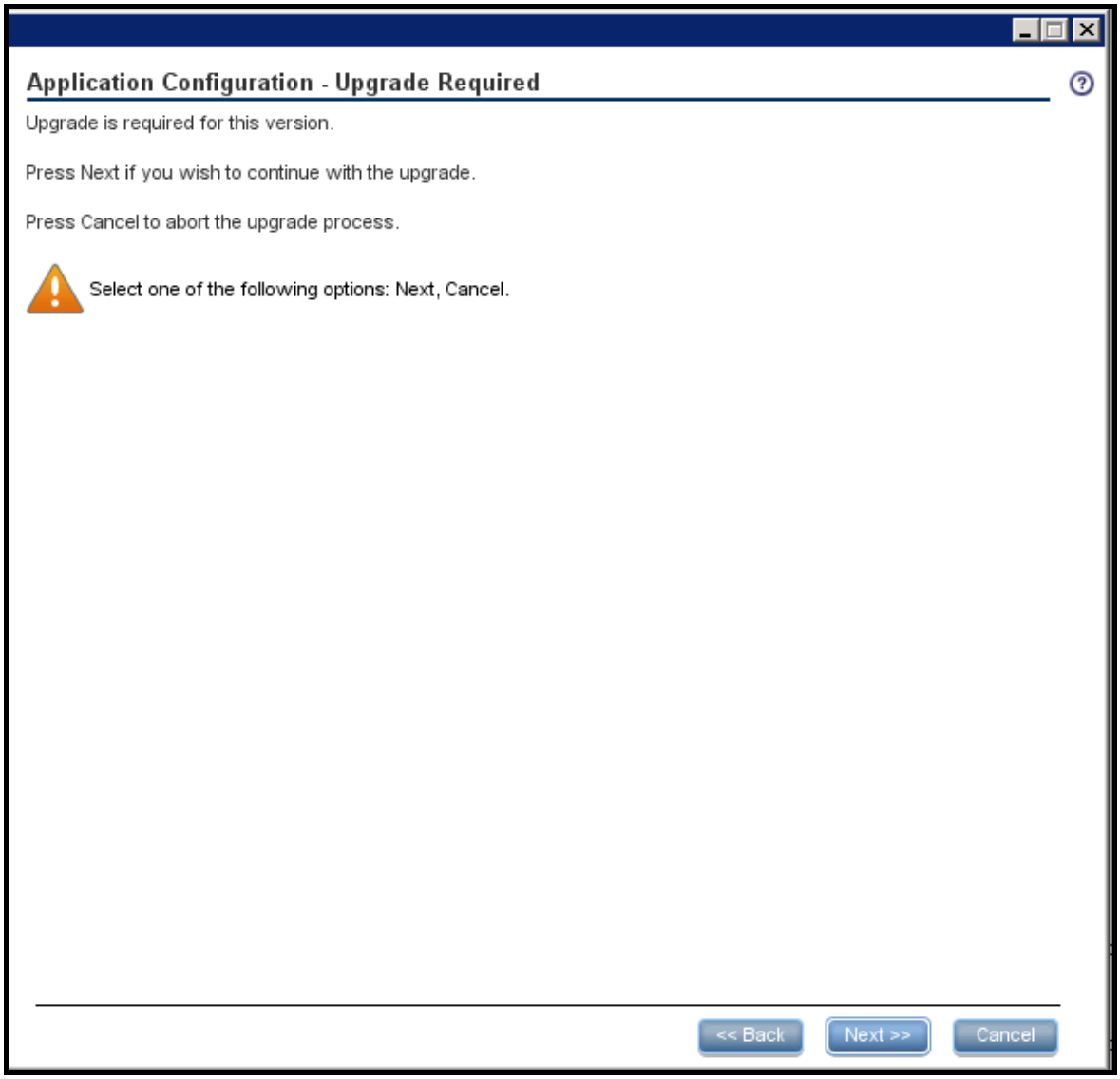


UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the SAP BusinessObjects BI platform 4.0 SP6 server.

UI Element	Description
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 BI platform 4.0 SP6 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 BI platform 4.0 SP6 administrator password.
Confirm Administrator password	Confirmation of the administrator password.
SSO shared secret	The shared secret that is used to authenticate communications with the SAP BusinessObjects BI platform 4.0 SP6 server. If trusted authentication is configured, the shared secret entered is validated against the SAP BusinessObjects BI platform 4.0 SP6 server. If trusted authentication is not configured, the entered shared secret is configured on the SAP BusinessObjects BI platform 4.0 SP6 server.
Confirm SSO shared secret	Confirmation of the SSO shared secret.
Authentication scheme	Select one of the following SAP BusinessObjects BI platform 4.0 SP6 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).

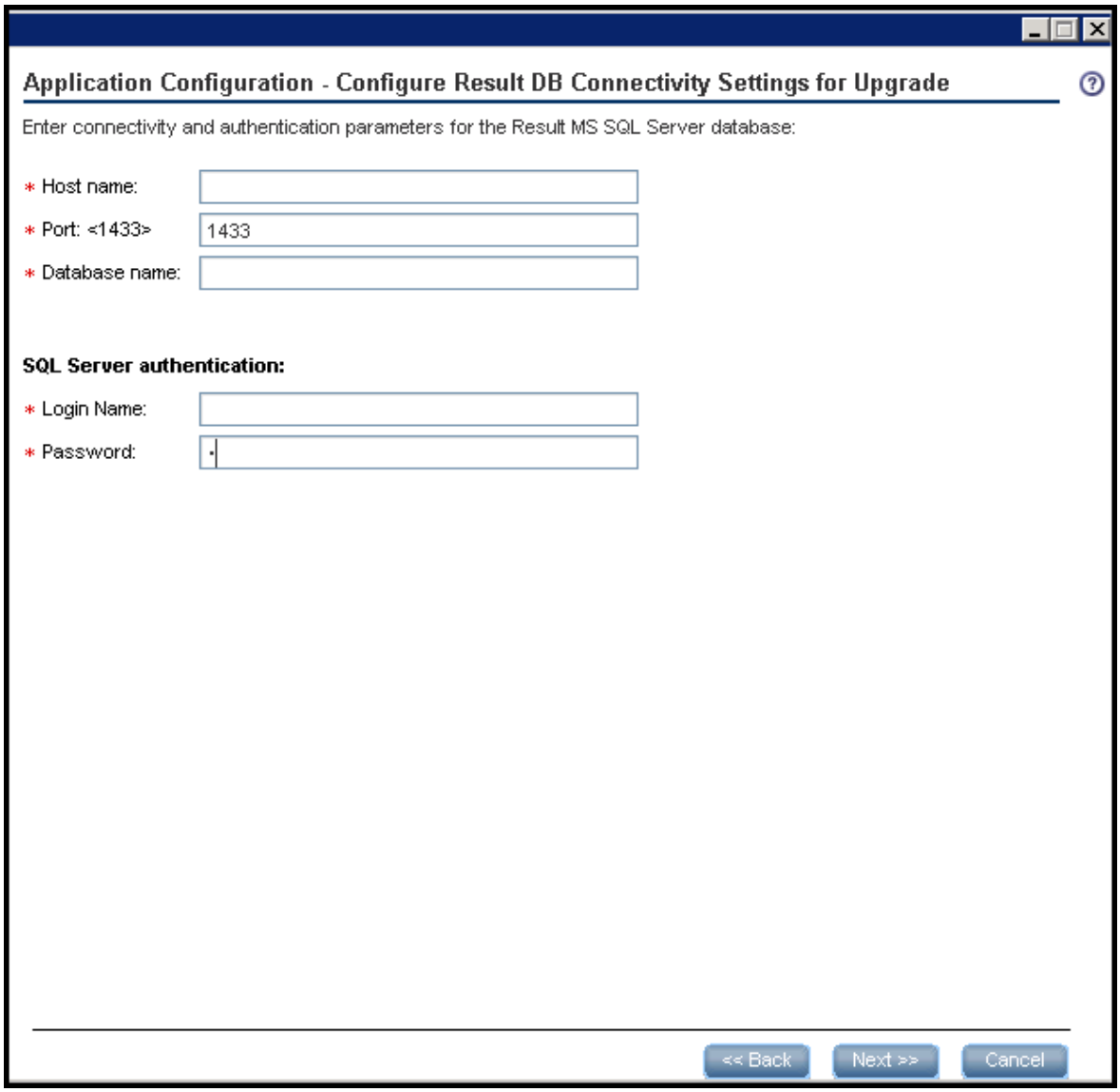
Application Configuration - Upgrade Required

In the **Application Configuration- Upgrade required** page, click **Next** to perform the upgrade.



Application Configuration - Configure Result Database Connectivity Settings for the Upgrade Page

In the **Application Configuration - Configure Result Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the restored 9.41 Result/DATA Schema, and click **Next**.



UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Result database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.

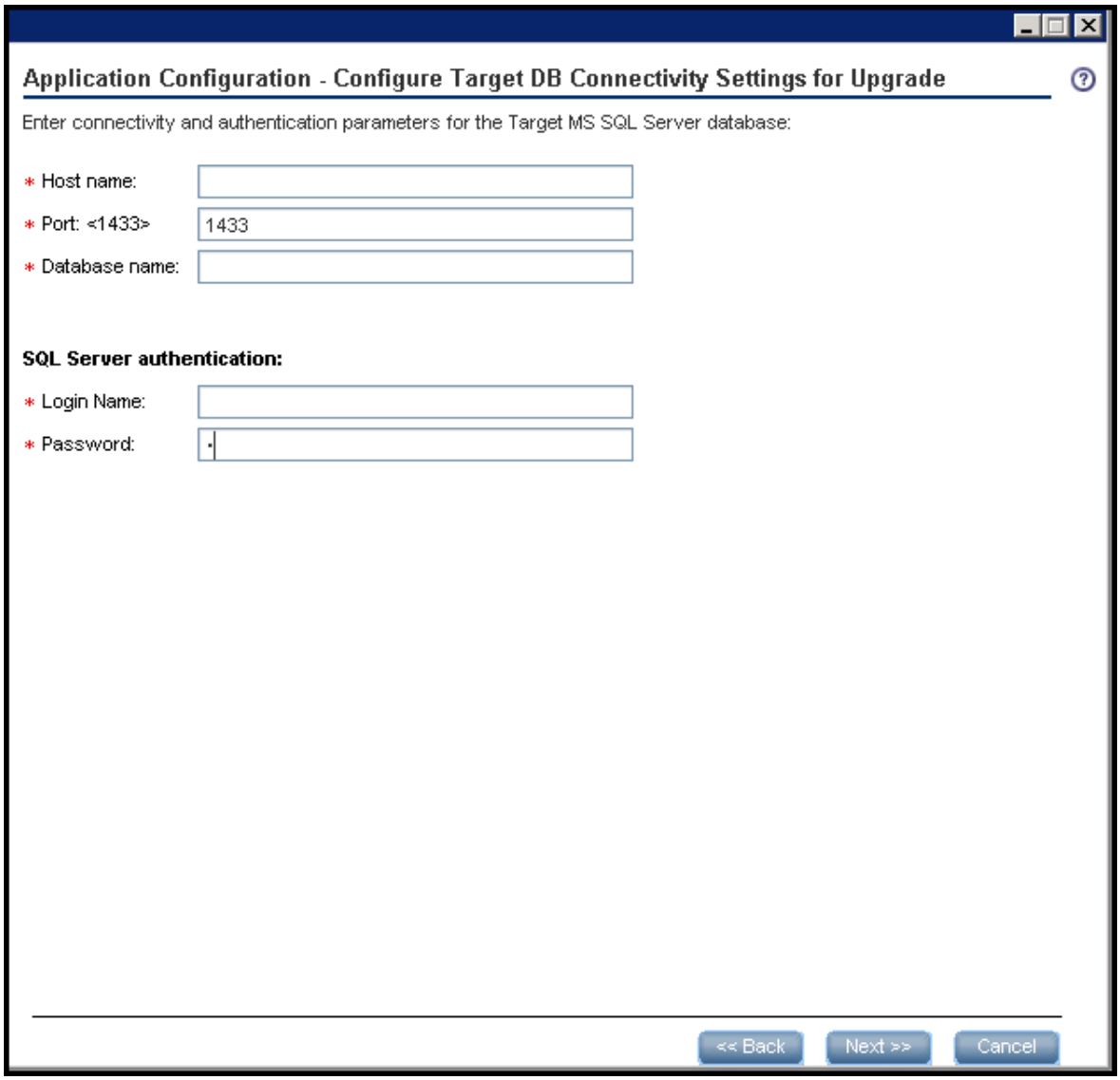
UI Element	Description
Port <1433>	The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** 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). XS does not support dynamic ports.
Database name	The name of the Result database that was restored earlier.

SQL Server authentication:

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Application Configuration - Configure Target Database Connectivity Settings for the Upgrade Page

In the **Application Configuration - Configure Target Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the restored 9.41 Target Schema, and click **Next**.



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

UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Target database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.

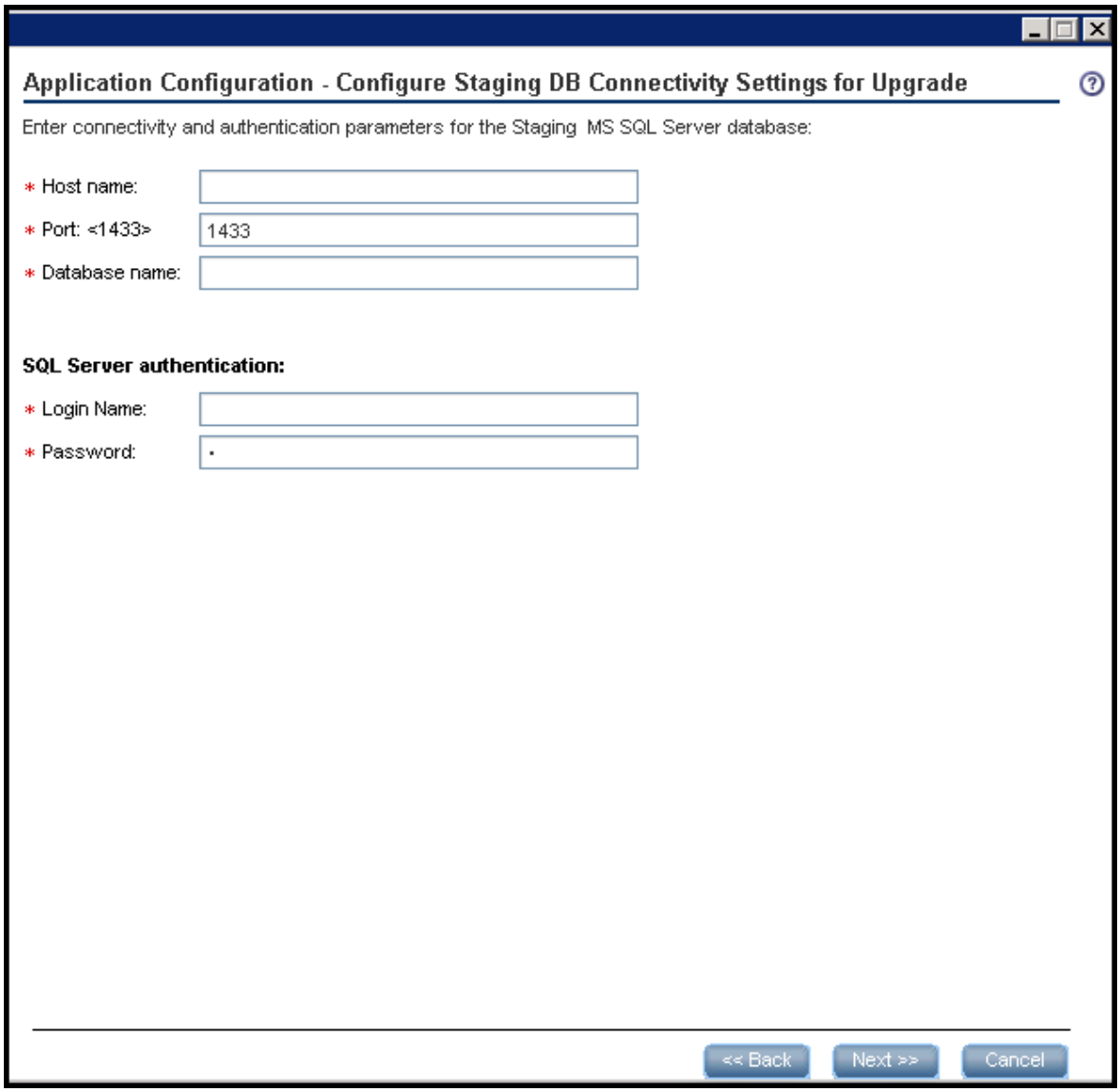
UI Element	Description
Port <1433>	The port of the MS SQL server listener. The default port is 1433. Change this value to connect to a non-default database instance on the server. For more information about ports, see the Support Matrix document available from the Support Site (**http://h20230.www2.hp.com/selfsolve/manuals** 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). XS does not support dynamic ports.
Database name	The name of the Target database that was restored earlier.

SQL Server authentication:

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Application Configuration - Configure Staging Database Connectivity Settings for the Upgrade Page

In the **Application Configuration - Configure Staging Database Connectivity Settings for the Upgrade** page, enter the relevant information and enter in the Database Name field the name of the duplicated 9.41 Staging Schema, and click **Next**.



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

UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL Server hosting the Staging database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.

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). XS does not support dynamic ports.
Database name	The name of the Staging database that was restored earlier.

SQL Server authentication:

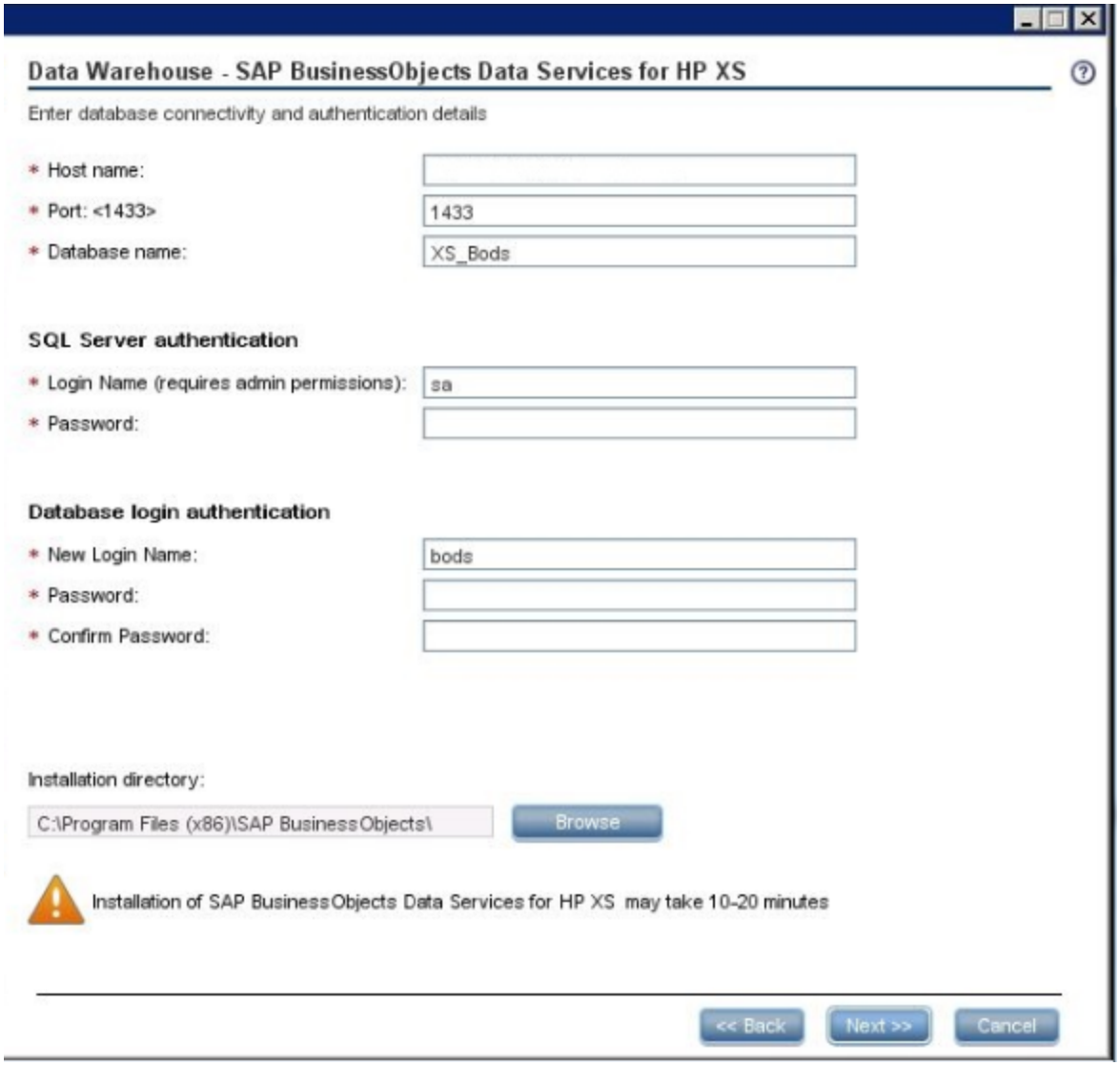
UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Application Configuration - Upgrade Summary

In the **Application Configuration - Upgrade Summary** page confirm the upgrade was completed successfully and click **Next**.

Data Warehouse - SAP BusinessObjects Data Services for HP XS Page

On the **Data Warehouse - SAP BusinessObjects Data Services for HP XS** page, enter the relevant 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 SAP BusinessObjects Data Services database.
	• Do not use localhost as the host name.
	• Do not use the server name 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>**. XS does not support dynamic ports.

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). XS does not support dynamic ports.
Database name	The name of the SAP BusinessObjects Data Services database. For an installation, use the database naming convention. For details, see Database Naming Conventions.

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password of the specified logon.

Database login authentication area:

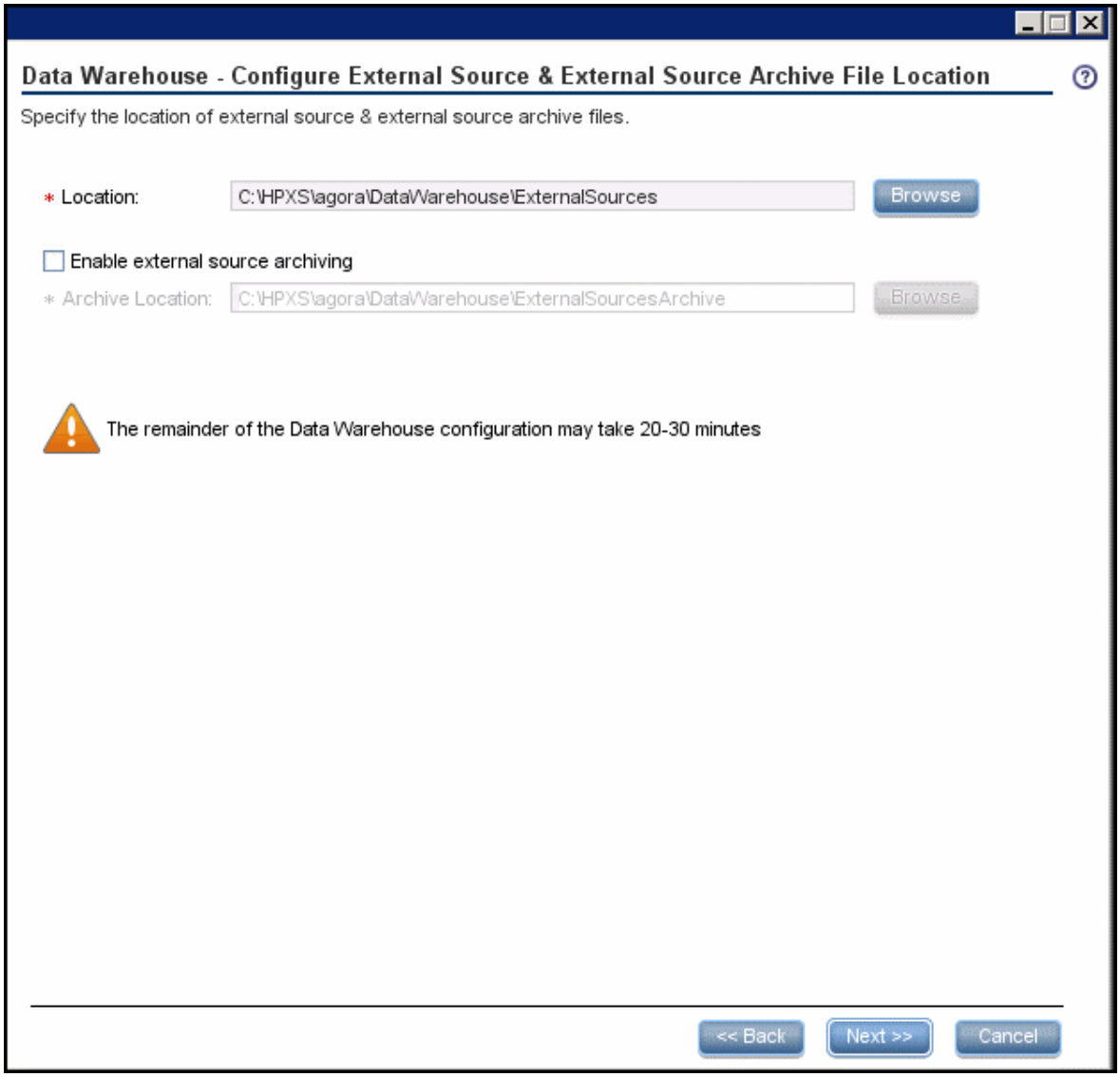
UI Element	Description
New Login name	A new MS SQL logon created for the SAP BusinessObjects Data Services database. A SAP BusinessObjects Data Services database user account with the same name is automatically created. **Note:** • The Login Name can only comprise alphanumeric characters and if required an underscore. • Do not use XS as a new database logon name because the XS user name is already used internally.
Password	The password for the new logon. 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 logon.

Installation directory area:

UI Element	Description
Installation directory	**Note:** This field is displayed only in Distributed mode. 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.

Data Warehouse - Configure External Source & External Source Archive File Location Page

On the **Data Warehouse - Configure External Source & External Source Archive File Location** page, select the relevant information, and then click **Next**.



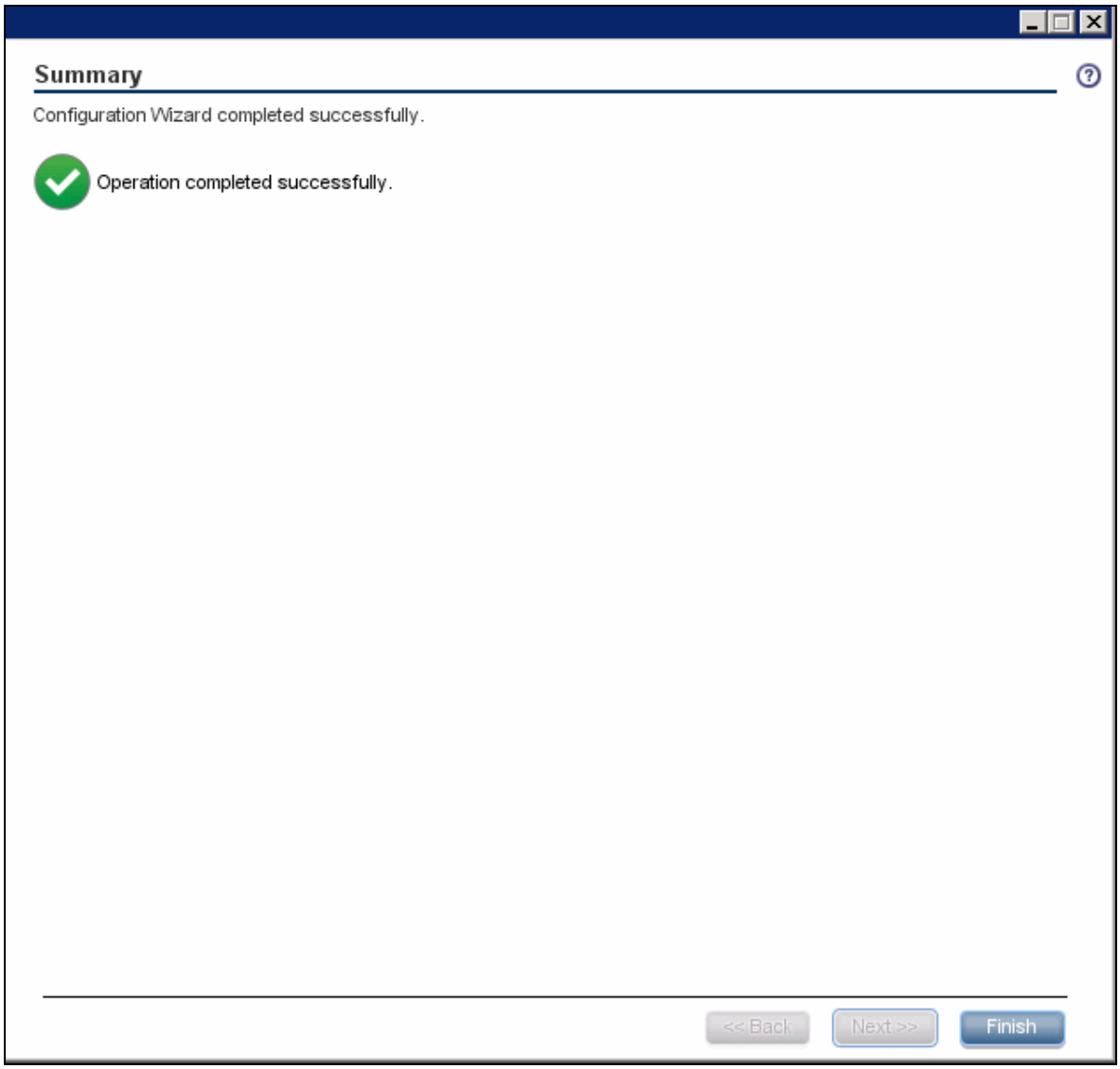
UI Element	Description
Location	The location of the external source files used by Data Warehouse. The default location is: **<Installationdirectory>\agora\DataWarehouse\ExternalSources** **Note:** Make sure you have already copied the folder from XS 9.41.
Enable external source archiving	Select to enable 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.
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.

Data Warehouse - Configuration Status Page

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

Summary Page

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



Note:

- At the end of the upgrade, verify the log files. If you find errors in the log files, investigate, correct, and consider re-running the upgrade process. For details on the log files, see Logs and the LogTool in the *IT Executive Scorecard Administrator Guide*.

Install Version 9.50 on the XS Server

This section includes the following steps:

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Summary Page 143
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Installation Steps of 9.50 on the XS Server

Note:

- No data will be lost during the upgrade process. All data that is created during the upgrade process will be retrieved upon completion directly from the data sources.

Prerequisites

1. Ensure that you have the relevant installation settings required for the installation/upgrade. For details, see the *IT Executive Scorecard Support Matrix*.
2. Close all open Windows before you start the installation process.

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.

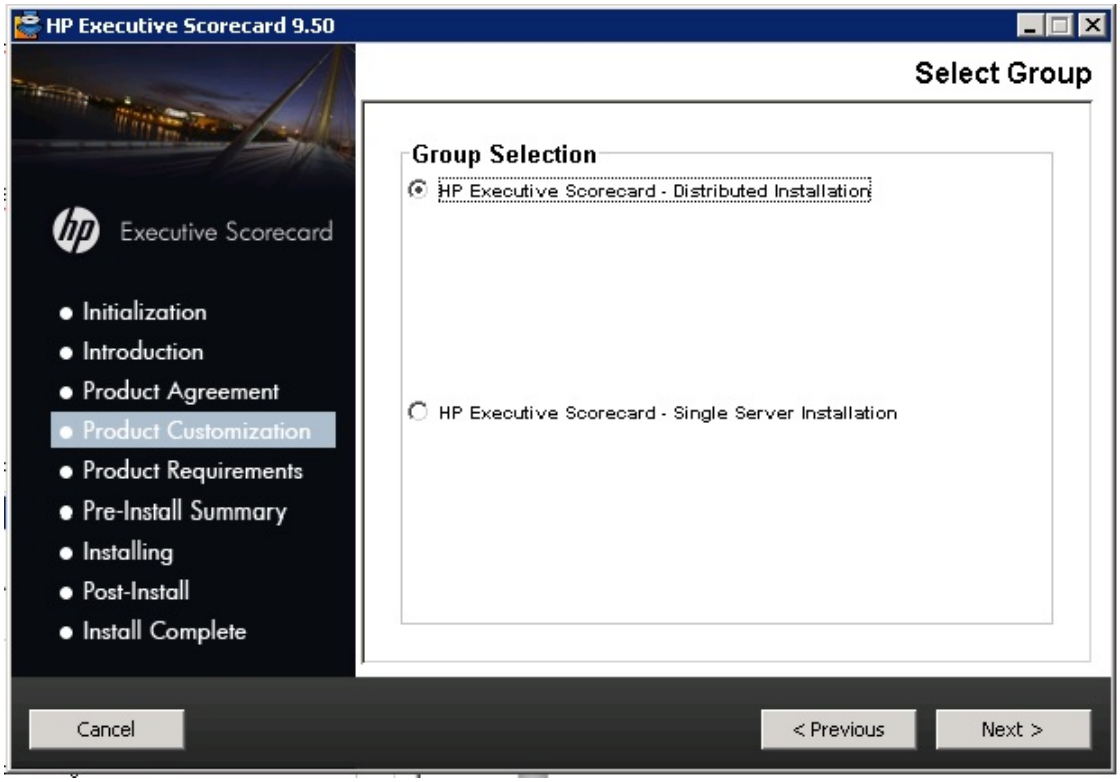
   Note: If the installation wizard does not start automatically, run the file: **<DVD_ROOT>\Windows_Setup\HPXS_9.5_setup.exe**

   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.

2. **Installation Section of the wizard.**

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

3. In the **Select Group** page, select the type of installation you are performing: **HP Executive Scorecard - Distributed installation**, and then click **Next**.



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

   Common Components are automatically selected and installed with each component.

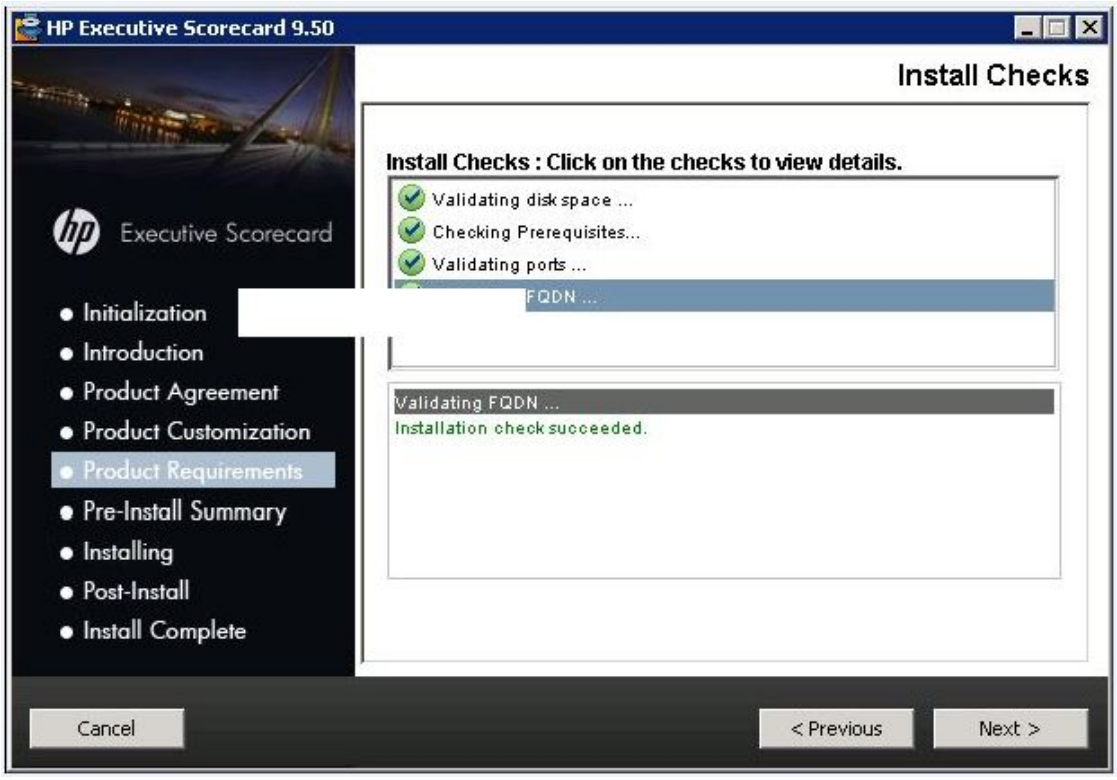
5. In the **Choose the folders** page, click **Next** to accept the default application folder, or **Browse** to navigate to and then select a new application folder location.

   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.

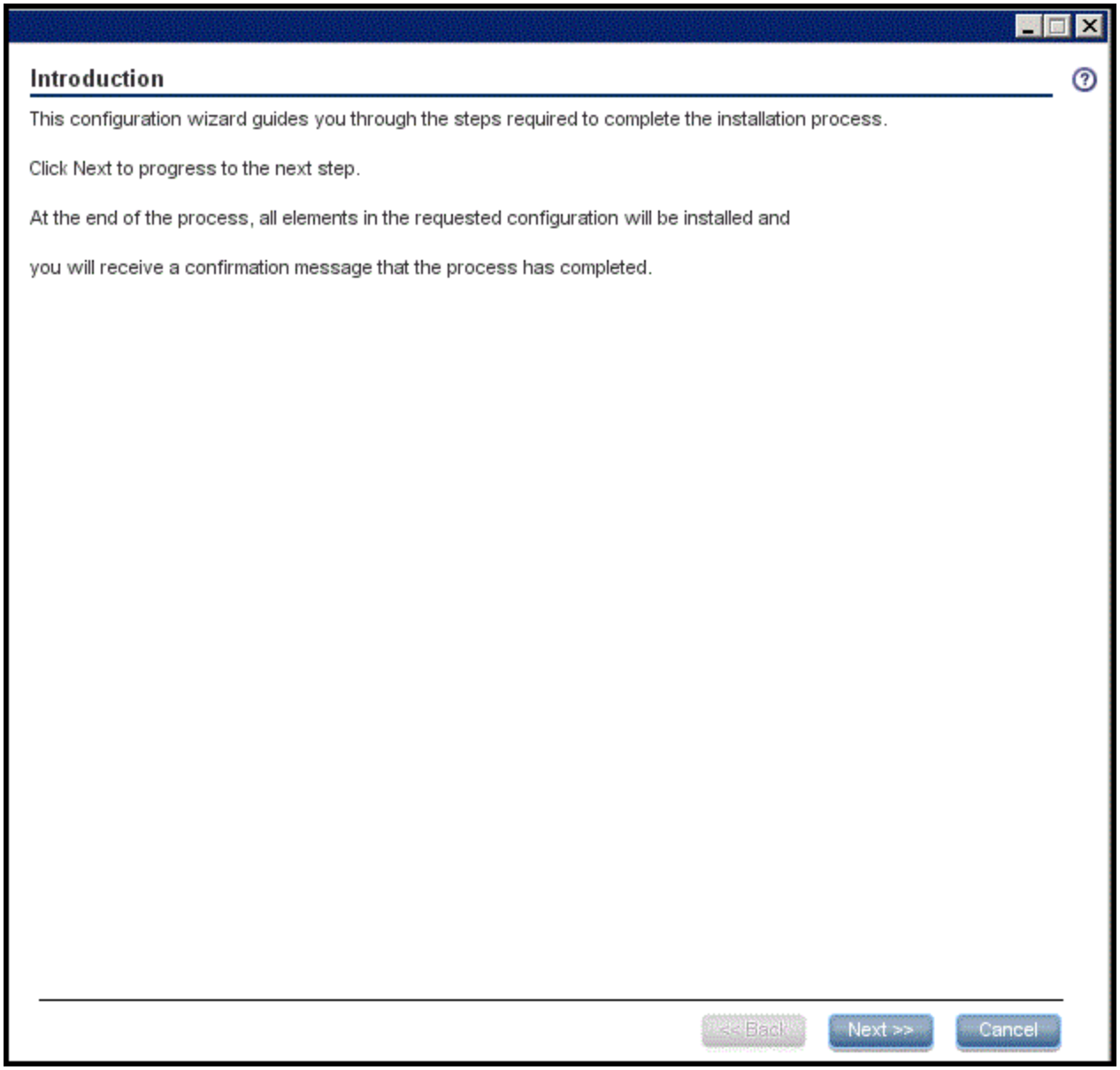
6. In the **Install Checks** page, ensure that all the installation checks are successful, and then click **Next**.



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

Run the Post-Install Wizard

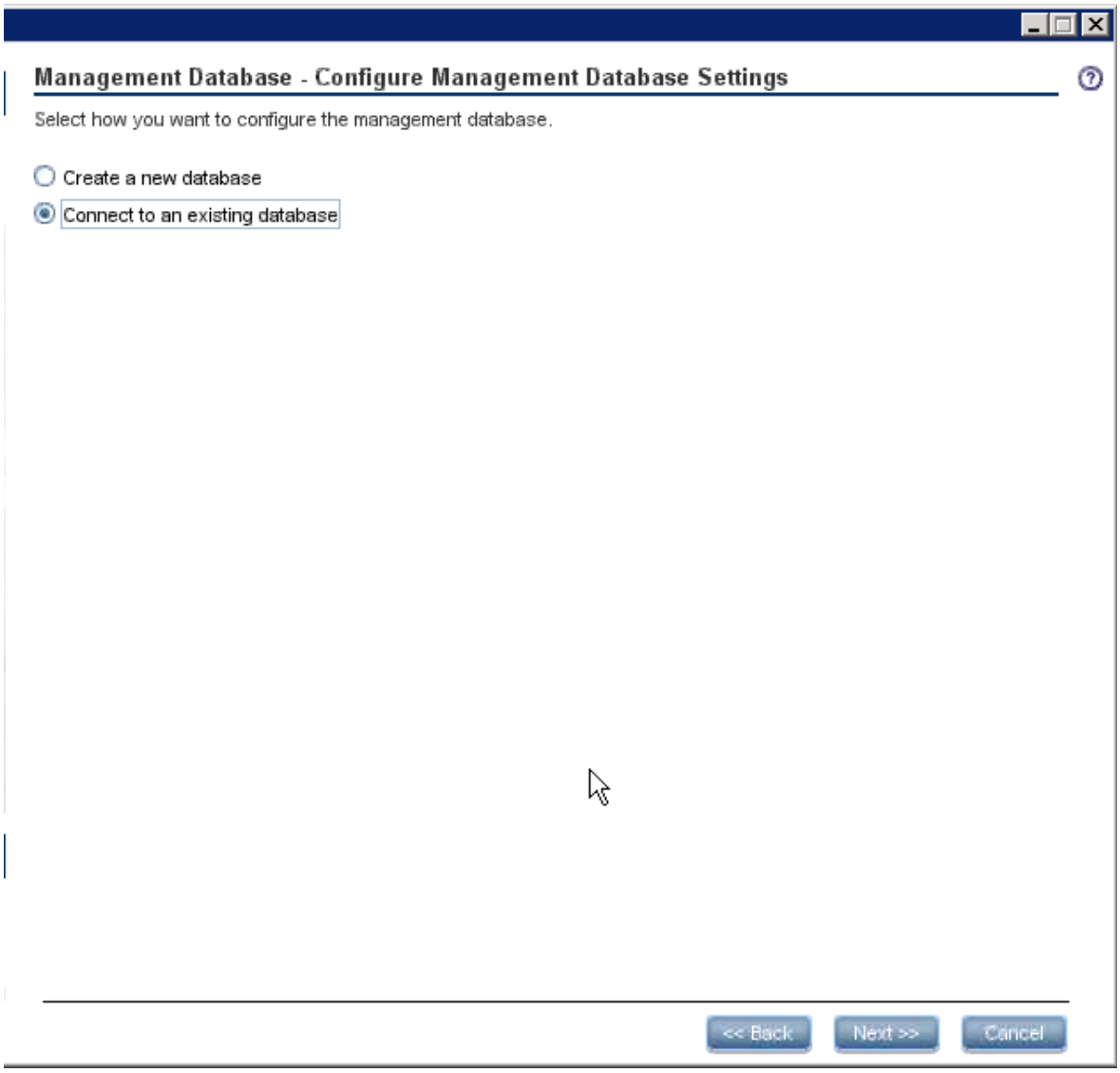
The **Introduction** page of the Post-Install Configuration wizard opens. Click **Next**.



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

Management Database - Configure Management Database Settings Page

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



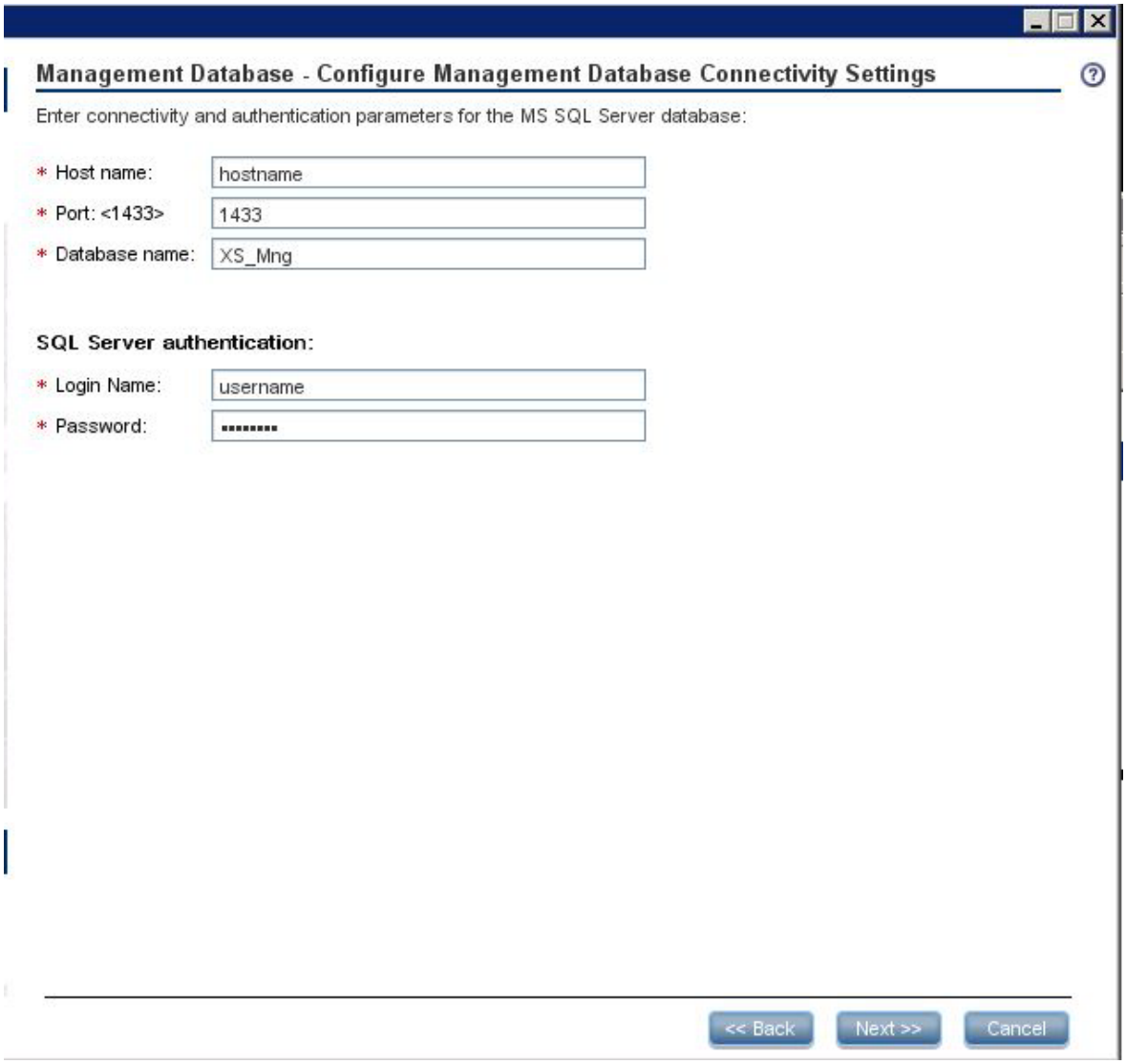
UI Element	Description
Create a new database	Select this option to create a new Management database. Select this option when installing the first HP IT Executive Scorecard component.

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

Management Database - Configure Management Database Connectivity Settings Page

In the **Management Database - Configure Management Database Connectivity Settings** page, enter the relevant information, and then click **Next**.

- XS supports only one Management database. The Management database cannot be changed after it has been defined.
- In a distributed environment, make sure that the Management database and the Result database are installed on the same database server.



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>**. XS does not support dynamic ports.
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). XS does not support dynamic ports.
Database name	The name of the Management database. **Tip:** If needed, take note of the database name, as it may be needed when installing other components. For an installation, use the database naming convention. For details, see Database Naming Conventions.

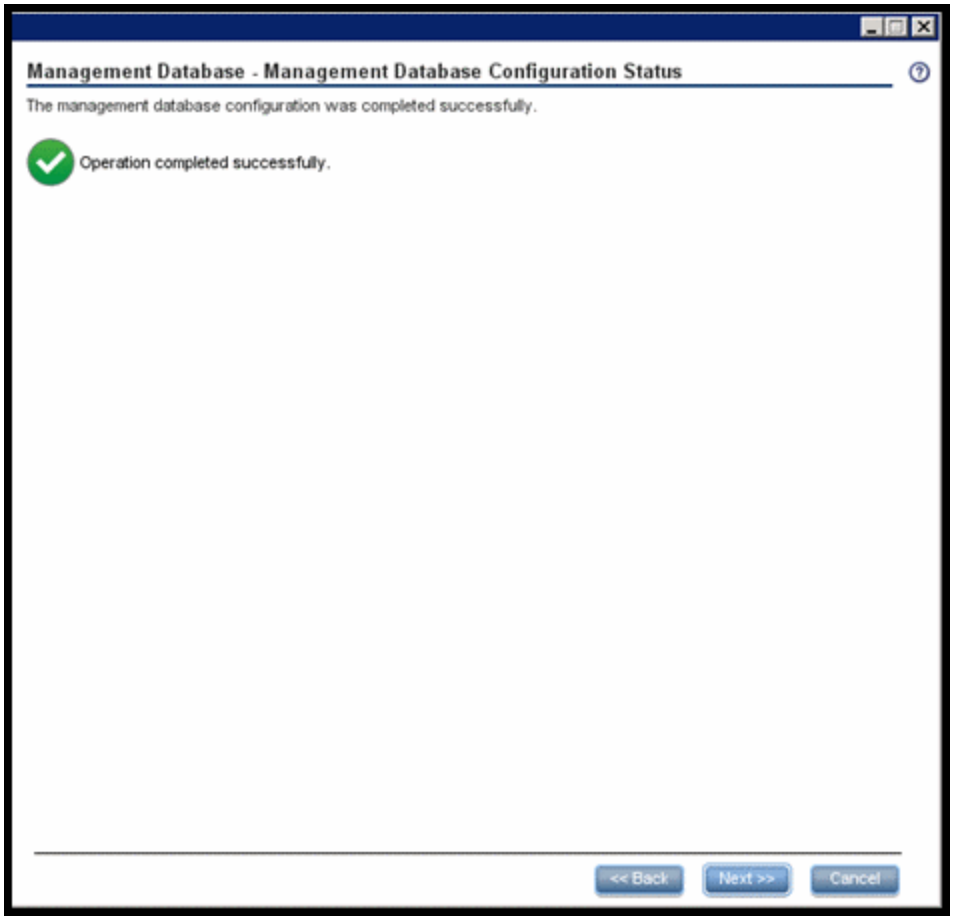
SQL Server authentication:

To work with the Data Warehouse, the user must have access to the SQLServer definition. Make sure that the permission has been assigned accordingly. For example, the SQL permission GRANT VIEW ANY DEFINITION TO public grants access to the SQL Server definition to everyone.

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified user.

Management Database - Management Database Configuration Status

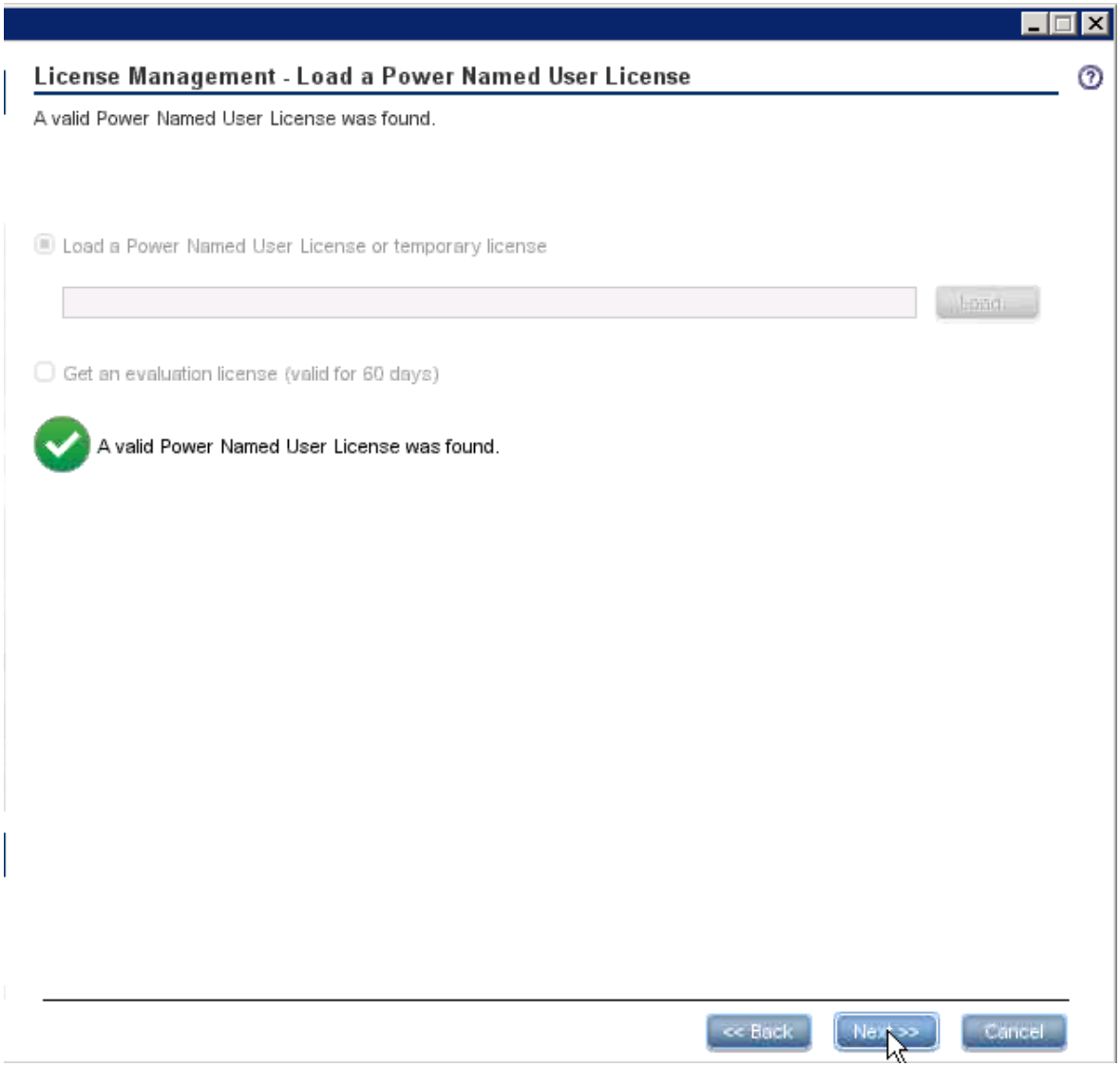
In the **Management Database - Management Database Configuration Status** page, verify that the Management database configuration was completed successfully, and then click **Next**.



License Management - Load a Power Named User License

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

The wizard recognizes the license entered in the previous version.

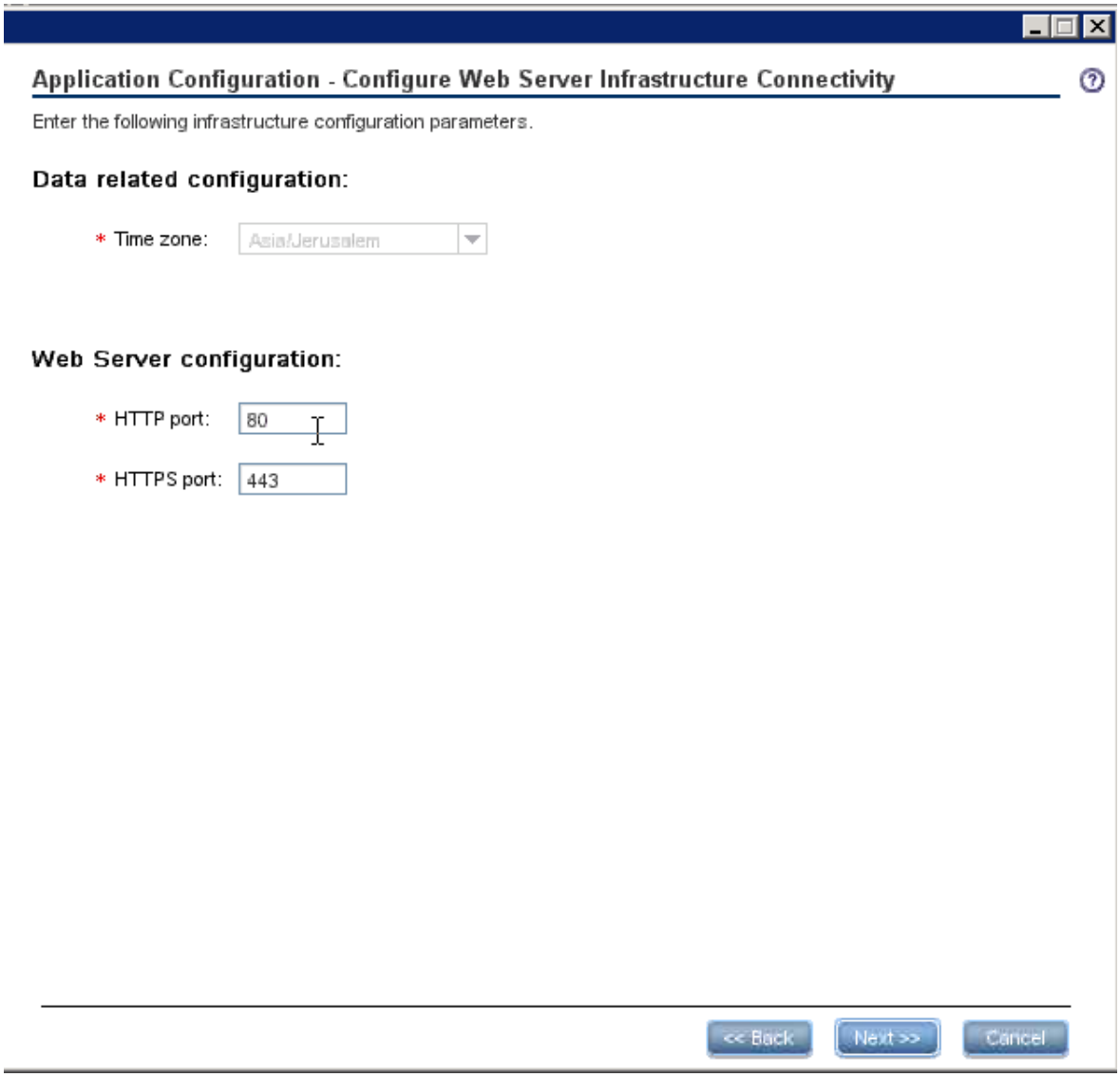


UI Element	Description
Load a Power Named User License or temporary license	Select to load one of the following license types: • **Power Named User License** - Has no expiry date and is loaded once during the post-install. • **Temporary** - Has an expiry date. On expiration, a new license must be loaded. To load a license, click **Load**, Navigate to the license file provided by your supplier, and then click **Load License**.

UI Element	Description
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 using the License Renewal feature. For details, see Renew your license using the Start menu in the *IT Executive Scorecard Administrator Guide*.

Application Configuration - Configure Web Server Infrastructure Connectivity Page

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



Data related configuration area:

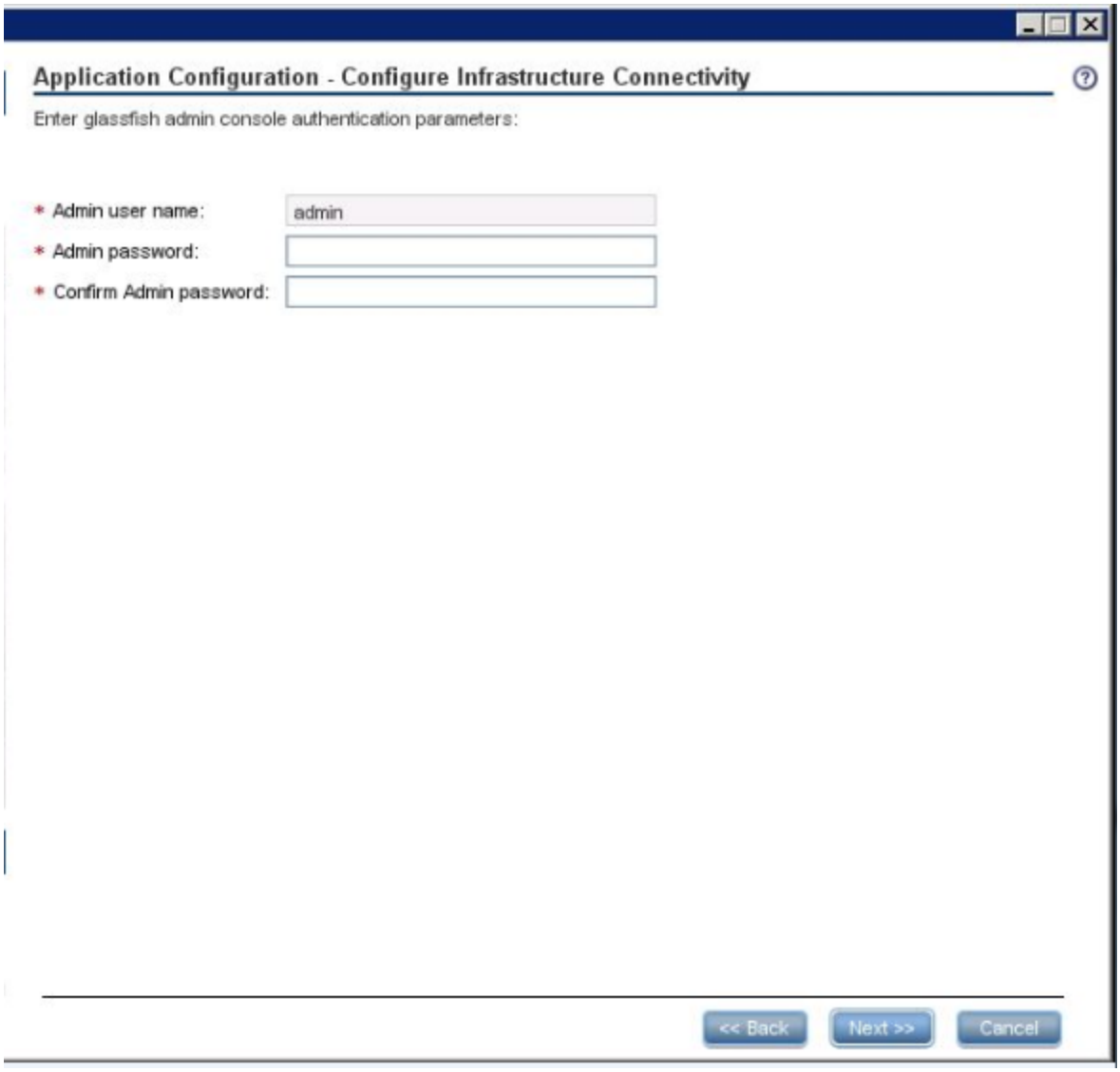
UI Element	Description
Time Zone	The Data Warehouse time zone used when consolidating the data extracted from the data sources. You cannot modify it after it has been defined as it impacts the calculations.

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: 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. • Do not use the Tomcat port to install BOE.
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). **Note:** Do not use the Tomcat port to install BOE.

Application Configuration - Configure Infrastructure Connectivity Page

On the **Application Configuration - Configure Infrastructure Connectivity** page, enter the relevant glassfish admin console authentication parameters, and then click **Next**.

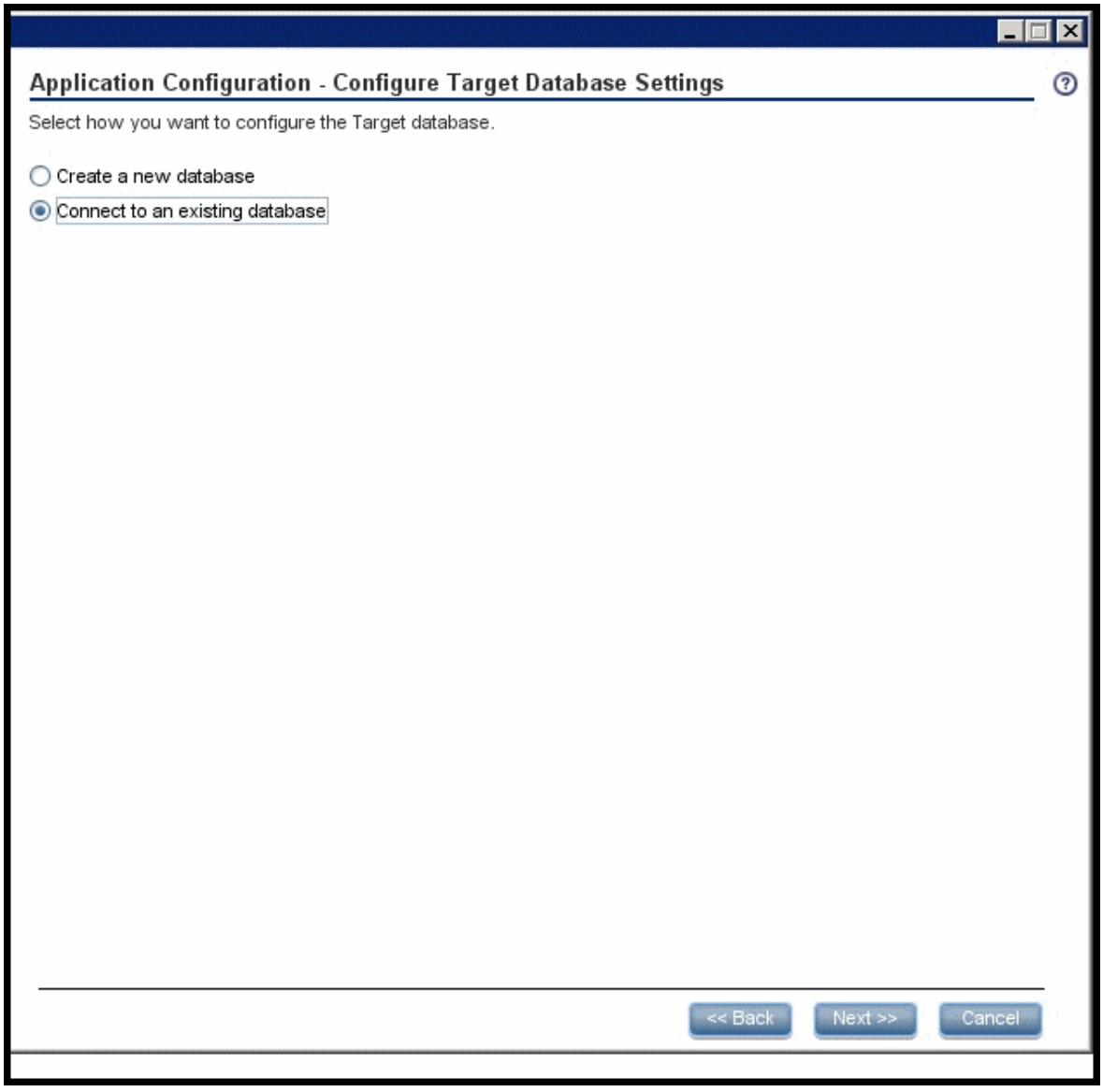


UI Element	Description
Administrator user name	The user name for the glassfish. Use this user to log on to glassfish.

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 cannot contain the word: administrator. • 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 is case-sensitive. • 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.

Application Configuration - Configure Target Database Settings Page

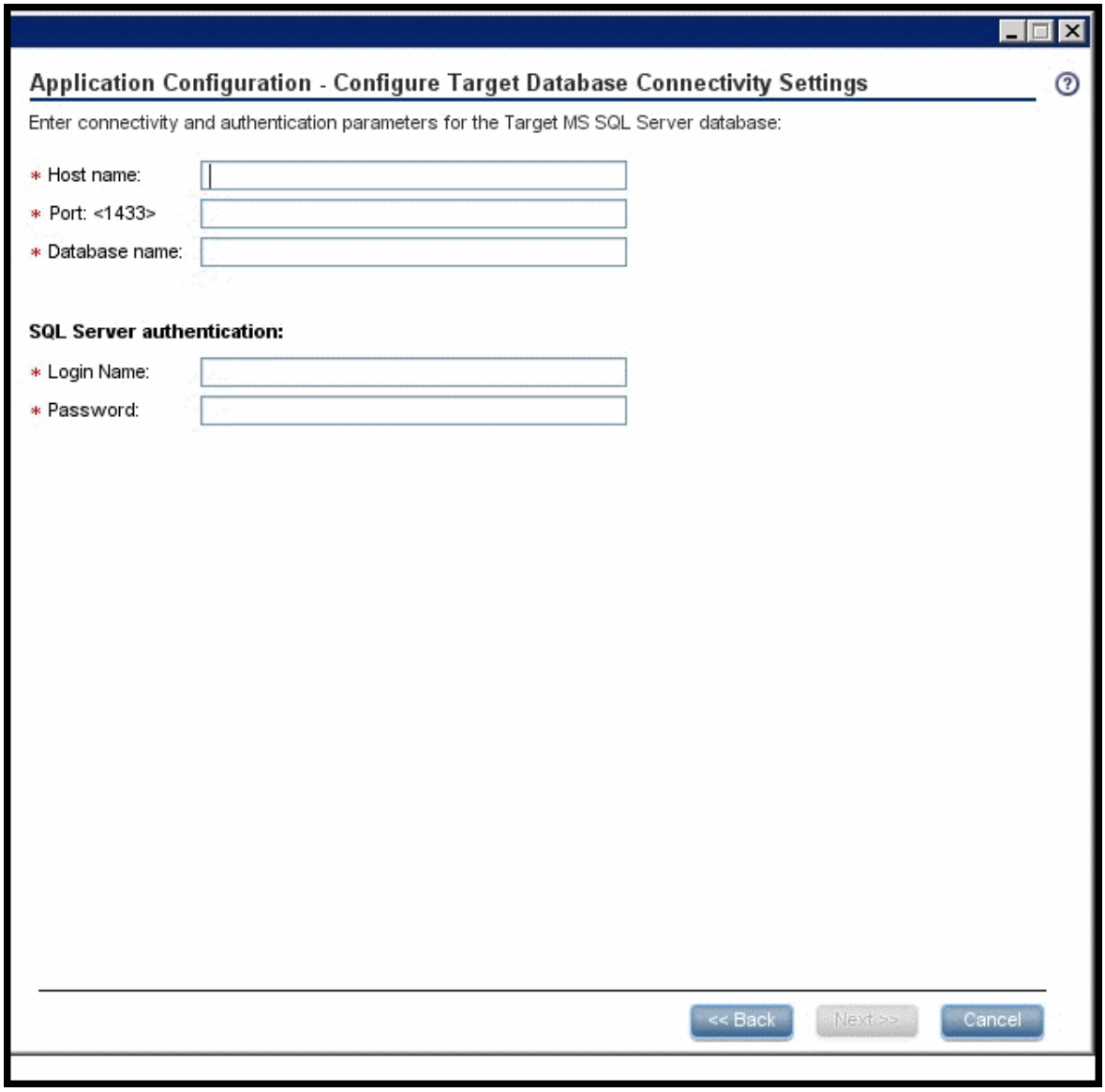
In the **Application Configuration - Configure Target Database Settings** page, select **Connect to an existing database**, and click **Next**.



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.

Application Configuration - Configure Target Database Connectivity Settings Page

In the **Application Configuration - Configure Target Database Connectivity Settings** page, enter the relevant information, and click **Next**.



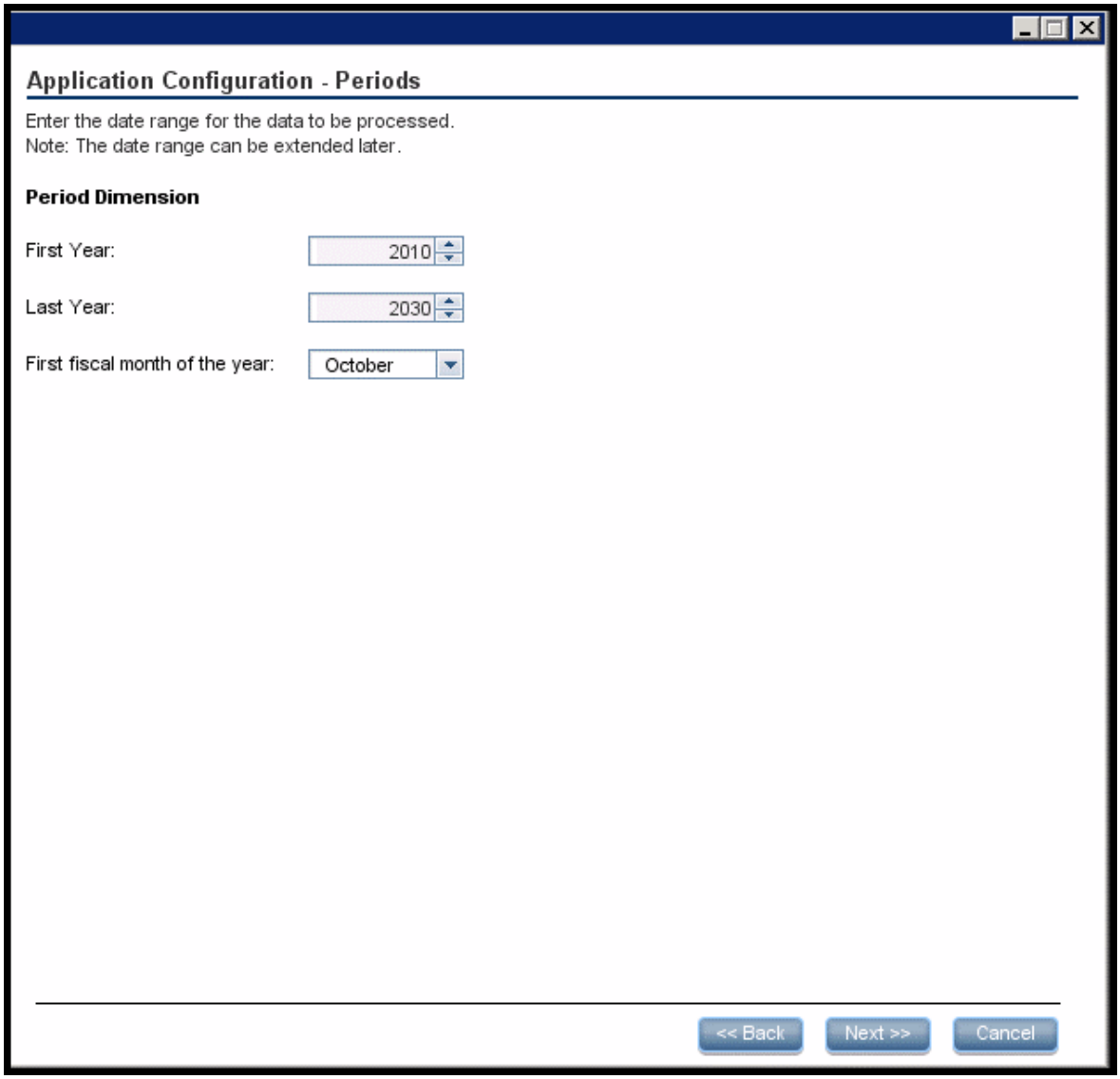
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the MS SQL server hosting the target database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.
Port <1433>	The 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). XS does not support dynamic ports.
Database name	The name of the target database. For an installation, use the database naming convention. For details, see Database Naming Conventions.

SQL Server authentication area:

UI Element	Description
Login Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified logon that creates the Target database.

Application Configuration - Periods

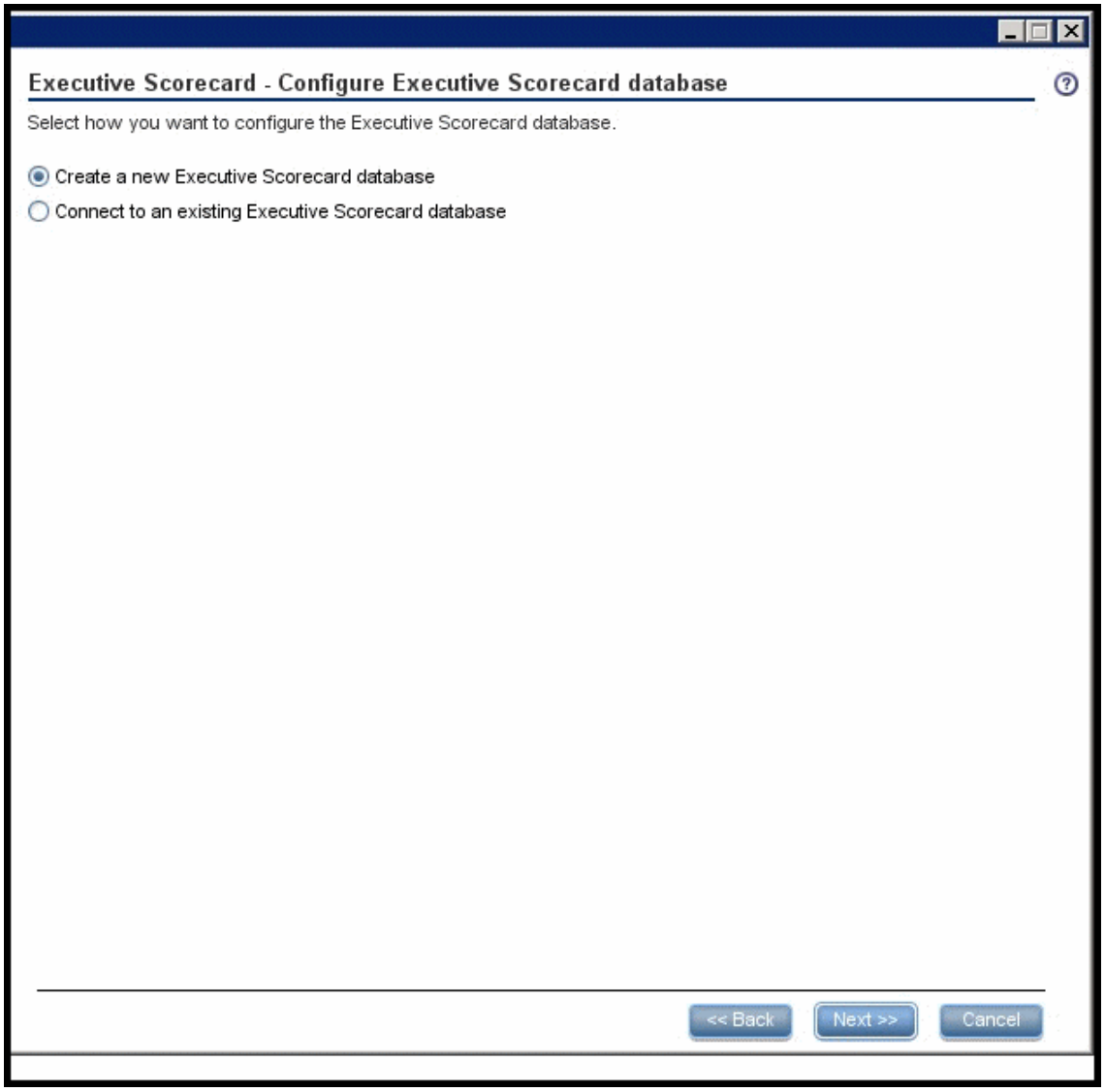
In the **Application Configuration - Periods** page, enter the relevant information and click **Next**.



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 *IT Executive Scorecard Administrator Guide*.
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 *IT Executive Scorecard Administrator Guide*.
First fiscal month of the year	The first fiscal month of the year in your organization.

Executive Scorecard - Configure Executive Scorecard Database Page

In the **Executive Scorecard- Configure Executive Scorecard Database** page, select **Connect to an existing database**, and click **Next**.

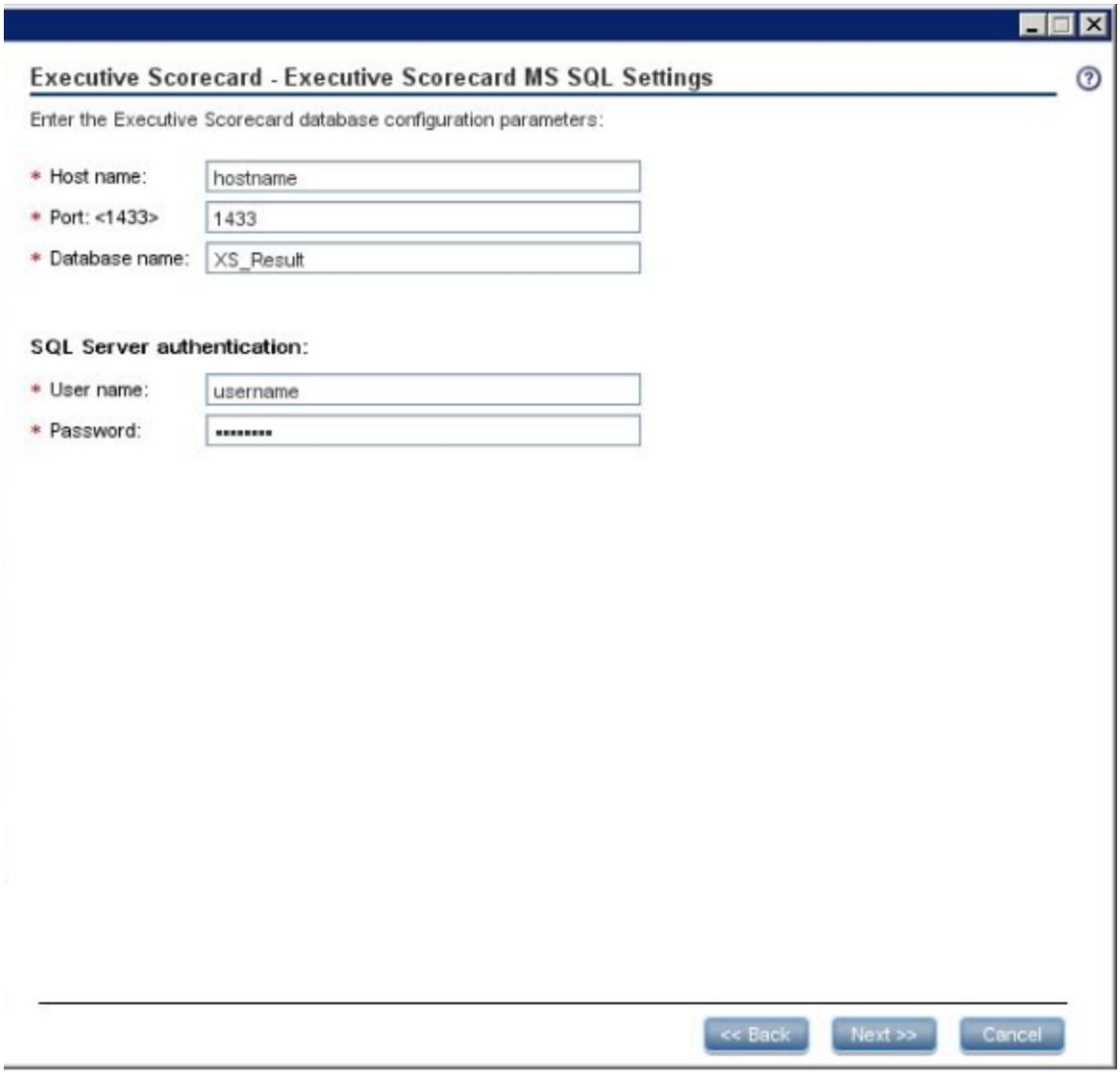


UI Element	Description
Create a new Executive Scorecard database	Enables you to create a new Executive Scorecard database.
Connect to an existing Executive Scorecard database	Enables you to connect to an existing Executive Scorecard database.

Executive Scorecard - Executive Scorecard MS SQL Settings Page

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

Note: In a distributed environment, make sure that the Management database and the Result database are installed on the same database server.



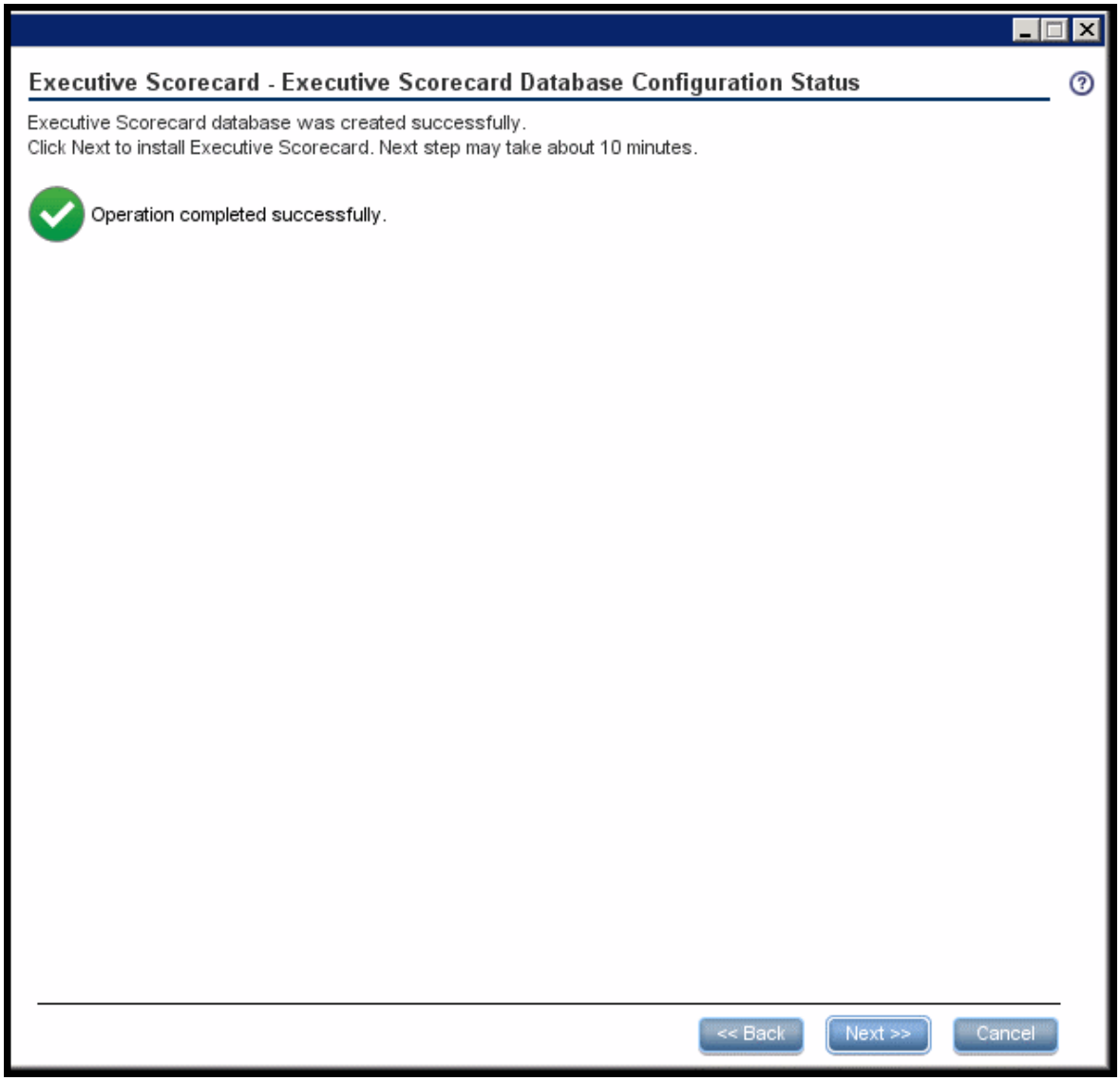
UI Element	Description
Host name	The fully qualified domain name (FQDN) or IP address of the server hosting the Executive Scorecard database. The Result database will be installed on the same instance as the Management database. **Note:** If you work with the Named Instance feature, format Host Name as follows: **<host_name>\<instance_name>**. XS does not support dynamic ports.
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). XS does not support dynamic ports.
Database name	The name of the Executive Scorecard database. For an installation, use the database naming convention. For details, see Database Naming Conventions.

SQL Server authentication:

UI Element	Description
User Name	The MS SQL logon name used to create or connect to the database. The user must have the administrator permissions.
Password	The password for the specified logon.

Executive Scorecard - Executive Scorecard Database Configuration Status Page

In the **Executive Scorecard - Executive Scorecard Database Configuration Status** page, check that the operation completed successfully and click **Next**.



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Financial Planning Analysis - Installing FPA Page

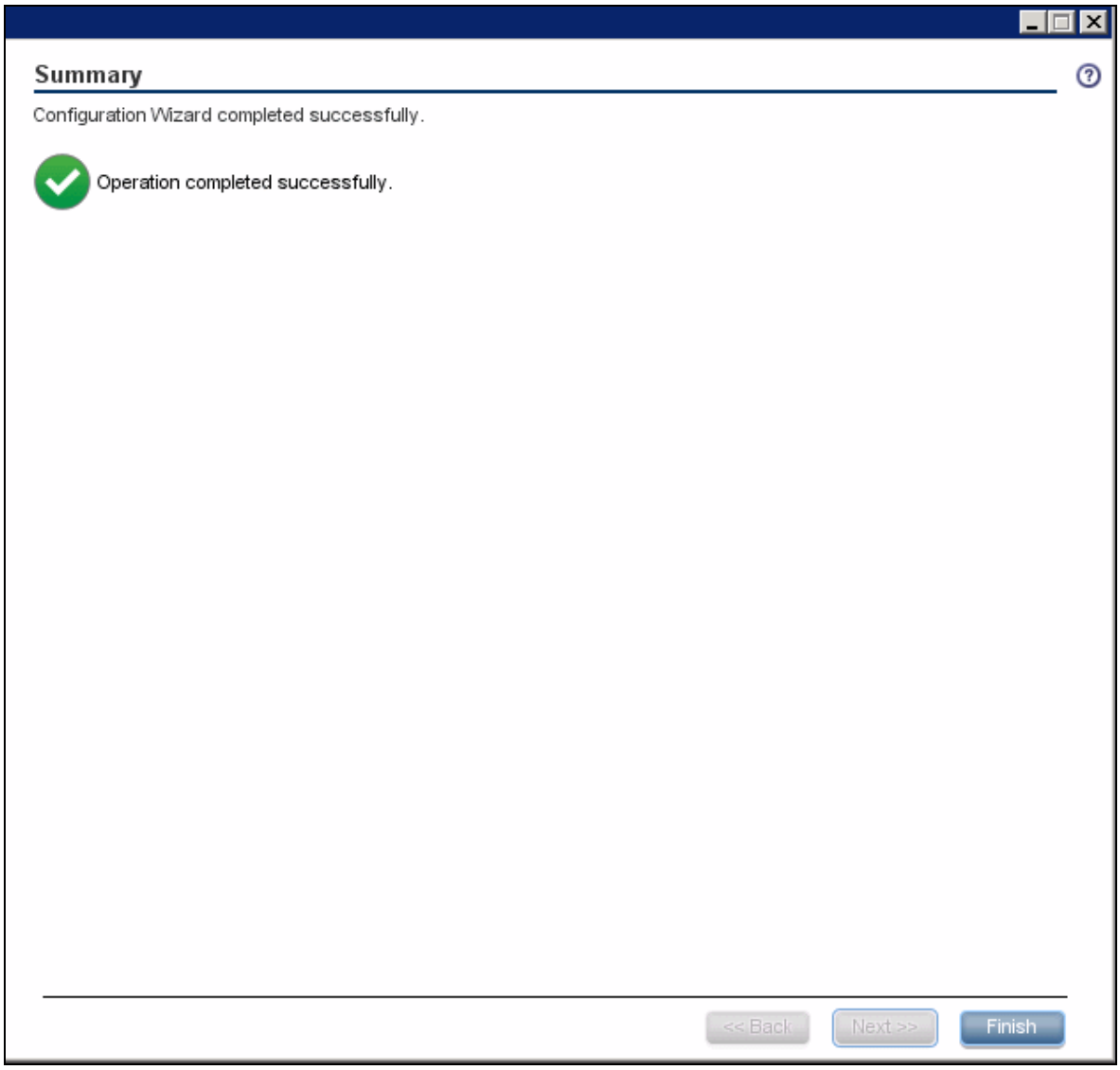
On the **Financial Planning and Analysis - Installing FPA** page, click **Next** to install IT Financial Management.

Financial Planning Analysis - Summary Page

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

Summary Page

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



Note:

- At the end of the upgrade, verify the log files. If you find errors in the log files, investigate, correct, and consider re-running the upgrade process. For details on the log files, see Logs and the LogTool in the *IT Executive Scorecard Administrator Guide*.

Go to Additional Steps

You can now proceed with "Additional Steps" on page 145.

Additional Steps

This section explains additional steps that you perform after the 9.50 upgrade.

The additional steps are:

"Reactivate the Data Sources" below

"Database Security Procedures" below

"Disaster Recovery" on the next page

"Optional, When Working With a Non-English Language" on the next page

"Display the Webi and the Xcelsius Reports" on page 149

"LDAP" on page 150

"Dashboard Components" on page 150

"Content Extension - Restoring the Content Packs" on page 150

"ITFM" on page 151

Reactivate the Data Sources

1. **Reactivate the data sources.** After completing the upgrade, all connected data sources are in the **Deactivated** state. You must reactivate the relevant data sources using the Executive Scorecard user interface. For more information, see Data Source Management in the *IT Executive Scorecard Administrator Guide*.

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

2. **Customized Content Packs.** If in 9.41 you had created new Content Packs or added entities to Content Packs, copy the artifacts to the Data Warehouse server and merge the customized Content Packs with the out-of-the-box ones in the **<HP_XS>\agora\ContentPacks** directory.

Database Security Procedures

Immediately following the upgrade procedures, perform necessary database security steps. For details, see Security Recommendations in the *IT Executive Scorecard Administrator Guide*.

Disaster Recovery

In case of disaster, find the latest disaster recovery procedure in the *IT Executive Scorecard Administrator Guide* .

The guide is also available from the Manuals site at HP Software Product Manual Site (**http://h20230.www2.hp.com/selfsolve/manuals**).

Optional, When Working With a Non-English Language

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

1. ## Localize the KPI Library

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

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

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

      The language code and country codes are as follows:

Language	Language Code	Country Code
Brazilian Portuguese	pt	BR
French	fr	FR
Spanish	es	ES
German	de	DE
Japanese	ja	JP
English	en	US
Dutch	nl	NL

Language	Language Code	Country Code
Italian	it	IT
Simplified Chinese	zh	CN
Korean	ko	KR
Russian	ru	RU
Turkish	tr	TR

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

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

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

2. Localize the Dashboard Pages and Components

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

During the upgrade to 9.50, all OOTB Page and Component categories in English and other languages are deleted and only the 9.50 Pages and Component categories in English are recreated. They include the OOTB pages and components for 9.50. If in the previous version you had created pages and components and had assigned them to OOTB Page or Component categories, you have to reassign them manually.

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

a. In the Executive Scorecard server, locate the **<HP_XS>\agora\glassfish\glassfish\domains\BTOA\config\uimashup\import\languages\Components\<lang>_<country_code>\<name>.uim.xml** or **<HP_XS>\agora\glassfish\glassfish\domains\BTOA\config\uimashup\import\languages\Pages\<lang>_<country_code>\<name>.uim.xml** files relevant to the language you want to install. These .uim.xml files represent the components and the pages used in the Dashboard. **lang** is the language code and **country_code** is the code of the country. See the table in the **Localize the KPI Library** section for details.

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

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

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

3. Test the installation

Check the universes in the Executive Scorecard Studio:

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

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

4. Set up the User Interface Display Language

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

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

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

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

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

5. Set up the Input and Content Language

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

6. **Import localized CAPs.**

   To upload localized CAPs:

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

   b. Upload the localized CAPS:

   - **Localized out-of-the-box CAP**. To upload a localized out-of-the-box CAP, proceed as described in "Additional Steps" on page 145 and specify the location of the out-of-the-box CAP.

     Note: Localized out-of-the-box CAPs .ZIP files are placed in the relevant language folder during installation:
     <HP_ XS>\agora\glassfish\glassfish\domains\BTOA\config\cap\import\languages

     For example, the VPOPS CAP in German is located at:
     <HP_ XS>\agora\glassfish\glassfish\domains\btoa\config\cap\import\languages\de_DE\VPOPS_de_DE.zip

   - **Localized user-defined CAP.** To upload a localized user-defined CAP proceed as described in "Additional Steps" on page 145 and specify the location of the localized CAP you have created.

Display the Webi and the Xcelsius Reports

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

To point to the named instance use the following steps:

1. Open the SAP BusinessObjects Enterprise Designer application on the SAP BusinessObjects Enterprise server.
2. Click **Tools > Connections** to display the connection list.
3. Select **XS_DWH_JDBC** and click **Edit**.
4. In the **Server** field enter <**sql server name>\<named instance>:1433**.

5. Click **Next** and then **Finish**.
6. Click **File > Export**, and then click **OK**.
7. Run a report to see if it works

LDAP

If you used LDAP in XS 9.41, you must proceed as follows:

1. Delete the row in the **dbo.SETTINGS_MANAGEMENT** table in the Management database where the column NAME and VALUE is **fnd.uum.type** and **ldap**.
2. After the upgrade to 9.50, configure the LDAP parameters in **Admin > Users and Roles > LDAP Management** with the administrator account.
3. After you configure the LDAP parameters in the XS server, copy the **external-ldap.properties** and **bsf.properties** files from the **<HP_ XS>\agora\glassfish\glassfish\domains\BTOA\config\conf** directory in the XS server and replace the same files in the DWH server.
4. Restart DWH server.
5. After the upgrade to 9.50, set the LDAP using LDAP Management. For details, see LDAP in the *IT Executive Scorecard Administrator Guide*.

Dashboard Components

The Dashboard components are automatically upgraded to 9.50 and provided with additional capabilities.

After upgrade, a Dashboard page and its components, created in 9.41, will look the same in 9.50. For example, if your Dashboard page included in 9.41, a KPI View component displaying KPIs A and B, after upgrading to 9.50, the KPI View component will display KPIs A and B using the Bar chart format. You will then be able to switch the display to the format you prefer with some limitations.

For details, see What's New in Version 9.50 in the *IT Executive Scorecard Release Notes*.

Content Extension - Restoring the Content Packs

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

1. Download and install the latest IDE on a new machine.
2. Import the metadata of the customized content packs.

3. Generate the artifacts of customized content packs.

4. Replace, in XS installation machine, the folder:
   <install drive>\<Installation directory>\agora\ContentPacks\<cp name>\ETL\jobs
   with the folder in IDE machine:
   <IDE ouput>\<cp name>\ETL\jobs

ITFM

If you work with ITFM (Financial Planning Analysis), after you have performed the upgrade to 9.50, make sure to delete the Financial Planning and Analysis Scorecard from the Studio, so that the activation of the ITFM_CAP proceeds correctly.

Send Documentation Feedback

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

Feedback on Upgrade Guide (IT Executive Scorecard 9.50)

Just add your feedback to the email and click send.

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

We appreciate your feedback!

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